



5th Annual Conference on

# COAL IN INDIA

Trends and Developments, Issues and Opportunities

August 19-20, 2010, Hyatt Regency, New Delhi

POWERLINE

Indian  
Infrastructure

# COAL IN INDIA

## Mission

- Coal plays a very important role in India's energy mix, accounting for more than 53 per cent of the country's total primary energy consumption. With the demand for coal likely to remain strong, it is expected to continue to dominate the energy mix in the long term.
- The demand for coal has been growing on account of an increasing demand for power, which is the key coal consuming sector. According to estimates, the demand for coal from the power sector is expected to reach 900 million tonnes (mt) by 2017. Steel and cement are the other industries driving the demand for coal in the country.
- Domestic production has not been sufficient to meet the growing demand for coal. In 2009-10, India imported 81 mt of coal to bridge the demand-supply gap. The trend of Indian companies acquiring overseas coal assets to ensure security of coal supplies is also being witnessed.
- Private sector firms have started entering the sector through the captive coal mining route. However, the progress of captive coal mining has been slow. As of March 2010, only 26 blocks had started production.
- To enhance production, Coal India Limited (CIL) is exploring the option of underground (UG) mines and is also looking to restart operations at abandoned mines. For this, the company is looking at the public private partnership (PPP) or joint venture (JV) models. This is definitely a step in the right direction and is expected to lead to the entry of multinational companies in the sector through JVs.
- CIL is also looking to acquire overseas coal assets through its Coal Videsh department. Mozambique, Australia, South Africa, the US and Indonesia are some of the countries where Coal Videsh is looking to acquire assets.
- The road map for the divestment of the government's stake in CIL has also been finalised. The government plans to divest a 10 per cent stake in the first phase through an initial public offering (IPO). The issue is likely to come out by August 2010.
- The sector faces a number of bottlenecks in transportation infrastructure that require attention. Procuring environmental clearances is another area that needs to be addressed to ensure the growth of the sector.
- In the backdrop of all these developments, the mission of the conference is to provide an update of the developments in the coal sector, plans and strategies for domestic coal supply, and emerging issues such as overseas acquisitions, environmental concerns and technology development.

## Target Audience

- The conference is targeted at:
  - Domestic coal producers
  - 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
  - Policy-makers and administrators

## Previous Participants

*The organisations that have participated in our previous "Coal in India" conferences include Abhijeet Group, Adani, Aditya Birla, AES, Alstom, Ambuja Cement, Aryan Coal, BEML, Bharat Forge, Boruka Energy, BLA, Carborundum, Caterpillar, Central Coalfields, CESC, Chambal Fertilisers, CLP, Coal India, Coastal Energy, Devendran Coal, Doosan, EMTA Group, Enam, Essar Power, Essel Mining, Feedback Ventures, FLSmidth, GAIL, Glencore, GMDC, GMMCO, GMR, GSECL, Gujarat Pipavav, GVK, Hagglands, Hazira LNG, Hindalco, ICICI, ICF, IDFC, IL&FS, Indiabulls, Integrated Coal Mining, IPGCL, Ispat, Jaypee, Jindal Photo, JSPL, Jubilant, KPCL, Kolkata Port, Krishnapatman Port, KSK, Lanco Infratech, L&T, Leighton, Liugong, Maha Genco, Mahanadi Coalfields, MCX, Mitsubishi, Mitsui, M.N. Dastur, MP State Mining, Mormugao Port Trust, MSTC, Mumbai Port Trust, NCC, NALCO, NMDC, NTPC, OPGCL, Orissa Mining Corporation, PFC, PSEB, Quippo, Railway Board, Reliance Infrastructure, RIL, Rio Doce, SAIL, Sara International, Sasol Mining, SBI Caps, SDG, Shree Cement, Shriram Infrastructure, Skil Infrastructure, South Eastern Coalfields, Sree Rayalseema, SREI, SRF, Suez Energy, Sumitomo, Tancem, Tata Power, TCE, Tenughat Vidyut Nigam, Terex, Thiess, TIL, Thermax, ThyssenKrupp, TNEB, Torrent Power, TOTAL, Uniphos, Vandana Global, Vinergy, Vishakapatnam Steel Plant, Voltas, Volvo, Warburg Pincus, Wirtgen, etc.*

## AGENDA/STRUCTURE

### GOVERNMENT PERSPECTIVE

- ❖ What is the government's perspective on the development of the coal sector?
- ❖ What are the key issues being faced by the sector?
- ❖ What is the update on divestment and expectations from the sector post divestment?
- ❖ What is the government's perspective with regard to encouraging greater private participation in the sector?

