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PNGRB



INDRAPRASTHA GAS

Energy Security

Driving India's Next Wave of Gas Demand

9–10 April 2026 | Hyatt Regency, New Delhi

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India stands at a **decisive inflection point** in its **energy transition** where energy security, affordability, and sustainability must be advanced in tandem. The Government's ambition to increase the **share of natural gas in the primary energy mix to 15% by 2030** is not merely a sectoral target; it represents a system wide transformation of India's energy architecture.

Delivering on this ambition requires coordinated action across the entire gas value chain from **upstream production and LNG sourcing to pipeline infrastructure, market design, and end-use adoption**. India's natural gas demand is projected to **grow by nearly 60% by 2030 and more than double by 2040**, driven by **structural shifts in city gas distribution (CGD), industrial fuel switching, and transport decarbonisation**.

Yet, this growth trajectory is contingent upon four critical enablers:

- ◆ Scaled and synchronised infrastructure build-out
- ◆ Market-oriented pricing and trading mechanisms
- ◆ Regulatory clarity and stability
- ◆ Secured and diversified LNG supply chains

Against this backdrop, the **Petroleum and Natural Gas Regulatory Board (PNGRB)**, in collaboration with leading industry stakeholders and global knowledge partners, convenes this high-impact discussion:

“Energy Security: Driving India's Next Wave of Gas Demand”

This is not a conventional conference. It is a closed-room, high-intensity strategic dialogue bringing together senior policymakers and regulators, Chairpersons and CXOs of leading energy companies and global energy experts and institutional advisors

The agenda is deliberately structured to move beyond diagnosis toward decision-enabling insights and actionable pathways.

The objective is clear:

To chart a credible, executable pathway from India's current 6–7% gas share to a sustainable and resilient 15%+ gas-based economy with collaborative efforts .

Organised By

**Petroleum and Natural Gas Regulatory Board (PNGRB)
Indraprastha Gas Limited (IGL)**

Knowledge Session Partners

**BCG | Deloitte | ICF | KPMG
McKinsey & Company | PwC**

FOREWORD BY THE CHAIRPERSON, PNGRB



*Dr. Anil Kumar Jain
(Chairperson, PNGRB)*

It is a privilege to welcome you to the conference on
“Energy Security: Driving India’s Next Wave of Gas Demand.”

We are meeting at a time when the country is looking at natural gas as a default fuel instead of a choice fuel. This gathering reflects a shared recognition that the future of India’s energy system will be shaped by natural gas, and not by incremental change, but by **decisive, coordinated action across policy, regulation, and industry**. The number of Control Orders issued by the Government to drive gas is a testimony to this new reality.

India today stands at a defining moment in its energy transition. The Hon’ble Prime Minister’s vision of increasing the share of natural gas to 15% in the primary energy mix is not only a statement of intent it is a blueprint for building a **cleaner, more resilient, and globally competitive energy economy**. Natural gas, in this context, is more than a transition fuel; it is an enabler of **structural transformation across industry, mobility, and urban energy systems**.

So far we were looking at it as more of a transport fuel as CNG, cooking fuel in homes as DPNG and for urea making. Now its role as a substitute to LPG in commercial establishment has also been underscored. We feel that the reliable supply of natural gas in the present crisis will make a huge impact on consumers across sectors. Unlike liquid fuels, the gas distribution business has been developed through bidding and is not a state monopoly. For this sector to lay the new strategic role, the former will need efficient markets. While liquid fuel depends on Government support, the same is not true for natural gas.

At PNGRB, our effort has been to move from enabling policy to **systemic market development**. The introduction of a unified tariff framework, along with consumer-centric reforms, is aimed at creating a more **integrated and equitable gas market**. The “**Vision 2040: Natural Gas Infrastructure in India**” roadmap was conceived exactly with this situation. While the Gulf crisis was not anticipated, but the emerging role of natural gas due to its inherent advantages – clean fuel, convenient and cheaper than oil – would ultimately bend the consumers to it. The current crisis has fast forwarded it, and our work at PNGRB has become more relevant than before.

The journey ahead will demand a step change in ambition and execution. As India’s gas demand scales, the sector must evolve into a **fully integrated, transparent, and globally competitive market ecosystem**.

This will require:

- ◆ Active support of the Petroleum Ministry
- ◆ Accelerated and synchronised infrastructure development
- ◆ Diversified and resilient LNG sourcing strategies
- ◆ Market-based frameworks that enable efficiency and innovation
- ◆ Regulatory certainty that fosters long-term investment

The Government has come forward like never before. This has put NGPL and CGD entities on notice – they have to meet their commitments and fulfil milestones. The consumers are now demanding gas, and connectivity with sources and delivery to consumers is in their domain. Next on the agenda would be gas storages, fiscal incentives, environmental mandates and level playing field with other fuels.

