

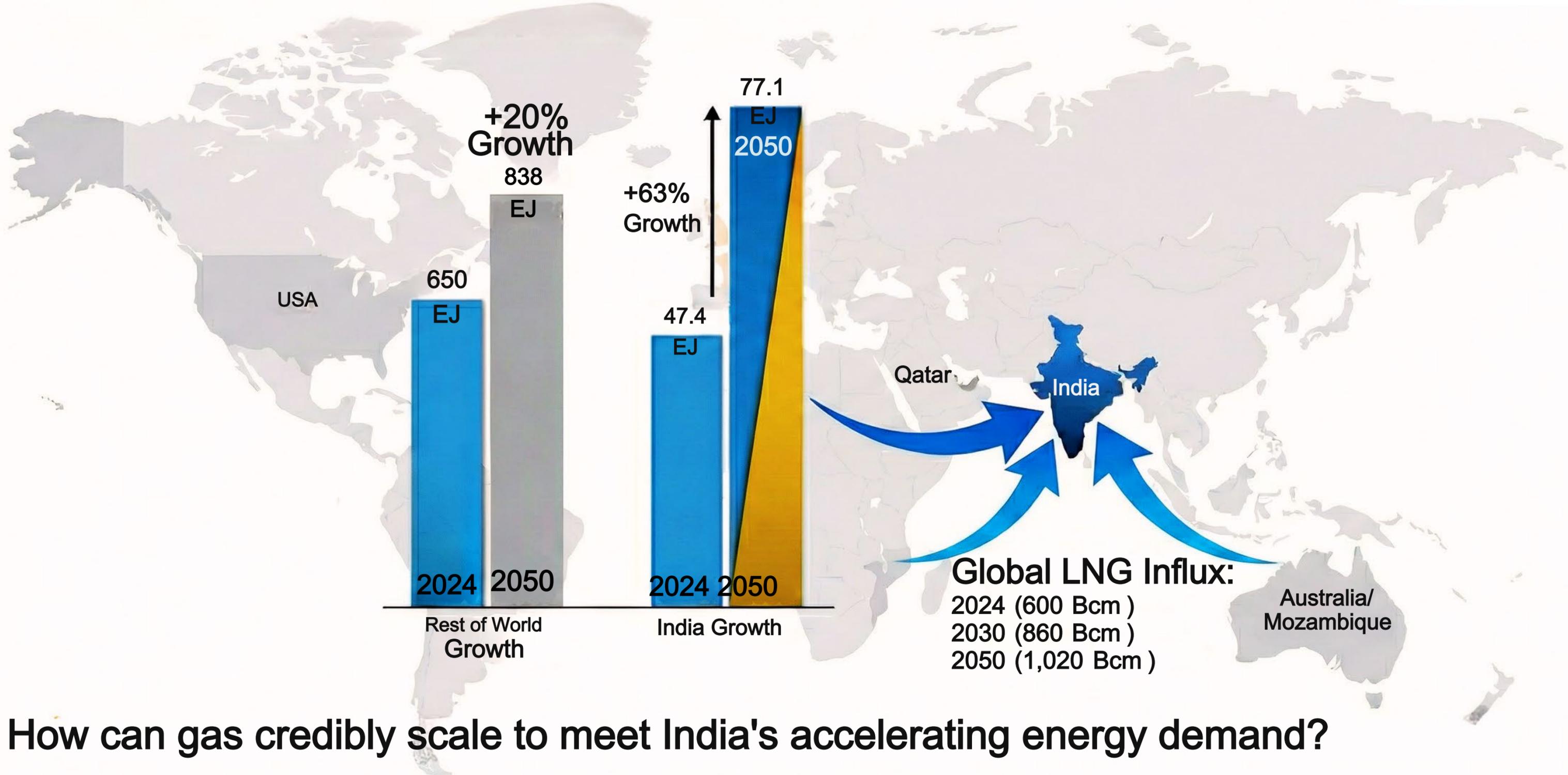
IGNITING THE FUTURE:

India's Strategic Roadmap to a 15% Gas Economy

Transforming Power, Transport, Industry, and Cities for a Sustainable & Secure Energy Future



