



Confederation of Indian Industry



MINING AND CONSTRUCTION EQUIPMENT SUMMIT

REDEFINING BOUNDARIES: INNOVATING A SUSTAINABLE FUTURE

19 May 2025
The Taj Palace | New Delhi

RETROSPECT

INAUGURAL SESSION:

Redefining boundaries: Innovating a Sustainable Future



The Mining and Construction Equipment Division of **Confederation of Indian Industry (CII)** organised its Annual Summit 2025 on **19 May 2025** at the **Taj Palace, New Delhi**. With the theme “Redefining Boundaries: Innovating a Sustainable Future,” The summit brought together a distinguished gathering of industry leaders, government representatives, international stakeholders, and policymakers, promoting meaningful dialogue and collaboration. It aimed to develop a roadmap for the mining and construction equipment sector, focusing on

sustainability, technological advancement, policy transformation, and global collaboration. The inaugural session of the CII MCED Summit set the tone for a high-impact day of insights and collaboration. India’s mining and construction equipment sector is poised to take the lead on the global stage—driven by innovation, sustainability, and a renewed focus on collaboration. Diplomats from Brazil and Zimbabwe emphasised the growing interest of global partners in India’s capabilities, pitching cross-border collaboration in technology,





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equipment supply chains, and critical mineral development. Their remarks highlighted India's potential not just as a domestic powerhouse but as a reliable partner in the global mining value chain.

The MCED report was formally unveiled by the dignitaries present on the dais, marking a unified vision for growth, innovation, and policy alignment within the sector.

The discussion pivoted towards carbon reduction technologies, the role of digitalisation, and India's readiness to responsibly harness its critical mineral reserves. The session powerfully connected India's industrial might with its climate goals and global trade ambitions, offering a compelling vision of a sector ready to transform and lead sustainably.



Mr Vivek Bhatia, Chairman, CII Mining and Construction Equipment Division & Managing Director & CEO, TKIL Industries Pvt. Ltd., delivered the Welcome Address. He opened the summit by underlining the **critical role of the MCE sector** in enabling India's infrastructure expansion and overall economic development. Mr Bhatia emphasized the importance of building a **resilient, innovative, and sustainable ecosystem**, stating that India's journey to global leadership in this sector would depend on embracing technology, promoting industry-government collaboration, and reinforcing domestic capabilities.

Mr Ravi Todi, Managing Director, BTL EPC Ltd., followed with an industry-focused perspective. He stressed the **urgency for domestic capability building and technology indigenisation** in the MCE space. Mr Todi highlighted the significance of **public-private partnerships** and called for a deeper alignment between industry stakeholders and policymakers to strengthen India's position as a **global manufacturing and engineering hub** in the mining and construction equipment sector.





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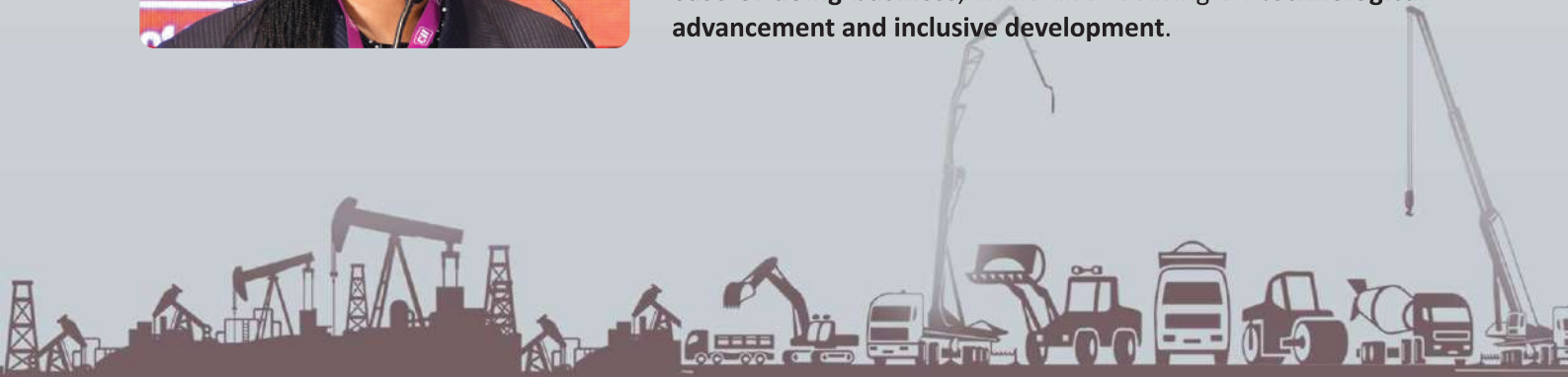
Mr Debashis Nanda, Director (Business Development) Coal India Limited, addressed the audience with a macroeconomic view of India's mining and energy landscape. "With 1.4 billion people and a USD 4.3 trillion economy, we are at a defining stage in the mining and construction sector," he stated. Mr Nanda reinforced the **centrality of coal in India's energy economy**, contributing 12–13% to GDP. He emphasized the **need to balance sustainability and energy demand**, and encouraged greater investment in **technology, R&D, and mineral resource utilization**. Urging the industry to move beyond traditional 'jugaad' innovation, he called for bold thinking: "We have the brains, and we are brave. Let's drive inclusive and sustainable growth through innovation."