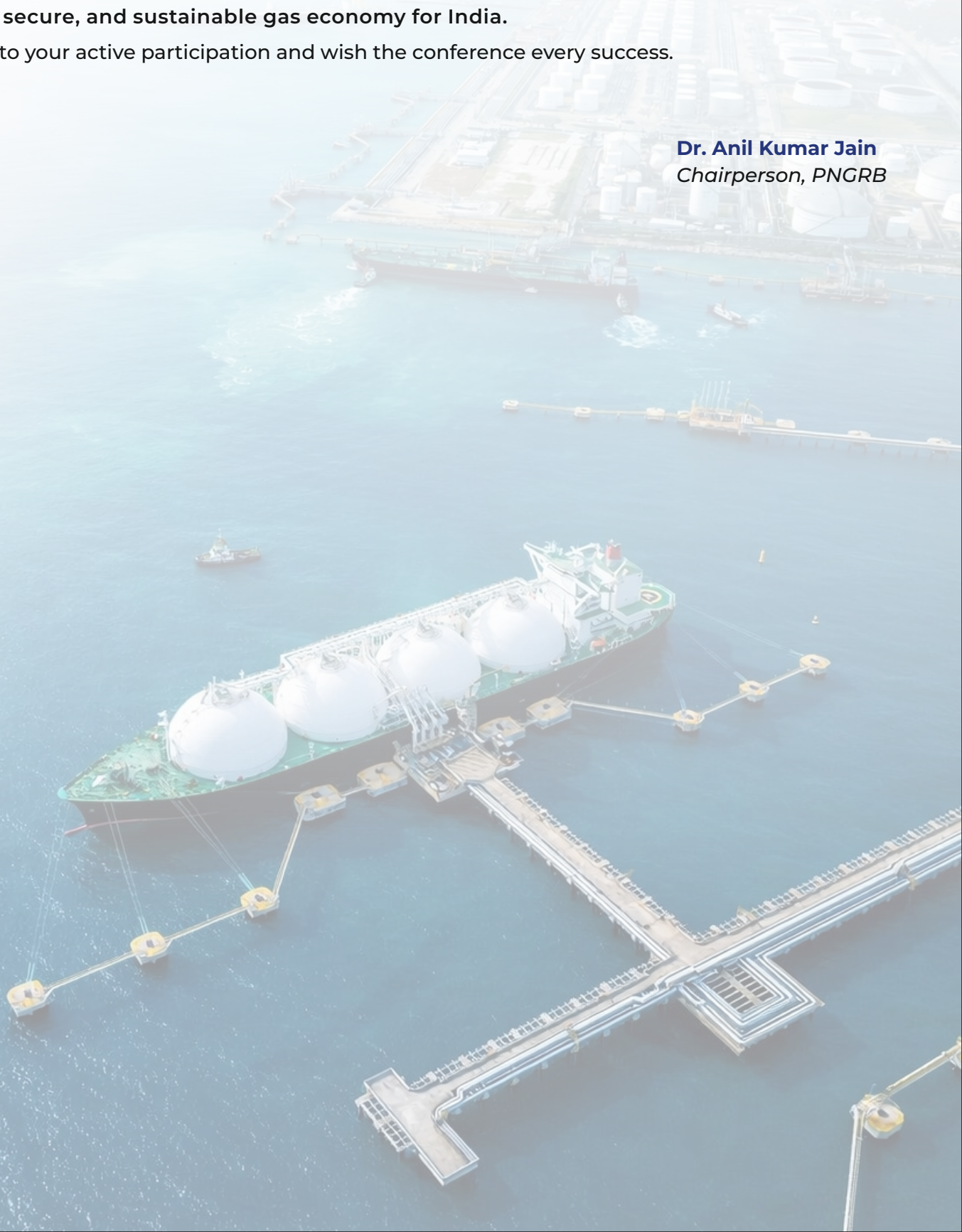
FOREWORD BY THE CHAIRPERSON, PNGRB

This conference has been conceived as a platform to move beyond dialogue to **direction-setting** to collectively examine what must change, what must accelerate, and what must be reimagined to unlock the next phase of growth in India's gas sector.

I am confident that the deliberations over the next two days will contribute meaningfully to shaping a **future-ready, secure, and sustainable gas economy for India.**

I look forward to your active participation and wish the conference every success.

Dr. Anil Kumar Jain
Chairperson, PNGRB



FOREWORD BY THE SECRETARY, MoPNG



Dr. Neeraj Mittal, IAS
*Secretary, Ministry of Petroleum
and Natural Gas*

The story of India's energy transformation is being rewritten rapidly, and natural gas occupies a central chapter in this narrative. As the world's fastest-growing major economy, India's energy appetite is expanding rapidly and meeting this demand in a manner that is secure, affordable, and sustainable is among the foremost policy priorities of the Government.

The Government is aiming to raise the share of natural gas in the country's primary energy basket to 15% by 2030, from the current 7%. Gas is being considered as the bridge fuel, as the country transitions away from polluting fossil fuels to clean energy to achieve its net zero emission target by 2070.

Ministry of Petroleum and Natural Gas has been pursuing a comprehensive agenda of reforms and seeking investments. The Government has taken various measures to implement 'One Nation, One Gas Grid,' which include approving key trunk pipelines, providing viability gap funding in low-demand areas, introducing a unified tariff, accelerating expansion of the CGD network, setting up LNG terminals, allowing marketing and pricing freedom for gas produced from challenging geological zones, and the SATAT initiative to

promote Bio-CNG. The length of the operational natural gas pipeline in the country has increased from 15,340 km in 2014 to about 27,000 km, with about 8,000 km of pipeline under further execution. With the completion of these pipelines, the National Gas Grid would connect all major demand and supply centres in India.

Recently, a comprehensive control order dated 24.03.2026 has been issued under the Essential Commodities Act, 1955 to facilitate time-bound expansion of pipeline infrastructure across the country, especially CGD. The Order provides a uniform framework for grant of right of way (RoW) and permissions by mandating strict timelines, enabling deemed approvals in case of delays, and prohibiting imposition of unauthorised charges by public authorities. It also addresses access issues in residential and private areas by ensuring non-discriminatory and time-bound permissions, thereby removing key bottlenecks in pipeline laying.