India Will Add More Energy Demand by 2050 Than Most Economies Consume Today



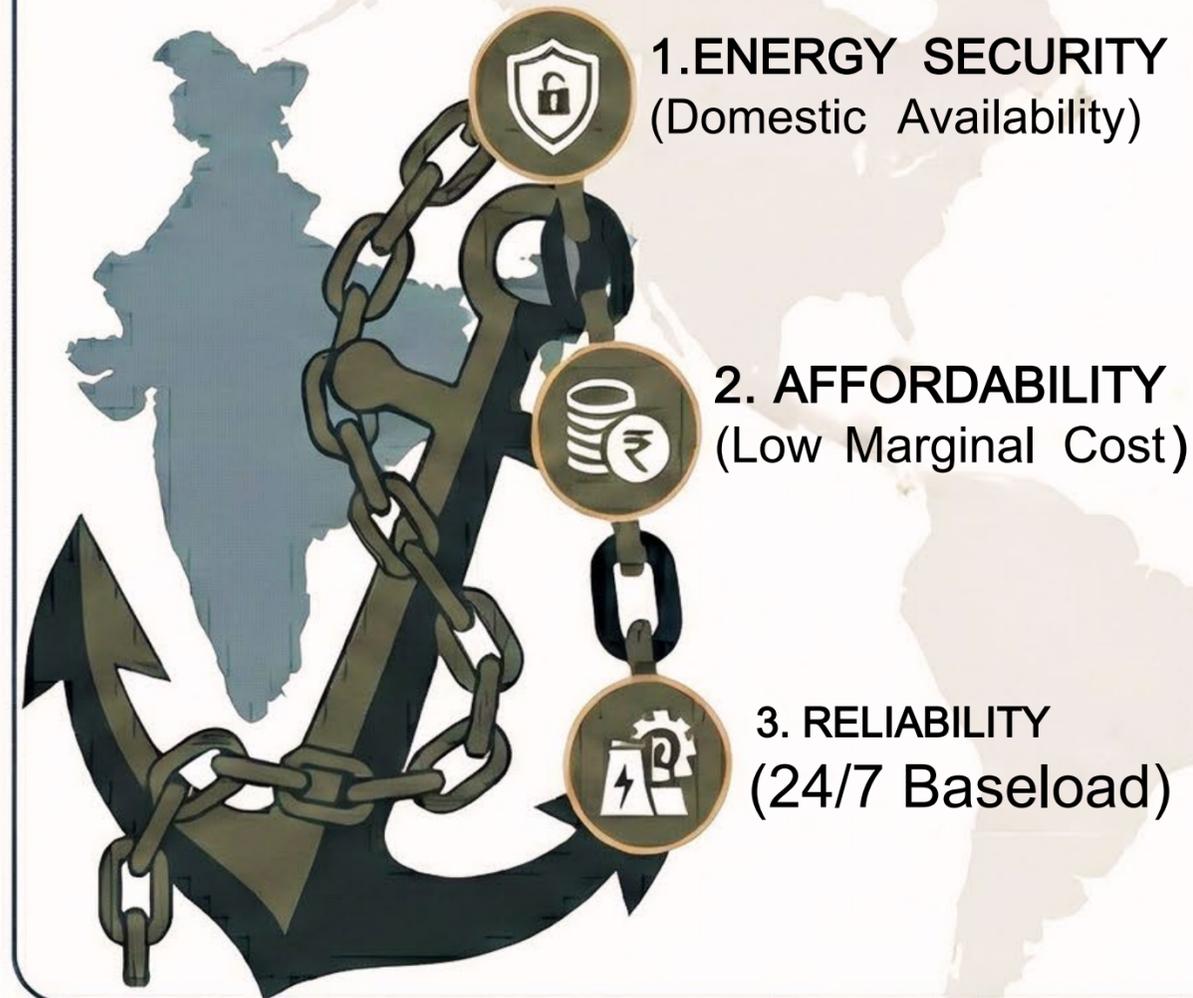
How can gas credibly scale to meet India's accelerating energy demand?

Source: IEA WEO 2025 (CPS Scenario)

Coal will continue to be the Dominant Force

Balancing demand imperatives with Security, Affordability and Reliability

CURRENT REALITY The Coal Anchor

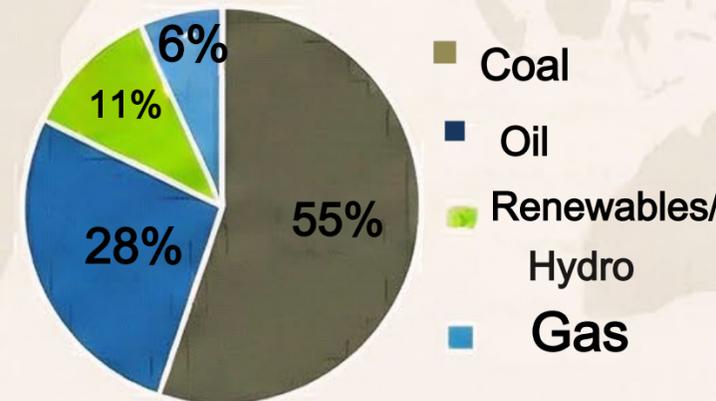


THE FUTURE IMPERATIVE: Building a Stable Transition Bridge

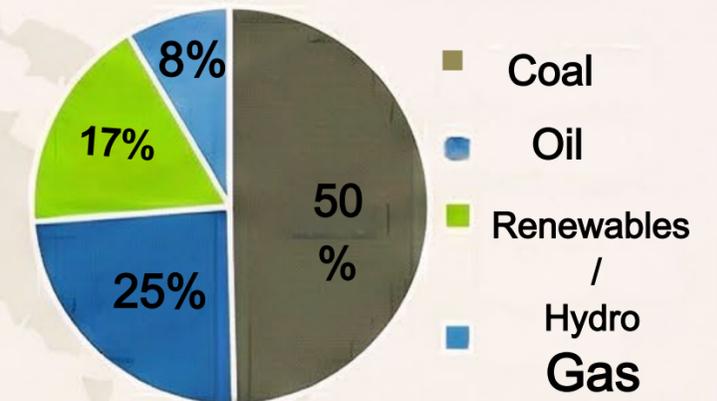


The Challenge: Moving away from coal's pollution while protecting the economy from energy price spikes.

