

Investor Index & Market Survey

EYEEON
Global Investment Intelligence

In Partnership with:

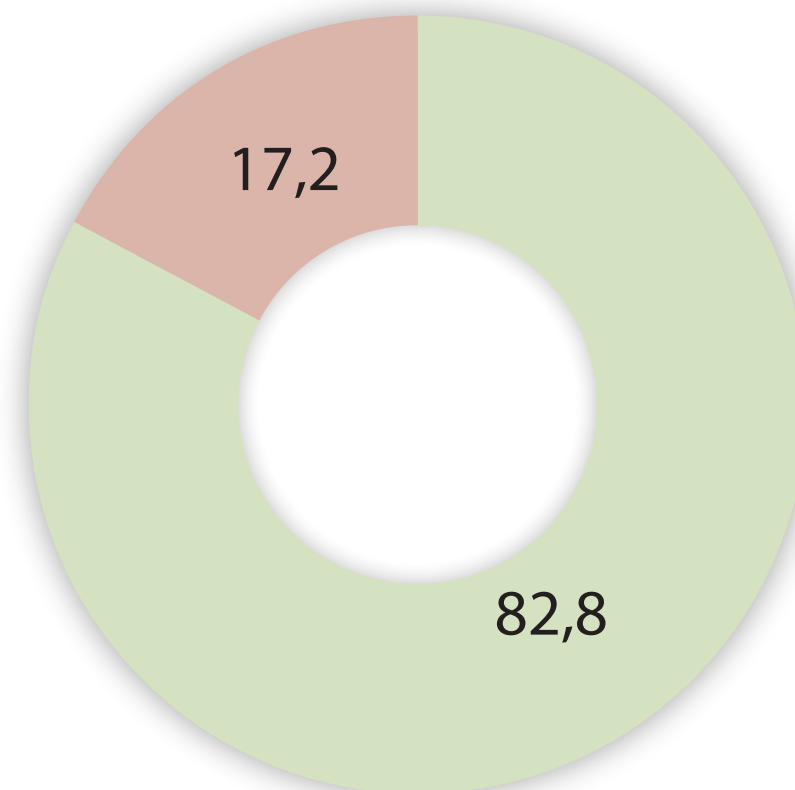


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Investment

Overall how do you rate the current investment conditions in India's hydrocarbons market?

