



14th Annual Conference on

CITY GAS DISTRIBUTION IN INDIA

Progress So Far; New Bidding Rounds; Future Outlook

February 26-27, 2019, Le Meridien, New Delhi

Organisers:



Supported by:



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*Lead and Co-sponsorship slots available

CITY GAS DISTRIBUTION IN INDIA

Mission

- The past year has been an important one for the city gas distribution (CGD) sector. In May 2018, the biggest CGD licensing round offering 86 geographical areas (GAs) in 174 districts was announced. The bidding round received a good response from both domestic and global players. Over 400 bids were received for all the 86 GAs. Recently, on November 22, 2018, the foundation stone was laid for CGD projects in 65 GAs covering 129 districts. Besides, the tenth round of bidding has been launched for 50 GAs in 124 new districts.
- Another turning point for the sector came with the amendment to the bidding criteria for setting up CGD networks. The amended regulation has addressed most of the sector's concerns. The market exclusivity period has been increased to eight years (as compared to five years earlier), 80 per cent weightage has been given to infrastructure creation (as compared to zero per cent earlier), tariff floors have been set to discourage unviable bids, the additional bid bond requirement has been removed, and penalties have been imposed for under achievement of MWPs.
- In terms of network, 1,069,263 PNG connections and 244 CNG stations have been added in the past 18 months. CGD operations have commenced in Daman & Diu, Bhubaneswar, Dadra & Nagar Haveli, Kutch (West), Amreli, Dahod, Dahej-Vagra and Jalandhar cities. Meanwhile, authorisations have been granted to 14 new GAs.
- Increasing importance is being given to deploying advanced IT and OT solutions such as enterprise resource planning, terminal automation systems, smart metering, customer relationship management, supervisory control and data acquisition, geographical information system, satellite surveillance and remote sensors.
- Meanwhile, the government is exploring new eco-friendly and cost-efficient fuels to expand CGD network coverage. There are plans to set up 5,000 compressed biogas plants at an investment of about Rs 1.75 trillion in the next four to five years. These compressed biogas networks will be integrated with CGD networks to boost supplies to domestic and retail users. Further, Petronet LNG plans to launch around 20 LNG fuel stations on a 4,000 km route running from Delhi to Thiruvananthapuram.
- Despite the aforementioned developments, an addition of 5.3 million PNG connections in the next two years for achieving the 10 million connections target by 2020 is no small task. The sector is facing several challenges including high execution risks associated with huge capital expenditure, the slow pace of pipeline build-up, low sales and customer penetration, and a high cost of providing last mile connectivity.
- As the government is doing its bit with the launch of new bidding rounds, and facilitation of policy and regulatory amendments to increase private interest, etc., initiatives have to be taken to build an adequate pipeline network in the north-eastern or eastern states. Further, the state governments should create a more conducive business environment and financiers/lenders should introduce innovative methods of financing.
- **The mission of this conference is to analyse the trends, developments, challenges and opportunities in the CGD sector. The conference will also provide a platform to showcase the best practices and noteworthy projects.**

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**. It also publishes the **City Gas Distribution**, **LNG Market in India**, **Gas in India report**, **Oil & Gas News** (a weekly newsletter) and the **Oil & Gas Directory and Yearbook**.

AGENDA/STRUCTURE

TRENDS AND OUTLOOK

- ❖ What have been the key trends and developments in the past one year?
- ❖ What is the outlook for the sector? What are the new opportunities?
- ❖ What are the key challenges?

KEYNOTE SESSION: PNGRB'S PERSPECTIVE

- ❖ What is the progress on the various bidding rounds?
- ❖ What has been the impact of recent regulatory initiatives taken by PNGRB?
- ❖ What are the changes expected in bidding strategies for the upcoming rounds?
- ❖ What are the targets for the next few years?

CGD OPERATORS' PERSPECTIVE

- ❖ How do the operators perceive the CGD sector currently?
- ❖ How keen are private players to invest in the sector? What are their expectations from the PNGRB?
- ❖ What are the key issues and challenges that remain to be addressed?

FOCUS ON CNG NETWORKS

- ❖ What is the current status of CNG infrastructure? How are CGD companies ensuring effective operations of networks?
- ❖ What are the new opportunities under upcoming bidding rounds?
- ❖ What are the key issues and challenges?

FOCUS ON PNG NETWORKS

- ❖ What is the current status of PNG infrastructure? How are CGD companies ensuring effective operations of networks?
- ❖ What are the new opportunities under existing and upcoming bidding rounds?
- ❖ What are the key issues and challenges?

ECONOMICS AND BUSINESS VIABILITY

- ❖ What factors determine the business viability of CGD projects?
- ❖ What are the key cost components and the revenue sources?
- ❖ What are the trends in network tariffs across states? What is the tariff outlook?

DOMESTIC GAS AND LNG SUPPLY: CURRENT SOURCING OPTIONS AND FUTURE STRATEGIES

- ❖ What are the current requirements of the CGD sector? How are these requirements being met?
- ❖ What are the gas sourcing strategies? Have they changed in the past one year?
- ❖ What is the outlook for gas supply?