India's Energy Mix 2025



India's Energy Mix 2030

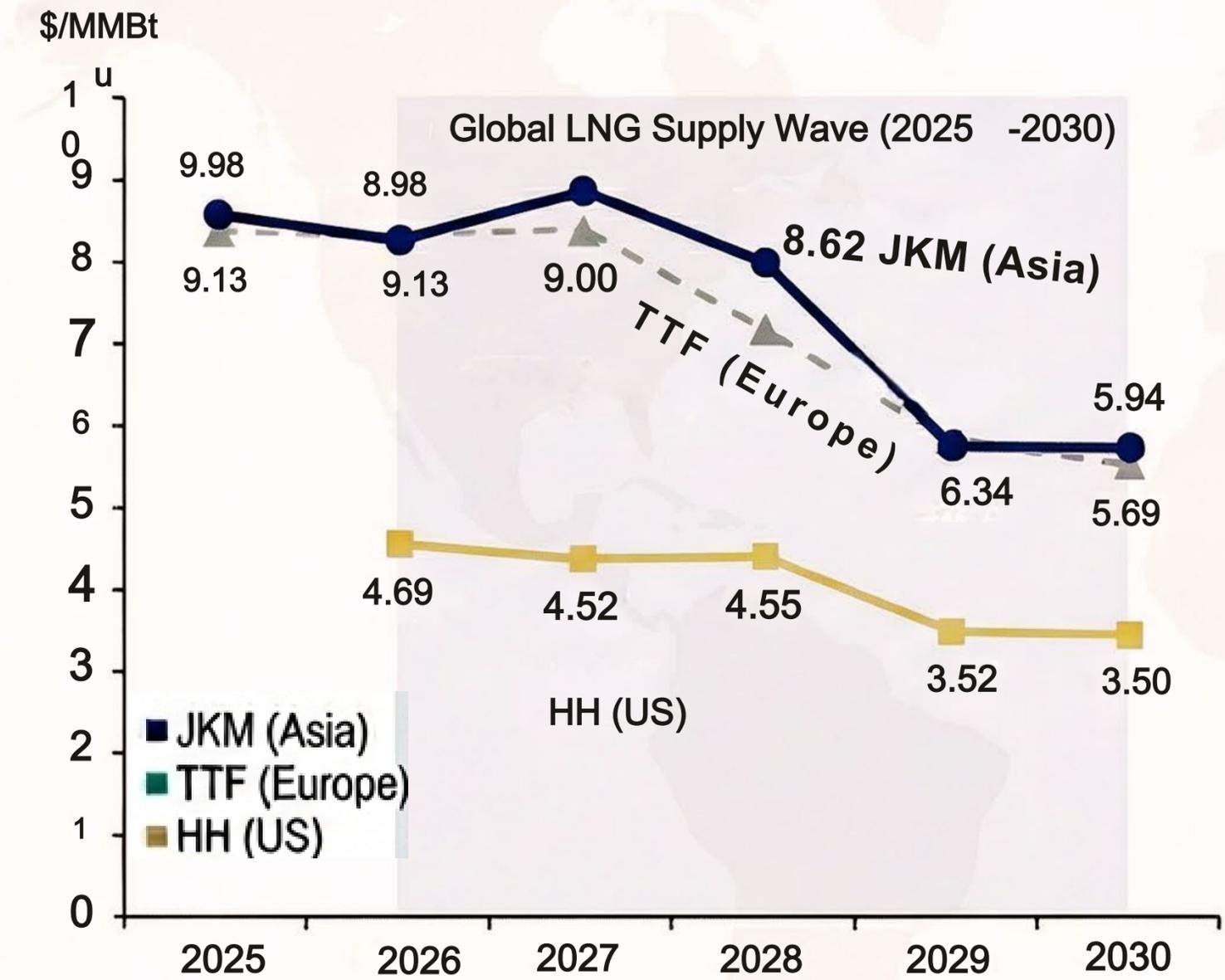


How can we leverage the current coal anchor while urgently constructing the stable, de-risked gas bridge for a secure future?