"In India, we believe in jugaad, but now we must go beyond it. We have the brains, and we are brave. Let's drive inclusive and sustainable growth through innovation."

Mr Shantanu Roy, Chairman & Managing Director, BEML Ltd., delivered the keynote address with a compelling analogy: "What immunity is to the human body, equipment is to mining and construction." He projected a transformative future for the sector driven by **Artificial Intelligence, autonomy, and sustainable engineering**. Mr Roy emphasized the need for Indian manufacturers to anticipate global trends, innovate for efficiency, and embrace digitalization to remain competitive in an increasingly tech-driven landscape.



H.E. Ms Stella Nkomo, Ambassador of the Republic of Zimbabwe to India, delivered a special international address. She emphasized that **mining and construction are core sectors for Zimbabwe's economy** in the 2025–26 period. Welcoming Indian investment and expertise, she declared: "Zimbabwe is open to Indian contractors, developers, and investors." Ms. Nkomo highlighted Zimbabwe's intent to offer **flexible ownership models** and improve **ease of doing business**, while also focusing on **technological advancement and inclusive development**.





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Panel Discussion with Industry CEOs:



Mr Ashish Jain, Senior Principal, Kearney, Industry CEOs highlighted pressing industry concerns, including inconsistent demand visibility, high logistics costs, and the absence of a robust innovation culture. The conversation focused on aligning the ecosystem—from startups to academia—to build globally competitive manufacturing capabilities. Emphasis was placed on embracing digital tools, addressing workforce skilling, and localizing technologies in line with the Atmanirbhar Bharat mission. Mr Ashish Jain, Senior Principal, Kearney, moderated the session.



Mr Dilip Sawhney, Managing Director, Rockwell Automation India Pvt. Ltd., emphasized the strategic role of the sector in India's economic trajectory. He highlighted that with India already among the top five economies and on track to become one of the top three, the mining and construction equipment (MCE) sector must align with this momentum. He pointed to the **new Capital Goods Policy** and its alignment with the Atmanirbhar Bharat mission. Mr Sawhney stressed that the sector is positioned to become a global manufacturing hub and must seize this moment to go beyond domestic operations. On digital technology, he emphasized the need to integrate it into operations, not in isolation but as an end-to-end enabler to manage complexity and drive outcomes.





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Mr Vivek Bhatia, Managing Director & CEO, TKIL Industries Pvt. Ltd., raised the concern that despite its importance, the sector lacks visibility and adequate policy attention. He described the industry as "operating in the shadows," even though it plays a vital role in supporting infrastructure and economic growth. He called for increased policy focus and emphasized that India should aspire to be the **export capital of equipment**. Mr Bhatia also emphasised the need for trust in Indian innovation, encouraging stakeholders to step forward with leadership in R&D, backed by government support mechanisms like the **PLI scheme**. He also noted the absence of a cohesive innovation ecosystem combining education, government, industry, and startups.

Mr Sunil K Chaturvedi, Chairman and Managing Director, Gainwell Commosales Private Limited, shared a personal note, calling himself an "accidental entrepreneur." He stated that India is at a defining stage where it must develop equipment not only for the present but for the decades ahead. Without building domestic demand and strengthening R&D, the manufacturing focus could shift to western countries. He pointed to **two major trends—automation and digitization** of machines, and the **energy transition**. He also warned about the massive skill gap in operating high-tech equipment, noting that although companies have advanced machines, the workforce is often not trained adequately.



