



ENRich 2018

Towards energy and resources security and sovereignty

11 December 2018

Hyatt Regency
Bhikaji Cama Place
New Delhi



About ENRich

The ninth edition of ENRich, KPMG in India's flagship event for the Energy and Natural Resources (ENR) sector, is scheduled to be held on Tuesday, 11 December 2018 at Hyatt Regency, Bhikaji Cama Place, Ring Road, New Delhi, India. The theme of the conclave is '**New partnerships for new energy**'.

Shri Dharmendra Pradhan, Minister of Petroleum and Natural Gas; and Minister of Skill Development and Entrepreneurship and **General (Retd.) V. K. Singh**, Minister of State in the Ministry of External Affairs have consented to grace the occasion.

The energy sector in India is witnessing massive disruption due to alternative sources of energy, the geo political scenario and technological advancements. In the light of these developments, this year, the discussions will focus on the following themes:

- Role of energy in India's inclusive growth
- Geopolitics, energy & consumers
- Energy transitions, technology and innovation
- India's energy security and sovereignty
- Strategies for decarbonising India's energy sector
- Digital transformation in the ENR sector
- Energy and natural resources in new age mobility
- Forging new partnerships for new energy.

Like previous editions, ENRich 2018 is set to have interactive discussions with CXOs, policy makers, regulators, government utilities, private players, investors and sector experts.

We look forward to your presence at ENRich 2018.

Highlights from last year's ENRich conclave are available at <https://home.kpmg.com/in/en/home/events/2017/11/enrich-2017.html>



Sessions | ENRich 2018

Geopolitics, energy
& consumers

Role of energy in
India's inclusive
growth agenda

Towards energy and
resources security
and sovereignty 

Decarbonising
energy for
sustainability

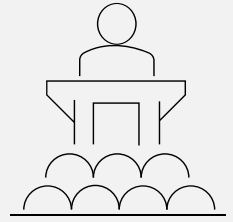
De-stressing the
Indian Power
Sector

ENR: Digital and
analytics revolution
in the making

Energy and natural
resources in new
age mobility

New partnerships for
new energy

Featured speakers



Plenary 1: Towards energy and resources security and sovereignty



Atanu Chakraborty

Secretary at DPAM

Has worked extensively with both Central and State Government in the energy and infrastructure sector



Anil Kumar Jha

CMD, Coal India Limited

Experience across production, mine planning; worked with Central Mine Planning & Design Institute Limited (CMPDI) for 14 years



Dr. Ajay Mathur

Director General, TERI

Climate change expert; previously served as Director General of the Bureau of Energy Efficiency



Bhuwan Chandra Tripathi

CMD, GAIL

Mechanical Engineer with vast experience in shaping energy policies and regulations



Sudhir Mathur

CEO, Cairn Oil & Gas – Vedanta

Experience across supply chain management, finance and strategic planning; Previously served as CFO of Aircel Cellular Ltd.



Nilaya Varma

Partner and Leader, Markets Enablement, KPMG in India

Advises State and National Governments in improving public health, service delivery and building technology and physical infrastructure

Moderator

Session context

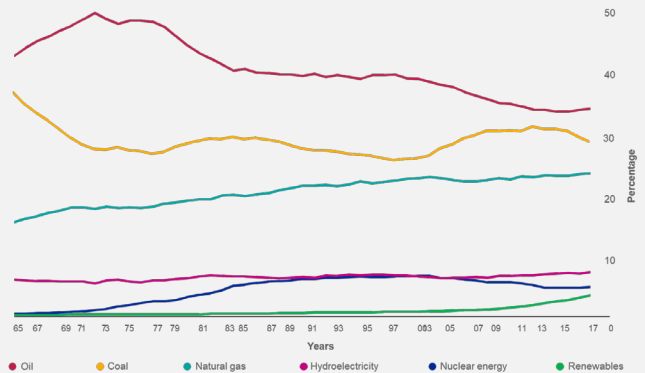
The energy sector is in the midst of a deep transformation, globally as well as in India, giving rise to increasing uncertainties around energy investments. A complex interplay of factors such as policy thrust on low carbon pathways, technological advancements, changing consumer preferences, shifting balance of power in oil and gas industry and government policies and actions are causing disruptions to conventional business models and investment flows. These shifts are impacting the entire value chain of the energy sector.

