

تحت رعاية صاحب السمو الشيخ محمد بن زايد آل نهيان، رئيس دولة الإمارات العربية المتحدة  
Under The Patronage of H.H Sheikh Mohamed Bin Zayed Al Nahyan, President Of The United Arab Emirates



أديبك  
نادي الشرق الأوسط للطاقة  
Middle East Energy Club



31 October - 3 November 2022  
Abu Dhabi, United Arab Emirates

# ADIPEC Leadership Roundtables

The Leadership Roundtables provide the thought leadership and direction to drive growth over the next decade and define the future of global energy

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Leadership Suite Host

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Leadership Roundtable Hosts



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# Welcome from dmg events

There has never been a more turbulent period for the energy industry, and the previous 12 months have seen it make headlines on the front pages around the world. The energy industry continues to navigate geopolitical shifts, global economic volatility, energy supply challenges, and the need to establish a pragmatic route to carbon neutrality.

We live in interesting and rapidly changing times, but with change comes opportunity.

This year's invitation-only Leadership Roundtables once again bring together ministers, policy makers, energy leaders and industry professionals to foster conversation and generate insight. Each of the eight roundtables aims to provide a platform for pragmatic and forward-looking dialogue between global energy experts behind closed doors and under the Chatham House Rule.

From the role of oil and gas in bridging to a new energy world, and the clean hydrogen opportunity, to how decarbonisation will reshape the global economy, the topics addressed will form essential discussions.

I would like to thank our hosts, knowledge, and content partners for bringing diverse perspectives, unparalleled insights, and a commitment to address the issues that will shape the future of the energy industry to ADIPEC.



Christopher Hudson  
President  
dmg events



# Welcome from AWS

AWS is proud to be the official host of the ADIPEC 2022 Leadership Suite, and we are delighted to welcome such esteemed members of the world's energy ecosystem to participate.

The Leadership Roundtables will host industry experts, thought leaders, and policy makers across the energy ecosystem to discuss the most critical energy topics; the energy system of the future, utilizing digital technologies, and capabilities that enable innovation, providing energy security, and accelerating the energy transition.

These discussions will be a critical part of shaping our collective energy future and providing a foundation for the most critical energy issues the world is facing.

Thank you for your participation.

## ABOUT AWS ENERGY

AWS is the world's most comprehensive and broadly adopted cloud platform, offering over 200 fully featured services from data centers globally. Millions of customers—including the fastest-growing startups, largest enterprises, and leading government agencies—trust AWS to power their infrastructure, become more agile, and lower costs.

AWS is how leading organizations across the energy value chain are transforming, innovating, and accelerating their businesses. Together, we are accelerating the energy transition through practical innovations for today and tomorrow that deliver energy efficiently, reliably, sustainably, and responsibly. AWS brings the most advanced and secure cloud services and deep industry expertise across energy, utilities, and sustainable energy sectors. With the broadest energy partner ecosystem, AWS empowers energy leaders to cloudify their businesses to improve performance, accelerate innovation, transform the customer experience, maximize safety, and minimize their carbon footprints.



# ADIPEC 2022 Leadership Roundtables

The energy industry continues to navigate geopolitical shifts, global economic volatility, energy supply challenges and next-generation energy solution priorities. The agenda for a clear pathway to carbon neutrality and investment in clean technologies remains a priority, even while addressing urgent energy security needs.

This year's invitation-only Leadership Roundtables will foster conversation, generate insight, and provide networking opportunities around the energy industry's greatest challenges, bringing together policy makers, energy leaders and industry professionals to address the key trends, challenges and opportunities facing the energy industry and the solutions required to transition to the new energy world.

## MONDAY 31 OCTOBER

**15:00 - 16:30** Ensuring European energy security: opportunities and challenges

## TUESDAY 1 NOVEMBER

**09:30 - 11:00** Tackling the methane challenge: UNEP's Oil and Gas Methane Partnership 2.0 and Aiming for Zero Methane Emissions Initiative

**12:00 - 13:30** The role of oil and gas in a new energy world: energy security, climate response, industry innovation and future supply perspectives