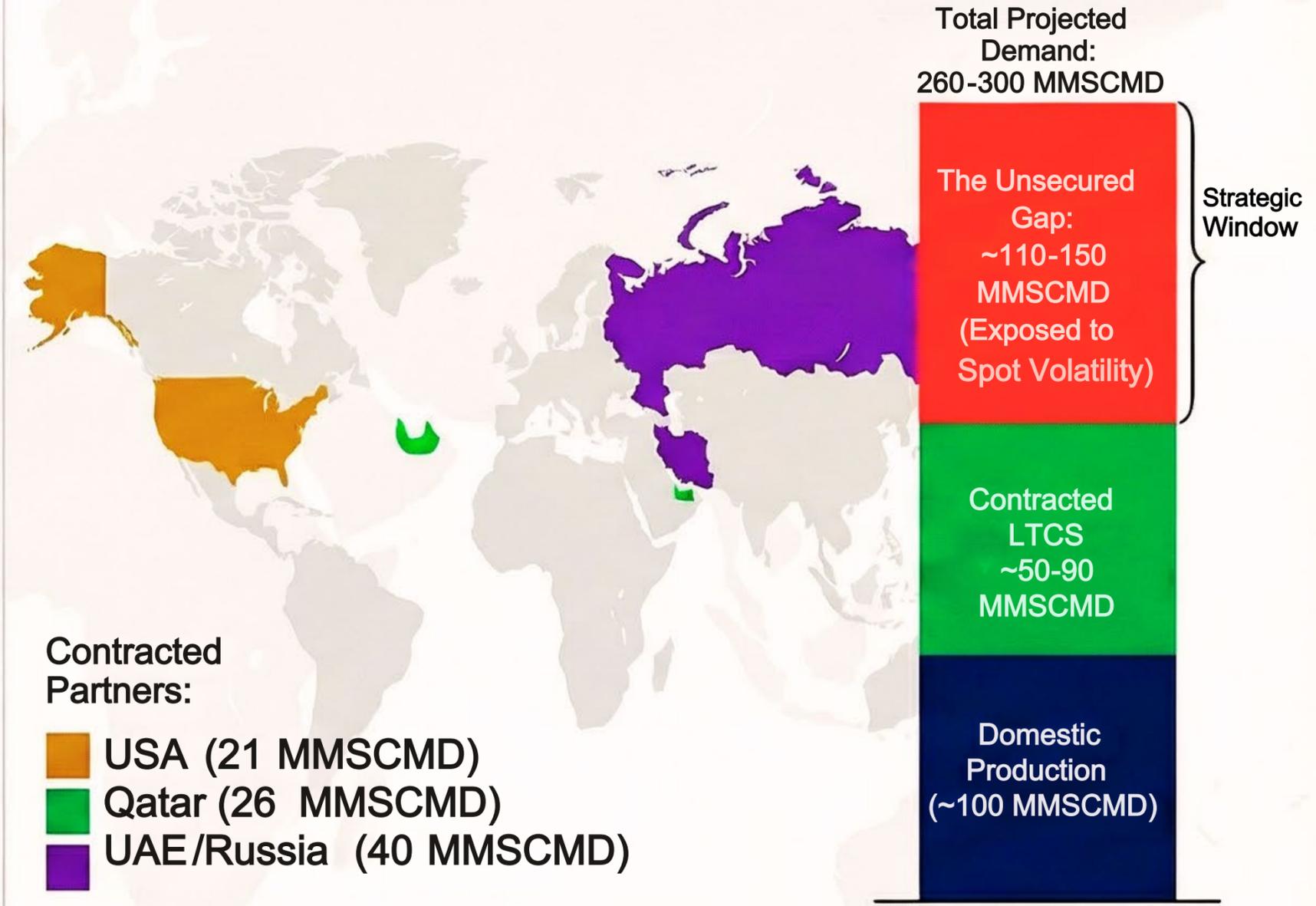
-risked gas bridge

SECURING THE FUTURE WITH DIVERSIFIED GAS AND RISK MANAGEMENT

Closing the Supply Gap: Securing Long-Term Affordability in a Softening Global Market
 Global Gas Price Convergence (2025 -2030)



