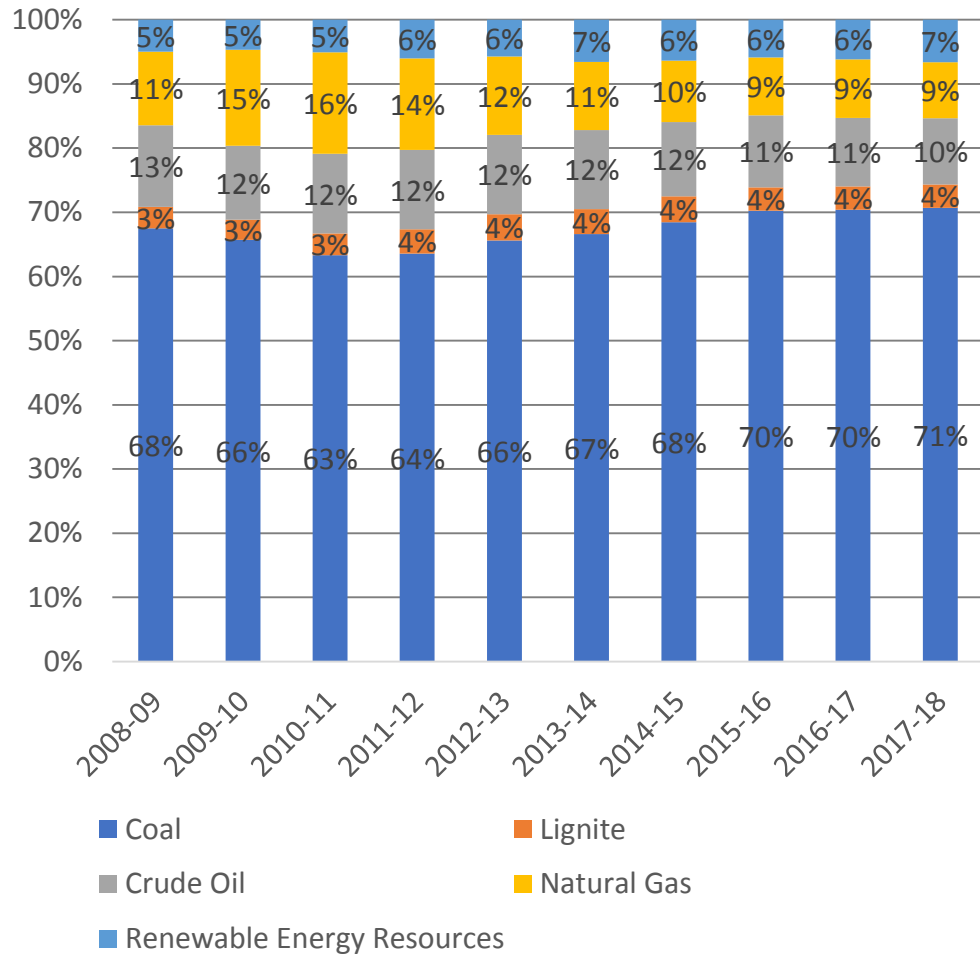


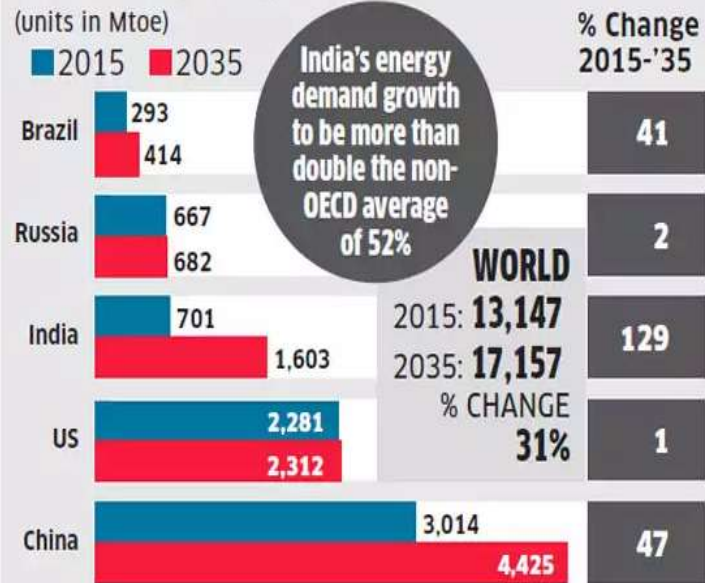
Energy Production and Consumption Trends

