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17th Annual
Conference on

Gas in India

New Scenario: Market Developments & Policy Initiatives

November 6-7, 2017, Le Meridien, New Delhi

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GAS IN INDIA

Mission

- The gas sector has seen some significant policy developments in the past one year. The government has taken constructive decisions to liberalise the sector by simplifying processes, increasing market access and encouraging the use of technology to enhance efficiency.
- One of the biggest reform measures has been the launch of the Open Acreage Licensing Policy (OALP) along with the National Data Repository. By allowing E&P companies to choose the areas they want to explore, the new policy attempts to address a major drawback of the NELP regime that forced exploration companies to bid for projects chosen by the government.
- The new policy also gives the government a chance to attract exploration companies that are more serious about doing business. Already, about 50 expressions of interest have been received under OALP for an area of 50,000 square km.
- Some of the other key policy developments are unified licensing, a shift to revenue sharing, providing marketing and pricing freedom to operators for discoveries in high-pressure, high-temperature and deepwater and ultra deepwater areas.
- Meanwhile, the Discovered Small Fields (DSF) policy, introduced by the government in 2015, received a reasonably positive response from investors. The progressive features of the policy and greater fiscal incentives led to several new players entering the E&P space. A total of 44 fields have been awarded under the first round of bidding. The government is soon planning to come out with the second round of bidding.
- The gas supply situation remained static in 2016-17 with domestic production standing at 88 mmscmd, a marginal decline of about 1 per cent over 2015-16.
- The shortfall in domestic gas supply continues to be met by LNG imports. The present share of LNG imports in the total supply has almost doubled to around 45 per cent from the level in 2010-11. Positive developments such as a reduction in the basic customs duty on LNG imports, renegotiation of long-term LNG contracts and falling spot LNG prices have made LNG imports even more lucrative for Indian companies.
- India is also diversifying its sourcing options to ensure procurement at competitive prices. The LNG supplier base has widened substantially to include imports from Australia, the US, Nigeria, Yemen, Algeria and Oman.
- However, over the next few years, incremental production of 50-55 mmscmd of domestic gas supply is expected from the existing acreages alone. In addition, production from DSF and the OALP fields will add significantly to the output.
- In the CGD space, new bidding rounds – the seventh and the eighth – were rolled out by PNGRB in 2016. However, the bidding response was lukewarm, with only one GA being sanctioned under the seventh round. On the positive side, in the past two years, PNGRB has granted authorisation to lay, build, operate and expand the CGD network in almost 25 cities under bidding rounds five, six and seven.
- In contrast, not much progress has been made in the pipeline segment. Utilisation of the existing pipelines remained low. Further, the development of new pipelines was slow owing to viability and right-of-use issues.
- Meanwhile, IT penetration has been growing with gas utilities seeking greater customisation from IT vendors for their unique business requirements. Technologies and solutions are being deployed across various segments such as enterprise resource planning to streamline business processes, smart metering for data collection, supervisory control and data acquisition (SCADA) and geographic information systems for asset management, customer relationship management (CRM) for improving consumer interface, etc. At the same time, the industry is paying increased attention to customisation and integration of information technology (IT) and operational technology (OT).
- **The mission of this conference is to discuss the recent trends and developments in the natural gas sector, highlight key issues and concerns, and examine the way forward in light of the recent policy and regulatory initiatives. The conference will also identify new and emerging opportunities, and showcase some of the noteworthy technologies and best practices.**

Target Audience

- The conference is targeted at officials and managers from:

- Natural Gas Producers
- Natural Gas Buyers
- LNG Suppliers
- Potential LNG Buyers
- Oil & Gas Exploration and Production Companies
- Pipeline Operators
- City Gas Distributors
- Policymakers and Administrators
- Government Agencies
- Regulatory Agencies
- Equipment and Technology Providers
- CBM Companies
- Independent Shale Operators
- Power Plant Operators
- Fertiliser Manufacturers
- Steel Manufacturers
- Other Industrial Users
- Ports and Shipping Businesses
- Financial Institutions
- Research Organisations
- Industry Analysts
- Consulting and Legal firms
- Etc.

AGENDA/STRUCTURE

KEY TRENDS AND OUTLOOK
- What are the key trends in gas demand, supply and prices? What are the recent developments?
- What are the key areas of concern for the sector?
- What are the upcoming opportunities? What is the outlook?

GOVERNMENT PERSPECTIVE
- What is the perspective of the government on the gas sector?
- What are the recent policy and reform measures taken by the government? What is the likely impact of these?
- What are the top priorities of the government going forward?