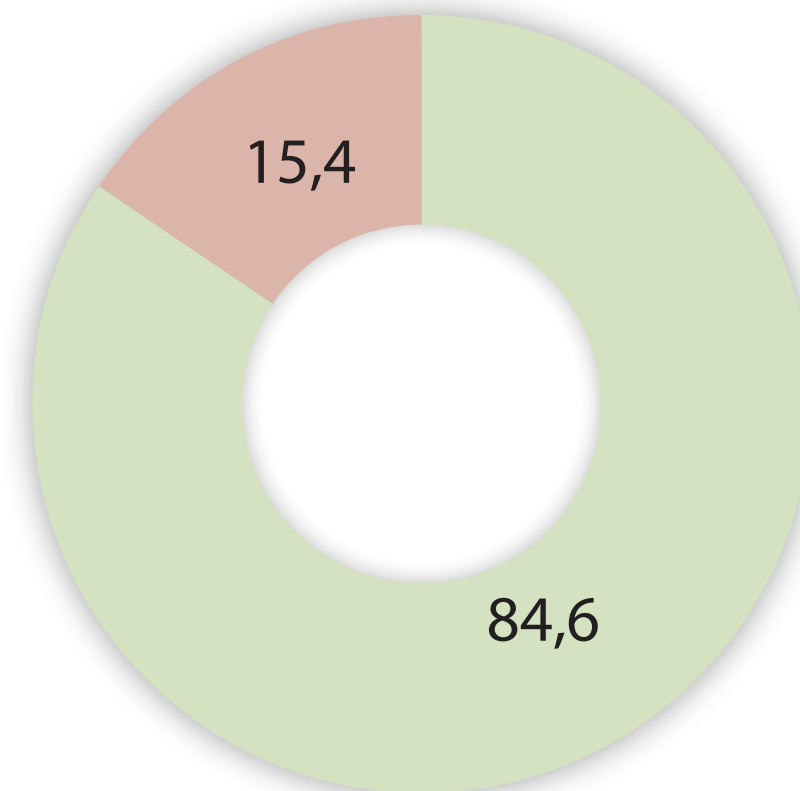
- Positive
- Negative



Investment

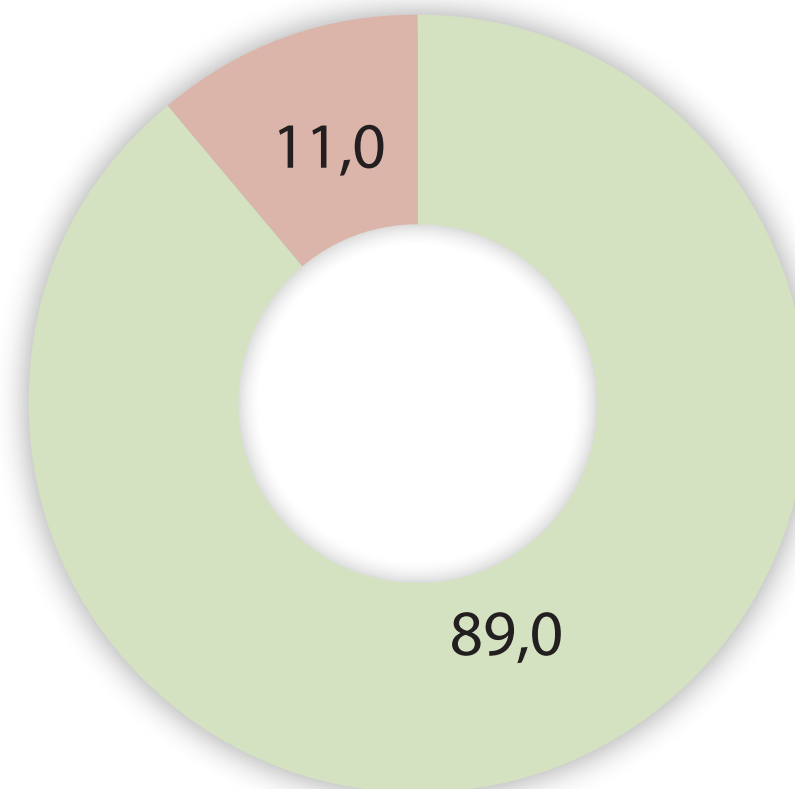
What are your expectations for the investment conditions over the short term (next 12 months) in India's hydrocarbons market?

- Positive
- Negative



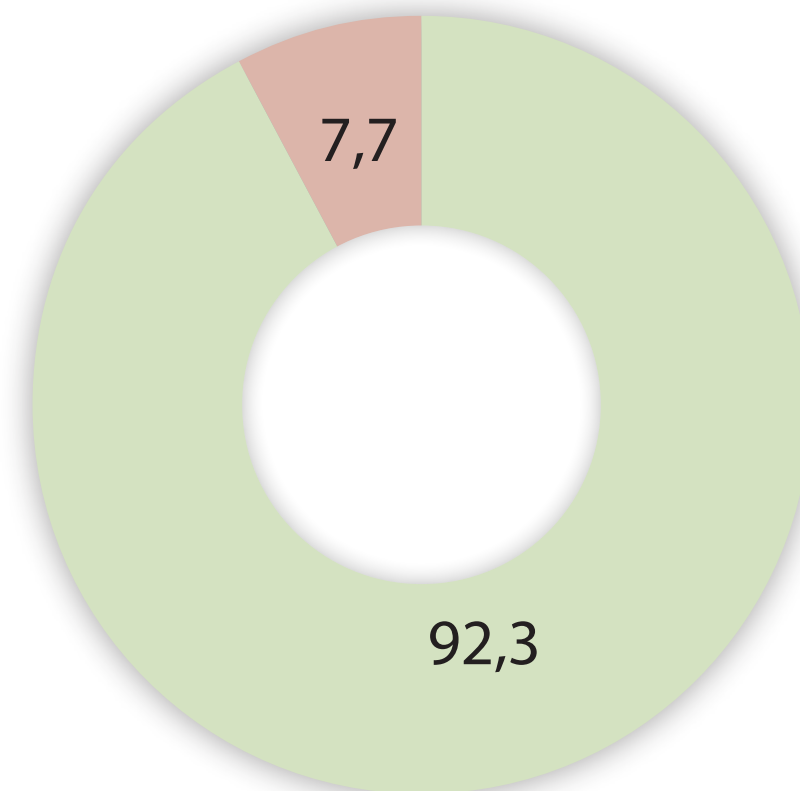
Do you think that mid term opportunities will exist to invest in India's oil & gas sector?

- Positive
- Negative



Do you think that long term opportunities will exist to invest in India's oil & gas sector?

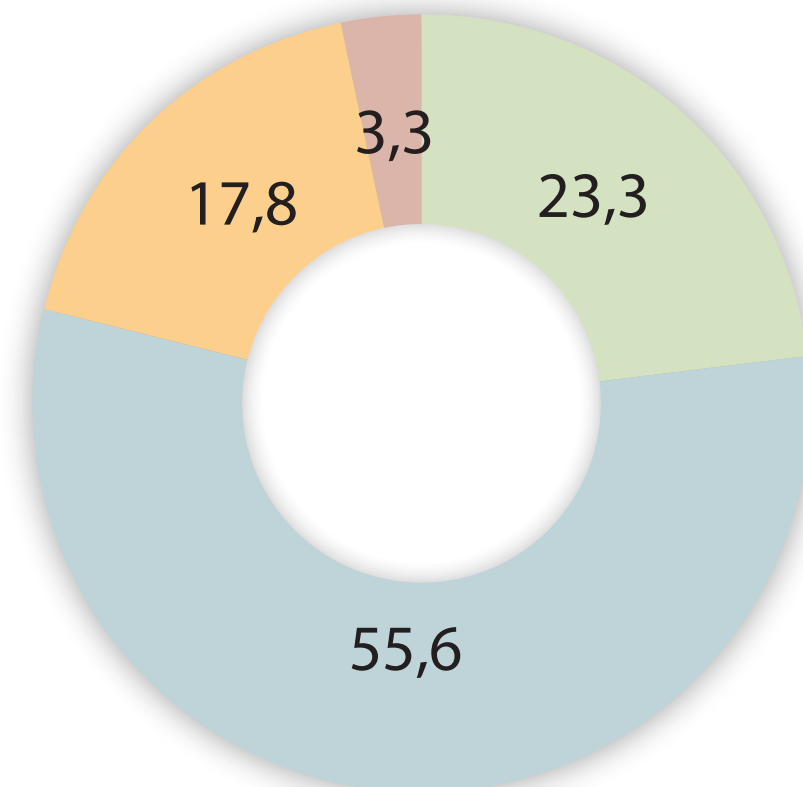
- Positive
- Negative



Investment

How would you categorize your overall investment and growth strategy in India?