These are not isolated interventions; they represent a cohesive strategy to create an integrated, competitive, and consumer-centric gas market. From long-term LNG procurement agreements that strengthen supply security, to the inclusion of Bio-CNG in the distribution network, and from regulatory reforms that lower transportation costs to the massive roll-out of PNG connections across the country - each initiative is a building block in India's gas economy.

This conference, organised by PNGRB, is a timely and important initiative. It brings together the brightest minds from government, regulation, industry, and the global energy community to deliberate on the structural changes required to accelerate gas adoption.

I wish the conference and all its participants the very best.

Dr. Neeraj Mittal, IAS
Secretary, Ministry of PNG

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ENERGY SECURITY DRIVING INDIA'S NEXT WAVE OF GAS DEMAND

9–10 April 2026 | Hyatt Regency, New Delhi

Conference Agenda



INDRAPRASTHA GAS

DAY 1 | 9 APRIL 2026

9:00 – 10:00 AM

Registration and Tea

Plenary Session: The session to be graced by eminent dignitaries including Dr. Anil Kumar Jain, Chairperson, PNGRB; Dr. Neeraj Mittal, IAS, Secretary, MoP&NG; Shri Ajay Tyagi, Former Chairman, SEBI; Shri D. K. Sarraf, Former Chairperson, PNGRB; Shri Anjani Kumar Tiwari, Member, PNGRB; and Shri Jayanta Narayan Das, Member, PNGRB.

10:00 – 10:05 AM

Welcome of dignitaries and Delegates by Sh. K.K. Chatiwal, MD, IGL

10:05 – 10:10 AM

Lamp Lighting

10:10 – 10:15 AM

Keynote Address by Chief Guest Dr. Neeraj Mittal, IAS, Secretary, MoP&NG

10:15 – 10:30 AM

Context Setting by Sh. Anjani Kumar Tiwari, Member, PNGRB

10:30 – 10:45 AM

Address by Dr. Anil Kumar Jain, Chairperson, PNGRB

10:45 – 11:05 AM

Presentation by Sh. Puneet Goel, Director (Fuels & Resources), ICF
Highlights of Vision 2040 – Natural Gas Infrastructure in India

11:05 – 11:20 AM

Presentation by Ms. Payal Goel, Director (Oil & Gas), Deloitte
Presentation on the issue related to promoting competition and level playing field in gas transmission and distribution businesses

11:20 – 11:30 AM | Tea Break

11:30 – 12:45 PM

Vision 2040: Inside the Minds Shaping India's Gas Future
A Candid Talk with Policy and Industry Leaders

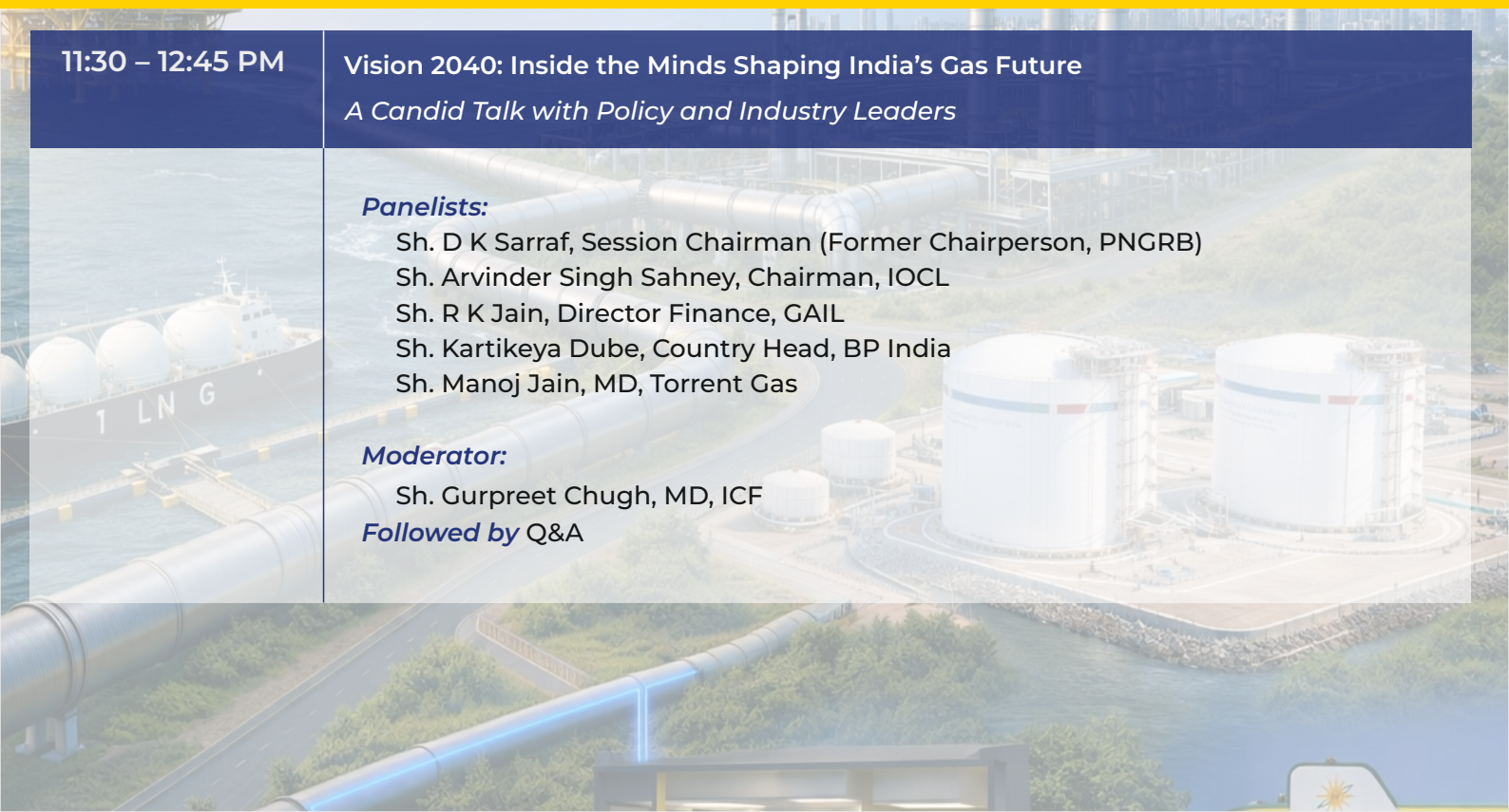
Panelists:

