

India Oil and Gas Report Q1 2016

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Abstracts

Includes 3 FREE quarterly updates

BMI View: Despite incremental improvements in the country's licensing and regulatory regime, India's oil and gas production outlook remains comparatively bearish. Small field developments will buoy production in the mid-term, but are insufficient to reverse a longer-term trend of decline. Low domestic gas prices and weak international crude prices pose major headwinds to growth and will continue to disincentivise investment in the upstream. Prospects in the downstream segment are better, due to a strong fuels consumption outlook, supportive government policy and continued price deregulations.

Key trends and latest updates for the Indian oil & gas sector are:

Prime Minister Narendra Modi's government is enacting incremental reform to improve the country's wider business environment. Key reforms include a streamlining of bureaucratic procedure and an increase in companies' operational flexibilities.

The government has also enacted various domestic pricing reforms, including an increase in the domestic gas price cap and the liberalisation of diesel prices.

Unconventional and deepwater resources, which account for the bulk of the prospective resource base, are subject to a separate pricing formula, which has yet to be determined. Interest in the NELP-X licensing round rests heavily on how this formula is calculated.

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