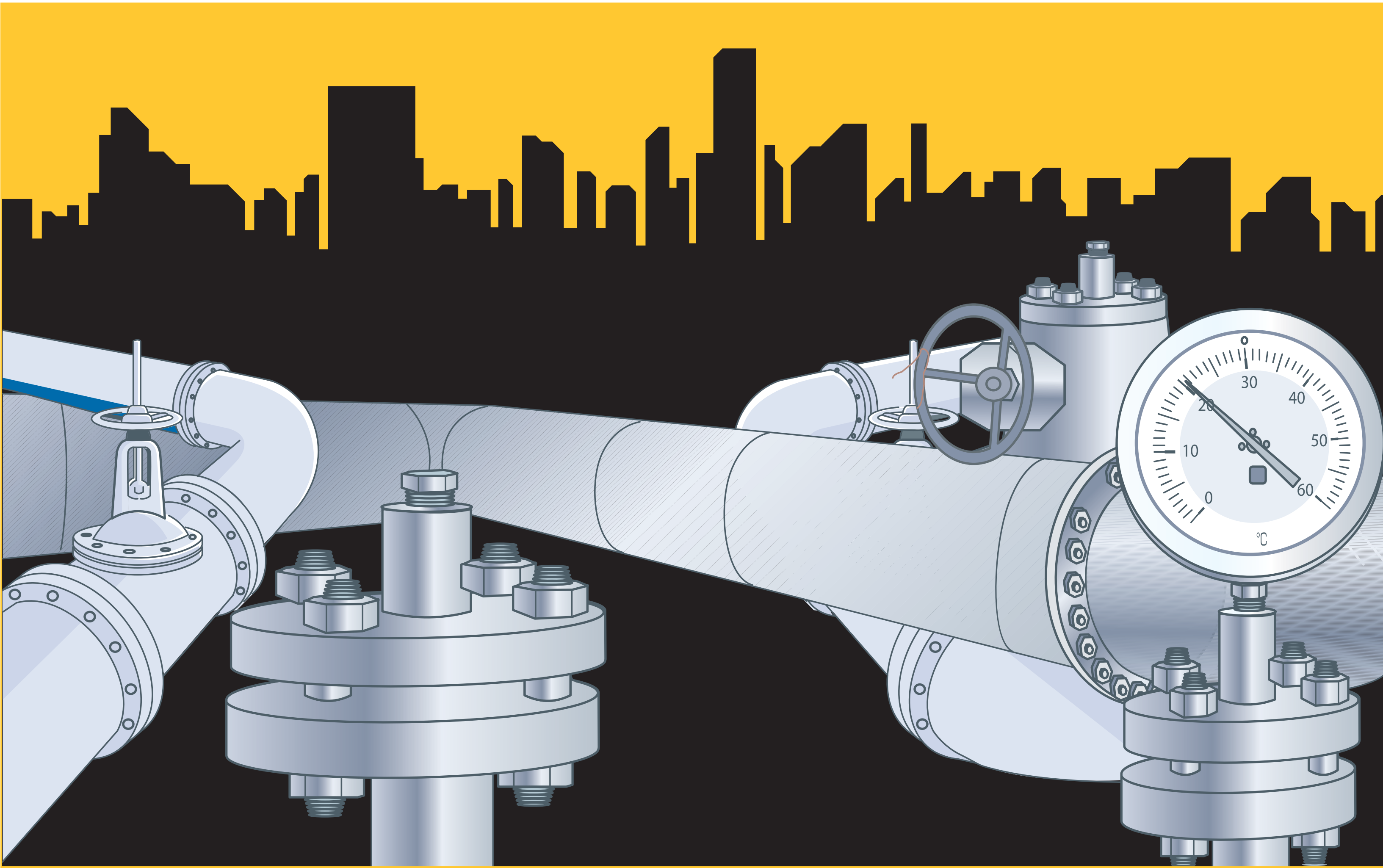

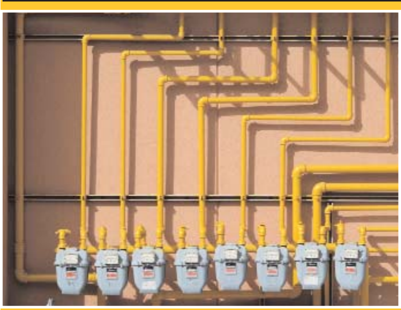

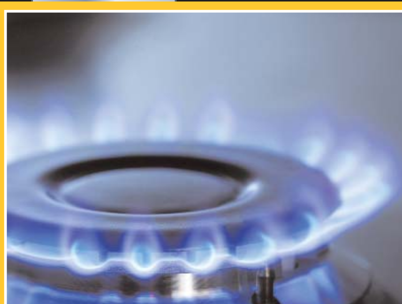

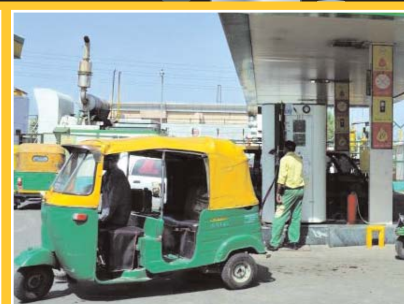

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13th Annual Conference on

CITY GAS DISTRIBUTION IN INDIA

Network Development: Strategies and Solutions

March 12-13, 2018, Le Meridien, New Delhi

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CITY GAS DISTRIBUTION IN INDIA

Mission

- The prospects of the city gas distribution (CGD) sector have improved in the past couple of years. Fresh licences have been issued at a much faster pace. Gas availability has increased due to the priority being given to the compressed natural gas (CNG) and piped natural gas (PNG) segments. This has enabled companies to cut prices and regain competitiveness. In addition, permitting asset-owning CGD companies to freely price their products has removed uncertainties in pricing.
- In terms of network, PNG connections have grown at a compound annual growth rate of 17 per cent, while CNG stations have grown by about 10 per cent in the past five years. Total sales in 2015-16 were close to 15 mmscmd.
- However, for the sector to maintain this momentum, a number of issues need to be dealt with. Better prospects have led to increased interest due to which aggressive bidding has been witnessed in recent rounds. This poses a long-term risk for CGD entities, given the tough Minimum Work Programme and service standards set by the Petroleum and Natural Gas Regulatory Board (PNGRB).
- CGD players face many challenges. Projects are exposed to high execution risks associated with huge capital expenditure and the slow pace of pipeline build-up. Besides, low sales and customer penetration, and high cost of providing last mile connectivity adversely affect project viability. Many of the geographical areas (GAs) in the 7th and 8th bidding rounds have not received any bids due to these reasons.