Dr Pradipta Mohanty, Chairman, SNM Group, brought in the mining sector perspective, stating that "mining holds the key to development." He argued that as India continues to grow, it must increase production, which will naturally drive demand for more equipment. He stressed the importance of building an efficient value chain and ensuring compatibility in technologies across the sector. On digital adoption, Dr Mohanty responded to Mr Jain's customer-centric question by saying that adoption is progressing well, especially in mining-intensive states like Odisha. While some processes are slower, overall industry readiness and adaptability are strong.





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Panel Discussion on Harnessing Cutting-Edge Technologies:



Mr Manojit Haldar, Managing Director and President, Sandvik Mining and Rock Technology India Pvt Ltd moderated the session. India's mining equipment sector is tired of being in the shadows. This session had one clear message: don't just call us enablers—treat us like the force we are. From demands for policy clarity to pushing India as a global export hub, the dialogue was bold, direct, and refreshingly ambitious. Talk turned to trust, R&D, and the urgent need for India to build—not borrow—its tech advantage.



Mr Tushar Chakraborty, Director – Technology & Transformation, Deloitte Touche Tohmatsu India LLP, opened with a forward-looking projection of India's mining trajectory, highlighting that coal production is expected to rise to **2 billion tonnes** and iron ore to **500 million tonnes** by 2035. He emphasized the importance of integrating **ESG frameworks** into India's mining regulations like MCDR and called for incentivising the deployment of **advanced vehicles and automation** in mines. While praising the intent of current policies, Mr. Chakraborty pointed out barriers such as lack of **post-implementation infrastructure**, ecosystem immaturity for digitisation, and slow reforms. He concluded with a powerful reminder: "Miles to go before we sleep. It's up to us to decide whether we want to drive technology forward or stay behind."





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Mr Nirbhay Sancheti, Director, SMS Limited, highlighted SMS Limited's extensive field experience across coal, copper, uranium, and zinc mining. He stressed the **immediate need for full-scale automation and digitisation**, not just in large mechanised mines but across **small- and medium-scale operations** as well. Mr. Sancheti advocated for uniform standards for **technology adoption, data integration, and remote operations** to enable safer, more productive mining environments across India's diverse terrains.

Mr Mukaya Simubali, CEO & Director, AAC Mining Executors India Pvt. Ltd., shared comparative insights from global mining practices. He appreciated India's proactive efforts in updating **safety protocols**, but noted a **critical gap between SOP design and implementation at the grassroots**. According to him, awareness and cultural resistance often hinder practical enforcement. He recommended **intensive, ongoing training programs** tailored for ground-level staff, noting: "Protocols from boardrooms must reach the mine floor."



Mr Atul Dwivedi, Managing Director, Technoblast Mining Corporation, showcased the technological transition within India's coal mining sector, particularly TMC's shift from traditional **drill-and-blast methods** to modern systems like **Continuous Miners (CM), Bolter Miners, Longwall Mining, and remotely operated machinery**. He noted a **4-5x increase in productivity per man-shift** and significant improvements in safety. However, he raised concerns about **supply chain reliability, the availability of quality spares, and maintenance challenges**. Mr. Dwivedi shared that TMC has established a **Miner Training Academy in Chhattisgarh**, aimed at rapidly upskilling workforce in equipment operation and maintenance, emphasizing that "Skilling and local manufacturing will bridge the gap."

Mr Deepak Paul, Managing Director, IGUS, added insights from a **technology-first perspective**. He discussed the potential of **IoT, automation, and real-time monitoring** in transforming Indian mines into smart, data-driven units. Mr Paul stated that IGUS is actively collaborating with stakeholders across the value chain to deploy rugged, high-precision components essential for automated systems. He stressed the importance of **standardized testing protocols and custom-engineering** for Indian conditions to make digital mining solutions truly scalable.





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Panel Discussion on Revolutionizing Mining for a Sustainable Future:



India has the talent. It even has the tech. But what it doesn't have—yet—is the ecosystem to scale it. This session laid bare the hard truth: only a tiny fraction of India's mines are tech-ready. And while

automation, AI, and ESG strategies are the buzz, they won't stick without better infrastructure, faster reforms, and serious upskilling. The future is here—it just needs better signal strength.

Mr Manav Kohli, Executive Director and CEO, Gainwell Commosales Private Limited, moderated the session and contributed valuable insights on the practical challenges and strategic priorities for achieving sustainability in mining. He emphasized that the transition towards greener practices must be guided by **technological adaptability, economic feasibility, and operational scalability**. Mr Kohli stated that while digitalization and low-emission equipment are critical, success will depend on **ecosystem-wide collaboration**, including policymakers, OEMs, and end-users. He highlighted the need for **customized, India-specific solutions** that reflect local mining conditions, cost structures, and infrastructure constraints. Mr Kohli also encouraged the industry to embrace a **mindset of innovation**, where sustainability is not viewed as a cost center but as a **long-term value driver** that enhances competitiveness and resilience in a rapidly changing global market.