Simultaneously, India's energy imports are reaching unsustainable levels. With more than 80 per cent of its oil, half of its gas and a quarter of its coal coming from imported sources, India's energy import bill at approximately USD120 bn is huge (Source: *Petroleum Planning & Analysis Cell, DGCIS Analytics*). With strong demand growth at more than 4 percent per annum (Source: *India Energy Security Scenarios*) likely to continue, the costs are likely to balloon, unless drastic measures are taken to further renewables, move to electrification, find and produce more hydrocarbons and accelerate energy efficiency.

Under COP 21 India has voluntarily committed to reduce the emission intensity of its GDP by 33-35% by 2030 as compared to 2005 levels. A significant part of the gains will come from energy efficiency on the demand side and it is widely anticipated that the current momentum on energy efficiency will substantially help achieve this target. However the supply side needs to see significant changes in approach if the goals are to be achieved since India has also committed to have in place 40 per cent of its electricity generation capacity from non-fossil fuels and in practice has set out on the path of targeting rapid renewable energy capacity addition.

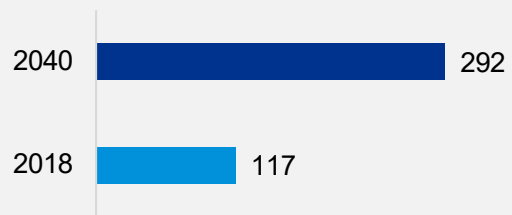
India thus needs to reduce coal usage, massively step up domestic hydrocarbon production, accelerate energy efficiency, and further renewable energy without adding commensurately to imports for these purposes. The session will discuss how this complex interplay, that is at times in conflict with the country's growth imperatives, can be managed.

Global primary energy consumption over the years



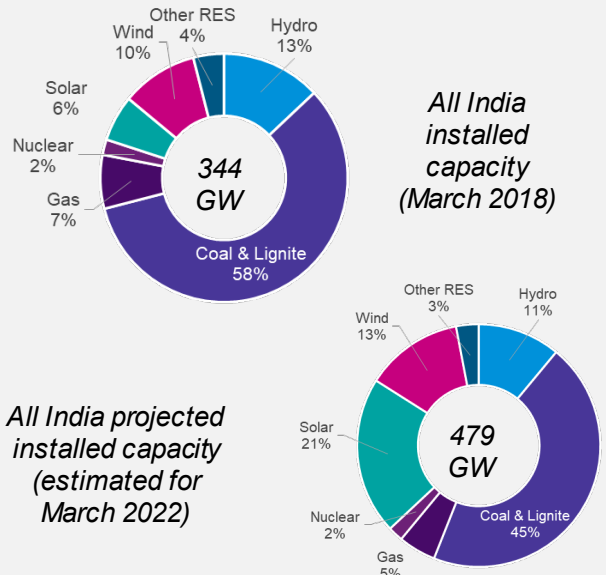
Source: BP Statistical Review of World Energy 2018

Energy (Oil & Gas) import bill in US\$ billion (at current prices)



Source: BP Energy Outlook, 2018; KPMG Analysis 2018

Expected change in power generation capacity mix for India



Source: CEA, National Electricity Plan 2018, KPMG In India Analysis.

Indicative issues for discussion

Is there a possible dichotomy between the objectives of containing energy consumption and the economic growth?

What would be the top actions for ensuring energy security?

What are the possible short, medium and long term measures to reduce oil imports?

What is the potential of energy efficiency and what needs to be done to realise its potential?

How can domestic production of Coal, Oil and Gas be enhanced?

What role would renewables play? How can we scale up and integrate renewable energy?

What would be the role and concerns of consumers (including industrial consumers) in achieving the goals without compromising supply security?

What should be the planning framework for managing the complex interplay of demand, resources, cost and environmental concerns?

What would be the role of partnerships (between nations, manufacturers, suppliers and consumers) in furthering India's energy security and sovereignty?



Tuesday **11**
December
12:15 hours

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