**14:30 - 16:00** The circular business opportunity: living up to promises and targets

**17:00 - 18:30** The clean hydrogen opportunity

## WEDNESDAY 2 NOVEMBER

**09:30 - 11:00** Cross-sector partnerships for a rapid transition to clean global transportation

**12:00 - 13:30** New business models of NOCs and IOCs: driving a low carbon world

**14:30 - 16:00** Digital technologies and capabilities: facilitating transformation success

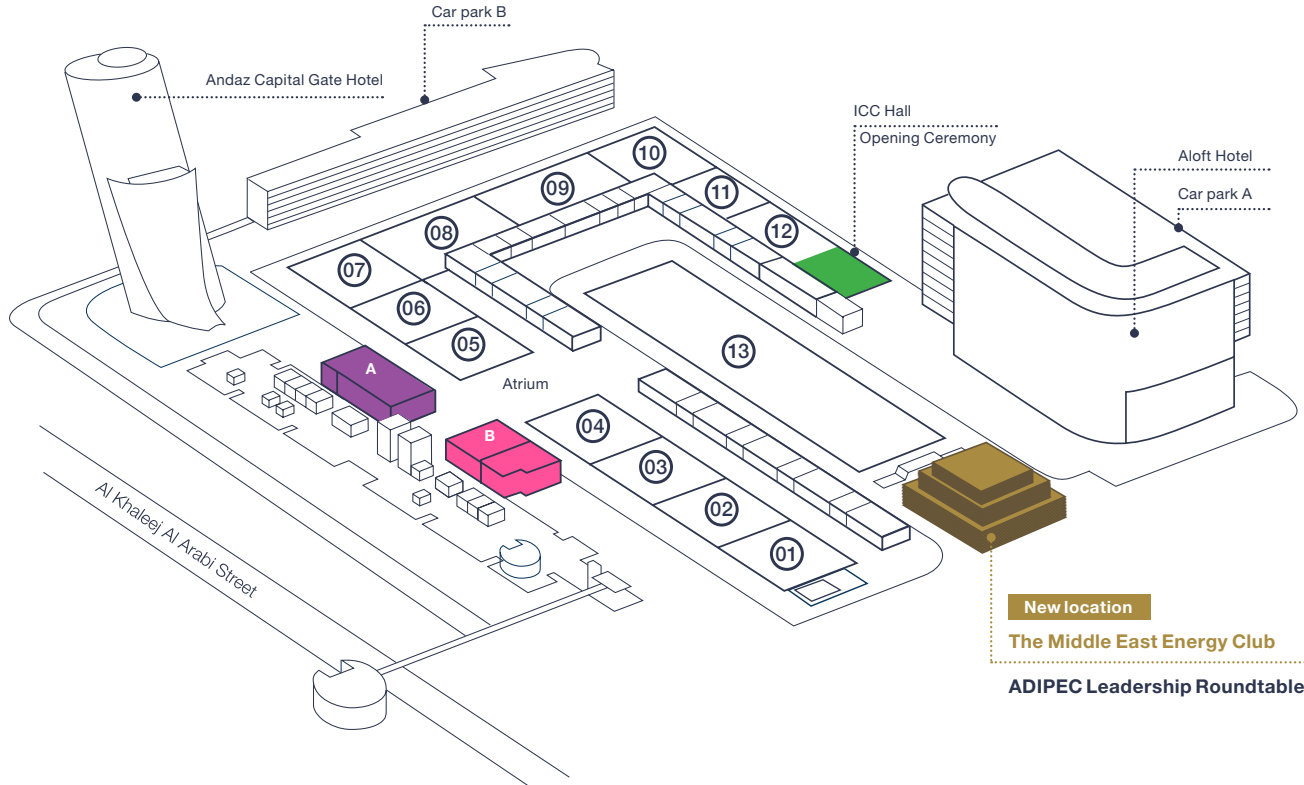


# ADIPEC Leadership Roundtables at The Middle East Energy Club

Venue Partner:



- ICC Hall - Opening Ceremony
- Conference Hall A
- Conference Hall B



**New location**  
**The Middle East Energy Club**  
**ADIPEC Leadership Roundtables**





Leadership Roundtable

## Ensuring European energy security: opportunities and challenges

**MONDAY 31 OCTOBER**  
**15:00 - 16:30**

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# Ensuring European energy security: opportunities and challenges

Recent events have caused the short-term priority for energy policy in much of the developed world to evolve from policy measures that enable affordability to those that drive energy security. Europe's position is particularly fragile due to this year's geopolitical events.

European leaders are tasked with rapidly identifying new energy trading routes to ensure energy supply can meet energy demand. This will require new partnerships and strategic alliances to enable a secure, stable and affordable energy future. The Middle East, strategically located between the East and the West, is well-positioned to address the energy needs of multiple European markets. It can also act as the gateway to Asia and Africa, establishing new energy partnerships that can facilitate energy transition around the world.