Mr Anand Mimani, CEO, Greenline Logistics, spoke about the **increasing momentum for alternate fuel vehicles** in the mining logistics sector. He noted that customer awareness around emissions has grown significantly, and companies are now expected to deliver **sustainable transport solutions**. Mr Mimani saw this shift not just as a regulatory necessity but as a **strategic opportunity** for innovation and growth. He emphasized that **proactive leadership** and **sustainability-driven innovation** must now be embedded into business models to ensure long-term relevance.





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Mr Saurabh Palsania, Joint President, Shree Cement, advocated for a **paradigm shift from extractive to regenerative mining practices**. He addressed the significant volumes of waste generated in the cement industry, particularly from rejected limestone, and emphasized the potential to **recover value** from this byproduct. Mr Palsania highlighted that **green operations are both economically and environmentally beneficial**, lowering greenhouse gas emissions and reducing operational costs. He expressed strong belief in the potential of **Carbon Capture, Transport and Storage (CCTS)** technologies, and encouraged the mining and equipment sectors to play a **transformational role** in scaling these innovations.

Mr Andy Dhanraj, Director – Mining, Caterpillar India, spoke on the sector's **transition from diesel to electric equipment**. He noted that although challenges exist, a **phased and strategic approach** to implementation can facilitate smoother adoption. With a wide variety of technologies now available, Mr. Dhanraj emphasized the importance of **selecting scalable and high-impact solutions**. He expressed optimism about the mining industry's readiness to adopt electric and hybrid models, provided there is **adequate infrastructure support** and policy alignment.



Mr Sauro Jyoti Ray, Director – Mining, Sany Group, provided insights into the **diverse operating conditions** across India's mining regions. He emphasized the need for **equipment versatility**, noting that while full electrification might not be feasible everywhere, **hybrid models** and **fuel-flexible machinery** offer practical alternatives. Mr. Ray also highlighted **hydrogen fuel** as a potential long-term clean energy solution and urged the industry to **remain open to multi-fuel innovations** instead of relying on a one-size-fits-all approach.

Mr Rishi Raj Kishore, Head – Government & Institutional Mining Business, Tata Hitachi Construction Machinery Co. Pvt. Ltd., addressed the broader energy paradox in electric vehicle deployment, pointing out that **EVs powered by coal-based electricity fail to offer net-zero solutions**. He recommended expanding focus beyond EVs to include **alternate fuels and cleaner power sources**. Mr. Kishore acknowledged the **mining sector's growing openness to adopt cleaner technologies** and expressed confidence that with sustained investments in **learning, innovation, and policy support**, India's mining industry can emerge as a leader in sustainable operations.





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Special Session with Dr Vijay Kumar Saraswat: Member, NITI Aayog



Dr Vijay Kumar Saraswat delivered a powerful keynote on India's strategic mining and metals roadmap under the Aatmanirbhar Bharat initiative. He reiterated the **critical role of the mining sector** in fueling economic growth, technology leadership, and sustainability. Dr. Saraswat highlighted India's progress in **modernizing mining operations**, improving **productivity, safety, and mechanization**, and emphasized the importance of **policy reforms**, including **simplified licensing processes and increased FDI opportunities**. He strongly advocated for **domestic R&D, MSME empowerment**, and environmentally responsible practices, affirming that India is well on track to becoming a **globally competitive and green mining economy**.





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Panel Discussion on Building Depth in the Supply Chain Ecosystem:



Industry leaders shared practical strategies to minimize environmental impact, such as shifting to clean fuels, optimizing haul logistics, and deploying carbon capture mechanisms. The importance of cross-

sector partnerships, investment in green innovation, and recognizing sustainability as a competitive advantage was strongly emphasized.

Mr Ravi Todi, Managing Director, BTL EPC Ltd , moderated the session. In his opening he set the tone by stating that the success of the Indian MCE industry will rest on its ability to meet three foundational benchmarks—**quality, reliability, and timely supply**. These, he said, are non-negotiable if India is to become globally competitive and expand its export footprint. He pointed out that while there has been progress in recent years, India still lags far behind China when it comes to core technology ownership and the maturity of R&D ecosystems. Mr. Todi noted with concern the prevailing hesitation among buyers to fully trust indigenous solutions and advocated for **shared accountability across the supply chain**, where both users and suppliers take ownership of innovation and product development costs. He reiterated the need for moving from transactional relationships to long-term strategic partnerships rooted in mutual trust and capability enhancement.