- Very aggressive
- Moderately aggressive
- Moderately conservative
- Conservative

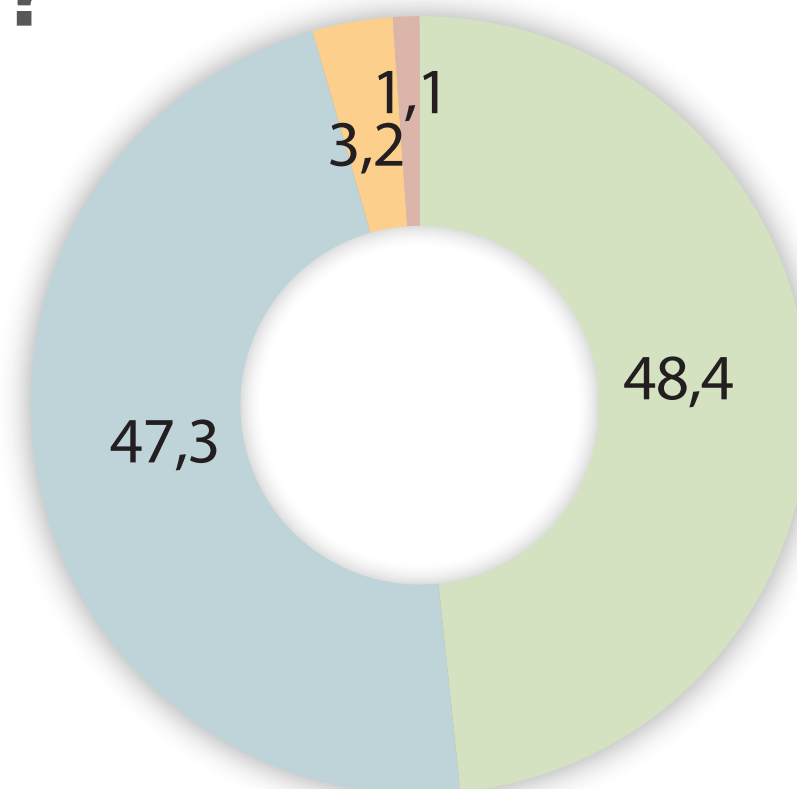


Policies

Policies

How do you see the change in recent policies of the government vis-à-vis the oil and gas industry?

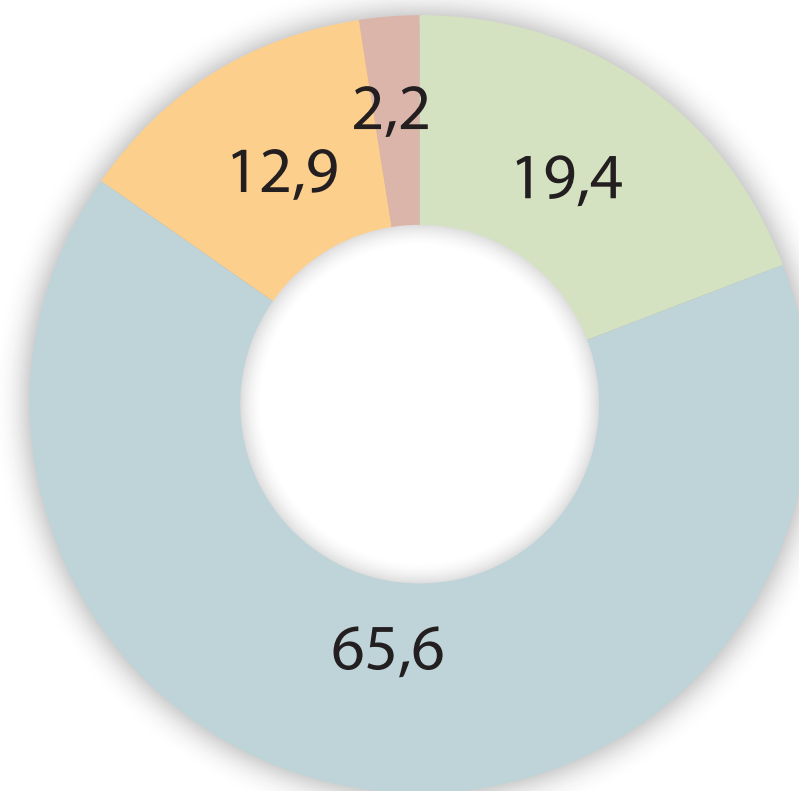
- Pro-business
- Pro-business, but restrictive
- Anti-business, but accommodating
- Anti-business



Policies

How would you rate the change in level of transparency in India's hydrocarbons market in view of recent policy changes?