Sh. D K Sarraf, Session Chairman (Former Chairperson, PNGRB)
Sh. Arvinder Singh Sahney, Chairman, IOCL
Sh. R K Jain, Director Finance, GAIL
Sh. Kartikeya Dube, Country Head, BP India
Sh. Manoj Jain, MD, Torrent Gas

Moderator:

Sh. Gurpreet Chugh, MD, ICF

Followed by Q&A



12:45 – 1:45 PM

India's Gas Market 2.0: Enabling a Competitive Ecosystem in NGPL and CGD Sectors – Strategic Panel on Market Design, Infrastructure Governance and Regulatory Pathways.

Panelists:

Sh. Ajay Tyagi, Session Chairman (Former Chairman, SEBI)
Smt. Avantika Singh Aulakh, IAS, MD, GSPL
Sh. Sanjay Kumar, Director (Marketing), GAIL
Sh. Subhankar Sen, Director Marketing, BPCL
Sh. K K Chatiwal, MD, IGL

Moderator: Sh. Amit Khara, Sr. Partner, McKinsey

Followed by Q&A

1:45 – 2:45 PM | Lunch Break

2:45 – 4:15 PM

LNG and Energy Security
Terminal Regulations and Strategic Storage and Energy Transition

Panelists:

Sh. Prabhat Singh, Former MD & CEO, Petronet LNG Ltd
Sh. Nakul Raheja, Country Head, Shell
Sh. Rajeev Kumar Singhal, Director (BD), GAIL
Sh. Debasish Goswami, CEO, HPLNG

Moderator: Sh. Sanjay Sah, Partner, Deloitte

Followed by Q&A

4:15 – 4:30 PM | Tea Break

4:30 – 6:30 PM

Balancing Ease of Compliance and Regulation

Background Setting By:

Prof. (Dr.) Naveen Sirohi, Founding Head of School of Finance at IICA

Panelists:

Sh. Anjani Kumar Tiwari, Member, PNGRB
Sh. Alok Tripathi, JS, MoP&NG
Sh. Anuj Jain, Director (Finance), IOCL
Sh. Subhash Kumar, DG, ACE (Former CMD, ONGC)
Sh. Kumar Shanker, MD, MNGL

Moderator: Sh. Manas Majumdar, Partner, PWC

Followed by Q&A

6:30 – 6:45 PM

Day Closure – Intro to Day 2 Agenda

NETWORKING GALA DINNER



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ENERGY SECURITY DRIVING INDIA'S NEXT WAVE OF GAS DEMAND

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Conference Agenda



INDRAPRASTHA GAS

DAY 2 – 10TH APRIL 2026

9:30 – 10:15 AM	Decarbonization Without Disruption: Navigating the New Energy Realpolitik.
	<p><i>Special Session By:</i> Dr. Ajay Mathur, Former Director General, International Solar Alliance</p>
10:15 – 11:15 AM	Decoding the Sustainability Imperative in the Oil & Gas Sector: From Global Mandates to Indian Boardroom Action
	<p><i>Panelists:</i> Sh. Sanjay Khanna, CMD, BPCL Dr. Vibha Dhawan, DG, TERI Sh. Akshay Wadhwa, CEO, Jio BP Sh. Maqsood Shaikh, MD, Ultra Gas Sh. Mohit Bhatia, Director (Commercial), IGL</p> <p><i>Moderator:</i> Sh. Ashish Kulkarni, Partner, Boston Consulting Group</p> <p><i>Followed by Q&A</i></p>

11:15 – 11:30 AM | Tea Break

11:30 AM – 1:30 PM	Reimagining Secure Energy Supply Chains in Light of New Geopolitical Challenges
	<p><i>Outlook By:</i> Sh. Anish De, Partner & Global Leader, KPMG</p> <p><i>Panelists:</i> Dr. Anil Kumar Jain, Chairperson, PNGRB Sh. Arun Kumar Singh, Chairman and CEO, ONGC Sh. Gurdeep Singh, CMD, NTPC Sh. B. C. Tripathi, Operating Partner-Energy, Essar (Former CMD, GAIL)</p> <p><i>Moderator:</i> Sh. Anish De, Partner & Global Leader, KPMG</p> <p><i>Followed by Q&A</i></p>

