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INDIA 2026

CONCLAVE

Driving the Future of Indian Bus & Coach Mobility
Innovation • Sustainability • Excellence

APRIL
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WELCOME



SUMMARY REPORT

Busworld India Conclave, April 28, 2026, New Delhi | Reflections and Gratitude

We are absolutely thrilled to be back in India after eight years. The Busworld India Conclave held on April 2026, at New Delhi gave us the perfect opportunity to welcome the who's-who of the world's second largest bus market.

The response was overwhelmingly positive.

The curated conference and exhibition was graced by the presence of Honourable Union Minister of Road Transport and Highways, Nitin Gadkari, HE Mr Didier Vanderhasselt, the Ambassador of Belgium to India and Mr TG Bharath, Honorable Minister for Industries, Commerce and Food Processing, Government of Andhra Pradesh.

More than 50 bus industry leaders, representing OEMs, body builders, bus operators, suppliers, policy makers and experts, addressed 350 delegates on topics such as:

- Transition to greener energy beyond diesel
- Getting to know the new wave of EV OEMs
- Opportunities and challenges for bus operators
- Building next-gen coaches in India
- Safety and standards
- Optimising the EV supply chain

The discussions, exchanges and connections created during the conclave once again demonstrated the strength and dynamism of the Indian and global bus-based public transport industry.

We had some cutting-edge buses on display, which were extremely well-received.

More than 20 exhibitors set up booths showcasing products and technologies encompassing chassis components, seating solutions, HVAC, charging systems, fire safety, telematics, NVH solutions, control systems, infotainment systems, interior fabrication, among others.

This is just the start. We are very keen to substantively support and champion the Indian bus industry with meaningful events and initiatives.

We will keep you updated!



Overview

Busworld India returned after an eight-year gap, framed by Belgium-headquartered Busworld International as a renewed long-term commitment to a market it considers among the most strategically important in the world. The conclave brought together OEMs, operators, regulators, financiers, suppliers and industry bodies across six structured sessions and an inaugural plenary led by Union Minister **Shri Nitin Gadkari**. The dominant arc through the day was a confident but candid one: India is at a genuine inflection point on clean mobility, but the gap between ambition and execution in charging infrastructure, financing, safety standards, supply chain resilience and digital infrastructure will define whether the next decade delivers.

By the Numbers

EV buses ordered vs. on road	Daily bus passengers in India	Bus fires (past year)	Annual road fatalities
63,000 ordered, ~16,000 on road	40 crore (more than rail, metro, air combined)	300+ buses, 200+ sleepers	4.7 lakh accidents, 1.7 lakh deaths

Inaugural and Plenary Session

Shri Nitin Gadkari, Union Minister of Road Transport & Highways

The Minister's address was the centrepiece of the day. He cited highway construction now consistently above 30 km/day, a national highway network that has grown from 91,000 km to 1.46 lakh km, and travel-time collapses such as Delhi to Dehradun (8–9 hours to 2) and Mumbai to Pune (6–7 hours to 2). His stated intent: shut Delhi–Dehradun flights within 15 days of the new expressway opening.

On clean fuel, the position was unambiguous: India spends ₹22 lakh crore annually on fossil fuel imports, and there is no long-term future for diesel and petrol. Lithium-ion battery costs have fallen from \$150/kWh to \$55/kWh, with parity expected within six months. He outlined a multi-fuel transition spanning electric, hydrogen (pilots underway with Tata, Volvo, IOCL, NTPC), 20% ethanol blending achieved ahead of target, methanol, CBG, and a mandatory 15-year scrap cycle expected to cut component costs by 30%.

On safety, he acknowledged 12 major bus accidents in six months causing 145 deaths and 200 injuries. The revised AIS-153 effective September 2025 ends self-certification: registration now requires type approval certification, ARAI testing

fees have been cut 50% to ₹14 lakh, and processing has dropped from four months to six weeks. He also issued a firm directive on disability-friendly city buses 400mm low-floor standard, hydraulic kneeling, ramps and wheelchair lifts warning he would halt registrations if progress stalled.

