Indian Infrastructure & LOCUSVIEW

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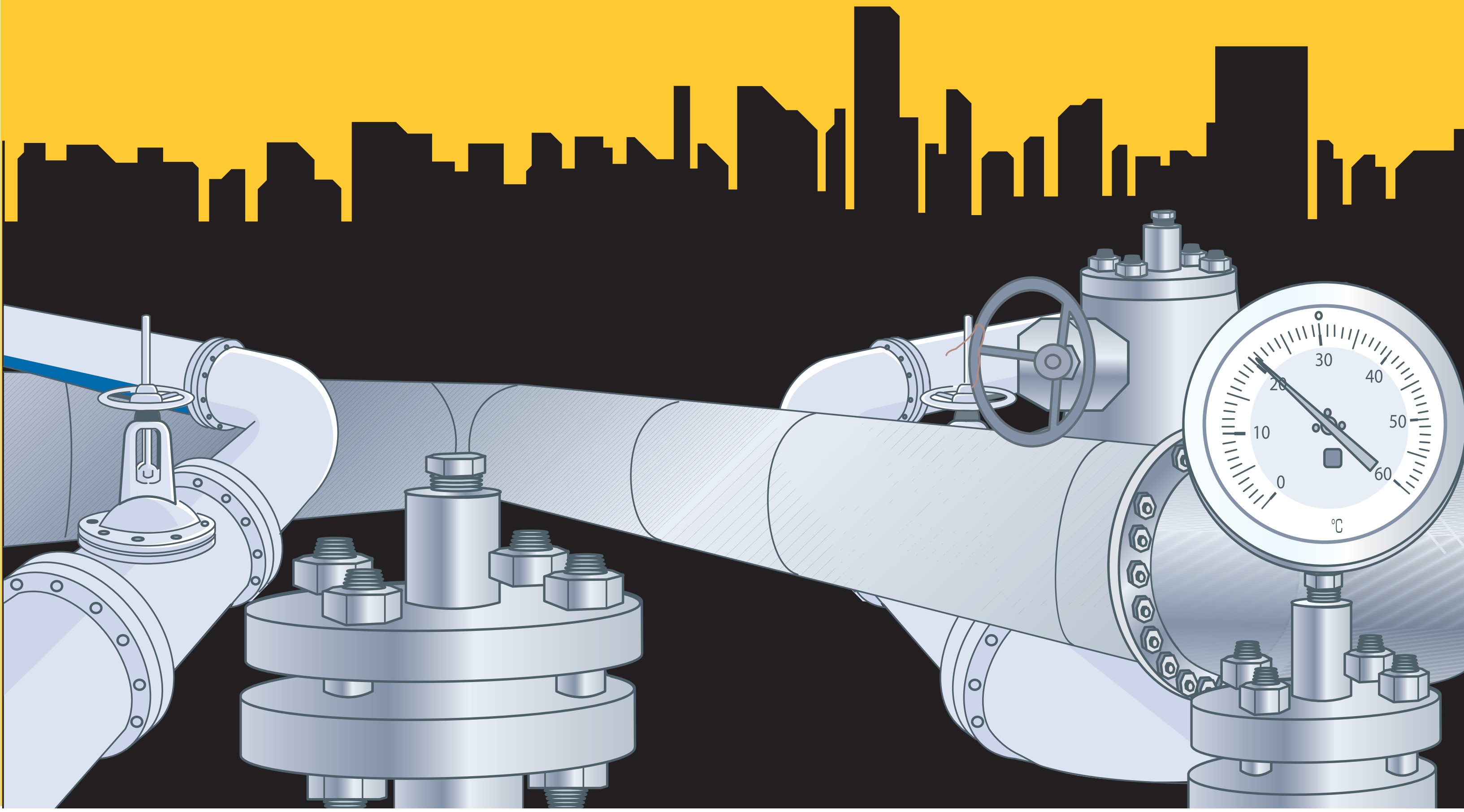
present