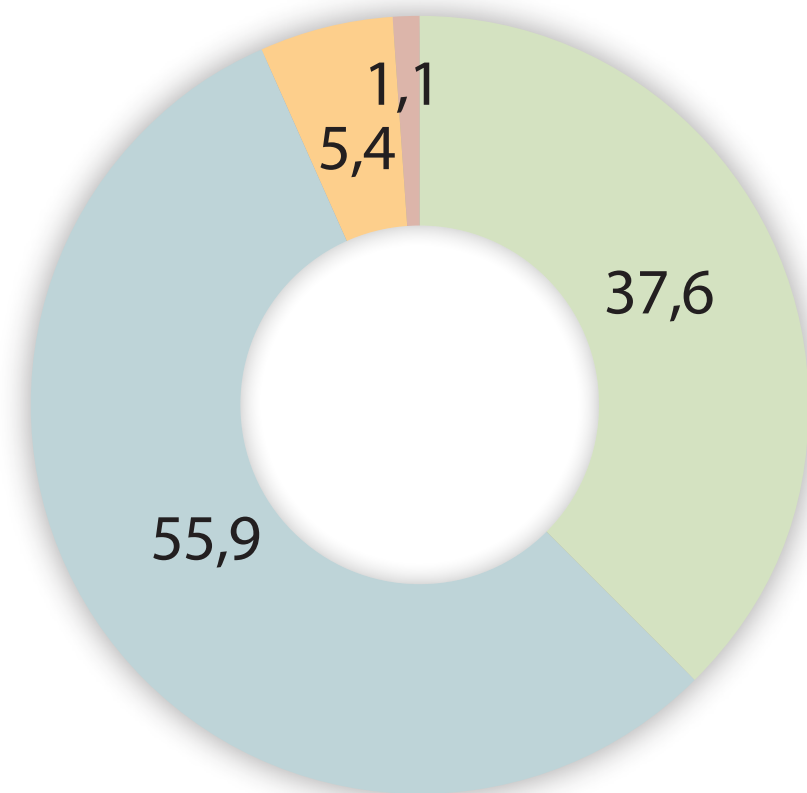
- Very transparent
- Transparent
- Not transparent
- Corrupt



Policies

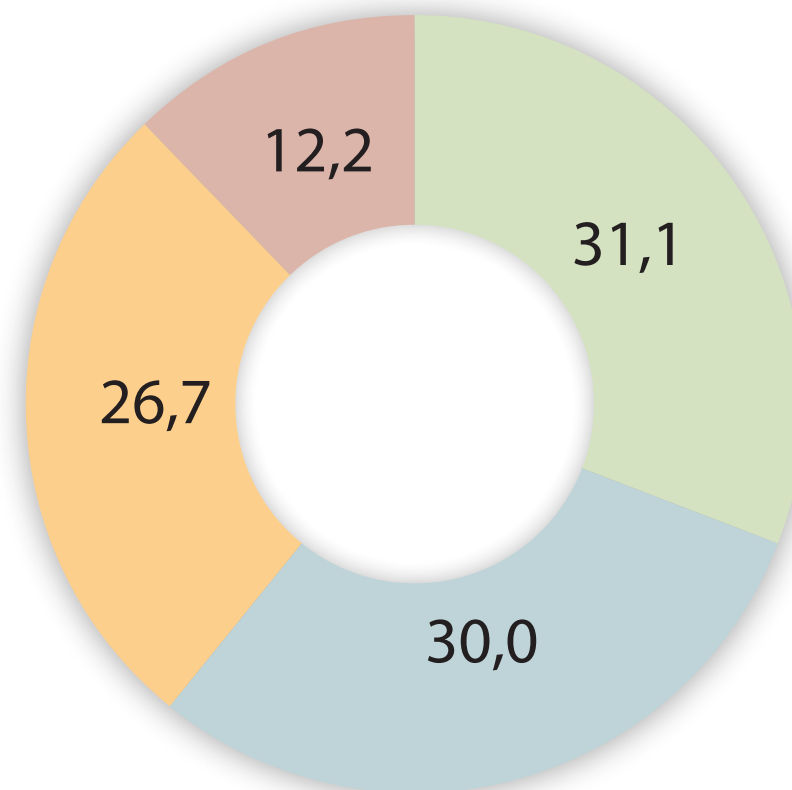
How do you expect the new policies impacting the growth of India's hydrocarbon sector in the next five years?

- Significant growth
- Moderate growth
- Moderate decline
- Significant decline



What can bring in more investment in India's hydrocarbon sector?

