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Indian Infrastructure

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18th Annual

Conference on

Gas in India

Trends and Developments: New Opportunities and Outlook

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GAS IN INDIA

Mission

- The year 2017-18 witnessed significant efforts by the government to drive investments in the natural gas sector. It was marked by the government's decision to hike natural gas prices after a long period of falling prices. The government also launched the first bidding round under the newly formulated Open Acreage Licensing Policy (OALP) under which over 2.8 million square km of hydrocarbon sedimentary area was offered for auction. The bidding round received an overwhelming response with 110 e-bids received for 55 blocks on offer.
- The union cabinet also approved the second round of Discovered Small Field (DSF) bidding (with 60 small fields on offer) in February 2018. The bidding process is expected to start in September 2018.
- The prospects for the city gas distribution (CGD) segment have also improved significantly in the past couple of years. The network has continued to grow and fresh licences have been issued at a much faster pace. The segment offers significant opportunities for all stakeholders. The recently announced ninth CGD bidding round has received a good response from both domestic and global players. More than 400 bids have been received for the 86 geographical areas (GAs) offered. The bidding round is estimated to entail an investment of about Rs 700 billion.
- Meanwhile, the gas supply situation improved only slightly in 2017-18 with domestic gas production standing at about 90 mmscmd, an increase of a meagre 2 per cent over the previous year. The consumption of natural gas has, however, been rising consistently since 2014-15.
- Nearly 45 per cent of the shortfall in gas production is met through LNG imports. At least 19 mtpa of LNG import capacity is under construction and another 30 mtpa is proposed/planned to be added in the future. India is also diversifying its LNG sourcing options to ensure procurement at competitive prices. Further, to take advantage of falling global LNG prices, Indian gas companies have renegotiated the terms of three long-term contracts.
- In the past one year, India's CBM production has also expanded rapidly on the back of favourable policy initiatives. CBM output doubled from around 1 million cubic metres per day in 2017 to 2.3 million cubic metres per day in 2018.
- In contrast, not much progress has been made in the pipeline segment. Utilisation of the existing pipelines remained low. The development of new pipelines has been slow owing to issues related to land acquisition and right-of-use.
- Meanwhile, Indian gas companies in the upstream, midstream and downstream segments are actively moving towards automation and digitalisation. Applications such as enterprise resource planning, terminal automation system, smart metering and customer relation management are being deployed to automate business processes. Also, advanced solutions such as SCADA, GIS, satellite surveillance system and remote sensors are being deployed for monitoring gas transmission pipelines.
- **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. In addition, the conference will identify new and emerging opportunities in the sector. It will also showcase some of the noteworthy technologies and projects.**

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 price?
- What are the recent developments?
- What are the upcoming opportunities? What are the key areas of concern?

GOVERNMENT PERSPECTIVE
- What is the perspective of the government on the gas sector?
- What are the recent policy initiatives that have been taken by the government? What has been the impact of these on the gas sector?
- What are the priority areas for the next few years?

INDUSTRY PERSPECTIVE: EXPERIENCE AND FUTURE PLANS
- What has been the experience of industry players so far?
- What have been the biggest challenges?
- What are the key expectations from the government? What are the future investment plans?

CUSTOMER PERSPECTIVE: CURRENT REQUIREMENTS AND KEY ISSUES
- 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?

REGULATORY PERSPECTIVE
- What are the recent regulatory developments?
- What will be the impact of these developments on the gas industry?
- What are the key unaddressed regulatory issues and concerns?

IMPACT OF GST
- What has been the impact of GST on upstream, midstream and downstream gas segments?
- What will be the impact on investments in these segments?
- What are the unresolved issues and challenges?

DISCOVERED SMALL FIELDS: PROGRESS SO FAR AND UPCOMING OPPORTUNITIES
- What is the progress on contracts awarded under DSF Round I? What are the current targets and timelines for project implementation?
- When is the second round of bidding likely to take place?
- What are the upcoming opportunities? What are the key issues and concerns?

UPDATE ON THE OPEN ACREAGE LICENSE POLICY: BIDDING EXPERIENCE AND UPCOMING OPPORTUNITIES
- What is the progress on the first round of auctions under the OALP? What has been the response of the industry? What are the timelines for implementation?
- What is the update on the second round of auctions under the OALP?
- What are the upcoming opportunities for various stakeholders?

GAS SUPPLY SCENARIO AND OUTLOOK
- What is the current status of domestic gas production? What are the key initiatives that have been taken to increase E&P investments?
- What are the recent trends in gas prices? What has been the impact of these price fluctuations on E&P investments?
- What is the outlook for gas supply?

CGD UPDATE AND PROGRESS
- How do the operators perceive the CGD sector? What are the new opportunities?
- What has been the response to the ninth bidding round? What is the progress under this round?
- What are the targets for the next couple of years? What are the key challenges?

FOCUS ON CBM
- How has CBM production grown in the past one year?
- What are the recent policy initiatives in the segment? What has been the impact of these on the CBM industry?
- What are the future plans and strategies of key producers? What are the key issues and challenges?

