India Oil and Gas Report Q2 2015

Description: BMI View: The outlook on India's upstream sector remains chequered; continued reform of fiscal, licensing and regulatory terms under the Modi-led government offer substantial upside risk to exploration and production. However, the overhang of convoluted and inefficient bureaucratic procedures, heavy state intervention, unfavourable pricing terms and policy discontinuity continue to weigh on developments in the sector. The outlook for the downstream is more positive, buoyed by strong refining capacity expansion, ongoing domestic fuel price liberalisation, the lower cost of crude feed and strong forecast consumption growth.

The main trends and developments we highlight for the Indian oil & gas sector are:
- The Modi-led 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 looked to enact various domestic pricing reforms, including an increase in the domestic gas price cap and a reduction in diesel and petrol subsidies.

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Indian Oil Corporation (IOC)
Reliance Industries
Hindustan Petroleum Corporation (HPCL)
Bharat Petroleum Corporation Ltd (BPCL)
Gas Authority of India (GAIL)
Cairn India
Essar Oil
Gujarat State Petroleum Corporation
Petronet LNG

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Asia Oil And Gas Regional Overview
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