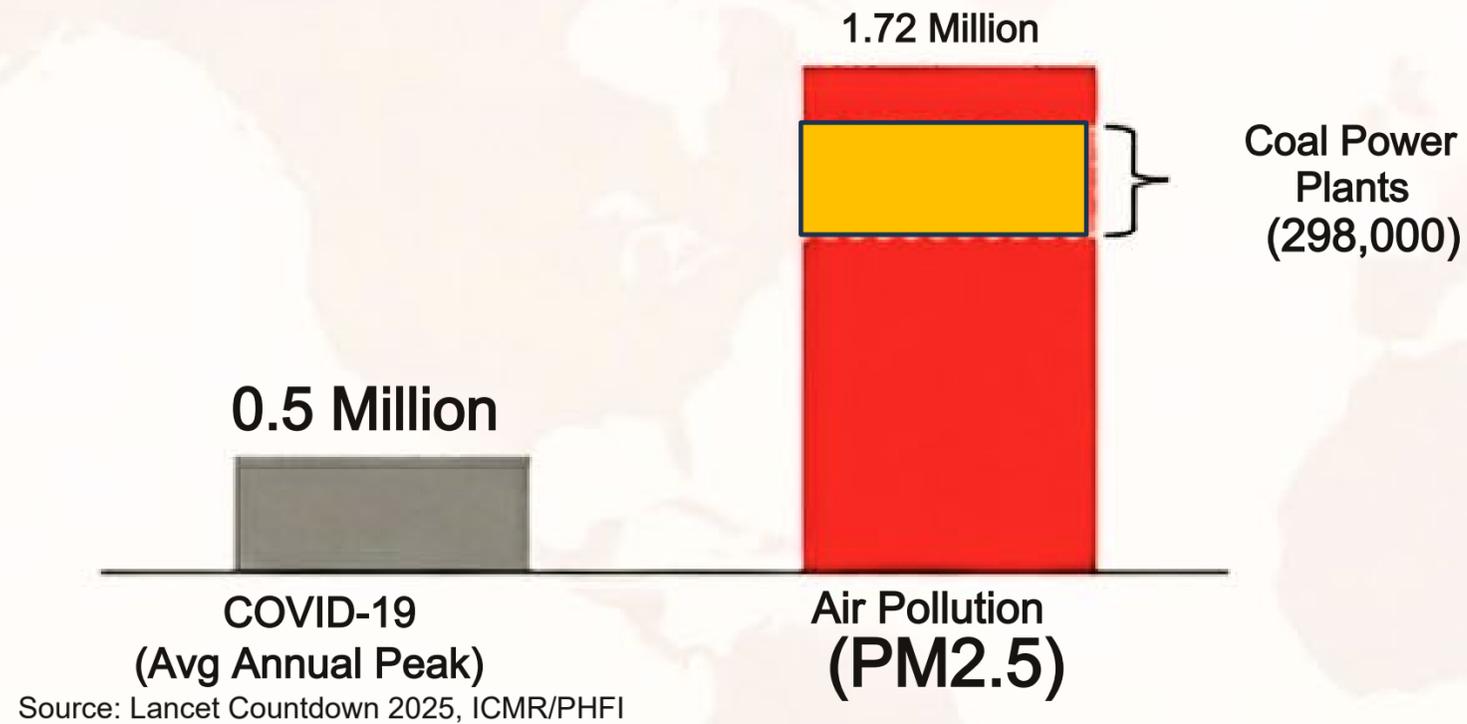
India's 2030 Security Equation



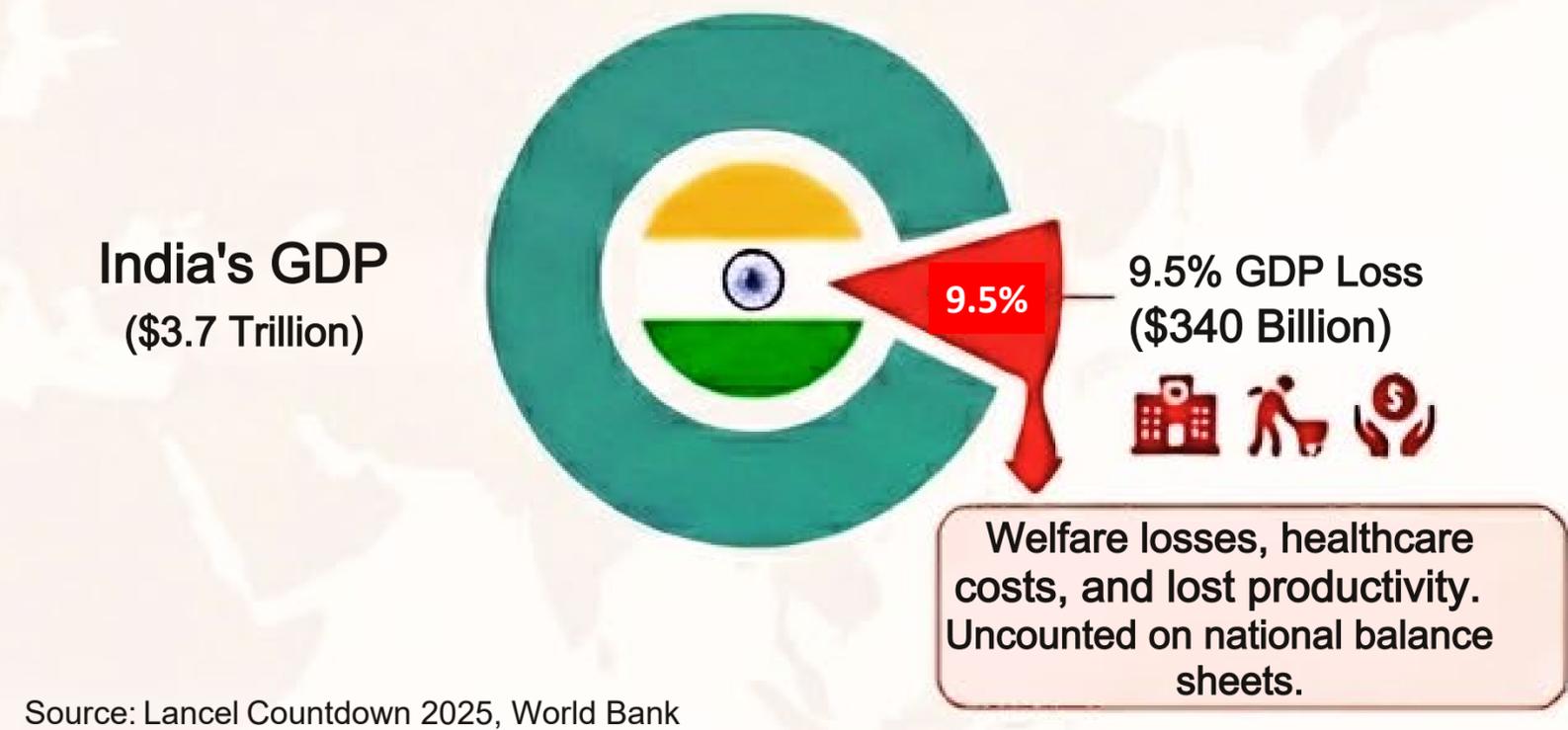
Will we seize this window to lock in tomorrow's affordable supply today, or pay the premium ?

Are we measuring the Uncounted Social Cost?

The Mortality Gap (Annual Deaths in India)



The GDP Leakage (2022) (\$ Billions)



The EV-Coal Trap vs. The Gas Bridge



EV (Coal-Charged):
High WTW (Well-to-Wheel) Emissions.
 Pollution Relocated, Not Eliminated.