His framing of the Indian opportunity: *"Good quality, no pollution, good comfort, safety at reasonable cost. Quality centric, not cost centric."*

Other Inaugural Voices

- **H.E. Didier Vanderhasselt**, Ambassador of Belgium, positioned Busworld's return as a strategic statement and pointed to the recently concluded EU–India FTA as a framework for technology, trade and investment in mobility.
- **Shri TG Bharath**, Minister of Industries, Andhra Pradesh, made an investment pitch citing 25%+ of India's proposed investments, EV Policy 4.0 incentives, and approval timelines "in months, not years."
- **Anil Mohan Kamat**, MG Group, framed the industry shift as moving from volume to value, from fabrication to engineering, and toward cleaner energy alternatives.

Session 1: Looking Beyond Diesel

Moderated by **Akash Passey** (ZF Group India), the panel framed the commercial vehicle industry at an inflection point: 63,000 EV buses ordered against ~16,000 on the road exposes systemic gaps in charging, financing and power readiness.

Key Threads

- **Mahua Acharya** (INTENT) noted that the shift to PPP made e-buses financeable as an asset class for the first time, with pension and infrastructure funds now treating them as legitimate long-term assets. The next bottleneck is the power sector itself, not finance.
- **Nishant Arya** (JBM) attributed JBM's pace to having no legacy ICE product to protect, a born-EV platform, and an ecosystem play across battery, charging and mobility services.
- **Sukanta Sahu** (Switch Mobility) described Switch as a deliberate startup spin-off from Ashok Leyland to pursue a digital-first, disruptive playbook. First international batch: 100 vehicles to Mauritius.
- **Mahesh Babu** (Olectra) challenged the industry: India is the second-largest bus market in the world but not yet behaving like it. Electric TCO is already lower than diesel; the financing problem is structural and demands ~₹15,000 crore annually.
- **Andamuthu Ponnusamy** (Daimler India) is betting on liquid hydrogen for intercity rather than electric, and called for government-led hydrogen trial corridors.

- **Vaibhav Dange** (Build India Foundation) argued for a bouquet of solutions — ethanol blending, CBG, electric — pointing to Stockholm's biogas-powered fleet and India's ₹1.75 lakh crore in import savings from 20% ethanol blending.
- **Sumit Mittal** (JSW Greentech) flagged that 95% of e-buses today are procured by government via GCC contracts; he proposed a "Right to Charge" PPP framework modelled on NHAI's right-of-way pre-commitment.

Session 2: Next-Gen OEMs

Moderated by **Jan Deman** (Busworld Foundation), with Neuton Auto, NaArNi, Chartered Speed, Frost & Sullivan and WRI India. The session's strongest signal: data and software are becoming as decisive as hardware.

Vertical Specialisation Wins

- Neuton Auto is targeting the 9-metre city bus segment for India's dense, urbanising cities.
- NaArNi operates exclusively in the private intercity coach market no government subsidy supplying NueGo, Fresh Bus and Zing Bus, with ~400 vehicles each running 18,000–22,000 km/month.
- Chartered Speed operates across 10 states and ~550 cities, building proprietary fleet intelligence on top of multiple OEM platforms.

Data as Competitive Frontier

- NaArNi tracks 850 real-time vehicle parameters and offers a personalised vehicle health card. Software, in their view, is the layer that generates customer trust.
- The absence of a common telematics API standard across OEMs is a significant barrier for fleet operators a sector-wide unlock if resolved.
- ADAS is at a premature stage in Indian buses; mandates for emergency braking and blind-spot detection are expected within 3–4 years.

China Dependency - Risk or Opportunity?

Panellists viewed Chinese cell, motor and electronics dependency with nuance rather than alarm. Recognition is the first step to building domestic alternatives, and reducing dependence is a 3–5 year horizon - not a binary choice. Battery OEMs decoupled from bus OEMs were proposed as a structural answer for large operators.

Session 3: Bus Operators - Movers and Shakers

Moderated by **Prasanna Patwardhan** (Purple Mobility, BOCCI). Buses move 40 crore Indians daily more than rail, metro and air combined yet the industry is severely under-promoted relative to cars and two-wheelers.

What Will Attract More Passengers?

