



Conference on

FUTURE OF COAL

Customer Requirement, Supply Scenario and Sector Outlook

August 2-3, 2018, Le Meridien, New Delhi

Organisers:

POWERLINE

**Indian
Infrastructure**

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FUTURE OF COAL

Mission

- The coal industry is witnessing a remarkable transformation and recent developments point to a structural shift in the future.
- From chronic shortages, the coal industry has seen a steady growth in supply. In pursuit of its 1 billion tonne target by 2020, the country's largest coal company, Coal India Limited (CIL), has witnessed a sharp increase in production in recent years, rising from 536 million tonnes (mt) in 2015-16 to 554 mt in 2016-17 and ending last fiscal with an output of 567 mt. With this, the country's overall coal production (including from other public and private miners) has shown a year-on-year increase of 3 per cent to reach 676.5 mt in 2017-18. Coal imports have seen a corresponding decline, from 203.95 mt in 2015-16 to 190.95 mt in 2016-17, a decline of 6.4 per cent.
- The improvement in domestic coal supply along with reforms in coal distribution and marketing has added new supply options for end-customers. The new coal linkage bidding mechanism, SHAKTI (Scheme for Harnessing Koyla Transparently in India), has drawn a positive response from the industry, which had been adversely affected due to the lack of FSAs.
- Meanwhile, the introduction of a special forward e-auction window for power consumers and exclusive e-auctions for non-power customers have aided in improving coal availability in recent years. Further, the recently approved methodology to allow flexibility in the utilisation of domestic coal by private producers is expected to reduce the landed cost of coal.
- The introduction of captive coal block auctions has been another decisive development for the coal industry in the recent past. Since December 2014, five rounds of auctions have been announced with 30-odd blocks (of the 204 cancelled blocks) auctioned so far.
- More recently, in one of the biggest reform moves since the nationalisation of the coal sector, the government has allowed commercial mining of coal by private players. The move is expected to further improve domestic output, benefit generators through more certainty in supplies, etc., provided that the quality and quantum of the blocks on offer are attractive. This would also bring in best-in-class technologies by global coal miners as well as increased mechanisation and automation as potential mine owners aim for higher efficiency to win bids.
- A new pricing policy is also proposed to be introduced this fiscal year to move to the global standard of charging customers based on the actual gross calorific value (GCV) of the dry fuel. The move is expected to resolve the long-standing differences over coal quality and grade slippage between CIL and power plant developers. This would also complement the efforts being made by public players to set up coal washeries to address quality concerns.
- Meanwhile, transportation and evacuation infrastructure-related challenges continue to be high on the government's agenda given that a number of power stations have been reporting critical coal stocks recently due to logistical constraints. Also, for steel and imported power generation plants, the dependence on coking and non-coking coal imports is significant. The government is trying to address the issue by expediting work on critical coal connectivity rail lines, increasing rake availability, strengthening port infrastructure, etc.
- Amidst these developments, the key questions being evaluated are the future demand for coal against the backdrop of subdued growth in thermal power generation in recent years as well as predictions of a slowdown in thermal capacity addition and India's climate commitments that call for a greater thrust on renewables. Also, whether the market conditions can be conducive for new entrants given legacy issues such as delays in clearances and land acquisition challenges are some of the key issues that will need to be examined. More so, as the incumbent owners are struggling to operationalise their assets, besides facing uncertainty in cost recovery after aggressively bidding for the blocks auctioned.
- The mission of this conference is to discuss the future of coal in India in light of the recent and expected developments in the sector, as well as examine the impact of these on industry stakeholders. The conference will examine key policy developments, discuss plans and strategies of coal producers, assess the future coal requirements of end-users, and analyse potential investment opportunities in mining. The conference will feature the viewpoints of all stakeholders and provide a platform to showcase the best practices and most promising technologies.