CLOSING SESSION

1:30 – 1:45 PM	Closing remarks by Sh. Jayanta Narayan Das, Member, PNGRB
1:45 – 2:00 PM	Vote of thanks by Sh. Mohit Bhatia, Director (Commercial), IGL
2:00 PM Onwards	Networking Lunch

DAY 1 - 9th April 2026

11:30 AM - 12:45 PM | SESSION 1 - STRATEGIC PANEL

Vision 2040: Inside the Minds Shaping India's Gas Future

This session brings together the **principal architects of India's gas economy** for a candid, closed-door leadership dialogue on the choices that will define the sector's trajectory over the next two decades. Designed as a strategic conversation—not a conventional panel—it aims to surface the **thinking, trade-offs, and execution realities** shaping decision-making at the highest levels.

India's gas market is entering a phase of **structural expansion**, with demand expected to scale significantly by 2030 and beyond. At the centre of this growth is **City Gas Distribution (CGD)** projected to emerge as the **single largest demand driver**, contributing **~87 MMSCMD by 2030**, and accounting for **~29% of total demand**, rising to **~44% by 2040**.

Delivering this scale, however, is not a given. It will require alignment across **policy, capital, infrastructure and market design**.

Against this backdrop, the session will focus on a set of **strategic questions critical to execution**:

- ◆ Are current policy and regulatory frameworks fit-for-purpose to enable the next phase of growth?
- ◆ What are the capital allocation priorities across pipelines, CGD networks, LNG infrastructure, and upstream investments?
- ◆ How should India balance domestic production ambitions with increasing LNG dependence?
- ◆ What structural changes are required to build a competitive, transparent, and integrated gas market?
- ◆ How can industry and government collectively accelerate demand realisation while ensuring affordability and supply security?

With participation from the leadership of India's largest public sector enterprises, global energy majors, and leading private operators, the discussion will reflect a **360-degree view of the sector—policy, commercial, and operational**.

The session will begin with a brief framing by the moderator, followed by a deep, unscripted exchange among participants, and conclude with a focused audience interaction.

Panelists:

Sh. D. K. Sarraf, Committee Chairman
Sh. Arvinder Singh Sahney, CMD, IOCL
Sh. R K Jain, Director Finance, GAIL
Sh. Kartikeya Dube, Country Head, BP India
Sh. Manoj Jain, MD, Torrent Gas

Moderator:

Shri Gurpreet Chugh, MD, ICF

12:45 - 1:45 PM | SESSION 2 - STRATEGIC PANEL

India's Gas Market 2.0: Enabling a Competitive Ecosystem in NGPL and CGD Sectors

This session addresses a foundational question for India's gas sector: *Can India transition from a regulated framework to a truly competitive gas market while preserving affordability, access, and investor confidence?*

The move toward **One Nation, One Grid, One Tariff** marks a significant structural reform, reducing regional disparities and improving network utilisation. However, it is only the first step in a broader transition toward a market-driven, transparent, and efficient gas ecosystem.

As the sector scales, **the complexity of market design will increase**. The next phase will require clear choices on regulation, competition, and governance—particularly across **natural gas pipelines (NGPL) and city gas distribution (CGD)**.

This panel brings together **policy makers, leaders from financial markets, public sector enterprises, and private operators** to deliberate on the next-generation architecture of India's gas market.

Key issues for discussion include:

- ◆ What should be the end-state market design for India's gas sector—regulated, hybrid, or fully market-based?
- ◆ How can pipeline access, capacity allocation, and tariff structures be redesigned to enable genuine competition?
- ◆ What governance models are required for common carrier infrastructure to ensure neutrality and efficiency?
- ◆ How can India transition from administered pricing regimes to market-linked mechanisms without creating disruption?
- ◆ What is the right balance between universal service obligations and commercial viability, particularly in CGD expansion?
- ◆ How can regulatory certainty be strengthened to unlock long-term private and institutional capital?

The discussion will reflect the inherent trade-offs between:

- ◆ Competition vs control
- ◆ Affordability vs investment returns
- ◆ Market efficiency vs social obligations

The format is designed to move beyond broad consensus and toward clear articulation of reform priorities and sequencing.

Panelists:

Sh. Ajay Tyagi, Former Chairman, SEBI | Smt. Avantika Singh Aulakh, IAS, MD, GSPL
Sh. Sanjay Kumar, Director Marketing, GAIL | Sh. Subhankar Sen, Director Marketing, BPCL
Sh. K K Chatiwal, MD, IGL

Moderator:

Shri Amit Khera, Senior Partner, McKinsey & Company

2:45 PM – 4:15 PM | SESSION 3 - STRATEGIC PANEL

LNG and Energy Security: Terminal Regulations, Strategic Storage, and Energy Transition

Energy security is no longer a strategic abstraction—it is an operational imperative shaped daily by geopolitics, market volatility, and supply chain disruptions.

India already imports ~50% of its natural gas requirement, and as demand accelerates, LNG imports are expected to more than double by 2030. At the same time, India's existing gas storage capacity—covering ~12 days of consumption—underscores a critical structural vulnerability.

The central question, therefore, is not just how India sources LNG, but:

How resilient, diversified, and shock-proof its gas supply system is in an increasingly fragmented global energy landscape.