- **Shiva Sankeshwar** (Vijayanand Travels): safety, comfort, service with price as an entry lever, not a long-term position. On-board washrooms now justify a ₹100–150 ticket premium.
- **Harsh Kotak** (Modern Tours): India has airports and seaports but no world-class bus ports. Manufacturers must move from fire containment to fire prevention 300+ buses caught fire in the past year, 200+ of them sleepers.
- **Surya Khurana** (FlixBus India): bus is still seen as a Plan B/C in India. The fix is infrastructure, safety and tech enablement. *"A country is not rich where the poor take buses; it's one where the rich choose public transport."*
- **Manoj Agarwala** (RedBus): platform demand is growing 30% YoY, with 50–60% of journeys starting from non-state capitals. 34% of intercity travellers are women a segment that could grow to 50% if served well.
- **Saurabh Patwardhan** (Purple Mobility): predictability and vibrancy are the missing levers; multimodal integration with metro and carpool will save the 2 hours that surround a 6-hour intercity ride.

Survival Strategies for Small Operators

90% of Indian operators run fewer than 10 buses each. The consensus playbook: identify niche routes rather than competing on Tier-1 trunks, partner with aggregators (RedBus, FlixBus) for distribution and pricing intelligence, and use associations like BOCCI's Pravas platform for collective buying power.

Session 4: Building India's Next-Gen Coaches

Moderated by **Dr. Sudhir Mehta** (EKA Mobility, Pinnacle Industries), who opened with a striking reframe: switching the entire bus fleet to electric or alternative fuels would save India ₹1 lakh crore annually roughly half the defence budget.

From Cottage Industry to Standardised Manufacturing

- No Indian OEM produces coaches in the thousands per year. Delivery times of 6–12 months reflect a custom-built model that cannot scale, cannot export, and creates new safety variables with every modification.
- **Sivakumar** (MG Group) traced the shift from CAPEX to TCO and experience: ₹30 lakh Volvo coaches once sparked viability debates; ₹1.8 crore multi-axle coaches are now bought without hesitation.
- **K. Srinivas Reddy** (Veera Vahan) flagged three coach challenges: India-first platform design (imported chassis fail in Indian conditions), reliable rapid-charging at route midpoints, and a severe shortage of EV-trained technicians.
- **Veeresh Manrai** (Southco India) drew sharp comparisons: internationally, battery and luggage panels have tamper-proof locks with feedback systems; in India they are often secured with ₹100 padlocks. "You build a ₹2 crore

house and spend ₹10,000 on a quality lock. Why compromise the same logic in a ₹2 crore coach?"

- **Kanwal Preet Singh** (Eberspaecher Suetrak) pointed to a regulatory gap: removal of the engine partition door has increased heat load without corresponding AC capacity upgrades. "You cannot cheat physics."
- **AG Giridharan** (Uno Minda) proposed a public, platform-integrated comfort and safety rating system for buses, integrated into RedBus-style booking flows.

Mehta's Closing Frame

"India needs less jugaad and more organised planning. Jugaad undersells us as a nation. The day we decide we are the industry driving the nation, all our aspirations will change."

Session 5: Safety, Standards & Skills

Keynote by **Tuhin Sinha**, moderated by **Bhagwan Bindiganavile (VECV)**. The session's framing: with buses carrying 40 crore Indians daily, even a small accident share creates a moral responsibility of a different order single incidents can claim 40 lives at a time.

PPP Proposals for Road Safety

- A real-time, reason-tagged accident database currently absent would transform policy, prevention and response.
- Emotional safety communication involving drivers' families, modelled on the 2017 Mahindra campaign, drives behaviour change beyond what regulation can.
- Three systemic failures raised from the floor and committed to escalation: passenger panic buttons alert vehicle owners rather than enforcement authorities, fire tenders are absent from toll plazas despite contractual obligation, and ambulances are similarly absent during the golden hour.

Where Regulation is Heading

- AIS-153 (September 2025): adds structural integrity and NVH standards across all bus types, with ICAT offering a consolidated AIS-052 + AIS-153 testing package.
- New interior material flammability and toxicity standards are in development, driven by bus fire incidents many current materials emit toxic fumes when burned.
- AIS-135 (Electric Bus Fire Safety): mandatory from October 2026, covering thermal runaway detection and EV-specific fire suppression.

Notable Voices

- **Suresh Chettiar** (VECV/Volvo): safety leadership is a choice of intent. Volvo built

features like under-run guards into Indian buses a decade before mandates, at extra cost.