Previous participants

The organisations that have participated in our previous "Coal in India" conferences include: *ACB, Adani Enterprises, Amardeep Coal, Ambit Capital, Aravali Power, Archean, Aryan Coal, Atlantic Shipping, Attalika, Australian Trade Commission, Avantha Power, Bain & Company, Balasore Alloys, Barclays Securities, BASF, BEML, BGR Energy, Bharat Coking Coal, Bharat Forge, Bhoruka Energy, Birla Corporation, BLA Industries, BMO Advisors, Bothra shipping, BSBK, Bucyrus, Carborundum, Cargill, Caterpillar, Central Coalfields, Central Mine Planning & Design Institute, CESC, Chambal Fertilisers, Chennai Port Trust, CLP, CMPDI, Coal India, Coastal Energy, Coastal Gujarat Power, Cotecna Inpection, Cotecna Inpection S.A. Dubai Branch, CRISIL, Cummins, Dalmia Bharat, Deloitte, Devendran Coal, DMT Consulting, DSP Group, DVC, Eastern Coalfields, EDS Technologies, Egis India, Elcome Technologies, ELP, EMTA Group, Enelex, Energo Engineering Projects, Essar Power, Essel Mining, FLSmidth, Fomento Resources, Fortum, GAIL, Glencore, GMDC, GMMCO, GMR, Grasim, Gujarat Pipavav, GVK, Haryana Power Generation Corporation, HEG, Hindalco, Hindustan Zinc, HPGCL Yamuna Nagar, ICF, ICICI, ICML, IL&FS, Indian Explosives, IMFA, IPGCL, Isgec Heavy Engineering, ISMT, Ispat, Jaypee, Jenissi Management Consultant, Jhajar Power, Jindal Power, Jindal Steel & Power, JK Cement, JMS Mining Services, JSW Steel, Jubilant, Karaikal Port, Karam Chand Thapar & Bros, Kolkata Port, KPCL, KPMG, Krishnapatman Port, KSK Energy Ventures, KSK Mineral Resources, KVK Energy, L&T, Lanco Group, Leica Geosystems, Leighton, M.N. Dastur, MAHAGENCO, Mahanadi Coalfields, Maharashtra State Power Generation, Maithon Power, Marsh India Insurance, Ministry of Coal, Mitra S.K. Private, Mitsubishi, Mitsui, MMD India, Monnet Ispat and Energy, Mormugao Port Trust, MP State Mining, MSTC, Mumbai Port Trust, NALCO, NPTI, NCC, Neyveli Lignite Corporation, NITI Aayog, NLC, NMDC, North East Coal, Northern Coalfields, NTPC, OPG Power, Oriental Structural Engineers, Orissa Power Generation Corporation, PFC, Prakash Industries, PSEB, PTC India, Putzmeister, Quippo, Railway Board, Rattan India Power, RDS Projects, Religare, Republic of Turkey Prime Ministry Investment Support and Promotion Agency of Turkey, RIL, Rio Doce, RITES Limited, Ministry Of Railways, Roxul Rockwool, RSB, Safire, SAIL, Sandvik Mining, Sasol Mining, SBI Caps, SGS, Shreeram Cement, Shriram Infrastructure, Singareni Collieries, SKF India, Skil Infrastructure, SKS Ispat, South Eastern Coalfields, Spark Capital Advisors, SRF, Sri Badrinarayan Alloys, SRK Consulting, Statkraft, Steel Mont, Suez Energy, Sumitomo, Swaymbhu Natural Resources, Tancem, Tata Chemicals, Tata Power, TCE, Tenova Delkor, Tenova Delkor India Tenova Mining & Minerals, Terex, TERI, THDC, The Tata Power Company Limited, Thermax, Thermo Fisher Scientific, Thiess, Thriveni Earthmovers, ThyssenKrupp, TIL, TNEB, Torrent Power, Tractors India, UJVN, UltraTech, Uniphos, VE Commercial Vehicles, Vedanta Group, Vinery, Virginia Mining Resources, Visakhapatnam Steel Plant, Voltas, Volvo, Walchandnagar, Warburg Pincus, Weir Minerals, Wipro Limited, XCOAL, etc.*

AGENDA/STRUCTURE

ROAD AHEAD FOR COAL

- ❖ What is the outlook for future coal demand in the context of the push towards renewables?
- ❖ What is the long-term outlook for domestic production and supply from sources such as captive mines and imports?
- ❖ What are the expectations on the policy and regulatory fronts?
- ❖ What is the outlook for competition and investments in the mining segment?