This session brings together a distinguished mix of policymakers, global energy majors, and LNG infrastructure leaders to examine the strategic architecture of India's LNG ecosystem from sourcing and infrastructure to regulation and storage.

The discussion will focus on four interconnected dimensions:

- ◆ Geopolitical Risk & Supply Security
- ◆ Role of LNG Terminals & Market Access
- ◆ Strategic Gas Storage
- ◆ Policy & Regulatory Architecture for Resilience

With perspectives spanning policy, infrastructure, and global LNG markets, the session is designed to move beyond incremental improvements toward a structural rethinking of energy security.

Panelists::

Sh. Prabhat Singh, Former MD & CEO, Petronet LNG Ltd.

Sh. Nakul Raheja, Country Head, Shell

Sh. Rajeev Kumar Singhal, Director BD, GAIL

Sh. Debasish Goswami, CEO, HPLNG

Moderator:

Sh. Sanjay Sah, Partner, Deloitte

4:30 PM – 6:30 PM | SESSION 4 - STRATEGIC PANEL

Balancing Ease of Compliance and Regulation

As India's gas sector looks to scale new heights and grow further, the next frontier of reform lies not in what to regulate, but in how to regulate.

This session aims to address a fundamental and often underappreciated challenge in a critical and essential sector as gas:

Can regulatory systems be simplified to reduce friction and cost without compromising oversight, accountability, and sectoral integrity?

Objective and expected outputs:

The objective of this discussion is to reflect on a critical shift in perspective: **from regulation as control to regulation as an enabler of efficient and responsible growth.**

In this context we aim to explore ideas that will help enhance the ease of doing business in the sector, the pace of infrastructure build-out, and the sector's ability to attract long-term capital. And as outcome, we hope to identify some high-impact regulatory and compliance reforms (across process, data, and institutional) that can be actioned over the next 12–24 months to accelerate gas infrastructure build-out and demand growth while strengthening consumer protection and enforcement credibility.

The session opens with a framework-setting address by Prof. (Dr.) Naveen Sirohi, who will examine the inherent tension—and potential alignment—between ease of compliance and regulatory vigilance. The framing will draw on principles of financial regulation, risk-based supervision, and institutional design, setting the stage for a more grounded discussion.

The subsequent panel brings together policymakers, regulators, and industry leaders to examine how regulatory frameworks and governance must evolve in response to:

- ◆ Increasing scale and complexity of the gas ecosystem
- ◆ The need for streamlining approvals and minimizing delays/ costs in compliance
- ◆ Enhancing sustainability and ESG requirements
- ◆ Growing expectations of transparency and accessibility in a digital world

Key points for deliberation

- ◆ Risk-based regulatory approach/ regulatory easing
- ◆ Speed of compliance & Digital governance
- ◆ Positive vs. negative-oriented regulations
- ◆ Enabling innovation and transition readiness
- ◆ Sustainability integration
- ◆ Key challenges & changes

Background Setting By:

Prof. (Dr.) Naveen Sirohi, Founding Head of School of Finance at Indian Institute of Corporate Affairs (IICA)

Panelists:

Sh. A. K. Tiwari, Member, PNGRB | Sh. Alok Tripathi, Joint Secretary, MoP&NG

Sh. Anuj Jain, Director (Finance), IOCL | Sh. Subhash Kumar, DG-ACE (Former CMD, ONGC)

Sh. Kumar Shanker, MD, MNGL

Moderator:

Shri Manas Majumdar, Senior Partner and Oil & Gas Sector Leader, PwC

DAY 2 - 10th April 2026

9:30 AM – 10:15 AM | SESSION 5 - PRESENTATION & OUTLOOK

Decarbonisation Without Disruption: Navigating the New Energy Realpolitik

The global energy transition is unfolding amid a structural paradox—while climate commitments call for a rapid reduction in fossil fuel use, near-term realities continue to be shaped by energy security concerns, supply disruptions, and price volatility. In this context, sustainability is increasingly being repositioned as a core element of economic resilience and strategic planning, particularly for emerging economies like India.

India's transition pathway is expected to remain development-centric and context-specific, balancing decarbonisation objectives with the need for affordable, reliable, and scalable energy access. This implies a calibrated approach that leverages strengths in renewable energy— particularly solar while progressively expanding into green hydrogen for hard-to-abate sectors.

In the near to medium term, the transition is likely to be driven by electrification of mobility and industrial processes, alongside strengthening of domestic supply chains, including access to critical minerals. At the same time, a diversified pathway is emerging, with increasing emphasis on bioenergy, compressed biogas (CBG), sustainable fuels, and renewable integration, complementing the role of natural gas in the transition.

A detailed outlook on these themes to be presented by **Dr. Ajay Mathur, Former Director General, International Solar Alliance**, focusing on how India can align energy transition pathways with growth, competitiveness, and energy security imperatives.

Key Questions for Consideration

- ◆ How can India balance energy security, affordability, and decarbonisation in a volatile global environment?
- ◆ What will be the optimal role of natural gas in India's transition alongside emerging fuels?
- ◆ How can India scale green hydrogen and renewable energy while maintaining cost competitiveness?
- ◆ How should industry navigate evolving global regulatory frameworks (e.g., carbon standards, trade-linked measures)?



10:15 AM – 11:15 AM | SESSION 6 - PANEL DISCUSSION

Decoding the Sustainability Imperative in Oil & Gas — From Global Mandates to Indian Boardroom Action

Sustainability is no longer a parallel agenda for the oil and gas sector—it is rapidly becoming a core determinant of strategy, capital allocation, and long-term competitiveness.