- **Jalpa Jain** (Aadinath Bulk): *"I'm not running buses. I'm caring for the lives of people."* Telematics data should coach drivers, not punish them. Unsafe public transport is a barrier to women's workforce participation reframing safety as an economic equity issue.
- **Soumik Ukil** (LightMetrics): AI-based driver monitoring and proactive health detection (smartwatch and steering-wheel biometrics) are deployable today.
- **Amit Chhabra** (Apollo Tyres): correct inflation alone could resolve 50–60% of preventable tyre-related incidents a strong case for mandatory TPMS on buses.

Session 6: Localising the EV Supply Chain

Hosted by **Chintan Daftardar** and **Rajat Bhatt** (WRI India). The session's central argument: India has built a strong physical EV bus layer but barely begun the digital one and that gap will throttle scale-up.

DPI as the Missing Layer

WRI argued that Digital Public Infrastructure common protocols, open APIs, shared data standards should be approached as an enabler of solutions, not a single product. The UPI and ONDC analogy was central: no single bank could have built India's payments ecosystem; the open protocol unleashed it. Today's EV bus operators must navigate disconnected platforms across charging, OEM telemetry, energy and finance a coordination cost that is actively slowing deployment.

China Dependency - The Candid Reading

Ravin Mirchandani (Quench) delivered the day's bluntest assessment: 90% of what India uses in the EV and battery transition comes from China, and a geopolitical disruption could halt the entire programme within two years. India's keiretsu-style concentration in a few large conglomerates trickles down too slowly; Europe's strength comes from its mid-tier and SME suppliers. India is best positioned as a scale-up economy taking proven global innovation and scaling it cost-effectively, as it has done with green hydrogen (from \$9/kg to \$3.50/kg in one IOCL tender).

Indigenisation in Practice

- **Vishwas Muktali** (Medha Servo Drives) has built a complete in-house range of motors, VCUs and power electronics. During the 2021–23 chip shortage, four pre-developed VCU board variants meant zero delivery delays for OEM customers.
- **Himanshu Vyas** (Manatec Electronics) covered cloud-connected TPMS, Central

Tyre Inflation systems, and standalone solar charging trees for highway stretches without grid connectivity.

- **Sachin Nijhawan** (Vertelo) framed the financing problem: residual value estimation for an 8-year EV lease is essentially guesswork without verifiable performance data. A digital data commons would directly translate into cheaper leasing rates.
- **Vinay Jain** (Masstrans) noted that PM e-Bus and PM e-Drive tenders now mandate MQTT and JSON protocols a meaningful first step toward national data standards.

Cross-Cutting Themes

Theme	Industry Position at the Conclave
Diesel transition	Irreversible. Multi-fuel mix electric as the lead, hydrogen and biofuels in support not single-solution thinking.
Execution gap	63,000 EV buses ordered vs. ~16,000 on road. Bottlenecks: power infrastructure, charging space for private operators (92% of fleet), and bank financing.
Safety as system	AIS-153 ends self-certification; AIS-135 (Oct 2026) introduces EV fire safety. Toxic interior material standards in development. Panic buttons, fire tenders and ambulances at toll plazas remain unresolved gaps.
Coach industry scale	Cottage-industry today; needs standardisation, India-first platform design, route-midpoint rapid charging, and EV-trained technician pipelines.
Data and DPI	Common API and protocol standards are the next ecosystem unlock. Government-led standardisation (UPI/ONDC model) preferred over industry-first interoperability efforts.
China dependency	Real and near-term unavoidable; 3–5 year horizon to build domestic alternatives. Mid-tier and SME suppliers, not just large conglomerates, are the missing layer.
Financing	Pension and infrastructure funds now treat e-buses as a long-term asset class. Better data → lower financier risk → cheaper leasing → faster deployment is the virtuous cycle that needs initiating.

Looking Ahead

The most quoted line of the day came from **Mahesh Babu** of Olectra: **"India is the second-largest bus market in the world it's time to behave like it."** The conclave's collective answer was that scale alone is no longer the question. The next decade will be decided by execution charging built ahead of buses, financing built on real performance data, safety treated as systemic rather than reactive, and coaches engineered to global standards at Indian cost. Busworld's return to India is, in that sense, a bet that the industry is finally ready to behave like the market it has long claimed to be.

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