### COAL INDIA LIMITED'S PLANS

- ❖ What are CIL's perspectives on the coal sector and its development in India?
- ❖ What are CIL's future plans and strategies?
- ❖ What is the update on JVs with private players for developing underground and abandoned mines?
- ❖ What are CIL's current and planned investments in overseas coal mines?

### KEY TRENDS AND MARKET OUTLOOK

- ❖ What are the demand-supply and pricing trends of coal in India?
- ❖ What is the outlook for demand and what are the various supply options?
- ❖ What are the key issues and concerns facing the sector?
- ❖ What are the opportunities and the way forward for the sector?

### GLOBAL MARKET SCENARIO AND IMPORT OPTIONS

- ❖ What are the trends in the key coal exporting countries (Indonesia, Australia, South Africa)?
- ❖ What is the present global demand-supply situation?
- ❖ What are the global coal pricing trends?
- ❖ What are the coal import options for Indian companies?
- ❖ What is the outlook for coal import in India?

### OVERSEAS MINE ACQUISITIONS

- ❖ Which are some of the recent overseas coal mines acquired by Indian companies?
- ❖ What are the challenges faced by Indian companies in acquiring mines abroad?
- ❖ What has been the experience of the companies that have acquired overseas coal mining assets?
- ❖ What is the outlook for overseas coal mine acquisitions?

### PROGRESS IN CAPTIVE MINING

- ❖ What is the current status of captive mining?
- ❖ What are the major issues and concerns and what has been the experience so far?
- ❖ What is the future potential for private participation in the coal sector?

### CUSTOMER PERSPECTIVE

- ❖ What is the perspective of some of the leading consumers with regard to coal availability, quality and delivery? (power/steel/cement)?
- ❖ What has been their experience with the new fuel supply agreements?
- ❖ What are their anticipated supply shortages and what options are they exploring to meet the supply shortages?
- ❖ What are their key issues and concerns?

### COAL TRANSPORTATION INFRASTRUCTURE

- ❖ What is the current status of the coal transportation infrastructure (rail, port)?
- ❖ What are the plans for enhancing infrastructure in the wake of increasing demand?
- ❖ What are the new requirements and challenges?
- ❖ What is the update on fuel transportation agreements?

### PROMISE OF TECHNOLOGY

- ❖ What are the new and upcoming technologies adopted by Indian coal mines?
- ❖ What are the productivity gains achieved/expected through the use of new technologies?
- ❖ What are the key issues and challenges?
- ❖ What is the way forward with regard to mining technologies?

### FOCUS ON COAL WASHING

- ❖ What is the present status of coal washing in India?
- ❖ What is the likely demand for washed coal in the coming years?
- ❖ What are the technology trends with regard to coal washing?

### ENVIRONMENT AND FORESTRY ISSUES

- ❖ What are the forestry and environmental issues (clearances, regulations, etc.) involved in coal mine prospecting, exploration and production in India?
- ❖ What are the issues faced by captive coal block owners with respect to clearances?
- ❖ What are the steps being taken to expedite environmental/forestry clearances for captive coal blocks?

Each session will be split into two parts. The first part will feature presentations by the speakers. The second part will be devoted to Q&A and floor discussions. Some sessions will also be interactive. The conference will feature the point of view of all the key stakeholders – buyers and sellers, existing players and potential new entrants, producers and marketers, importers and transporters, policy-makers and investors.

### Delegate Fee

- The delegate fee is Rs 22,500 for one participant, Rs 37,500 for two, Rs 52,500 for three and Rs 67,500 for four.

### Organisers

The conference is being organised by **India Infrastructure Publishing**, a company dedicated to providing information on the infrastructure sectors through magazines, newsletters, reports and conferences. The company publishes **Indian Infrastructure** (a magazine devoted to infrastructure policy and finance), **Power Line** (India's premier power magazine), **Power News** (a weekly newsletter) and a series of reports including **Coal in India**, **Thermal Power Generation**, **Mining Industry in India** and **Power in India**.

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## Registration Form

I would like to register for the conference. I am enclosing Rs \_\_\_\_\_ vide cheque/demand draft no. \_\_\_\_\_ drawn on \_\_\_\_\_ dated \_\_\_\_\_ in favour of India Infrastructure Publishing Pvt. Ltd payable at New Delhi.

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## Registration Fee

Delegates	One	Two	Three	Four
INR	22,500	37,500	52,500	67,500
USD	540	900	1,260	1,620

• Registration will be confirmed on receipt of the payment.

## Contact

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