From evolving global ESG frameworks and disclosure standards to India's net-zero 2070 commitment, the sector is witnessing a fundamental shift:

From compliance-driven sustainability to strategy-led transformation.

For energy companies, this transition is no longer optional. It is reshaping:

- ◆ Investment decisions and asset portfolios
- ◆ Access to capital and cost of financing
- ◆ Regulatory expectations and reporting frameworks
- ◆ Market positioning in a decarbonising global economy

At the same time, the sector continues to play a critical role in ensuring energy security, including efficient management of LNG supply chains and alignment with government targets for gas-based growth. However, the transition landscape in India is also evolving beyond natural gas—towards a more diversified, low-carbon energy mix.

Oil and gas companies are now increasingly exploring adjacent opportunities such as biogas CBG, green hydrogen and its derivatives, biofuels, and renewable energy integration, as part of their long-term transition strategies.

This extended session is designed to bridge the gap between global sustainability mandates and Indian execution realities.

The session opens with a high-level outlook that contextualises the global energy transition for India's oil and gas sector—examining how international climate commitments, investor expectations, and policy frameworks are translating into regulatory requirements and boardroom priorities.

The discussion then moves to a leadership panel of industry practitioners who are directly navigating this transition. The focus shifts from “why sustainability matters” to: “how it is being operationalised within energy companies today.”

Key areas of discussion include:

- ◆ How are oil and gas companies embedding sustainability into core business strategy, rather than treating it as a compliance function?
- ◆ What are the practical decarbonisation pathways for gas-focused businesses, including CGD and downstream players?
- ◆ How are companies balancing growth imperatives with emissions reduction commitments?
- ◆ What role do regulatory mandates and incentives play in accelerating—or constraining the transition?
- ◆ How is sustainability influencing capital allocation, partnerships, and technology adoption?
- ◆ How are companies leveraging emerging opportunities in CBG, hydrogen, biofuels, and renewables to future-proof their business models?

The session brings together perspectives from public sector leadership, private operators, sustainability institutions, and global advisors, offering a holistic view of the transition—from policy to execution.

At its core, the discussion recognises a critical shift:

Sustainability is no longer about managing downside risk—it is about creating long-term strategic advantage.

Panelists:

Sh. Sanjay Khanna, CMD, BPCL

Dr. Vibha Dhawan, Director General, TERI

Sh. Akshay Wadhwa, CEO, Jio BP

Sh. Maqsood Shaikh, MD, Ultra Gas

Sh. Mohit Bhatia, Director Commercial, IGL

Moderator:

Shri Ashish Kulkarni, Partner, Boston Consulting Group



11:30 AM – 1:30 PM | SESSION 7 - OUTLOOK & PANEL DISCUSSION

Reimagining Secure Energy Supply Chains in Light of New Geopolitical Challenges

The concluding session of the conference addresses the single most consequential external force shaping India's energy future—geopolitics.

India already meets ~50% of its natural gas demand through imports, and as consumption scales, LNG imports are expected to more than double by 2030. This rising dependence is unfolding in a world marked by geopolitical realignments, supply concentration risks, trade disruptions, and increasing competition for energy resources.

The core challenge, therefore, is no longer limited to securing supply—it is to build a system that is resilient under stress, adaptable to disruption, and strategically diversified.

Energy security, in this context, is not just a policy priority—it is a structural necessity.

The session opens with a strategic outlook that situates India within the evolving global energy landscape examining how geopolitical shifts are influencing:

- ◆ LNG availability and pricing dynamics
- ◆ Contracting strategies and supplier concentration
- ◆ Shipping routes, logistics risks, and infrastructure vulnerabilities
- ◆ The balance between global integration and domestic energy security

The closing panel brings together India's foremost energy leaders across upstream, power, regulation, and global LNG markets to deliberate on the next phase of India's energy security strategy.

Key questions include:

- ◆ How should India diversify its LNG sourcing portfolio in an increasingly contested global market?
- ◆ What is the optimal balance between long-term contracts, spot exposure, and strategic reserves?
- ◆ How can India strengthen domestic production and alternative fuels to mitigate import dependence?
- ◆ What investments are required in storage, regasification, and transmission infrastructure to enhance system resilience?
- ◆ How should policy frameworks evolve to align energy security with decarbonisation and market efficiency goals?

The discussion will be anchored in real-world strategic choices—reflecting both national priorities and corporate decision-making imperatives.

As the final session, it is designed not just to synthesise insights from the conference, but to elevate them into a forward-looking agenda.

Outlook by:

Sh. Anish De, Partner & Global Leader, KPMG

Panelists:

Dr. Anil Kumar Jain, Chairperson, PNGRB

Sh. Arun Kumar Singh, Chairman and CEO, ONGC

Sh. Gurdeep Singh, CMD, NTPC

Sh. B. C. Tripathi, Operating Partner-Energy, Essar (Former CMD, GAIL)

Moderator:

Shri Anish De, Partner & Global Leader, KPMG



INDRAPRASTHA GAS

IGL: India's Future Foreword Energy



Leading India's clean energy landscape

IGL believes in a customer-centric approach and provides clean energy solutions through innovative technology and diversification in India and abroad. IGL is playing a crucial role in the emerging scenario, in augmenting its compression capacity by adding new stations and investing in new-age fuels like Liquefied Natural Gas (LNG), Compressed Bio Gas (CBG) and Hydrogen to address changing energy needs.

