

Fourth Annual Conference on LNG-The future Fuel in India

7th & 8th June, 2018



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4th Annual Conference on LNG-The future Fuel in India

Introduction

Global LNG trade in 2017 had depicted an interesting trend. It is pertinent to note that the countries that entered the market after 1999 are showing growing trend and promising market for LNG trade. In the last 6-7 years these markets have experienced an average annual growth rate of ~22%. Although the year on year growth rates are expected to slow down in the coming years, these countries will compose a consistently increasing share of total LNG trade, as demand in China, India, and Southeast Asia are anticipated to grow significantly.

Chinese LNG consumption has been a major demand mover of global LNG trade in the second half of 2017, largely driven by environmental policy and the ongoing ramp up of new long-term contracts. On the other hand, with increasing demand, India now, is the fourth largest LNG importer in the world.

Natural gas demand in India is constrained by limited domestic supply. The fall of D6 production has significantly impacted gas consumption over the last decade. Against the planned production of 2.8 Bcf/d, the gas production had fallen significantly to approximately 0.3 Bcf/day. Consequently, LNG has been an important offset to India's production shortfall in the recent years.

India's LNG demand is braced by long term LNG supply from Qatar. The country has also taken a major bet on LNG supply from the United States, particularly from Sabine Pass LNG and Cove Point LNG. However, a key uncertainty for the market is the ability for Indian consumers to consume relatively high-priced LNG on a long-term basis. Nevertheless, a sustained period of low spot and short-term pricing is expected to benefit India as the market will be a key consumer for excess cargoes as the industry is moving towards excess supply.

In the coming decade, the demand for LNG in India will majorly be influenced by the outlook for domestic production and by emerging gas demand sectors like City Gas Distribution ("CGD"). With 9th round of CGD bidding around the corner, total of 86 new Geographical Areas are identified by the government for developing CGD infrastructure, consequently contributing to sustained LNG demand. However, by the end of the next decade, domestic production is expected to decline creating a tremendous opportunity for sustainable LNG demand growth.

With the LNG market facing oversupply pressures, Indian LNG buyers are under pressure to deliver price-competitive LNG for the country's gas market. As a result, the buyers are pushing for contract re-negotiations. Regasification capacity has been a constraint on further growth in the LNG market. In the first half of 2017, there has been 11% underutilization of effective capacity indicating that Indian importers could have imported more if they needed to.

In the next few years, multiple new terminals and expansion capacity are expected to come online, further enhancing India's ability to import LNG. Regasification capacity is expected to expand considerably in India after several years of high utilization. As regional markets develop in India that have been isolated due to a lack of pipeline connectivity, new regasification terminals will help unlock latent demand in these regions. New regasification is needed in central-eastern and northeastern India. New pipelines are proposed to enable further gas penetration from those import points to other parts of the country. India has long considered importing pipeline gas, but no such plan looks likely to materialize in the near future. Thus, there will be continuing reliance on LNG for the country's import needs.

Government of India's plan to set up a gas trading exchange is a positive move towards increasing the share of natural gas in country's energy mix.

About Organiser

Founded in 2012, Diligentia specializes in organizing conferences, exhibitions and exclusive master classes for the targeted audience. Our services span across industry verticals including —Infrastructure, Oil and Gas, Aviation and Power.

A unique combination of Industry veterans and young professionals who represent the board of Diligentia promises niche and stimulating conference properties that resonate well with the audience. Special

focus is laid on developing well researched and high value content which is unbiased and provides unique business insights. Our strong network within industry, academia as well as the government help us invite the best in class speakers which ensures an engaged and participative audience. Our motto is to provide our clients with solutions which help them innovate and grow in the ever changing competitive environment.

Program Convenor



Mr. J Wason
Former CEO - Gail Gas
Principal Advisor- Diligentia Advisors
(Former CEO Gail Gas Limited)

Mr. J Wason former CEO Gail Gas Limited & former Chairman, Kerala GAIL Gas Ltd. He has been the author of many a Joint Ventures in the Indian downstream Gas sector in the states of Karnataka, Kerala, Andhra Pradesh and Rajasthan. He has been Instrumental in bringing in the concept of FSRU being worked at & by GAIL Gas joint venture APGDC where he was the Director.

He has been the Director on the Board of Directors of Mahanagar Gas Ltd (a Joint venture of GAIL and British Gas), CUGL, and Vadodara Gas Ltd (a Joint venture of GAIL Gas and Vadodara Municipal Corporation (VMSS)), Executive Director (Marketing) Gas, Polymers, Liquid & Hydrocarbons and City Gas in GAIL (India) Ltd.

More than 35 years of experience in two of India Maha Ratna National Companies-BHEL and GAIL. His last engagement prior to retirement was the CEO of GAIL Gas Ltd. He is a Post Graduate from Xavier Labour Relations Institute, (XLRI) Jamshedpur and has done his graduation in Physics from the University of Delhi.