- The government recognises these challenges and is taking measures to address these. PNGRB has formed a committee that has finalised its recommendations for alternative bidding models for the CGD network. Some of the key suggestions are increasing the exclusivity period for operating pipelines to 10 years and increasing the minimum net worth criteria.
- Other challenges that require urgent attention include delays in obtaining clearances, high restoration charges by local authorities, asset management, pipeline network safety, leakage detection and metering.
- Going forward, there is significant opportunity for all stakeholders in the sector. PNGRB has identified 223 GAs for future bidding depending on the gas connectivity spread and demand scenario in the areas. There is also a huge opportunity for technology players as most of the CGD operators are testing world-class technologies and best practices to ensure effective operations.
- **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 new technologies, best practices and noteworthy projects.**

Target Audience

The conference is targeted at:

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

CGD OPERATORS' PERSPECTIVE
- How do the operators perceive the CGD sector currently?
- How attractive is the CGD business?
- What are the new business opportunities?
- What are the key challenges?

REGULATORY UPDATE: PNGRB's PERSPECTIVE
- What is the progress on the various bidding rounds?
- What are the key policy initiatives in the pipeline?
- What are the changes expected in bidding strategies for the upcoming rounds?
- What are the targets for the next few years?

ACCELERATING DEPLOYMENT OF CGD INFRASTRUCTURE FOR A SUSTAINABLE INDIA
- What are the key hurdles in rolling out CGD infrastructure in new geographical areas? How can IT help accelerate roll-outs?
- How can IT be used to achieve more precise and predictable outcomes during the project phase?
- How can cloud-based IT platforms be used to optimise software deployment and costs during the project phase?
- Will the IT model of "start small" and "leverage large" be beneficial for new CGD companies?
- How can a CGD company accelerate customer acquisition by leveraging IT?