IGL's core deliverables include:

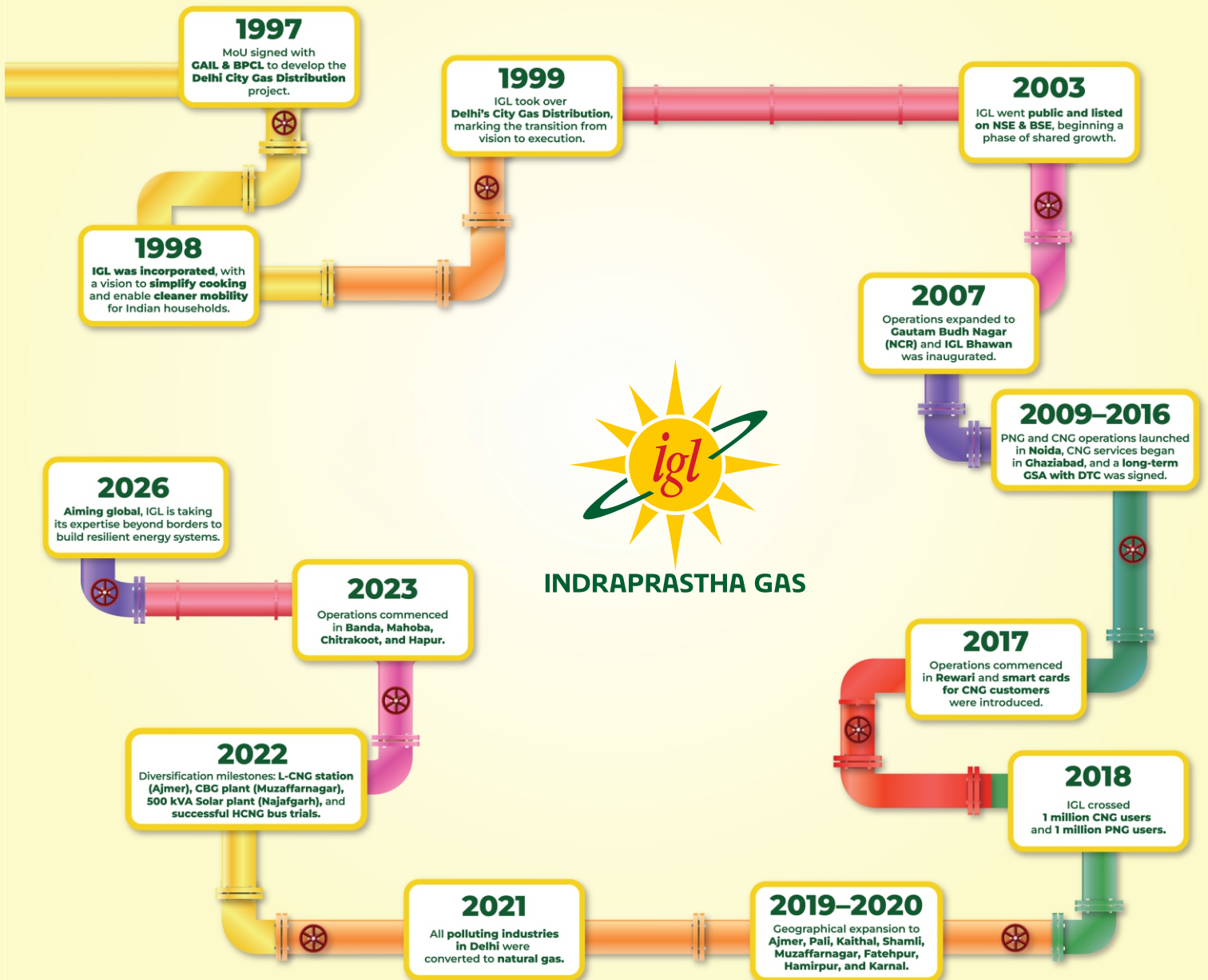
- IGL is a leading provider of clean and convenient Piped Natural Gas (PNG) and Compressed Natural Gas (CNG).
- IGL offers various services to meet the needs of Residential, Commercial and Industrial customers.
- IGL is a growing company, strongly committed to safety, innovation, and customer satisfaction.



INDRAPRASTHA GAS LIMITED

IGL

Glorious Journey of 27 years



**India's largest CNG
Distribution Company**

CNG ke saath **Non stop Zindagi**

Switch to CNG (Compressed Natural Gas)

Reliable Convenient Economical

Global winds may shift,
but our flame stays stable.

PNG ke saath **Non stop Zindagi**

Switch to PNG (Piped Natural Gas)

Domestic PNG is the silent constant

Even in the current changing world

Keeping your kitchen up and running in every situation...

We are always with you.

PNG ke saath **Non stop Zindagi**

PNG Drive 2.0
January 1, 2026 to March 31, 2026

India's kitchens keep running.

Even during supply adjustments, domestic PNG supply remains uninterrupted.

PNG ke saath **Non stop Zindagi**

PNG Drive 2.0
January 1, 2026 to March 31, 2026

No Booking, Only Cooking

Safe.
Reliable.
Continuous.

PNG eliminates storage, handling & fuel loss.

Har Ghar PNG **Har Gaadi CNG**

PNG Drive Non stop Zindagi
January 1, 2026 to June 30, 2026



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