- Market driven commodity prices
- Ease of granting licenses and approvals
- Fiscal stability and reduced bureaucracy
- India's oil & gas market should open to global competitiveness

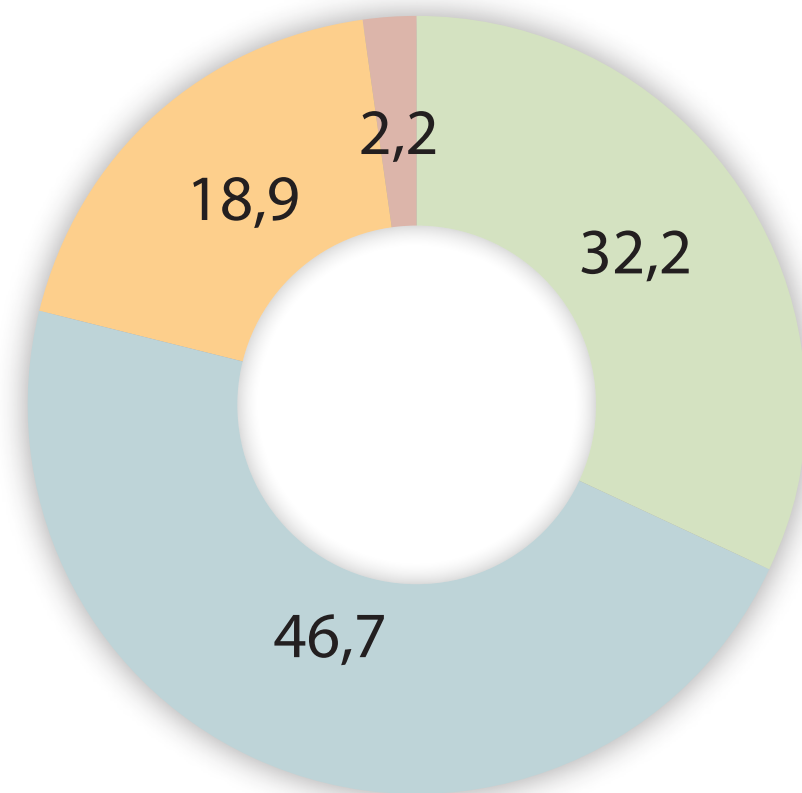


Upstream

Upstream

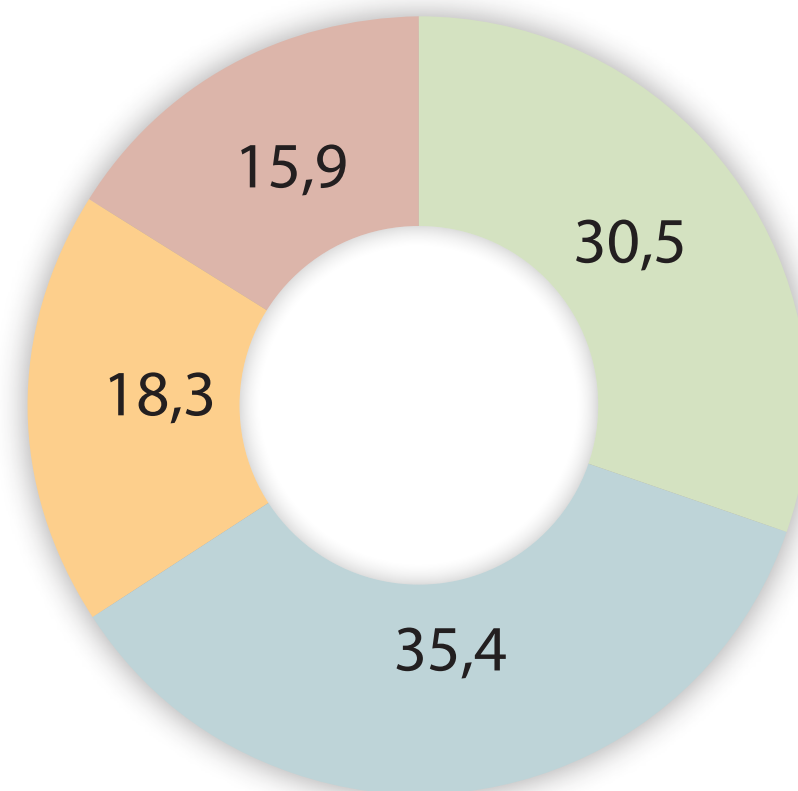
How receptive are you to the shift from production/profit-sharing contracts to revenue-sharing contracts?

- Very receptive
- Receptive
- Moderately receptive
- Not receptive



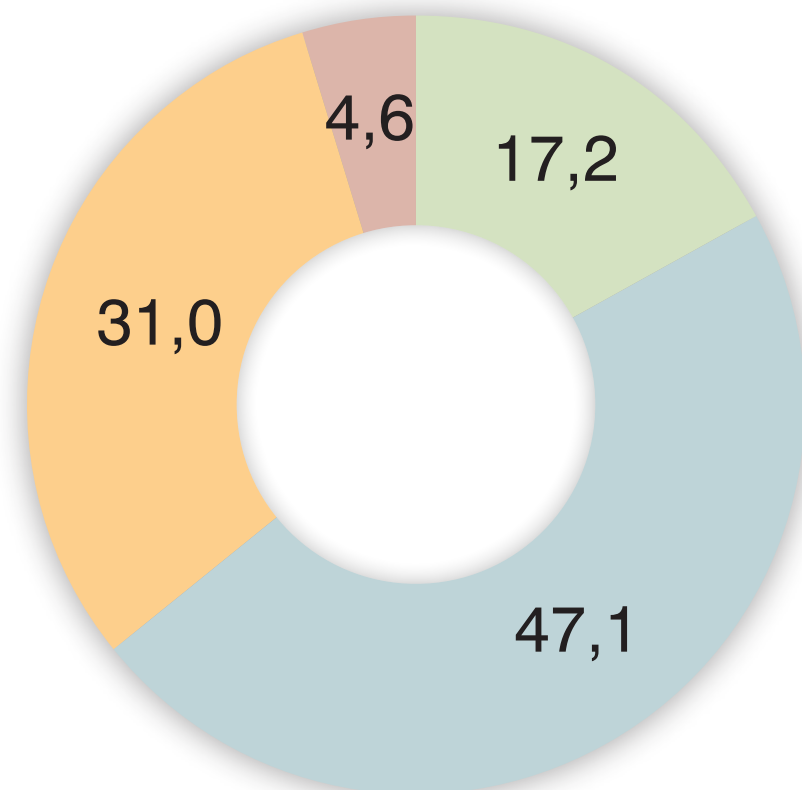
What are the main advancements brought about by the HELP?