The European market challenges will be a critical catalyst for the global energy system in the development of new solutions and partnerships that foster energy efficiency, next generation energy innovation, smart technology solutions and a more balanced energy mix.

**Attendee insights:** Gain insights into Europe's energy security needs, the strategies required to address them, and key partnerships needed to create a secure, sustainable, energy future.

KNOWLEDGE PARTNER

MODERATOR



Dr. Daniel Yergin  
Vice Chairman  
S&P Global





Leadership Roundtable

# Tackling the methane challenge: UNEP's Oil and Gas Methane Partnership 2.0 and Aiming for Zero Methane Emissions Initiative

**TUESDAY 1 NOVEMBER**  
**09:30 - 11:00**

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# Tackling the methane challenge: UNEP's Oil and Gas Methane Partnership 2.0 and Aiming for Zero Methane Emissions Initiative

According to the latest IPCC Assessment Report, we need to reduce methane emissions by about one-third by 2030 to stay on track to reach the Paris Agreement goal of limiting climate warming to 1.5°C. The oil and gas industry is one of the largest human-made methane emission sources. However, technologies are available today to rapidly reduce methane emissions in the short-term at a low net cost. The IEA, in its Net Zero by 2050 Roadmap, requires a 75% reduction in oil and gas methane emissions by 2030.

**The Oil and Gas Methane Partnership 2.0 (OGMP 2.0)**, managed by UNEP's International Methane Emissions Observatory (IMEO), aims to support companies to realise and credibly report on deep reductions of methane emissions. OGMP 2.0 is a measurement-based reporting framework covering all material sources of methane emissions from both operated and non-operated assets across all segments of the value chain. Today, more than 80 oil and gas companies have joined the initiative, representing over 30% of global oil and gas production.

In addition to accurately measure and report methane emissions information, driving down emissions requires setting ambitions and implement mitigation actions. Assuming that virtually all methane emissions can and should be avoided, **The Aiming for Zero Methane Emissions Initiative**, incubated by the CEOs of the Oil and Gas Climate Initiative (OGCI), establishes an all-in approach that treats methane emissions as seriously as the oil and gas industry already treats safety or oil spills: aiming for zero and striving to do what is needed to get there. It is a tangible, ambitious effort to eliminate the industry's methane footprint by 2030, complementing other voluntary initiatives, such as the Methane Guiding Principles. This industry has proved its ability to set a global standard when such mindset changes happen, and it is critical to understand the strategies, technologies and solutions needed to get to this goal. Launched in March 2022, the initiative is today already supported by the CEOs of more than 50 companies, both producers and players across the oil and gas value chain.

**Attendee insights:** Gain insights into the industry perspective on OGMP 2.0, the Aiming for Zero Methane Emissions Initiative, and gather ideas and commitments to drive forward these initiatives and explore other strategies the industry is putting in place to reduce methane emissions.

HOSTED BY



HOST



**Bob Dudley**  
Chair  
OGCI

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HOST

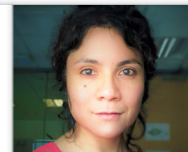


**Manfredi Caltagirone**  
Head of the International Methane  
Emissions Observatory  
UNEP

KNOWLEDGE PARTNER



MODERATOR



**Martha Vazquez**  
Partner & Associate Director  
Upstream O&G  
Boston Consulting Group

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MODERATOR



**Simon Birkebaek**  
Partner  
Boston Consulting Group





Leadership Roundtable

**The role of oil and gas in a new energy world: energy security, climate response, industry innovation and future supply perspectives**

**TUESDAY 1 NOVEMBER**  
**12:00 - 13:30**



# The role of oil and gas in a new energy world: energy security, climate response, industry innovation and future supply perspectives

The energy industry - especially oil and gas - influences and shapes economies at global, regional, national and local levels. This is not just true of facilitating energy supply to meet energy demand but also through business development, climate impact, employment growth, investment influence and more.

Today's rapidly evolving energy landscape requires an equal response - one that demands optionality in supply - from the energy industry and policymakers to evolve the way the world produces, consumes and trades energy. This needs to be achieved while also addressing current demand, net-zero ambitions and a just energy transition. It raises questions on projections for future oil and gas demand, the future role of OPEC+ and investment today in setting the stage for a secure and sustainable future.