INDUSTRY PERSPECTIVE
- What has been the experience of industry players so far?
- What have been the biggest challenges?
- What are the policy measures expected from the government?

FOCUS ON THE OPEN ACREAGE LICENSING PROGRAMME
- What are the key features of OALP?
- What is the likely impact of the policy on the sector?
- Which are the key sedimentary basins on offer?
- What are the upcoming opportunities and timelines?

SPOTLIGHT ON NATIONAL DATA REPOSITORY
- What are the key features of the National Data Repository?
- What are the guidelines for data collection & dissemination? What are the benefits?
- What are the key issues and concerns?

UPDATE ON DISCOVERED SMALL FIELDS
- What is the update on the first round of the DSF auction? What are the timelines for its implementation?
- When is the second round of bidding likely to be announced? What are the upcoming opportunities?
- What are the key issues and concerns?

REGULATORY UPDATE
- What are the key regulatory issues and concerns?
- What have been the recent regulatory developments?
- What is the future outlook?

CUSTOMER PERSPECTIVE
- What are the current requirements of the key consuming segments?
- How are the requirements being met? What are the gas sourcing strategies?
- What are the key issues and challenges?

FOCUS ON THE LNG MARKET
- What is the current demand for LNG?
- What are the LNG import options? What are the future sourcing options?
- What are the recent trends in global LNG prices?
- How have the buying strategies changed with the falling spot prices?

PROGRESS ON LNG INFRASTRUCTURE
- What has been the performance of the existing LNG terminals?
- What are the planned investments/projects in this segment?
- What are the emerging opportunities?

GAS SUPPLY OUTLOOK
- What is the current gas supply scenario? What are the sourcing options?
- What is the status of CBM exploration? What is the update on shale gas production?
- What is the outlook for gas supply?

CGD UPDATE AND PROGRESS
- How do the operators perceive the CGD sector?
- What has been the response to the recent bidding rounds (seventh and eighth)?
- What are the targets for the next couple of years? What are the new business opportunities?
- What are the key challenges?

FOCUS ON CBM
- How has CBM production grown over the past few years?
- How has the policy for marketing and pricing freedom benefited the CBM industry?
- What are the key issues and challenges? What is the outlook?

UPDATE ON PIPELINE INFRASTRUCTURE
- What is the status of approved/upcoming pipelines?
- What are the investments expected in this segment?
- What are the key issues and challenges?

CONVERGENCE OF IT AND OT
- What are the key drivers for the convergence of OT and IT systems in the oil and gas industry?
- What are the key enablers supporting this integration?
- What are the key issues and challenges?

TECHNOLOGY SHOWCASE
- What are the key trends in the technology market (SCADA, OPCUA, cybersecurity, cloud computing, ERP, communication technologies, etc.)?
- What are the recent developments and innovations in India and globally?
- What are the key issues and challenges? What are the market opportunities?

EQUIPMENT SHOWCASE
- What are the key trends in the equipment market?
- What are the recent innovations in India? What are the global best practices?
- What are the key challenges?

ASSET AND NETWORK MANAGEMENT
- What has been the experience so far with respect to asset management in the gas industry?
- What are the key technologies being deployed for effective asset management (GIS, SCADA, ERP, etc.)?
- What are the global best practices?

GAS IN INDIA

Previous Speakers

Atanu Chakraborty
Director General
Directorate General of Hydrocarbons

Yash Malik
ED, Corporate Planning
ONGC

Rajeev Mathur
Managing Director
Mahanagar Gas Limited

Shridhar Tambarparni
Joint President
Adani Gas

Dr Ashutosh Karnatak
Director, Projects
GAIL

S.K. Sharma
Executive Director, Gas
Indian Oil Corporation

Nitin Patil
Chief Executive Officer
Gujarat Gas

Rajesh Aggarwal
Operations Director
KRIBHCO

Subir Purkayastha
Director, Finance
GAIL

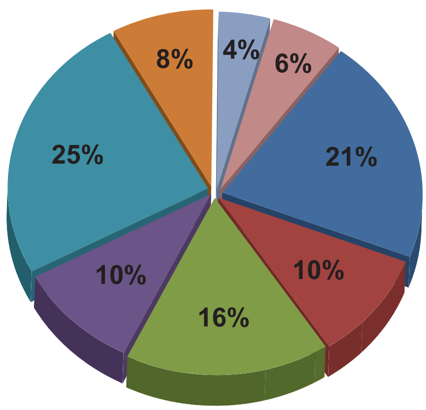
S.D. Prasad
Head Corporate Gas Sourcing
NTPC