Shri. M. Ravindran
Principal Advisor- Diligentia Advisors
(Former Director- HR Gail (India)
and MD& Chairman IGL)



Shri M. Ravindran former Director (HR) with additional responsibility of business development during his tenure from June 2013 to Jan 2017 at Gail India. He was the Chairman of Gail's USA subsidiary Gail Global (USA) LNG LLC for the same period. Apart from serving as

Chairman of the Board of IGL, Shri M. Ravindran also served as Chairman of Green Gas Limited, Lucknow; Bhagyanagar Gas Limited, Hyderabad.

He has over 34 years of rich and diverse experience in the Fertilizer and Oil & Gas industries, particularly in Gas Transmission, Petrochemicals, City Gas Distribution, was involved in various Pipeline projects feasibility and Business development initiatives for LNG business for GAIL.

Prior to his appointment as Director (HR), GAIL Shri. Ravindran served as Managing Director of Indraprastha Gas Ltd. (IGL), a Joint Venture of GAIL & BPCL and the largest supplier of Compressed Natural Gas (CNG) and Piped Natural Gas (PNG) in Delhi and National Capital Region.

Shri M. Ravindran has the distinction of being the first CEO of GAIL's wholly owned subsidiary, GAIL Gas Limited from 2008 to 2011. During his tenure as CEO of the wholly owned GAIL subsidiary, GAIL Gas Limited, he steered the formulation of the company's business policies, particularly in the regulatory regime of PNGRB.

4th Annual Conference on LNG-The future Fuel in India

Preliminary Programme

Day One – 7th June 2018	
Inaugural Session	
10:00 to 10:10 am	Welcome Address
10:10 to 10:20 am	Host Remark by Diligentia Advisors
10:20 to 11:00 am	Address by Industry Veteran
11:00 to 11:10 am	Address by the Ministry of Petroleum & Natural Gas
11:10 to 11:15 am	Vote of Thanks
11:15 to 11:25 am	Hi Tea and Networking
11:25 am to 13:25 pm	Session 1- LNG -The future Fuel in India Key Opportunities <ul style="list-style-type: none"> • Environmental compulsions and drivers. • Government Initiatives • The regulatory strides • Opportunities <ul style="list-style-type: none"> o Policy Paradigms-International practices and learning for India o Infrastructure development o Trading Hub Grace time –Q &A
13:25pm to 14:30pm	
14:30 pm to 15:30pm	Session 2 : LNG Industry :Key challenges <ul style="list-style-type: none"> • Supplier perspective / compulsions • Developing a market structure conducive to trading LNG • Current & emerging dynamics of sectoral Usage:City Gas, Power; Fertilizer; Transport, Industry etc. • Promoting cleaner fuel mix for the power sector and as transition fuel from high carbon to low carbon economy. • Developing LNG as a bridge fuel for the renewables. Grace time – Q&A
15:30pm to 17:30 pm	Session 3:Innovation in LNG Delivery <ul style="list-style-type: none"> • Emerging options/Evolution of LNG distribution - Technology Advances • Integrated LNG solutions • Development of small scale LNG carriers and barges etc. Grace time – Q&A
Hi Tea & Networking	

Day Two - 8th June 2018	
10:00 to 10:20 am	Welcome Address & a quick recap of Day 1
10:20 to 12:20	Session 4:LNG: New generation fuel <ul style="list-style-type: none"> • Alternate Fuel for transport ss • LNG Growth based on diversification opportunities - offsetting India's production shortfall. Grace time& Q&A
12:20 to 13:30 pm	Session 5:Road ahead for LNG Industry <ul style="list-style-type: none"> • Contracting trends and trading dynamics- LNG competitiveness vs oil - indexation • Scope of quick options - the FSRU market – LNG distribution • Industry expectations etc.
	Vote of Thanks and Closing Remarks

FEE STRUCTURE			
No of Delegates	Early Bird Before 30 th April 2018	Standard	GST
1	INR 23,500	INR 25,000	18%
2	INR 47,000	INR 50,000	18%

Note

- The conference is a non-residential programme.
- 18% GST Tax payable Separately.



PAYMENT MODE
<ul style="list-style-type: none">• Cheque / Demand Draft payable at Diligentia Advisors Private Limited at New Delhi• RTGS/NEFT Transfer
NEFT / RTGS DETAILS
<ul style="list-style-type: none">• Beneficiary : Diligentia Advisors Private Limited• Bank Name : Kotak Mahindra Bank Ltd.• Bank Address : New Friends Colony, Delhi 110065• Bank Account No: 2211667324• IFSC/NEFT Code: KKBK0000176

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Last name _____
Job title _____
Company _____
Country _____
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Fax _____
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