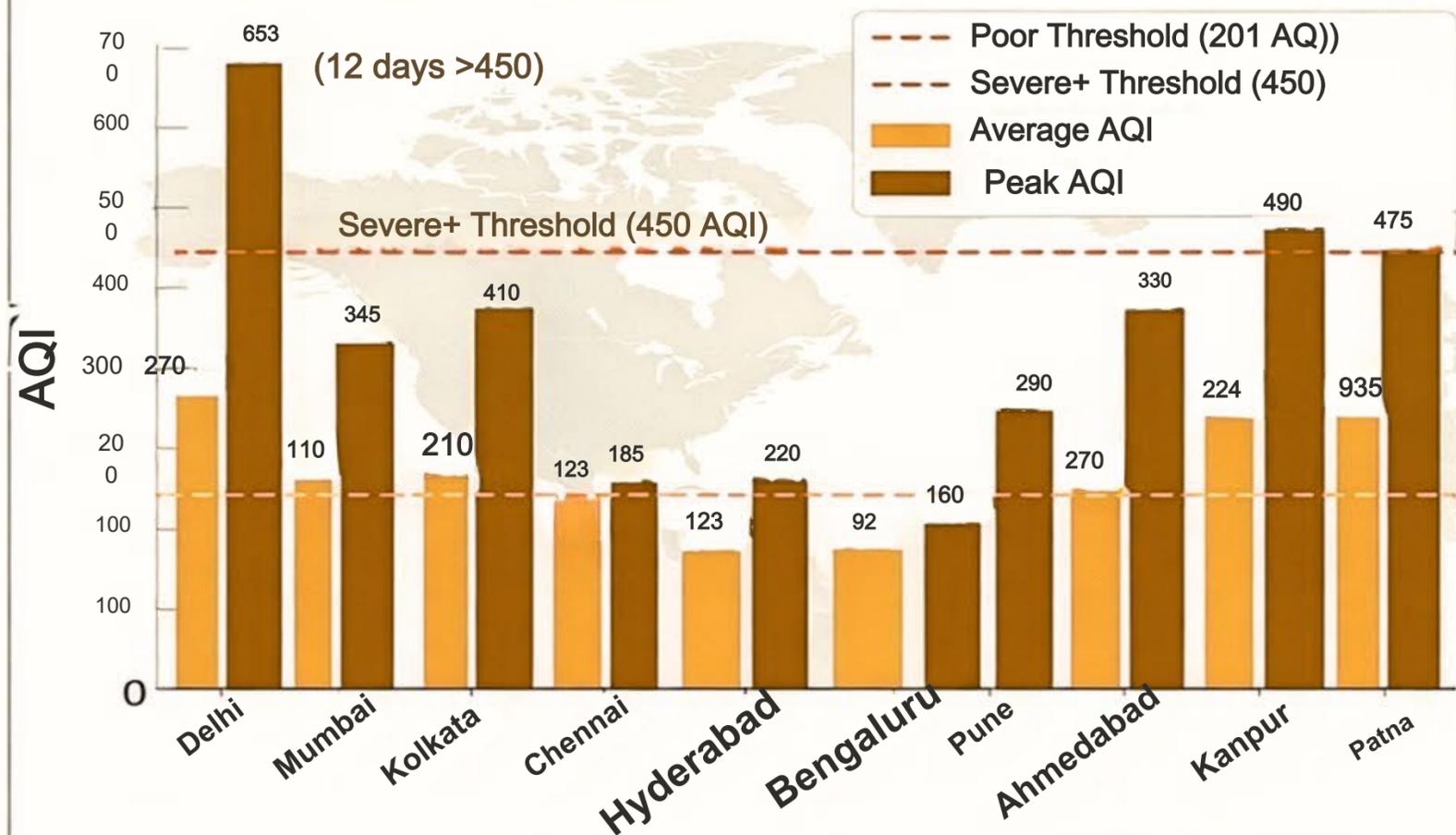
EV (Gas-Charged):
40% Lower WTW CO2.
 Immediate Health Benefit.



If we account for the \$340 Billion in health losses, is coal -based power still 'affordable'?

LNG Trucks Make Economic Sense, but Infrastructure Is Lagging

National Air Quality (2025): Scaling the Impact of Urban Vehicular Pollution



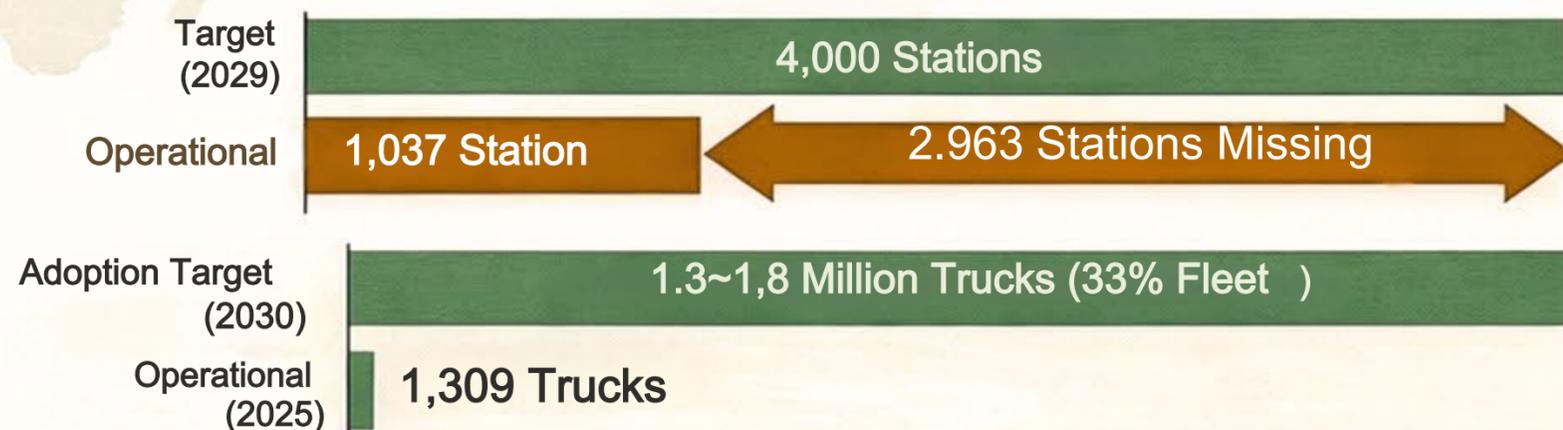
Heavy Trucks' Share of Urban Vehicular Pollution: 46%