Energy/Power Production from Various Sources



At 129%, India's energy consumption growth to be highest among major economies

Total primary energy consumption (units in Mtoe)



Oil imports to rise by 165% and account for 56% of the increase in imports, followed by increasing imports of gas (173%) and coal (105%)

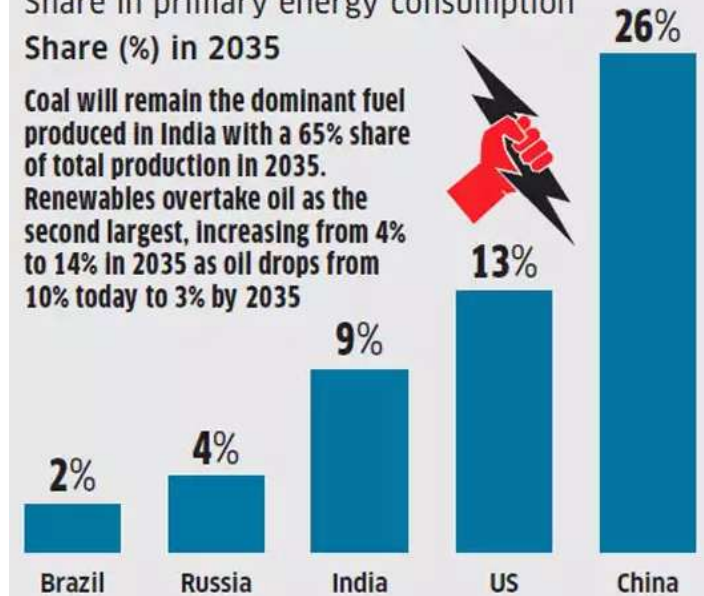
By 2035, India's energy intensity of GDP will be 36% lower than today's level, similar to the non-OECD average

Source: BP Energy Outlook, Agencies

India's share of global energy demand to rise to 9% by 2035

Share in primary energy consumption
Share (%) in 2035

Coal will remain the dominant fuel produced in India with a 65% share of total production in 2035. Renewables overtake oil as the second largest, increasing from 4% to 14% in 2035 as oil drops from 10% today to 3% by 2035



Change in consumption in the next 20 years
Change (%), 2015-2035

	Brazil	Russia	India	US	China	World
Oil*	15	15	121	-17	61	15
Gas*	43	-2	162	25	186	38
Coal	-16	-22	105	-50	-2	5
Nuclear	149	17	317	-2	644	59
Hydro	37	14	97	15	38	42
Renewables^	157	>1000	712	182	673	291

A Snapshot : Oil and Gas Sector

Oil Production

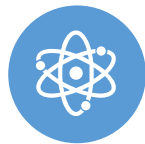
India's oil production is going to be go down as we reach 2035. Due to ongoing investment towards renewable resources, the share of energy from the same would go from 4% to 14%

Oil and Gas Sector

Oil and Gas sector is an equipment heavy sector and doesn't function as a mass employer. The industry has remained more or less the same over last 50 years in terms of core practices

Oil and Gas Sector Value chain and Ecosystem

From exploration to offshore practices to refineries, the new and upcoming requirements in technology and skills required in this ecosystem are constantly fed back to educational institutions to update the skill development process.



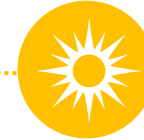
Oil Consumption

India's oil import will rise by 156%, and domestic oil production for fuel will drop down to 3% of total fuel production.



Government Initiatives

Many government initiatives are coming up though no organized visible actions have been taken ip in relation to building competencies



Develop and Retain Talent

Major players are trying to retain and develop talent through upskilling though this method is more prevalent in global markets