DOMESTIC GAS AND LNG SUPPLY OUTLOOK
- What is the current status of gas supply?
- What are the current sourcing options? Have they changed in the past one year?
- What is the outlook for gas supply?

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

FOCUS ON CNG NETWORKS
- What are the specific requirements of setting up CNG networks?
- How are the CGD companies ensuring effective operations of networks?
- What are the different technology options?
- What has been the experience so far?

FOCUS ON PNG NETWORKS
- What are the specific requirements of setting up PNG networks?
- What are the different technology options?
- What has been the experience so far?

COSTS AND TARIFFS AND VIABILITY
- What factors determine the commercial 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?

PROJECT MANAGEMENT
- What are the various aspects of project management from concept to commissioning (planning, engineering, design, etc.)?
- What are the key statutory requirements (land, environment, safety, etc.)?
- What are the success factors for project execution and technical evaluation in the sector?
- What are the biggest challenges?

O&M OF CGD NETWORKS
- What has been the experience so far in leveraging IT for the O&M of CGD networks/assets?
- What are the most promising technologies (GIS, SCADA, ERP, etc.)?
- What are the global best practices?
- What are the emerging IT-OT requirements for asset optimisation?

PIPELINE INTEGRITY AND SAFETY MANAGEMENT
- What are the key risks and challenges in ensuring safety and security in CGD pipeline networks?
- What are the innovations/technologies available in driving integrity and safety (leak detection, repair/rehabilitation, etc.)?
- What are the global best practices?

SMART METERING AND BILLING
- What has been the experience so far in metering and billing?
- What are the new metering technologies being considered for deployment?
- What are the key challenges?
- How can IT support the emerging smart metering and billing requirements?

CUSTOMER SERVICE
- What are the emerging requirements of customer service?
- How can world class services be offered at affordable costs?
- What are the global best practices?

FOCUS ON MATERIALS AND FITTINGS
- What are the key materials/fittings being used in CGD pipelines?
- What are the latest innovations in the Indian market?
- What are the global best practices?

PROJECT SHOWCASE: EXISTING AND NEW GAs
- Which are some of the noteworthy projects (operational and upcoming)?
- What are their key features (network size, design, 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:

Last year's keynote speakers:

(In alphabetical order)

