



ATKearney

Global Business Policy Council

2019 CEO Retreat Agenda

Technology **Redefining Business:** From Strategy to Consumer Engagement

Mallorca, Spain / June 30-July 2, 2019

A scenic view of a coastline in Mallorca, Spain, during sunset. The sun is low on the horizon, casting a warm, golden glow over the scene. The sky is a mix of blue and orange. In the foreground, there are rocky cliffs with some greenery. A stone wall runs along the edge of the cliff. In the middle ground, there are several buildings, including a large white hotel or resort building. The sea is visible in the background, with a sandy beach and some people. The overall atmosphere is peaceful and beautiful.

Sunday, 30 June, 2019

9:15 a.m. – 5:00 p.m.

Departure from Park Hyatt Mallorca

Optional Excursion: Cap de Formentor – Natural Beauty That Inspires

While the Mediterranean has many legendary and fascinating islands, few match the intense beauty, history, cuisine, and culture of Mallorca, often called the jewel of the Balearics.

Under Spanish sovereignty, Mallorca has been an extraordinary witness to history, from the ancient world to the Moorish conquest to the Middle Ages and beyond. We will begin our morning at the superb Park Hyatt Mallorca, and our historian/guide will set the tone for the day with a short briefing on the island's story, unique features, and magical qualities.

From the Park Hyatt we will drive along the east coast of the island, past the bay of Alcudia to reach **Puerto Pollença**, a small town on the northern tip of Mallorca. From Puerto Pollença, we will embark on our sea voyage to discover the breathtaking peninsula of Formentor.

At this port, we will board a **llaüt**—a typical Balearic-style boat inspired by ancient Latin sailing vessels and originally built by Menorcan craftsmen (“mestres d’aixa”) using techniques passed through generations. Once aboard, we will enjoy extraordinary views from the sea as we navigate along the spectacular coastline of Formentor before heading toward the **Formentor Royal Hideaway Hotel**, also known as “the hotel of the stars.” There, we will enjoy a lunch of fresh, local Mediterranean specialties while overlooking the seafront.

This spectacular property belongs to the Barcelò Group and its origin dates back to the 1920s. Inspired by poetic odes extolling the beauty of the Formentor region and seeking to cultivate his own cultural oasis, **Adan Diehl**—an Argentinian avant-garde art and nature lover—purchased a large area of Formentor and moved there with his wife. By 1929, Diehl realized his vision of creating an artistic haven, and Hotel Formentor became a reality as writers, painters, and musicians visited from all over the world. Years later, the Boadas family took the baton from Diehl, vowing to preserve the hotel as a shelter for creative minds.

After lunch we will head back to the Park Hyatt along Mallorca's scenic snake road, which opens to a number of panoramic lookout and viewing points including **Mirador d'es Colomer**.

8:00 p.m.

Departure to the Artá Caves

Opening Reception and Dinner: Welcome to the Age of Acceleration

Throughout history, the advance of technology has always been the most powerful driver of change, wealth creation and, at times, unexpected disruptions. Two decades into the 21st century, we have reached a rate of accelerating tech change that would have seemed unthinkable even a decade or two ago. The 2019 CEO Retreat will draw on some of the world's leading

Sunday, 30 June, 2019 (cont'd)

thinkers and doers as we seek to understand and harness a new generation of quantum leaps—and what they mean to the conduct of business.

We begin the Retreat with a celebration of our spectacular venue in the **Artá Caves**, which since the Neolithic period (6000–4000 BC) has witnessed ebbing flows of people, interests, worldviews, and technologies. Here, we set the stage for our deliberations of how technology will propel us into the future.

Council welcome remarks from **Mr. Paul Laudicina**, Chairman, Global Business Policy Council, A.T. Kearney; Partner and Chairman Emeritus, A.T. Kearney

A.T. Kearney Iberia 30th Anniversary Celebratory Remarks by **Mr. Pedro Mateache**, Partner and Managing Director, A.T. Kearney Iberia

Monday, 1 July, 2019

8:00 a.m. – 8:15 a.m.

Park Ballroom, Park Hyatt Mallorca

Welcome and Opening Remarks: Technology's "Double Edge" Revisited

Four years ago, our CEO Retreat in Silicon Valley cast the spotlight on tech's "double edge" - the promise of mind-blowing discoveries and innovations on the one edge, and the perils associated with disruptive change on the other. We meet now in Mallorca amidst even higher levels of global political turmoil and economic uncertainty. From the rapid rise of populism based on the anger of the "left-behinds" to states' use of social media to hack elections in other countries, the contextual implications now permeating our business environment are tremendously complex.