17th Annual Conference on

CITY GAS DISTRIBUTION IN INDIA

Progress, New Technologies, Outlook, and Opportunities

March 2-3, 2022 | Le Meridien, New Delhi



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CITY GAS DISTRIBUTION IN INDIA

Mission

- The city gas distribution (CGD) sector has witnessed remarkable growth over the past year. The existing players have invested significantly in developing infrastructure and expanding operations to new geographical areas (GAs)/markets. Gas sales have returned to pre-Covid levels and technology penetration has grown rapidly. During 2019-20 and 2021-22 (till August 31, 2021), over 3 million piped natural gas (PNG) connections and 1,640 compressed natural gas (CNG) stations have been added in GAs authorised under the ninth and the tenth bidding rounds. In the upcoming 11th round of bidding, another 65 GAs, covering 203 districts, are being offered. Bids for these are due on December 15, 2021.
- Over the past few years, the Petroleum and Natural Gas Regulatory Board has introduced various policies to streamline activities in the sector. These include the issuance of force majeure guidelines, relaxation in LNG marketing and distribution regulations, simplification of the gas pipeline tariff structure and creation of a gas exchange framework.
- Further, digital technologies are rapidly gaining traction among CGD utilities. SCADA, GIS and the use of dashboards, smart metering, analytical tools and innovative software are enabling CGD companies to monitor their assets in real time.
- Meanwhile, alternative modes of gas sourcing and new CNG models have also been emerging lately. CGD operators are setting up small-scale LNG-based CNG stations for bridging the gas demand-supply gap in the newly awarded GAs. New revenue models for CNG station development, such as company owned company operated, company owned dealer operated, and dealer owned dealer operated, are also being explored to expand network coverage.
- The CGD sector is expected to witness investments of up to Rs 900 billion in the next seven to eight years as more and more regions of the country are brought under the CGD network. Clearly, the sector provides significant opportunity to all stakeholders including contractors, investors, and equipment/material/technology providers.
- **The mission of this two-day conference is to analyse the key trends and outlook of the CGD sector in India, discuss the challenges and highlight the upcoming opportunities. The conference will provide a platform to showcase recent innovations in technology and equipment, noteworthy projects and best practices.**

Target Audience

The conference is targeted at:

- Gas distributors
- Engineering and design firms
- Consulting and legal firms
- Gas marketers/suppliers
- Pipeline manufacturers
- Pipeline operators
- Policymakers and regulators
- Leak detection solution providers
- Industrial consumers
- Infrastructure builders
- Technology providers
- IT solution providers (SCADA, GIS, ERP, etc.)
- Natural gas producers
- Meter manufacturers
- Financial institutions
- State development agencies
- Material technology providers
- Etc.

Organisers

The conference is being organised by **India Infrastructure Publishing**, the leading provider of information on the infrastructure sectors. The company publishes **Indian Infrastructure, Smart Utilities, Power Line** and **Renewable Watch** magazines. It also publishes the **City Gas Distribution Market in India** and **Gas in India reports, Oil & Gas News** (a weekly newsletter) and the **Oil & Gas Directory and Yearbook**. The group also operates **www.cgdindia.co**, which provides decision-makers with information, analysis and insights that are of interest and relevance to CGD network operators, technology providers, investors, regulators, consultants and other concerned organisations.

TENTATIVE AGENDA/STRUCTURE

TRENDS, DEVELOPMENTS AND OUTLOOK

- What have been the key trends and developments in the CGD sector?
- What is the outlook for the next two to three years?
- What are the new opportunities in the sector going forward?
- What are the key unresolved issues and challenges?

CGD OPERATORS' VIEWPOINT: NETWORK GROWTH AND EXPANSION PLANS

- What is the current status of the CGD networks operated by your company (with regard to CNG stations, PNG consumers, steel and MDPE pipelines, etc.)?
- What are the current gas supply sources? What are the future gas requirements?
- What are the company's network expansion plans? What are the capex requirements?