Ashutosh Jindal,
Joint Secretary (IC&GP),
Additional Charge (Marketing), MoPNG

Narendra Kumar,
Managing Director,
Indraprastha Gas Limited

Rajeev Mathur,
Managing Director,
Mahanagar Gas Limited

Dr B. Mohanty,
Member,
Petroleum and Natural Gas Regulatory Board

Nitin Patil,
Chief Executive Officer,
Gujarat Gas

Shridhar Tambraparni,
Joint President,
Adani Energy

The companies that participated in our previous conferences on "City Gas Distribution in India" included Aarvi Encon Private Limited, ABB, ACME, Adani Gas, Agi-Glaspac, Al Aziz, Allard India Private Limited, AMP Capital Advisors India Private Limited, Anacon Process Control, APGIC, Ario Infrastructure, Arrukn Consultation, Asahi Glass, Ashoka Buildcon Limited (Unison Enviro Pvt Ltd), Assam Gas Limited, AT Kearney, Auctus Advisors, Avantha Power & Infra, Avantika Gas Limited, Avineon, Basell Polyofins India, BASG, Berry Plastics, BG Exploration and Production India Limited , Bhagyanagar Gas, Bharat Petroleum Corporation Limited, Bhotika Pipeline, Borouge (India) Pvt Ltd, BP Exploration (Alpha) India, Bridge and Roof, Burckhardt Compression, Cairn India Limited, Calcutta Fluid System Components(Tubacex Group), Caterpillar Commercial, CEIL, Central UP Gas, Chemtrols, Chevron, Chicago Pnuematics, Clarke Energy, CPL Energy India, CRISIL, Cryogas, Cryostar India, Cyient, Daniel Measurement Solutions, Denso International India (P) Limited, Directorate General of Hydrocarbons, DNV-GL , Dolat Capital Market, Duraline, East India Petroleum, Eastern Gas, EIL, Elara Capital, Elster-Instromet, Emerson, ESAB, ESP Safety Pvt Ltd, Essar Oil, Evonik, ExxonMobil, EY, Feedback Business Consulting Services Pvt Ltd, Feedback Ventures, Ferranti, Fike Safety, Fluid Controls Private Limited, Fujitsu, GAIL, Gail Gas Limited, Gas Natural Fenosa, Gasvigil Technologies (P) Limited, GE Oil & Gas, GE Oil and Gas, GE Sensing, Genus Power Infrastructures, Georg Fischer Piping Systems Pvt Ltd, Germanischer Lloyd Industrial Services GmbH, GLNoble Denton, Glynwed, GMMCO, GMR Energy, Goa Natural Gas Pvt Ltd, Green Gas Limited, GSPC, Gujarat Gas Limited, Gujarat Glass, Haridwar Natural Gas Pvt Ltd, Haryana City Gas Distribution, HCC, Hitachi, Hoerbiger India Pvt Ltd, Honeywell, HPCL, ICF, ICICI Bank, ICPCI, ICRA, IDBI, IDCO, IDFC, IFC, IGL, Imkemex, Indian Oil Corporation Limited, Indraprashtha Gas Limited, Inel Gas Controls Private Limited, Intertek, IRM Energy Private Limited, Ispat Energy, Itron, Jai Hind Projects, Jain Irrigation Systems Ltd, Jubilant Energy, Katlax, Kawasaki, Kerala State Industrial Development Corporation, Kimplas Piping, Kirloskar Oil Engines, Kirloskar Pneumatics, Kotak Mahindra, Kotak Securities, KPMG, KSIDC, L&T Valves, Lanco Infratech, Leister Technology India Pvt.Ltd, Magnatech Smartgrid Solutions Pvt Ltd, Mahanagar Gas Limited, Maharashtra Natural Gas, Maharashtra Seamless, Mahesh Gas, Makwana Engineering, McElroy, Mehta Brothers & Co.(Oventrop), Mecon, MIDC, Mitsui & Co., MoPNG, Morgan Stanley, Motilal Oswal Securities Ltd, Mott Macdonald, MSA (India) Limited, Natural Gas Society, NCC, NTPC, Oil India, ONGC, Oracle, Parker Hannifin, PDIL, Petronet LNG, Pinnacle Engines India, Plutus Smart Energy Solutions Pvt Ltd, PNGRB, PPAC, Pratibha Industries, Protos Engineering, Quippo Energy, Rajasthan State Gas, Ramboll Oil & Gas, Ratnamani Metals & Tubes Ltd, Raychem RPG (P) Ltd, Reliance , Reliance Natural Resources, RMG Autometers, RMSI, Rockwin Flowmeters, Rolls Royce, Romet, Rosewood Projects, RPG Raychem, Sabarmati Gas Ltd, Safire Capital, Sandvik Asia, Sangir Plastics, SAP, Saumya DSM, Savair Energy, SBI Capital, Seal For Life India Pvt Ltd, Secured Meters, SGB Scaffolding and Industrial Services Private Limited, Shell, Sick India Private Limited, Simon Carves, Singhania System Technologists Pvt Ltd, Siti Energy, Spark Capital Advisors (India) Pvt Ltd, Spice Energy, SRG Engineering Pvt Ltd, SSP Fittings, State Bank of Hyderabad, Sterling & Wilson, Suraksha Products, Swagelok, Tata Power, TDW India, Technip KT, TGE Engineering, The Corporate Profile, TIL, Torrent Power Limited, Toyota Kirloskar Motor, Tractebel Engineering, Tractors India Private Limited, Trimble Navigation, Tripura Natural Gas Co.Ltd, Tulip Energy Pvt Ltd, U3S Chemsolutions Private Limited, Vargo Petro-Tech, Varicon Pumps & Systems Pvt Ltd, VCS Quality Services, Veekay Plast, Warburg Pincus, Wärtsilä, Welspun Infratech, Wipro, etc.

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- *Distribution of sponsor promotional material to each delegate*
- *Prominent logo presence at the conference (backdrop, vertical panel, etc.)*

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- *Stall space at the conference*
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Delegates	INR	GST @ 18%	Total INR	Total USD
One delegate	22,500	4,050	26,550	418
Two delegates	37,500	6,750	44,250	732
Three delegates	52,500	9,450	61,950	1,045
Four delegates	67,500	12,150	79,650	1,359

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