Welcome Remarks

Mr. Paul Laudicina, Chairman, Global Business Policy Council, A.T. Kearney; Partner and Chairman Emeritus, A.T. Kearney *

Call to Order and Housekeeping

Mr. Erik Peterson, Partner and Managing Director, Global Business Policy Council, A.T. Kearney *

8:15 a.m. – 9:45 a.m.

Park Ballroom, Park Hyatt Mallorca

Prepare for Lift-Off: How Technology is Redefining Production

Four critical nodes of technology—artificial intelligence, the Internet of Things, additive manufacturing (3D printing), and advanced robotics—are already transforming production in radical ways. What are the business implications for the next several years? In this session, we will seek to map

Monday, 1 July, 2019 (cont'd)

some of the important ways in which these technologies will continue to evolve and, in the process, redefine the very nature of production.

Internet of Things:

Professor Sanjay Sarma, Vice President for Open Learning, MIT; Co-Founder, Auto-ID Center at MIT; Author, *The Inversion Factor: How to Survive in the IoT Economy* *

Advanced Robotics:

Dr. Henrik I. Christensen, Qualcomm Chancellor's Chair of Robot Systems and a Professor of Computer Science at Dept. of Computer Science and Engineering, UC San Diego; Director, Institute for Contextual Robotics *

Additive Manufacturing:

Professor Skylar Tibbits, Co-Director and Founder, Self-Assembly Lab, MIT International Design Center *

Session Chaired by **Mr. Erik Peterson**, Partner and Managing Director, Global Business Policy Council, A.T. Kearney *

9:45 a.m. – 10:00 a.m.

Break

10:00 a.m. – 11:00 a.m.

Park Ballroom, Park Hyatt Mallorca

Taming and Using Overload: How Tech is Redefining Information Flows

How do we deal with a world whose “datasphere” last year was estimated to be 7.6 zettabytes (7.6 sextillion bytes)? Or the rise of China as the largest source of data? The challenges associated with the rapid digitization of truly cosmic amounts of data—the merging of real and virtual worlds—are herculean; yet the potential upsides are breath-taking. Organizations are ushering in new business models and practices in ways that disrupt many existing institutions and practices. How is business responding? And where will things go in the future?

Ms. Victoria Angelica Espinel, Chief Executive, BSA | The Software Alliance *

Mr. Andrew W. Wyckoff, Director for Science, Technology and Innovation, OECD *

Session Chaired by **Mr. Paul Laudicina**, Chairman, Global Business Policy Council, A.T. Kearney; Partner and Chairman Emeritus, A.T. Kearney *

Monday, 1 July, 2019 (cont'd)

11:00 a.m. – 11:45 a.m.

Park Ballroom, Park Hyatt Mallorca

The New Geopolitics of Artificial Intelligence

The global rise of populism and nationalism is reflected in the election of leaders and parties that exploit the lack of public trust in established institutions and procedures. It is also reflected in policies that aim to restrict the growing competition in technology (“techno-sovereignty”) that is part of the Fourth Industrial Revolution. What is the scope of this techno-nationalism, and how might growing concern over technological innovation articulate itself in the future?

General John R. Allen (Ret.), President, The Brookings Institution; Retired U.S. Marine Corps Four-Star General and Former Commander of the NATO International Security Assistance Force (ISAF) and U.S. Forces in Afghanistan *

11:45 a.m. – 12:00 p.m.

Break

12:00 p.m. – 1:30 p.m.

Restaurant Asia, Park Hyatt Mallorca

Lunch Session: How Tech and Innovation Are Redefining the Value Chain

Classic value chain strategies have been turned upside down – for global giants as well as for their suppliers, customers, competitors, and partners, not to mention newcomers to various industries. From unparalleled modeling through BASF’s supercomputer, Curiosity, from leveraging its global Verbund structure, and from combining profitability with CO2-neutral growth, BASF has a remarkable global footprint. We will have a close-up-and-personal discussion with the head of the world’s largest producer of chemical products.