The Economic vs. Infrastructure Challenge

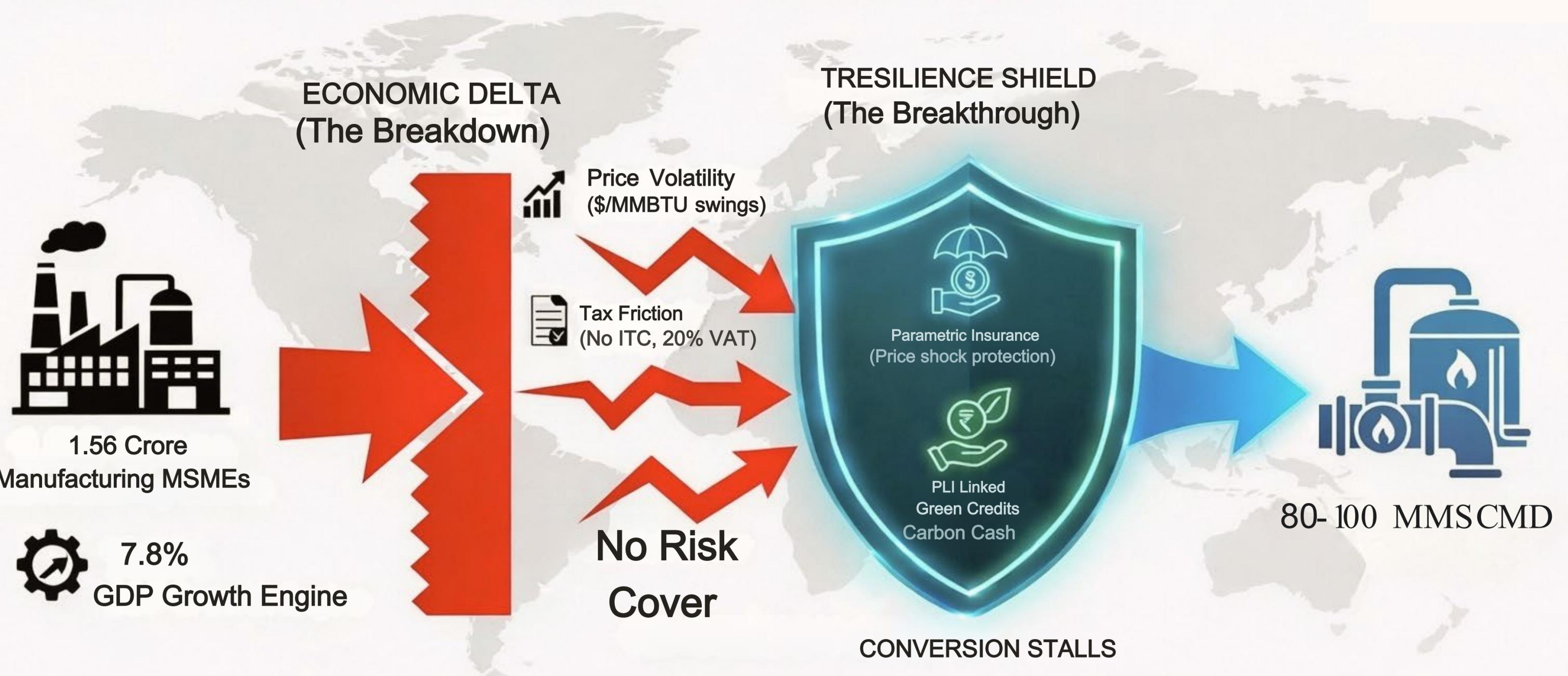


Potential Payback Period : 3 Years

THE SCALING GAP



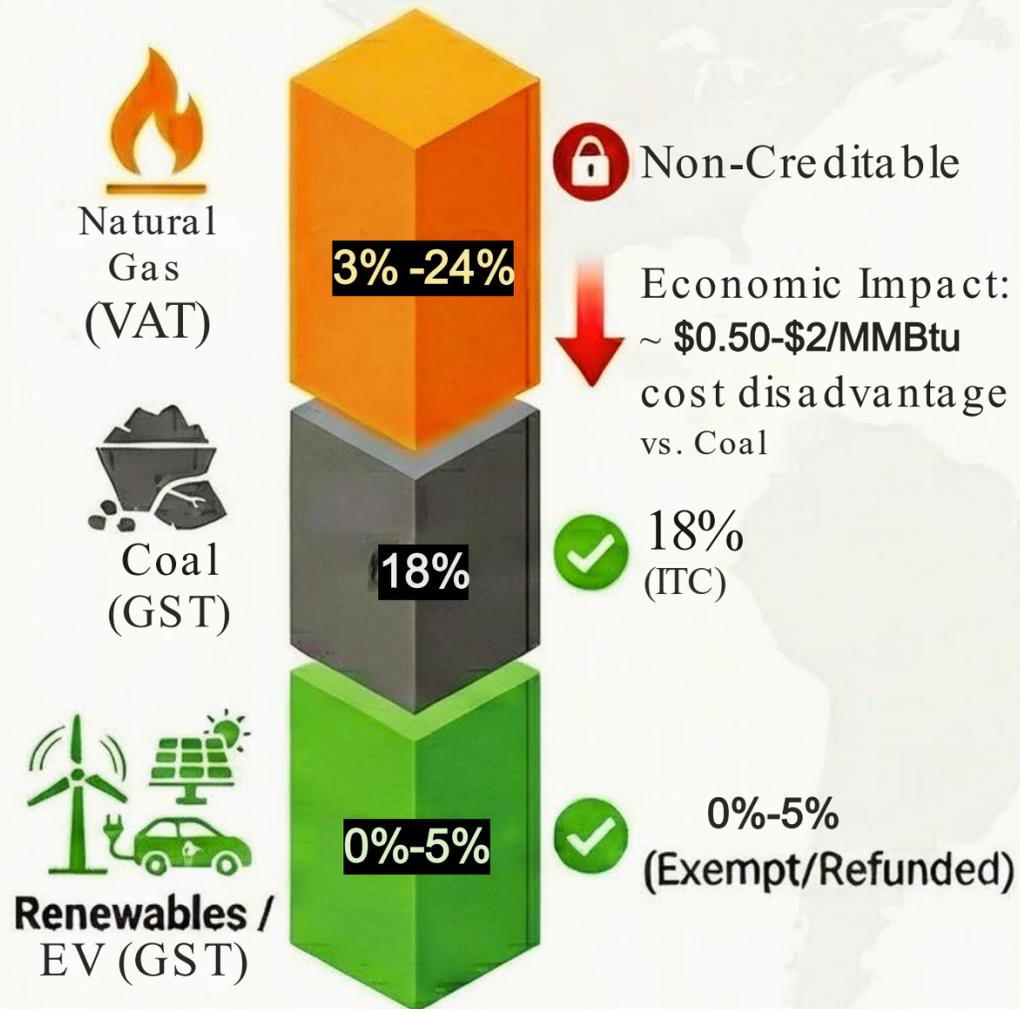
Is India under-investing in a proven clean transport pathway?



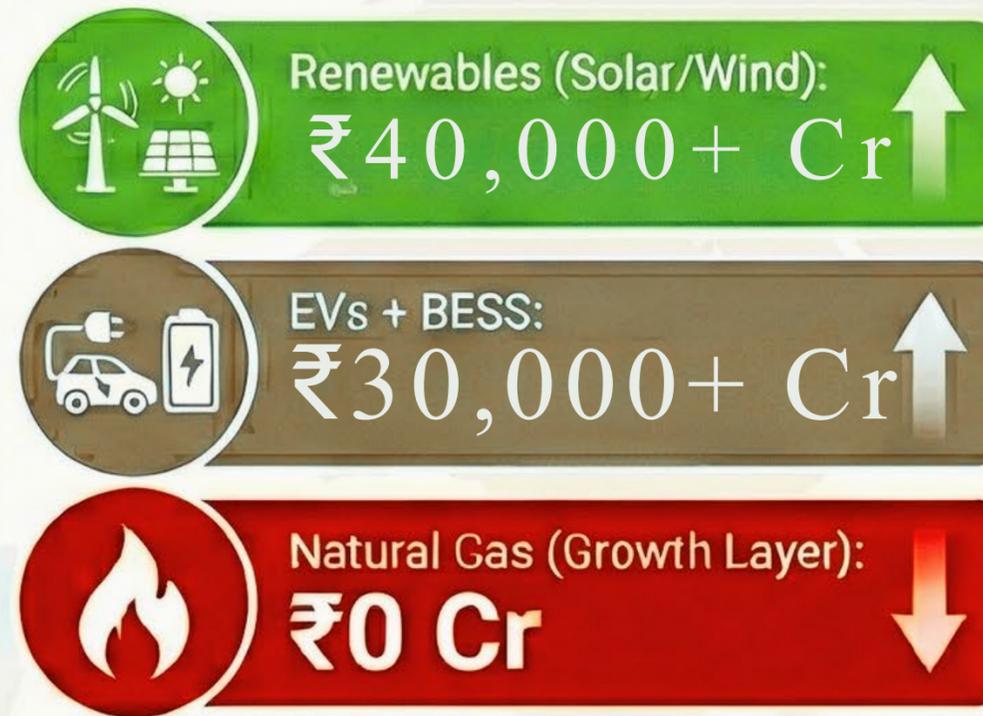
Can we leverage Parametric Insurance and PLI -linked Green Credits to turn energy price volatility from a threat into a manageable financial risk for the MSME sector?

Can Natural Gas be one of the India's Economic Anchor?

TAX BURDEN & MARKET FRICTION



GROWTH SUPPORT DISPARITY (₹ crore) - Last 5 Years



Building on the ₹70,000+ Cr investment in future-tech, integrating gas into national support schemes creates a direct pathway for 50% of MSME manufacturers to align with India's long-term energy and growth objectives.

FUEL STRATEGY: NEED FOR CLEAR LIFECYCLES & TARGETS

? Q: What are the target dates for fuel phase-outs to meet Paris Agreement goals?

? Q: How will the government balance 8-9% GDP growth with rising pollution without a clear fuel strategy?

INTEGRATED STRATEGY REQUIRED

Is there a need for Government to establish clear, time-bound target dates for all fuel lifecycles to align economic aspirations with climate commitments?

How can fuel policy be rationalized to ensure the energy security required for a \$30T economy?

Why Gas?

