



Survival in an Age of Volatility

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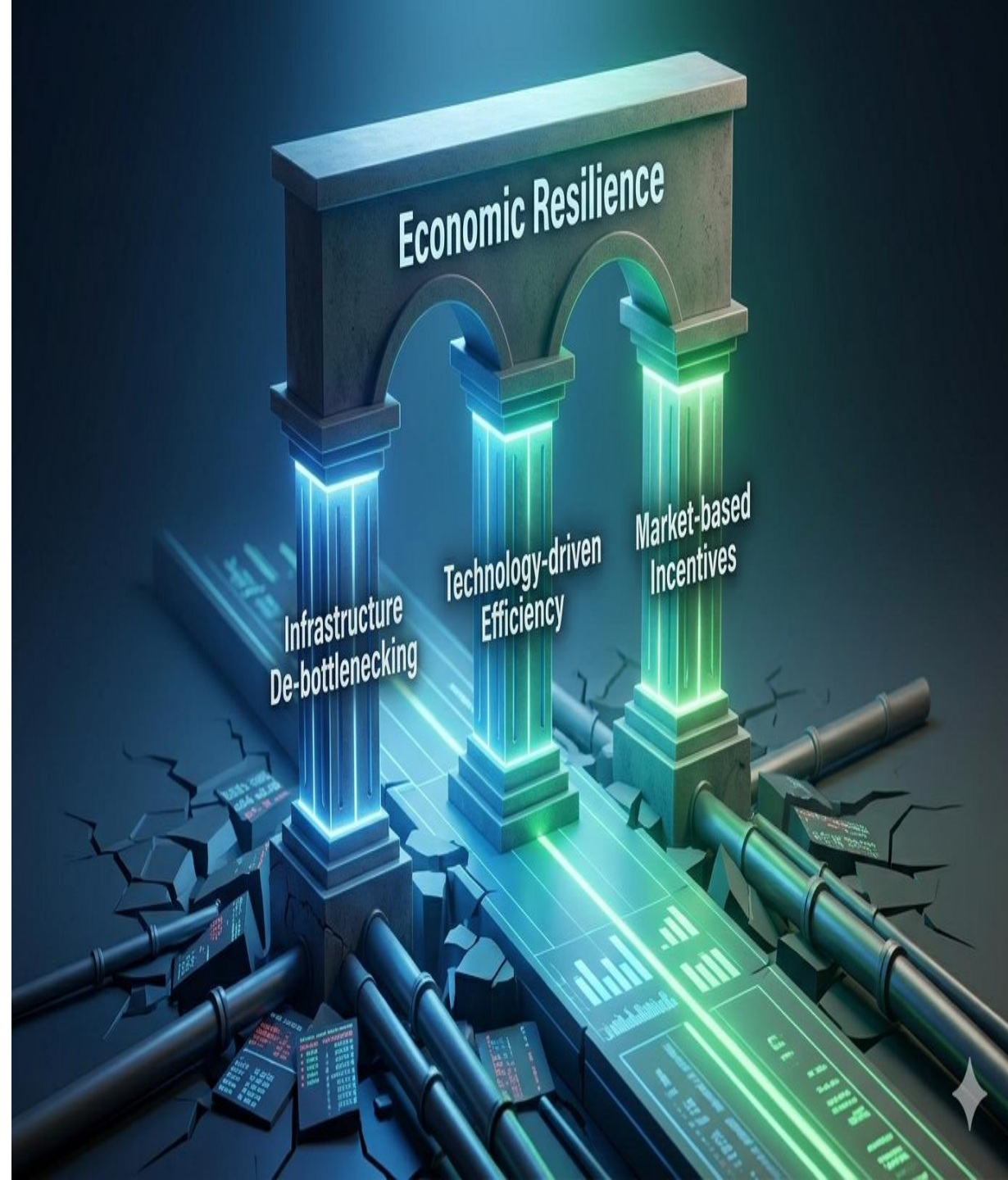
- . **Current Reality:** We are facing an energy emergency.
- . **"Oil Realpolitik" 2026:** Geopolitical crises have moved from headlines directly into corporate balance sheets.
- . **The Threat:** Fracturing supply chains and peak prices threaten industrial



- **Past Perception**
 - Regulation viewed as a set of brakes.
- **Present Mandate**
 - In this climate of scarcity and spiralling costs, PNGRB has to be an Accelerator.
- **New Identity: Proactive Enabler of Survival**



- **Sustainability re-defined:** Not corporate social responsibility, but an absolute necessity for economic survival.
- **The Three Pillars:**
 - **Pillar 1:** Infrastructure de-bottlenecking.
 - **Pillar 2:** Technology-driven efficiency.
 - **Pillar 3:** Market-based incentives.



