

India Oil and Gas Report Q3 2016

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Abstracts

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BMI View: The Indian government's decision to raise the natural gas price for undeveloped discoveries in hard-to-access areas, alongside regulatory improvements, will spur exploration and offer upside to our production forecasts. The outlook on the refining sector remains broadly bullish, supported by strong forecast consumption growth, supportive government policies and continued market deregulation. The natural gas and LNG sector remains restrained due to limited domestic production, insufficient import capacity and delays in building out infrastructure.

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

The Indian government's decision to raise the natural gas price for undeveloped discoveries in undeveloped deepwater, ultra deepwater and high temperature-high pressure areas, alongside regulatory improvements, will spur exploration and help unlock resources in a number of prospective plays, including those in the Krishna-Godavari basin.

The Hydrocarbon Exploration Licensing Policy (HELP) is the new uniform licensing system that covers all hydrocarbons under a single and policy framework, replacing the New Exploration Licensing Policy (NELP).

However, changes in the licensing terms from a profit sharing to a revenue sharing structure could dissuade some international oil companies from investing. A revenue sharing contract poses higher risk and entails a significantly longer period of cost recovery.

Lower fuels subsidisation, rising consumption and a fall in global crude prices

will offer strong support to India's refining sector over the coming years. State-owned refiners, which dominate the sector, will be able to secure cheaper crude oil cargoes and achieve better financial performance after the government allowed them to implement their own crude oil import policies.

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