UPDATE ON PIPELINE INFRASTRUCTURE

- ❖ What is the status of pipeline infrastructure?
- ❖ What is the progress on pipelines under construction?
- ❖ What are the plans for the next few years?

ROLE OF DIGITALISATION IN O&M

- ❖ What is the role of IT and automation systems in the O&M of CGD networks/assets?
- ❖ What are the most promising technologies (GIS, SCADA, ERP, CRM, etc.)? What are the future requirements?
- ❖ What are the global advancements? What lessons can be learnt?

EMERGING OPPORTUNITIES I: SPOTLIGHT ON LNG FUEL STATIONS

- ❖ What are the recent initiatives and plans for setting up new LNG fuel stations?
- ❖ What are the upcoming opportunities and investment requirements?
- ❖ What are the key issues and challenges?

EMERGING OPPORTUNITIES II: SPOTLIGHT ON COMPRESSED BIOGAS PLANTS

- ❖ What are the recent initiatives and plans for setting up compressed biogas plants?
- ❖ What are the upcoming opportunities and investment requirements?
- ❖ How is the government planning to integrate the compressed biogas networks with CGD networks? What are the key issues and challenges?

NINTH ROUND OF CGD BIDDING: EXPERIENCE AND PROGRESS SO FAR

- ❖ What is the current status of GAs announced under the ninth bidding round?
- ❖ What are the targets and timelines? What are the investment requirements?
- ❖ What are the key issues being faced?

TENTH ROUND OF CGD BIDDING: NEW GAS & UPCOMING OPPORTUNITIES

- ❖ Which GAs are being offered under the tenth bidding round?
- ❖ What are the targets and timelines? What are the upcoming opportunities and investment requirements?
- ❖ What are the expected issues and challenges?

PIPELINE INTEGRITY AND SAFETY MANAGEMENT

- ❖ What are the key requirements for ensuring pipeline integrity and safety?
- ❖ What are the various products and technologies available in this field?
- ❖ What has been the experience so far? What are the specific issues and challenges?

NEW MATERIALS, COMPONENTS AND TECHNOLOGIES

- ❖ What are the material/component requirements and specifications for CGD projects?
- ❖ What are the new technologies/equipment options being deployed?
- ❖ What are the global best practices?

SMART METERING AND BILLING

- ❖ What are the new metering technologies being considered for deployment?
- ❖ What has been the experience so far?
- ❖ What are the key challenges?

FOCUS ON NATURAL GAS VEHICLES: EMERGING TRENDS AND NEW OPPORTUNITIES

- ❖ What are the emerging trends and developments in the natural gas vehicle market?
- ❖ What are the new technologies/equipment options being deployed? What has been the experience so far?
- ❖ What are the key issues and challenges?

PROJECT SHOWCASE: OPERATIONAL AND UNDER CONSTRUCTION CGD NETWORKS

- ❖ Which are some of the noteworthy projects (operational and under construction)?
- ❖ What are their key features (network size, pipeline infrastructure, future plans, milestones, etc.)?
- ❖ What lessons can be learnt from the experience of these projects?

CITY GAS DISTRIBUTION IN INDIA

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



Previous speakers:



Ashutosh Jindal,
Joint Secretary (M),
MOPNG



Dinesh Kumar Sarraf,
Chairperson,
Petroleum and Natural Gas Regulatory Board



Rajeve Mathur,
Executive Director & OSD to CMD
GAIL India Limited



Nitin Patil,
Chief Executive Officer,
Gujarat Gas



E.S. Ranganathan,
Managing Director,
Indraprastha Gas Limited



Bashit Dholakia,
Director,
IndianOil - Adani Gas

The participants at the conference on "City Gas Distribution in India" included:

- ❖ Aarvi Encon Private Limited
- ❖ ABB India Limited
- ❖ ABN Equipments
- ❖ Adani Energy
- ❖ Allard India
- ❖ Amberonics Engineers
- ❖ AMP Capital Advisors India
- ❖ Assam GAS Company
- ❖ Bharat Petroleum Corporation
- ❖ Bhotika Trade & Services
- ❖ Borouge (India)
- ❖ Brajdharm Power Pvt Ltd
- ❖ Bridge and Roof Company
- ❖ Cairn india
- ❖ Central UP Gas
- ❖ Chicago Pneumatic
- ❖ Clarke Energy
- ❖ Cryostar India
- ❖ Cryptzo Engineering Pvt. Ltd
- ❖ Cyient
- ❖ Deloitte
- ❖ DNV-GL
- ❖ Dolat Capital
- ❖ Dura-Line India
- ❖ Elara capital
- ❖ ESP Safety
- ❖ Essel Gas
- ❖ Essel Infraprojects Ltd
- ❖ Essel Utilities Distribution
- ❖ Feedback Consulting Services
- ❖ FLIR Systems India
- ❖ Fluid Controls
- ❖ GAIL (India)
- ❖ Gas Natural Fenosa
- ❖ GE Oil & Gas
- ❖ GE T&D India
- ❖ Georg Fischer Piping Systems
- ❖ Goa Natural Gas
- ❖ Green Gas
- ❖ Gujarat Gas
- ❖ Gujarat State Petroleum Corp
- ❖ Gujarat State Petronet
- ❖ Haridwar Natural Gas
- ❖ Haryana City Gas
- ❖ Health Consultants
- ❖ Hindustan Petroleum Corporation
- ❖ Hoerbiger
- ❖ Honeywell Automation India
- ❖ Honeywell Technology Solutions
- ❖ Hp Valves & Fittings India Pvt. Ltd.
- ❖ ICF International
- ❖ ICRA
- ❖ Indian Oil - Adani Gas
- ❖ Indian Oil Corporation
- ❖ Indraprastha Gas
- ❖ Inel Gas Controls
- ❖ IRM energy
- ❖ Itron India
- ❖ Jain Irrigation Systems
- ❖ Josler Hydrocarbons India Pvt. Ltd.
- ❖ Kabsons India
- ❖ Kimplas Piping Systems
- ❖ Kirloskar Pneumatic
- ❖ KPMG
- ❖ Leister Technologies
- ❖ Magnatech Smartgrid Solutions
- ❖ Mahanagar Gas
- ❖ Maharashtra Seamless Limited
- ❖ Matcor
- ❖ MECON
- ❖ Mehta Brothers & Co.
- ❖ Mitsui & Co. India
- ❖ Mosaic Advisors
- ❖ Motilal Oswal Securities
- ❖ MSA (India)
- ❖ Natural Gas Society
- ❖ Nirmal Industrial Controls
- ❖ Numaligarh Refinery
- ❖ Oil India
- ❖ Parker Hannifin
- ❖ Petronet LNG
- ❖ PNGRB
- ❖ Pollution Protection Systems
- ❖ Positive Metering
- ❖ PPS Mumbai
- ❖ Rajasthan State Gas
- ❖ Rama Cylinders
- ❖ Ratnamani Metals and Tubes
- ❖ Raychem RPG
- ❖ Reliance Industries
- ❖ Sabarmati Gas
- ❖ Sandvik Materials Technology
- ❖ Sangir Plastic
- ❖ Sanwariya Gas
- ❖ SAP India
- ❖ Savair Energy
- ❖ Seal Excel (India)
- ❖ Seal For Life
- ❖ Secure Meters
- ❖ SENSIT Technologies
- ❖ SGB Scaffolding and Industrial
- ❖ Sick India
- ❖ Singhania System Technologists
- ❖ Siti Energy
- ❖ Spark Capital Advisors
- ❖ SRG Engineering
- ❖ SSP Fittings
- ❖ Sterling and Wilson
- ❖ Super Fire Engineering IPI
- ❖ SV GAS Solutions
- ❖ Swagelok Bombay Fluid System
- ❖ Techsol Engineers
- ❖ Torrent Power
- ❖ Tractebel Engineering
- ❖ Tractors India
- ❖ Tripura Natural Gas
- ❖ Tubacex Group
- ❖ Tulip Energy
- ❖ Tulsa Gas Technologies
- ❖ U3s Chemsolutions
- ❖ Uniphos Envirotronic
- ❖ Unison Enviro Pvt Ltd
- ❖ Varicon Pumps & Systems
- ❖ VCS Quality Services, etc.

SNAPSHOTS FROM PREVIOUS YEAR



Sponsorship Opportunities:

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- Up to six delegate registrations from the sponsoring company
- One speaker slot
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- Mention on all conference promotional material (mailings, ads, etc.)
- Distribution of sponsor promotional material to each delegate
- Prominent logo presence at the conference (backdrop, vertical panel, etc.)

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For sponsorship opportunities, contact: Deavanjan Ranjan, Tel: +91-11-46038152, 8585900089

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Registration Fee

Delegates	15 per cent discount (before February 7, 2019)		Fee without discount			
	Total INR (incl. tax)	Total USD	INR	GST @ 18%	Total INR	Total USD
One delegate	25,075	418	25,000	4,500	29,500	492
Two delegates	40,120	669	40,000	7,200	47,200	787
Three delegates	55,165	919	55,000	9,900	64,900	1,082
Four delegates	70,210	1,170	70,000	12,600	82,600	1,377

- There is a 15 per cent "Early Bird" discount for those registering before February 7, 2019.
- GST @ 18 per cent is applicable on the registration fee.
- Registration will be confirmed on the receipt of payment. To register online, please log on to <http://indiainfrastructure.com/conf.html>

Payment Policy:

- Full payment must be received prior to the conference.
- Payments for "early bird" registrations should come in before the last date of discount.
- Conference fees cannot be substituted for any other product or service being extended by India Infrastructure Publishing Pvt. Ltd.
- Conference fee includes lunch, tea/coffee and conference material.

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