Dr. Martin Bruder Müller, Chairman of the Board of Executive Directors and Chief Technology Officer (CTO), BASF SE *

Chaired by **Mr. Paul Laudicina**, Chairman, Global Business Policy Council, A.T. Kearney; Partner and Chairman Emeritus, A.T. Kearney *

1:30 p.m. – 2:00 p.m.

Restaurant Asia, Park Hyatt Mallorca

CEO Spotlight Interview With:

Mr. Pablo Isla, Chairman and Chief Executive Officer, Inditex *

Interview by **Mr. Pedro Mateache**, Partner and Managing Director, A.T. Kearney Iberia*

2:00 p.m. – 2:15 p.m.

Break

Monday, 1 July, 2019 (cont'd)

2:15 p.m. – 3:15 p.m.

Park Ballroom, Park Hyatt Mallorca

Re-making the Physical, Not Only the Digital, World: What Tech is Doing to Transform Global Supply Chains

Tech, clearly, is only one of several major forces now transforming global supply chains, though it is arguably the most powerful one. What is the nature of that transformation, and what are companies doing to leverage advancing technologies in the face of the anti-globalization storm, volatile geopolitics, and other risks to the stable and smooth flow of goods?

Mr. Christopher G. Caine, President, Center for Global Enterprise;
President and Chief Executive Officer, Mercator XXI, LLC *

Professor Carlos Cordon, LEGO Professor of Strategy and Supply Chain Management; IMD Business School *

Session Chaired by **Mr. Erik Peterson**, Partner and Managing Director, Global Business Policy Council, A.T. Kearney *

3:15 p.m. – 3:45 p.m.

Park Ballroom, Park Hyatt Mallorca

CEO Spotlight Interview With:

Mr. James Quincey, Chairman and Chief Executive Officer, The Coca-Cola Company

Interview by **Mr. Konstantinos Apostolatos**, Partner, Global Strategy and Top Line Transformation, A.T. Kearney *

3:45 p.m. – 4:00 p.m.

Break

4:00 p.m. – 5:00 p.m.

Park Ballroom, Park Hyatt Mallorca

Dream It, Have It: How Tech Is Redefining Consumption and Consumer Expectations

Within living memory, the world of consumers seemed a relatively changeless aggregation of department store retail, legacy television networks, classic advertising on TV, radio, and in newspapers, direct mail, and lively, browsable physical bookshops and record stores. That world has vanished, and younger consumers raised on Amazon, Apple, Netflix, social media, pop-ups, and fast fashion have absolutely no memory of it. What's still ahead, and how do brands and companies anticipate, inspire, adapt, and connect as Generation Z comes online?

Mr. Tod Johnson, Executive Chairman, NPD Group *

Mr. Yan Xuan, Vice President of Corporate, External and Legal Affairs for the Greater China Region, Microsoft *

Monday, 1 July, 2019 (cont'd)

Session Chaired by **Mr. Greg Portell**, Lead Partner, Global Consumer Industries & Retail Practice, A.T. Kearney *

5:00 p.m. – 5:45 p.m.

Park Ballroom, Park Hyatt Mallorca

AI Superpowers: The New World Order

After historical boom-and-bust cycles, artificial intelligence (AI) is moving into a stage marked by unprecedented development, and the subsequent changes will represent significant challenges for societies across the planet. We are witnessing radically different approaches to AI in the United States and China—the world's AI “superpowers”—with profound implications for the future.

Dr. Kai-Fu Lee, Chairman and Chief Executive Officer, Sinovation Ventures; President, Sinovation Venture's Artificial Intelligence Institute; Author, *AI Superpowers: China, Silicon Valley, and the New World Order* *

Session Chaired by **Mr. Erik Peterson**, Partner and Managing Director, Global Business Policy Council, A.T. Kearney

8:00 p.m.

Departure to Ca S'Hereu

Social Evening

Under a setting sun and a rising moon, we will enjoy a spectacle showcasing the sounds, artistry, and legendary cuisine of Mallorca. This “evening out” at a traditional Mallorca country house will allow members and guests to get better acquainted in a casual atmosphere.

Tuesday, 2 July, 2019

8:00 a.m. – 9:30 a.m.

*Park Ballroom Terrace,
Park Hyatt Mallorca*

Council Breakfast

GBPC Chairman and Founder Paul Laudicina and Council Managing Director Erik Peterson share key findings of the GBPC's “Views from the C-Suite” white paper and open the floor to discussion by Retreat participants on potential priorities for GBPC work over the coming year.