- The shift from production/profit-sharing to revenue-sharing contracts
- The introduction of the open acreage licensing policy
- The pricing and marketing freedom for gas produced from deepwater and HPHT fields
- The single license for all types of hydrocarbons



What degree of success do you anticipate for the forthcoming small discovered fields bidding round?

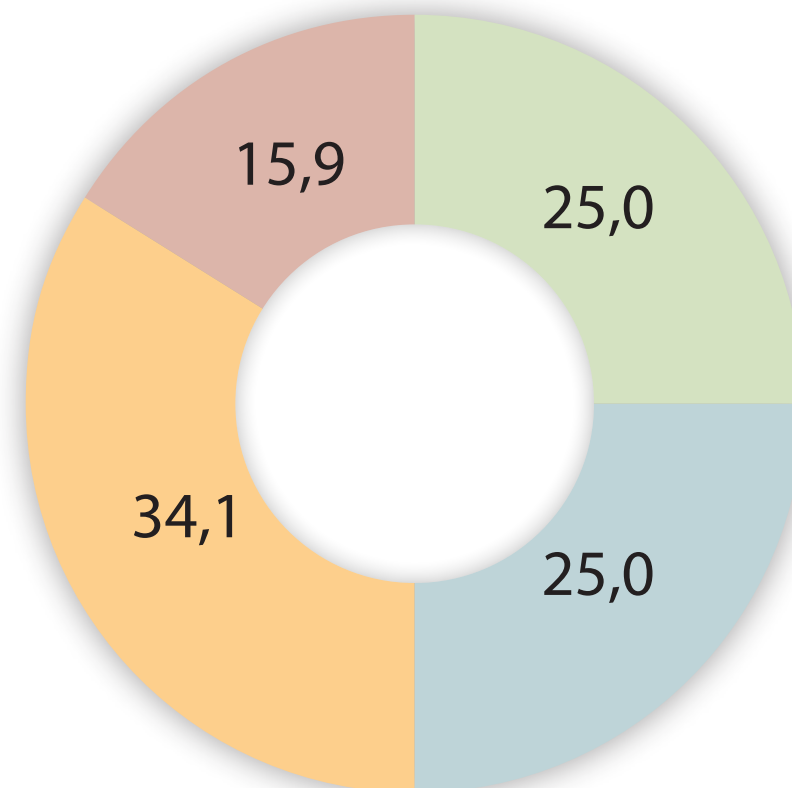
- Very successful
- Successful
- Moderately successful
- Limited



Upstream

What do you think should be the primary focus of the government and the industry to reduce India's hydrocarbons import dependency by 10%?

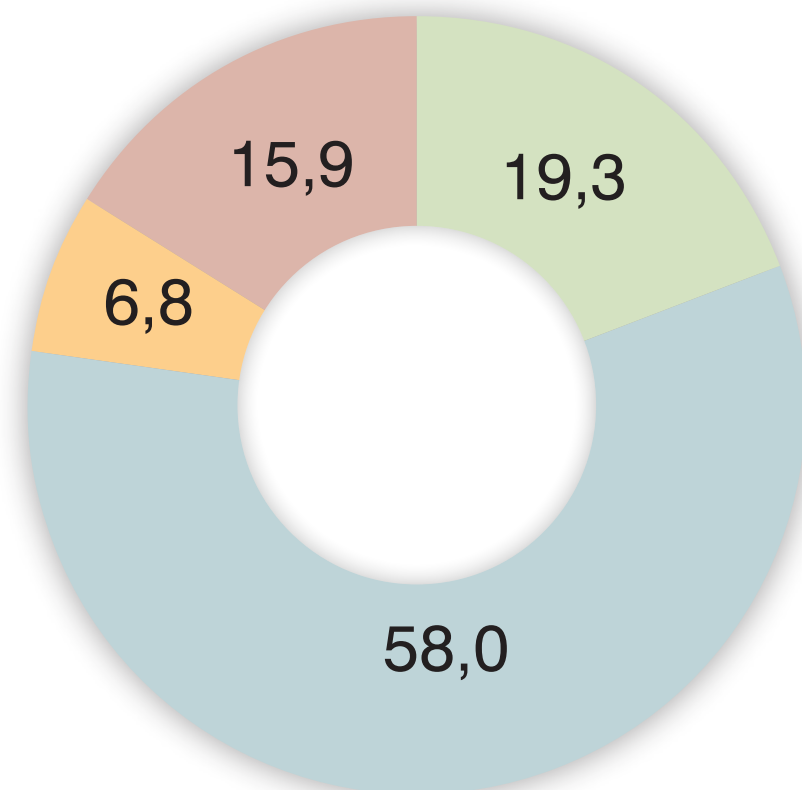
- Encouraging exploration of India's sedimentary basins
- Increasing India's E&P portfolio and investments abroad
- Boosting private investments in the domestic E&P sector
- Decreasing consumption by switching to alternative fuels and sources of energy