Dr A.K. Balyan
CEO, Oil and Gas
Reliance Infrastructure

Pankaj Wadhwa
Senior Vice President
Petronet LNG

Participants Composition (2016)

- Gas E&P Companies
- Pipeline Operators
- Gas Buyers
- City Gas Distributors
- Equipment and Technology Providers
- Financial and Legal Institutions
- Government Institutions & Policymakers
- Research Organisations and Consultants



Previous Participants

The organisations that participated in our previous conference on **"Gas in India"** include: **Aarvi Encon, Adani Ports & SEZ, Adani Ports and SEZ, Adventz Zuari, Aiut Technologies, Aker Solutions, AUCTUS Advisors, Bhagyanagar Gas, Black & Veatch, BPCL, BMR & Associates LLP, Cairn, Central U.P. Gas, Central UP Gas, Charotar Gas, Clarke Energy, CLP, Deepak Fertilisers & Petrochemicals, Directorate General of Hydrocarbons, DLF Utilities, DNV-GL, Dolat Capital, DUA Associates, Duraline, EIL, Elster, Empire Industries, Engie, Evonik, Fearnleys LNG, Filter Concept, Forbes Bulmi Armada, Frames Group, GAIL India, Gas Natural Fenosa, GDF Suez Energy, GE Oil & Gas, GMMCO, GMR Energy, Greenfuel Energy Solutions, Greka Drilling, GSPC, Gujarat Flurochemicals, Gujarat Gas, HCL, Honeywell, Honeywell Process Solution, HPCL, HPCL-Mittal, HSA Legal, ICICI Bank, IEX, ICF, ICRA, IFC, IFFCO, Imkemex, Indraprastha Gas, Inox Wind, IOCL, IOT Infrastructure & Energy Services, IMC Limited, India Futuristic Marine, Jain Irrigation, Jainsons Industries, JSW Steel, Kimplas Piping, KPCL, KPIT, Kraton Polymers, KRIBHCO, Linde, Madras Fertilisers, Maharashtra Natural Gas, Mahanagar Gas, Maharashtra State Power Genco., Maruti Suzuki, MECON, Mits Skills, Mitsubishi Heavy Industries, Mitsui, Mumbai Port Trust, National Fertilizers, NFL, NTPC, ONGC, ONGC Tripura Power Company, Parker Hannifin, Petronet LNG, Piramal Glass, PPAC, PROTEGO, Rajasthan State Gas, Reliance, Reshamwala Ship Brokers, RIL, Rockwell Automation, RSGL, Sabarmati Gas, SAGE Group, Saipem, SBI Capital Markets, SBI Caps, SECON, Secure Meters, Sener, SENER, Shapoorji Pallonji Oil & Gas, SICK, Siemens, Siemens - Power & Gas Sales, Simorgh Energy, Sterling & Wilson, Swagelok, Technip, The Corporate Profiles, U3S Chemsolutions, Varicon Pumps & Systems, Varun Global, Vimta Labs, Vitrum Glass, Wallfort Financial Services, Western Australia Trade etc.**

SNAPSHOTS

Organisers

*The conference is being organised by **India Infrastructure Publishing**, the leading provider of information on the infrastructure sectors. The company publishes **Indian Infrastructure** (a magazine on infrastructure policy and finance), **Power Line** (India's premier power magazine) and **Renewable Watch** (covers the entire spectrum of renewable energy). It also publishes a series of reports on the oil and gas sector including **Gas in India, City Gas Distribution in India** and **LNG in India**. It also publishes **Oil & Gas News** (a weekly newsletter) and the **Oil & Gas Directory and Yearbook**.*

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Registration Form

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Name(s)/Designation (IN BLOCK LETTERS)

Company

Mailing Address

Phone Mobile

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Registration Fee

Delegates	Discounted fee (before October 12, 2017) INR	GST @ 18%	Total INR	Total USD	Fee without discount (after October 12, 2017) INR	GST @ 18%	Total INR	Total USD
One delegate	18,000	3,240	21,240	335	22,500	4,050	26,550	418
Two delegates	30,000	5,400	35,400	585	37,500	6,750	44,250	732
Three delegates	42,000	7,560	49,560	836	52,500	9,450	61,950	1,045
Four delegates	54,000	9,720	63,720	1,087	67,500	12,150	79,650	1,359

- There is a 20 per cent “early bird” discount for those registering before October 12, 2017.
- Registration will be confirmed on receipt of the payment.
- To register online, please log on to http://indiainfrastructure.com/conf.html

Payment Policy:

- The conference is a non-residential programme.
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