PNGRB'S PERSPECTIVE: KEY REGULATORY DEVELOPMENTS AND OUTLOOK

- What is the progress on the various bidding rounds? What are some of the recent regulatory initiatives taken by the PNGRB?
- What are the plans and timelines for the launch of the 11th round of CGD bidding? What are the specific network expansion plans and investment requirements?
- What are the changes expected in bidding strategies for the upcoming rounds? What is the regulatory outlook?

11th CGD BIDDING ROUND: NETWORK DEVELOPMENT PLANS, TIMELINES AND OPPORTUNITIES

- What are the specific features of the 11th round of CGD bidding (number of GAs, population, CNG network, PNG network, steel and MDPE pipelines, etc.)?
- What are the plans and tentative timelines for the launch and the bidding process?
- What are the investment requirements and upcoming opportunities?

CNG SEGMENT FOCUS: CURRENT INFRASTRUCTURE AND FUTURE EXPANSION PLANS

- What is the current status of CNG infrastructure in the country?
- What has been the progress with regard to CNG stations in the GAs authorised in the ninth and tenth bidding rounds?
- What are the CNG network expansion plans in the operational GAs? What are the investment requirements?

PNG SEGMENT FOCUS: CURRENT INFRASTRUCTURE AND FUTURE EXPANSION PLANS

- What is the current status of PNG infrastructure in the country?
- What has been the progress with regard to PNG connections in the GAs authorised in the ninth and tenth bidding rounds?
- What are the PNG network expansion plans in the operational GAs? What are the investment requirements?

COST ECONOMICS AND NEW CNG MODELS (DODO, LCNG, ETC.)

- What factors determine the business viability of CGD projects? What are the key cost components and revenue sources?
- How has the cost competitiveness of alternative fuels impacted the demand for CNG and PNG?
- What are the new models being adopted to facilitate the development of CNG stations (DODO, LCNG, etc.)? What are the cost savings expected through the use of these models?

GAS AVAILABILITY: DOMESTIC SUPPLY AND DEPENDENCE ON R-LNG

- What are the requirements of the CGD sector? What is the current mix of domestic gas and R-LNG?
- What are the gas sourcing strategies? Have they changed in the past 6-12 months due to the Covid-19 pandemic?
- What is the outlook for gas supply?

GAS TRANSMISSION INFRASTRUCTURE: CURRENT STATE AND NETWORK ADDITION PLANS

- What is the status of the approved and announced pipeline projects?
- What are the investments expected in this segment?
- What are the likely benefits of a unified tariff structure for CGD utilities?
- What are the key issues and challenges? How are they being addressed?

TECHNOLOGY INNOVATIONS IN DESIGN, PLANNING AND OPERATIONS

- What are the latest technologies being used for network design, planning and operations?
- What are some of the best practices and noteworthy initiatives in this space?
- What have been the biggest challenges faced? What are the lessons learnt?

SMART METERING: POTENTIAL AND PROGRESS

- What has been the progress made by CGD utilities with regard to smart metering?
- What are the implementation challenges?
- What are the expected targets, investments and timelines for smart metering by CGD utilities?

GOING DIGITAL: ROLE OF AUTOMATION AND INSTRUMENTATION

- What is the role of IT and automation systems in the O&M of CGD networks? What has been the implementation experience and learnings?
- What are the new and emerging asset management and remote monitoring requirements (IoT, big data, SCADA, GIS, AI, ML, etc.)?
- What are the implementation issues and challenges? What is the way forward?

DATA MANAGEMENT AND CYBERSECURITY

- What are the new and emerging requirements for data management in the CGD sector?
- What are the key technologies and solutions available and their deployment?
- What are the cybersecurity threats and risks for CGD companies? What are the best practices?