Mr. Paul Laudicina, Chairman, Global Business Policy Council, A.T. Kearney; Partner and Chairman Emeritus, A.T. Kearney *

Mr. Erik Peterson, Partner and Managing Director, Global Business Policy Council, A.T. Kearney *

9:30 a.m. – 9:45 a.m.

Break

Tuesday, 2 July, 2019 (cont'd)

9:45 a.m. – 10:15 a.m.

Park Ballroom, Park Hyatt Mallorca

Don't Be Evil: How Big Tech Betrayed Its Founding Principles -- and All of Us

Ms. Rana Foroohar, Global Business Columnist and Associate Editor, *Financial Times*; Global Economic Analyst, CNN; Author, *Makers and Takers: The Rise of Finance and the Fall of American Business* *

10:15 a.m. – 11:30 a.m.

Park Ballroom, Park Hyatt Mallorca

The Great Disruptor: Tech Redefining Society, Economics, Politics and Security

With the help of several world-class thinkers, we now widen the aperture to assess the profound effects of tech on society, the economy, and politics and governance. From Brexit to the Trump White House, and from the winners to the losers, technological change is the great underlying factor driving much of what now ultimately makes the headlines and shakes the world.

Dr. W. Brian Arthur, External Professor, Santa Fe Institute; Visiting Researcher, System Sciences Lab, PARC *

Professor Richard Baldwin, Professor of International Economics, Graduate Institute, Geneva; Director, Centre of Economic Policy Research (CEPR) *

Ms. Rana Foroohar, Global Business Columnist and Associate Editor, *Financial Times*; Global Economic Analyst, CNN; Author, *Makers and Takers: The Rise of Finance and the Fall of American Business* *

Chaired by **Mr. Paul Laudicina**, Chairman, Global Business Policy Council, A.T. Kearney; Partner and Chairman Emeritus, A.T. Kearney *

11:30 a.m. – 11:45 a.m.

Break

11:45 a.m. – 12:45 p.m.

Ballroom, Park Hyatt Mallorca

The Fate of Nations: Tech Redefining National Competitiveness Strategies

It goes without saying that those countries which cultivate technological breakthroughs, innovation, and diffusion will position themselves effectively for the economy of the future. This is especially true with the “readiness” of economies to cultivate the key technologies of the Fourth Industrial Revolution. So what are countries now doing to pre-position themselves for the future?

Dr. Beh Swan Gin, Chairman, Singapore Economic Development Board *

Tuesday, 2 July, 2019 (cont'd)

Dr. Amit Kapoor, Honorary Chairman, Institute for Competitiveness, India; President, India Council on Competitiveness; Editor-in-Chief, *Thinkers* *

Session Chaired by **Mr. Erik Peterson**, Partner and Managing Director, Global Business Policy Council, A.T. Kearney *

12:45 p.m. – 1:15 p.m.

Ballroom, Park Hyatt Mallorca

CEO Spotlight Interview With:

Ms. Henadi Al-Saleh, Chairperson, Agility

Session Chair and Interview by **Mr. Mauricio Zuazua**, Partner, A.T. Kearney *

1:15 p.m. – 1:30 p.m.

Break

1:30 p.m. – 3:00 p.m.

Ballroom, Park Hyatt Mallorca

Lunch Session: Spotlight on Digital Governance

Ann Cairns frequently appears on the lists of the world's most powerful women, and for good reason. By virtue of her deep understanding of local cultures and expectations, she has played a key role in the strong, sustainable growth of Mastercard's international business. Beyond that, her passions include diversity and inclusion as well as financial inclusion of some 2 billion of the world's people still lacking access to the most basic financial services. New technologies have the potential to bring the globe's "unbanked" into the global economy, but rising competition and mercantilist policies could become even more of an obstacle. Ann Cairns offers a one-of-a-kind perspective relevant to all industries.

Ms. Ann Cairns, Vice Chairman, MasterCard *

Interview by **Mr. Arjun Sethi**, Partner, A.T. Kearney *

3:00 p.m. – 3:15 p.m.

Ballroom, Park Hyatt Mallorca

Concluding Remarks and Toast

In longstanding tradition, Council Chairman and GBPC Founder Paul Laudicina will share key immediate takeaways of the Mallorca proceedings and then set the stage for next year's CEO Retreat.

3:15 p.m.

Ballroom, Park Hyatt Mallorca

Adjourn