RECENT LNG TRENDS AND CONTRACT RENEGOTIATIONS
- What are the recent trends and developments in the LNG market?
- What are the LNG import options? What are the future sourcing options?
- What are the recent trends in global LNG prices?
- Which contracts have been renegotiated? What are the revised terms of contract?

PROGRESS ON LNG INFRASTRUCTURE
- What has been the performance of the existing LNG terminals? What are the future expansion plans?
- What are the upcoming and planned projects in this segment?
- What are the opportunities for developers, contractors, and technology and equipment suppliers?

SPOTLIGHT ON GAS TRADING EXCHANGE
- What are the plans and timelines for the launch of a natural gas trading exchange in the country? What will be the key features of the exchange?
- What will be the expected impact on natural gas pricing and consumption?
- What will be the key benefits for gas consumers?

FOCUS ON LNG SHIPPING
- What are the recent trends and developments in LNG shipping in India?
- What has been the experience of shipping companies in the segment?
- What are the global advances? What are the key issues and challenges?

UPDATE ON PIPELINE INFRASTRUCTURE
- What is the status of approved and planned pipeline projects?
- What are the investments expected in the segment?
- What are the key issues and challenges?

FOCUS ON TECHNOLOGY
- What are the latest technological developments in the gas sector?
- How can the gas industry benefit from these developments?
- What are the new trends and advancements in gas flow meters?
- What are the challenges in the adoption of these technologies?

ROLE OF DIGITALISATION
- What is the role of IT and automation systems in the gas industry?
- What is the current status of IT adoption in the upstream, midstream and downstream segments? What are the future requirements?
- What are the global advancements? What lessons can be learnt?

ASSET MAINTENANCE AND MONITORING
- What are the technology solutions available to help gas companies better manage their production, storage and transmission assets?
- What are the best practices in the management and monitoring of assets?
- What are the new trends and developments in the field?

EQUIPMENT SHOWCASE
- What are the various equipment requirements of the gas industry?
- What are the recent trends and advancements?
- How is the industry gearing up to meet the emerging requirements of the gas sector?
- What are the key issues and challenges?

Previous Speakers


Atanu Chakraborty
Then Director General
Directorate General of Hydrocarbons


Yash Malik
ED, Corporate Planning
ONGC


Rajeev Mathur
Then Managing Director
Mahanagar Gas Limited


Devinder Singh Ahuja
Director (Technical),
National Fertilizers Limited


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


Sudhir Mathur
CEO
Cairn India


S.D. Prasad
Head Corporate Gas Sourcing
NTPC


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


Pankaj Wadhwa
Senior Vice-President
Petronet LNG

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, Baumer, Bhagyanagar Gas, Black & Veatch, BPCL, BMR & Associates LLP, Cairn, Care Ratings, Central UP Gas, Charotar Gas, Cinda, Clarke Energy, CLP, Chambal Fertilisers and Chemicals, Deepak Fertilisers & Petrochemicals, Directorate General of Hydrocarbons, DLF Utilities, DNV-GL, Dolat Capital, DUA Associates, Duraline, E Contols, EIL, Elster, Empire Industries, Engie, Evonik, Fearnleys LNG, Filter Concept, Flosil, 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, Heath Consultants, Honeywell, Honeywell Process Solution, HPCL, HPCL-Mittal, HSA Legal, HITECH Industrial Lining Pvt Ltd, 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, Lloyd's Register, Madras Fertilisers, Maharashtra Natural Gas, Mahanagar Gas, Maharashtra State Power Genco, Maruti Suzuki, MECON, Mits Skills, Mitsubishi Heavy Industries, Mitsui, Mumbai Port Trust, Motilal Oswal, Neumen Esser, 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, Scania, Saigal Sea Tradem Saipem, SBI Capital Markets, SBI Caps, SECON, Secure Meters, SENER, Shapoorji Pallonji Oil & Gas, SICK, Siemens, SGS, Simorgh Energy, Suren Enterprises, Sterling & Wilson, Swagelok, Technip, The Corporate Profiles, Tata Communications, Thermax, Toyota Touche, Tulip Compression, Uniper Global Commodities, U3S Chemsolutions, Varicon Pumps & Systems, Varun Global, Vimta Labs, Vitrum Glass, Wallfort Financial Services, Western Australia Trade,** 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** (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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One delegate	18,000	3,240	21,240	327	22,500	4,050	26,550	408
Two delegates	30,360	5,465	35,825	551	37,950	6,831	44,781	689
Three delegates	42,720	7,690	50,410	776	53,400	9,612	63,012	969
Four delegates	55,080	9,914	64,994	1,000	68,850	12,393	81,243	1,250

- There is a 20 per cent "early bird" discount for those registering before October 4, 2018.
- Registration will be confirmed on receipt of the payment.
- To register online, please log on to http://indiainfrastructure.com/conf.html

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