Gas

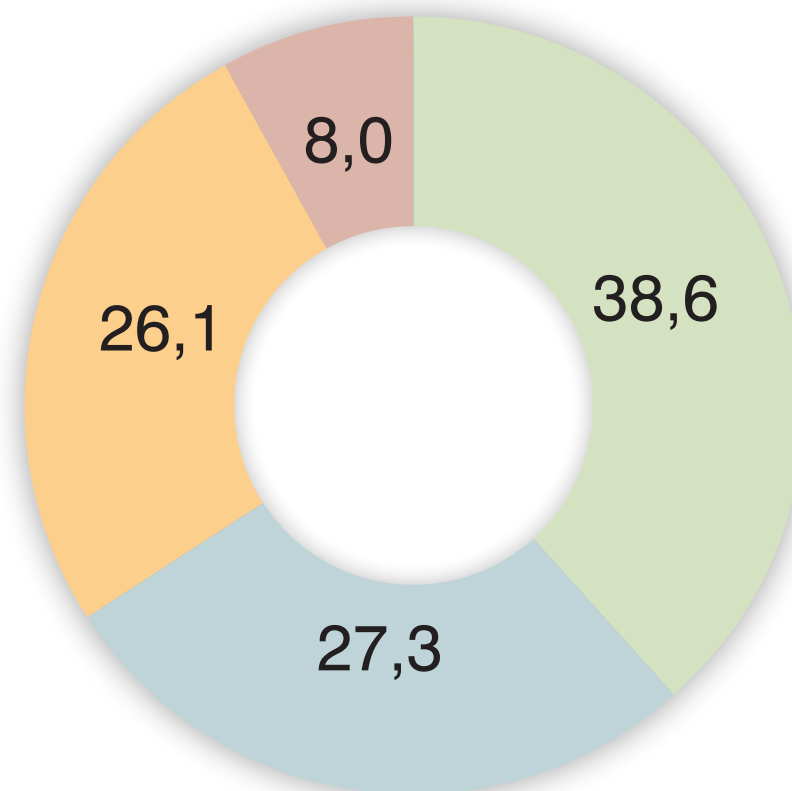
What is the most efficient way to curb CO2 emissions in India?

- Encourage the use of biofuels
- Further encourage the country towards a gas-based economy
- Develop the electric cars industry
- Increase energy efficiency



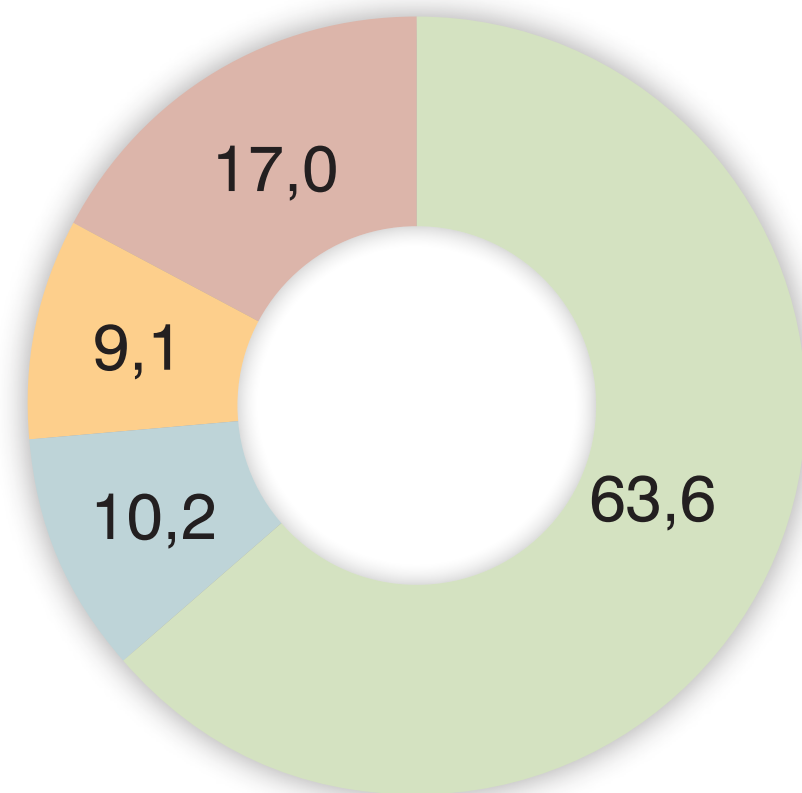
How do you assess India's gas pricing reforms since October 2014?

- Will boost overall investments in the sector
- Help developing deepwater and HPHT areas on fast-track
- Increase gas share in total energy mix in India
- No change expected



Which of the following in your view would accelerate the gas usage in India at par with global average?