**Attendee insights:** Learn more about future oil and gas trends, OPEC's market perspectives and what the future may hold.

KNOWLEDGE PARTNER

HOST



His Excellency Haitham Al Ghais  
Secretary General  
OPEC

CONTENT PARTNER

MODERATOR



Andrew Horncastle  
Partner & Head of Energy and  
Natural Resources  
Oliver Wyman IMEA



Leadership Roundtable

# The circular business opportunity: living up to promises and targets

**TUESDAY 1 NOVEMBER**  
**14:30 - 16:00**

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## The circular business opportunity: living up to promises and targets

Circular economy is becoming a key component of the strategy of virtually all companies across industries. The energy industry is no exception, with an array of initiatives undertaken both on the feedstock/input side and in recycling. New value pools and opportunities are emerging along the value chain – companies will need to adopt new business models and develop new partnerships to succeed in the new ecosystems that are taking shape, and that are still up for grabs. The challenge today for industry leaders and policymakers revolves around innovation, both to identify the opportunities (the 'what?') and to set-up their organisations for success (the 'how?'): new capabilities and partnerships, as well as technology advancements, will be key to catalyse transformation towards set (political and industry) targets.

The winners will be able to reap the benefits of the circular economy opportunity that, according to the World Economic Forum, could yield \$4.5 trillion in economic benefits by 2030\*.

Source: World Economic Forum

**Attendee insights:** Hear industry expert perspectives on the role circular economy can play in the strategy of energy companies, and the commercial opportunities that it can unlock.

HOSTED BY



HOST



**Alfred Stern**  
CEO  
OMV

KNOWLEDGE PARTNER



MODERATOR



**Mirko Rubeis**  
Managing Director  
and Senior Partner  
Boston Consulting Group

KNOWLEDGE PARTNER



MODERATOR



**Christoph Michel**  
Managing Director and Partner  
Boston Consulting Group





Leadership Roundtable

Hydrogen H<sub>2</sub>

# The clean hydrogen opportunity

**TUESDAY 1 NOVEMBER**  
**17:00 - 18:30**

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## The clean hydrogen opportunity

With the global climate change debate amplifying the call to limit global warming to 1.5 degrees Celsius, clean hydrogen has emerged as a solution for hard-to-decarbonise industries such as heavy transport and manufacturing.

McKinsey analysis shows that the hydrogen share of global energy demand could reach 22% by 2050, abating some 20% of global emissions. This is an opportunity not only for companies transitioning to clean energy production but also for hydrocarbon-rich countries with access to abundant renewable energy, highly developed infrastructure, and the geographic location to develop and export clean hydrogen.

The McKinsey analysis estimates clean hydrogen could create up to \$3 trillion in initial GDP as well as more than 35 million initial jobs by 2050.

**Attendee insights:** Understand the opportunities hydrogen offers for the energy industry, and the technologies, investment and strategies needed for success.

HOSTED BY



HOST



**Maarten Wetselaar**  
CEO  
Cepsa

CONTENT PARTNER



MODERATOR



**Rachid Majiti**  
Senior Partner  
McKinsey & Company





Leadership Roundtable

# Cross-sector partnerships for a rapid transition to clean global transportation

**WEDNESDAY 2 NOVEMBER**  
**09:30 - 11:00**

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# Cross-sector partnerships for a rapid transition to clean global transportation

Calls for clean transportation fuels are mounting amid growing demand for the services that move people and goods around the globe. Decisive action by energy producers is needed to bring clean, zero-carbon fuels to market - but they cannot act alone. New energy systems require coordination to bring to scale and deliver value to all participants.

Our existing hydrocarbon value chains developed slowly over a century, with multiple participants in different geographies innovating to drive commoditisation and integration. New energy systems require collaboration across the value chain to accelerate this process from production through transport to distribution and use. Energy producers will need to work with energy users in the aviation, shipping, and automotive industries to be ready for innovative clean fuels.

OEMs will play a key role in creating efficient engines. Policymakers and financial institutions will need to play supportive roles, in addition to challenges of engineering the solutions with EPC players, training experts to build and service the new systems. This dialogue will explore the strategic considerations and decisions required today to meet net-zero emission goals by 2050, opportunities for collaboration between producers, consumers, policymakers and investors that can initiate real progress for greening global transport.

**Attendee insights:** Understand how these industries can collaborate for greater energy transition success against net-zero ambitions.