CIL's PERSPECTIVE

- ❖ What is CIL's perspective on the coal sector?
- ❖ What are CIL's production targets for the next few years? What are its expansion plans?
- ❖ What are the key issues and concerns?

DOMESTIC PRODUCTION SCENARIO

- ❖ What has been the recent domestic coal production performance?
- ❖ What has been the gap in demand and domestic supply for various end-use sectors?
- ❖ What is the future production outlook? What are the key issues and concerns?

COMMERCIAL COAL MINING PROSPECTS

- ❖ What are the implications of opening up the coal mining industry to private players?
- ❖ What are the provisions proposed in the auction methodology?
- ❖ What are the key issues and concerns of the industry with regard to bidding?

CAPTIVE COAL MINING UPDATE

- ❖ What is the update on captive coal block auctions?
- ❖ What has been the output trend from captive coal blocks?
- ❖ What have been the key concerns relating to the auctioned coal blocks? What is the production outlook?

COAL TRANSPORTATION AND LOGISTICS

- ❖ What has been the share of various modes of transportation (rail, ports, inland waterways, etc.) in the coal sector?
- ❖ What is the upcoming railway capacity for coal transportation? What has been the progress on critical rail connectivity projects?
- ❖ What are the key issues and concerns?

QUALITY AND GRADING OF COAL

- ❖ What have been the key industry concerns with regard to coal quality?
- ❖ What is the current grading methodology and the changes proposed in the new pricing norms?
- ❖ What have been the key initiatives taken for improving coal quality?

FOCUS ON COAL WASHING

- ❖ What is the current and expected coal washing capacity?
- ❖ What are the policy and regulatory requirements with regard to the use of washed coal?
- ❖ What are the various technologies and solutions being used for coal beneficiation?

FOCUS ON TECHNOLOGY

- ❖ What are the latest advancements in mining technology solutions for improving productivity, reducing emissions and enhancing safety?
- ❖ What has been the uptake of these solutions in the Indian coal mining industry?
- ❖ What are the new and emerging requirements in the segment?

SUPPLY OPTIONS - SHAKTI, SPOT E-AUCTIONS, ETC.

- ❖ What has been the trend in domestic coal supply allocation and actual supply to end-customers?
- ❖ What has been the experience of end-customers with new supply options such as SHAKTI and spot e-auctions?
- ❖ What are the key issues and concerns?

COAL IMPORTS

- ❖ What has been the trend in coal imports?
- ❖ What are the future projections regarding import requirements, prices, etc.?
- ❖ What are the key issues and challenges with sourcing imported coal?

FOCUS ON COKING COAL

- ❖ What have been the recent trends with regard to supply, demand and prices of coking coal?
- ❖ What are the projected requirements of coking coal over the next few years?
- ❖ What are some of the emerging import destinations and their suitability for Indian requirements?

Target Audience

- The conference is targeted at:
 - Domestic coal producers
 - Bulk cargo ports
 - Coal buyers
 - Power generators
 - Coal transporters
 - Steel and cement manufacturers
 - Technology providers
 - Coal importers
 - Financial institutions
 - Potential captive miners
 - Consulting and legal firms
 - International coal producers
 - Research companies
 - Prospective investors
 - Regulatory agencies in related sectors
 - Policymakers and administrators
 - Coal quality and grading companies
 - Equipment manufacturers
 - Indian Railways
 - etc.

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Registration Form

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Registration Fee

Delegates	Fee			
	INR	GST@18%	Total INR	Total USD
One delegate	22,500	4,050	26,550	443
Two delegates	37,500	6,750	44,250	738
Three delegates	52,500	9,450	61,950	1,033
Four delegates	67,500	12,150	79,650	1,328

- GST @18 per cent is applicable on the registration fee.
- Registration will be confirmed on receipt of the payment.
- To register online, please log on to <http://indiainfrastructure.com/conf.html>

Payment Policy:

- Full payment must be received prior to the conference.
- Conference fee includes lunch, tea/coffee and conference materials.

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