- Development of Infrastructure
- Create new demand centres
- Thrust on environmental issues
- Gas pricing aligned to markets



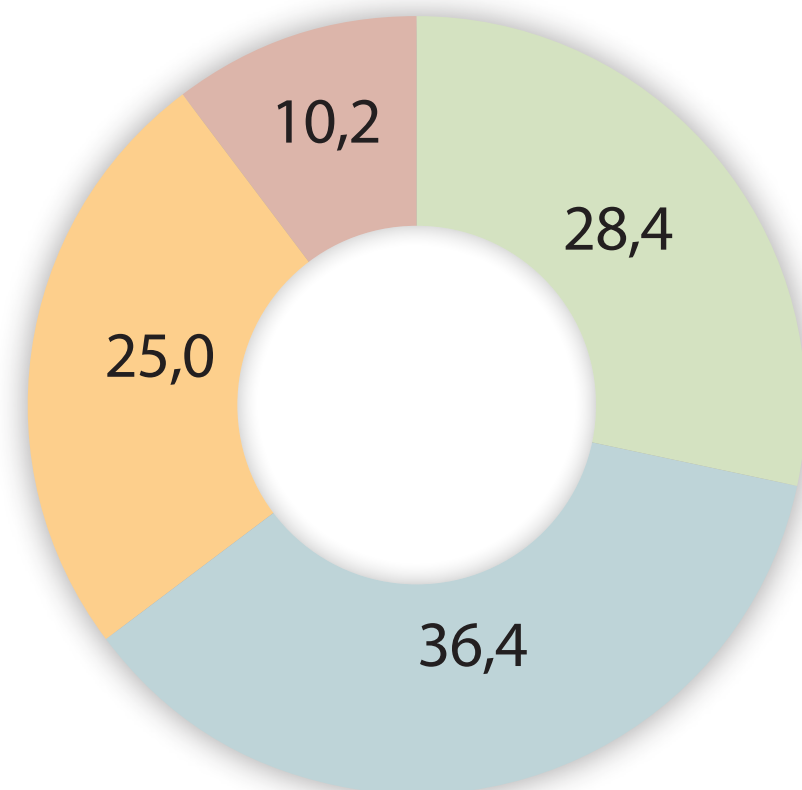
Downstream

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Downstream

What is the main way that diesel deregulation is impacting the market?

- OMCs can increase investments in both existing and new assets on account of no under-recoveries
- Reduced subsidy burden on Government, allowing more spending on infrastructure and social sector
- Opens up the sector to competition from private retailers
- Helping bridge gap of petrol & diesel prices, thereby curbing diesel consumption

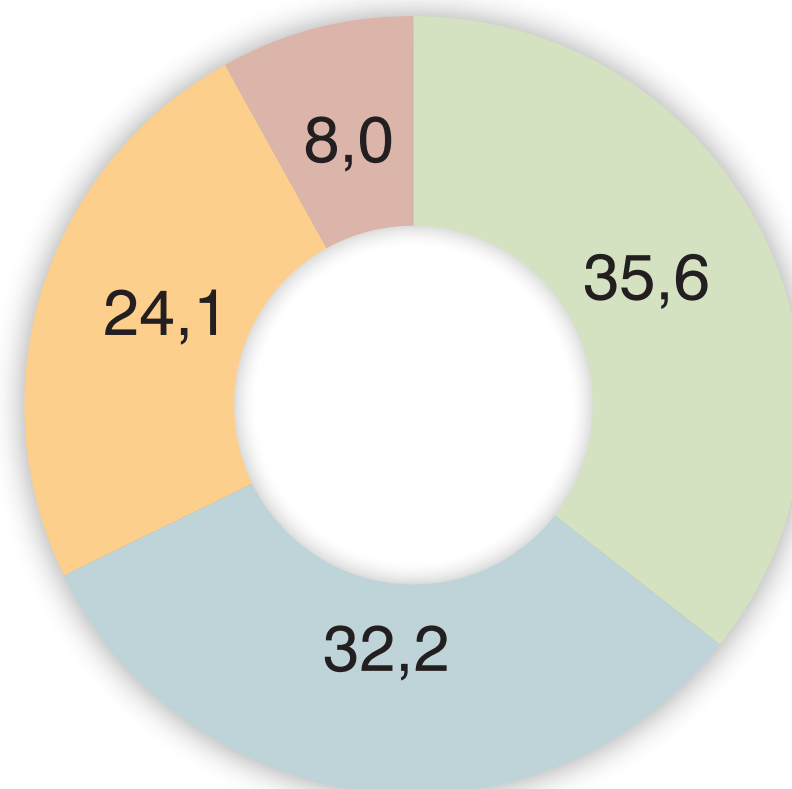


Technology

Technology

What is the best way to increase technology deployments in India's hydrocarbon sector?

- Increase spending on R&D in Hydrocarbon sector
- Further develop cooperation with international services providers
- Increase collaboration with international research and educational institutions
- Encourage development & deployment of indigenous technologies



Start-Ups

Start-Ups

How would you rate the ease of starting an oil and gas business in India?

- Very easy
- Easy
- Difficult
- Extremely difficult