FOCUS ON CUSTOMER RELATIONSHIP MANAGEMENT (CRM)

- What are some of the customer relationship management initiatives taken by CGD utilities?
- What are the best practices and enabling technologies?
- What are the key issues and challenges?

EQUIPMENT SHOWCASE

- What are the new and emerging requirements for the CGD sector?
- What has been the industry experience with the use of this new equipment?
- What are the key challenges in the adoption of this equipment? What is the future outlook?

CITY GAS DISTRIBUTION IN INDIA

The city gas distributors that have participated in the conference include:

Previous Speakers (in alphabetical order):

Ravi Agarwal
Executive Director,
GAIL

Suresh Manglani
Chief Executive Officer,
Adani Gas

Shashwat Agrawal
Then Senior Vice President,
Mahanagar Gas

Rajeev Mathur
Executive Director,
GAIL Gas

Ranjan Dwivedi
Then Managing Director,
Central UP Gas

E.S. Ranganathan
Managing Director,
Indraprastha Gas

Satpal Garg
Then Member, Petroleum and Natural Gas Regulatory Board

D.K. Sarraf
Chairperson, Petroleum and Natural Gas Regulatory Board

A.K. Jana
Managing Director,
Indraprastha Gas

Rajiv Sikka
Chief Executive Officer
IndianOil - Adani Gas

Ramana Kumar
Then Managing Director,
Sabarmati Gas

M.V. Ravi Someswarudu
Chief Executive Office,
GAIL Gas

Previous Participants:

Aarvi Encon, ABB, Accenture, ACE GAS Conversions, ACME, Adani Gas, AG&P, Agi-Glaspac, Al Aziz, Allard, Ambetronics, AMP Capital Advisors, Anacon Process Control, APGIC, Ario Infrastructure, Arrukn Consultation, Arush Gas Technology, Asahi Glass, Ashoka Buildcon, Assam Gas, AT Kearney, Auctus Advisors, Avantha, Avantika Gas, Aveva, Avineon, Basell Polyofins BASG, Beckhaul Technology, Berry Plastics, BG Exploration and Production, Bhagyanagar Gas, Bhotika Pipeline, Bombay Tools Centre, Borouge, BP Exploration, BPCL, Bridge and Roof, Burckhardt, Bureau Veritas, Cairn, Calcutta Fluid System Components (Tubacex Group), Captiva Energy Solutions, Caterpillar Commercial, CEIL, Central UP Gas, Central Warehousing Corporation, Charotar GAS, Chemtrols, Chevron, Clarke Energy, Comfit & Valves, CPL Energy, CRISIL, Cryogas, Cyient, Daniel Measurement Solutions, Denso, DNV-GL , Dolat Capital Market, Duraline, East India Petroleum, Eastern Gas, EIL, Elara Capital, Emerson, ESAB, ESP Safety, Esri India Technologies, Essar Oil, Evonik, ExxonMobil, EY, Feedback Business Consulting, Ferranti, Fike Safety, Fluid Controls, Fornovogas, Fujitsu, GAIL, Gainwell Commosales, Gardner Denver, Gas Natural Fenosa, Gasvigil Technologies, GE India Industrial, GE Oil & Gas, GE Sensing, GE T&D, Genus Power, Georg Fischer Piping Systems, Germanischer Lloyd, GLNoble Denton, Glynwed, GMMCO, GMR Energy, Goa Natural Gas, Green Gas, Greenfuel Energy Solutions, GSPC, Gujarat Gas, Gujarat Glass, HandyTube, Hansa Management Services, Haridwar Natural Gas, Haryana City Gas Distribution, HCC, Heath Consultants, Hitachi, Hoerbiger Wien, Honeywell, HPCL, HP Oil & Gas, ICF, ICICI Bank, ICPCI, ICRA, IDBI, IDCO, IDFC, IFC, IGL, IMC, Imkemex, India Ratings & Research, Indian Gas Exchange, Indian Oil Corporation, Indian Oil-Adani Gas, IOTL, Indraprashta Gas, Inel Gas Controls, Innovative Automation, Institute of Asset Integrity & Reliability Management, Instromet, Intertek, IRM Energy, Ispat Energy, Itron, Jai Hind Projects, Jain Irrigation Systems, Josler Hydrocarbons, Jubilant Energy, Jyotech Engg., Katlax, Kawasaki, Kimplas Piping, Kirloskar Oil Engines, Kirloskar Pneumatics, Kotak Mahindra, Kotak Securities, KPMG, KSIDC, L&T Valves, Lanco, Leister Technology, LocusView, Lucky Investment Managers, Luxfer Uttam, MagikMinds, Magnatech Smartgrid Solutions, Mahanagar Gas, Maharashtra Natural Gas, Maharashtra Seamless, Mahesh Gas, Makwana Engineering, McElroy, Mecon, Mehta Brothers & Co., Meter Sit Srl - Inel Gas, MIDC, Mitsui, MoPNG, Morgan Stanley, Motilal Oswal Securities, Mott Macdonald, MSA (India) Limited, Natural Gas Society, NCC, Neet-Vasant, Nirmal Industrial Controls, NTPC, NYK Line, OCS OIL-Tech, Oil & Gas Plant Engineers, Oil India, ONGC, Oracle, OSI, Pahwa MetalTech, Panam Engineers, Pandit Deendayal Petroleum University, Parker Hannifin, PDIL, Perma-Pipe, Petroleum & Natural Gas Regulatory Board, Petronet LNG, Pinnacle Engines, Pipeline Infrastructure, Pipeline Management Services, Plutus Smart Energy Solutions, PNGRB, Pollution Protection Systems Mumbai, PPAC, Pratap Technocrats, Pratibha Industries, Protos Engineering, Quippo Energy, Rajasthan State Gas, Ramboll, Ratnamani Metals & Tubes, Raychem RPG, Reliance, Reliance Natural Resources, Renaissance Group, Respo Safety Solutions, RMG Autometers, RMSI, Rockwin Flowmeters, Rolls Royce, Romet, Rosewood Projects, Sabarmati Gas, Safire Capital, Sandvik Asia, Sangir Plastics, SAP, Saumya DSM, Savair Energy, SBI Capital, Seal For Life, Secured Meters, SGB Scaffolding, SGS, Shell, SICK Engineering, Simon Carves, Singhania System Technologists, Siti, SKN Haryana City GAS Distribution, Smart Energy Water, Spark Capital Advisors, Spice Energy, SRG Engineering, SSP Fittings, State Bank of Hyderabad, State Bank of India, State Industrial Development Corporation, Sterling & Wilson, Super Technical, Suraksha Products, Surya Roshni Limited, Swagelok, Swiftlifter, Systematix Shares and Stocks, Tata Consulting Engineers, Tata Power, TDW, Technip KT, Techsol Engineers, TGE Engineering, The Corporate Profiles, THINK Gas Distribution, TIL, Torrent GAS , Torrent Power, Toyota Kirloskar Motor, Tractebel Engineering, Tractors India, Trimble Navigation, Tripura Natural Gas Co. Ltd, Tulip Compression, Tulip Energy U3S Chemsolutions, Uniphos Envirotronic Pvt. Ltd, Unique Hydrographic Systems, Valogin Technology, Vargo Petro-Tech, Varicon Pumps & Systems, VCS Quality Services, Veekay Plast, Warburg Pincus, Wärtsilä, Welspun Corp., Welspun Infratech, Wipro, Zapp Materials Engineering, Zhejiang, etc.

SNAPSHOTS FROM THE PREVIOUS YEARS

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Delegates	Fee INR	GST@18%	Total INR	Total USD
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Two delegates	40,000	7,200	47,200	700
Three delegates	55,000	9,900	64,900	950

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