HOSTED BY



HOST



**Mark Brownstein**  
SVP - Energy Transition  
Environmental Defense Fund

CONTENT PARTNER



**Peter Parry**  
Chairman of Global Energy  
and Natural Resources Practice  
Bain & Company





Leadership Roundtable

# **New business models of NOCs and IOCs: driving a low carbon world**

**WEDNESDAY 2 NOVEMBER**  
**12:00 - 13:30**

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# New business models of NOCs and IOCs: driving a low carbon world

Since 2020, both national oil companies (NOCs) and international oil companies (IOCs) have worked to clarify the role they wish to play during and after the energy transition.

Decarbonisation will reshape the global economy, opening new markets and imperiling others, forcing both NOCs and IOCs to make asset portfolio choices and evolve their understanding of a business model capable of generating value for stakeholders. It's fair to say no industry business model template exists. Some are focusing on producing low cost, low emission hydrocarbons, leveraging new technology and digital to reduce costs, and manage carbon and emissions. Others are doing all the above and transforming themselves to cover both low carbon solutions and a new electrification agenda.

Across the industry, businesses are engaged in a fundamental transformation of their business models to, firstly, decarbonise their legacy businesses; secondly, to adjust their business portfolios to position for success in a new energy system; thirdly, to build green businesses to penetrate markets that their current models cannot serve; and, fourthly, to differentiate in existing markets with green products and value propositions like green liquified natural gas (LNG).

**Attendee insights:** Understand how NOCs and IOCs are changing their strategies, which markets can offer them the best growth opportunities and what partnerships may best facilitate success.

CONTENT PARTNER

MODERATOR



**Florent Maisonneuve**  
Managing Director  
Alvarez & Marsal



Leadership Roundtable

# Digital technologies and capabilities: facilitating transformation success

**WEDNESDAY 2 NOVEMBER**  
**14:30 - 16:00**

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# Digital technologies and capabilities: facilitating transformation success

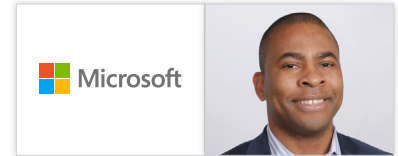
The need to transform both business and operating models will undoubtedly benefit from placing digital technologies and capabilities at the core of business operations as a critical enabler of strategic change. The energy industry has indeed worked hard over many years at enhancing digital technologies and capabilities across business operations. However, the digital agenda will need to shift from digitisation of business processes to the digitalisation of a business, allowing businesses to connect people, organisations and resources in an interactive ecosystem through digital technology.

New energy platform businesses will bring together producers and users in efficient exchanges of value as they leverage the network effect of access to more participants and the opportunity of delivering greater value. This will require a new talent agenda to attract and retain the talent pool of the future by meeting evolving expectations and priorities.

**Attendee insights:** Understand how digital technologies can enable transition and net-zero agendas as well as what is needed to attract and retain the talent needed to support progress.

HOSTED BY

HOST



**Uwa Airhiavbere**  
GM Oil & Gas for Energy& Resources  
Microsoft

CONTENT PARTNER

MODERATOR



**Muqsit Ashraf**  
Chief Executive - Accenture Strategy  
Global Management Committee  
Accenture



31 October - 3 November 2022

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ADIPEC continues to evolve and grow and this year, it will continue to provide a platform for open discussions, where ministers, global energy leaders and the entire energy ecosystem will convene to collaborate and explore the latest ideas and transformative thinking, that is shaping the energy industry.

#### | PARTICIPATION CRITERIA

The invitation only ADIPEC Leadership Roundtables are now open for attendee applications. For an applicant to be considered, attendees are required to meet the criteria below, as well as the scope of the leadership roundtable the applicant is registering for.

Minister, Ambassador, Chairman, Chief Executive Officer, Chief Financial Officer, President, Regional Director, Managing Director, Partner, Senior Executive, Senior Vice President - Supply Chain/Energy, Chief Operations Officer, Director General.

Governments, Embassies/Consulates, National Oil Companies, International Oil Companies, Energy Companies, Utility and Multi-National Power Companies, EPC Contractors, Service Companies, Technology Companies, Investment Banks, Private Equity Firms, Law Firms, Consultancies and Think Tanks.

**If you would like to participate in one of the Leadership Roundtables, please reach out to Saleem Ali at [adipecroundtables@dmgevents.com](mailto:adipecroundtables@dmgevents.com)**

[adipec.com/middle-east-energy-club](http://adipec.com/middle-east-energy-club)

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