- **Focus:** Maximize Every Domestic Molecule: Create shields against global price traps.
- **1. CBG "Domestic Shield":**
 - Implementing PNGRB guidelines for injecting Compressed Biogas (CBG).
 - Operationalizing "grid-based evacuation" to make bio-waste a critical energy source.
 - **Key Advantage:** Immune to

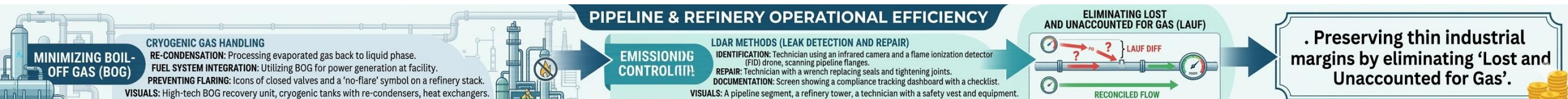



- **2. Compressor Electrification:**
 - Eliminating the economic absurdity of "using gas to move gas" in high-price environments.
 - Unprecedented speed in converting the national grid.
 - First **14 compressors** identified for immediate conversion.



3. Methane Mitigation:

- Waste in a crisis is a crime.
- Strict enforcement of Boil-off Gas (BOG) and Leak Detection and Repair (LDAR).
- Preserving thin industrial margins by eliminating "Lost and Unaccounted for Gas".





**Medium-Term
Strategy:
Dismantling
the Price
Trap (2-5
Years)**

- **1. Unified Pipeline Tariff (UPT):**
 - "One Nation, One Grid, One Tariff" is a national survival requirement.
 - Eliminates the "distance penalty".
 - Gives the hinterland and remote clusters a fighting chance.

- **2. Common Carriers (Open Access) :**

- Declaring CGD networks as Common Carriers upon exclusivity expiry.
- Breaking single-supplier monopolistic strangleholds.

- **3. MSME Resilience:**

- Currently the most vulnerable sector, paying premiums for liquid fuels.
- PNGRB to facilitate "shared infrastructure" models to slash entry CAPEX.
- Collaboration with institutions like SIDBI to create "guarantees" to provide comfort to

Long-Term Goal: Strategic Autonomy (5+ Years)

- **1. 100% Hydrogen Corridor:**
 - Fast-tracking Technical Standards (T4S) for pure hydrogen.
 - Decoupling Indian industry from fossil fuel volatility forever.
 - Crucial for high-heat industries: Steel, Cement, Chemicals



Long-Term Actions (Contd.): The Digital and Green Backbone

• **2. Digital Twins and Predictive Resilience:**

- Leveraging National Hydrocarbons Infrastructure Monitoring System (NHIMS).
- AI management of decentralized supply (CBG, Hydrogen) with millisecond precision.

• **3. Green Gas Certification Market:**

- Establishing a liquid, transparent market.
- Allows monetization of sustainability for producers.
- Enables consumers to "buy their way out" of carbon risks.

Conclusion : Protecting the Boardroom

Message to Industry

Leaders: These actions are designed for your Economic Resilience.

Profitable Investments:

The "Hydrogen-ready" retrofitting CAPEX is massive, but necessary.

Guaranteed Returns: PNGRB

"Cost of Service"

methodology guarantees a

12% post-tax return on

capital

Conclusion: Architects of Our Future



The Choice: We can be victims of "Oil Realpolitik," or architects of a new, independent energy reality.



The FTA Deadline: January 2026 Free Trade Agreement makes action urgent.



Our Vision: Sustainability is the legal highway to lead the global economy.



"Made in India" synonymous with "Sustainable and Resilient".

The Final Word

From Intent
to Urgent
Execution.

Let us build
this highway
together.

Thank you.