Mr C P Rangachar, Managing Director, Yuken India Limited, stressed on the importance of **developing localized supply chains** to ensure consistent availability and responsiveness. He emphasized that Indian manufacturers must build long-term partnerships with vendors and end-users to nurture an integrated value system. According to him, decentralization and vendor development are key to unlocking efficiencies and reducing disruptions caused by global shocks or logistical challenges.





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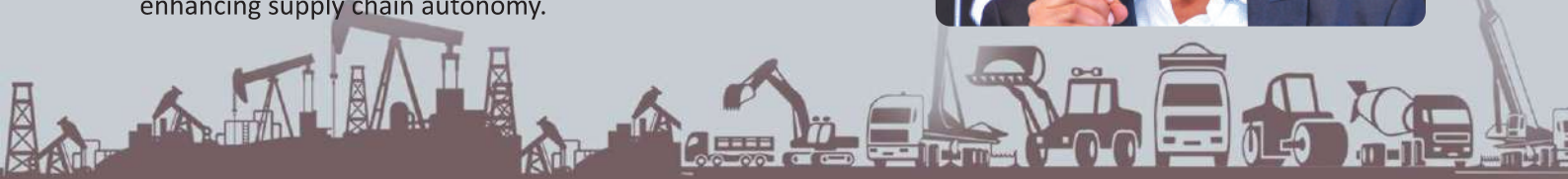
Mr Dinesh Aggarwal, Executive Director, Marathon Electric Motors (India) Limited, shared his organization's experience in producing **indigenous motors** capable of operating in **extreme mining conditions**. He stated that while the technical capability exists, India lacks **service infrastructure** and **skilled operators** to handle complex equipment. He called for the establishment of **localized service hubs**, robust training programmes, and preventive maintenance protocols to ensure system longevity and customer satisfaction. Mr. Aggarwal specifically flagged **critical skill shortages** in maintaining systems like hazardous area motors, which leads to recurring breakdowns.

Mr Shekhar Dey, Senior Vice President, Forech India Pvt Ltd, offered a valuable perspective as a **bulk material handling expert**. He advocated for the creation of an **ecosystem-driven supply chain**, where OEMs, EPCs, and vendors collaboratively engage in R&D and product development. He shared examples of how such models have already yielded **significant emission reductions** and process improvements. Mr Dey argued that EPC players must evolve beyond their traditional procurement mindset and shift towards **value creation and innovation partnerships** to remain competitive.



Mr Indranil Roy, Director Mining, TKIL Industries Pvt Ltd, who plays a dual role as both a manufacturer and EPC contractor, provided deep insights into the practical challenges faced on the ground. He stressed the need for clear, **early-stage communication** across the supply chain, especially during project planning and engineering design phases. He highlighted how project downtime and reliability failures often stem from **delayed clarifications, missed specifications, or last-minute reworks**, which could be avoided through **transparent collaboration**. Mr. Roy cautioned against excessive focus on L1 (lowest bid) procurement models, which may compromise safety, quality, and timelines. He stressed on the importance of **building mutual respect between partners** and emphasized that safety should never be compromised—it costs nothing, yet saves lives.

Mr Umesh Mehta, Chief Techno Commercial Officer, Power Mech Projects Limited, elaborated on the broader systemic challenges affecting India's supply chain. He pointed out the **absence of alternatives for critical components**, heavy **import dependency**, and the **fragmentation of R&D efforts**, which collectively increase project costs and limit operational flexibility. He called on the government and private players alike to invest in **indigenous product development ecosystems** that promote innovation while enhancing supply chain autonomy.





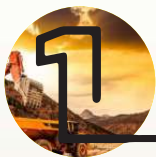
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10-point Action Plan to de-bottlenecking and accelerating the vision 2030

Action for Government:



Institutionalize the governance mechanism to implement MCE vision by 2030



Rationalize tax and import duty structures for component and equipment



Launch a dedicated PLI scheme for the MCE sector



Developing a cross-stakeholder forum for piloting new technologies and driving innovation in MCE.



Provide regulatory clarity for homologation processes.



Drive a sustainability agenda in the MCE sector.



Accelerate export growth for MCE OEMs.



Providing impetus to underground mining and multi-mineral beneficiation



Enable faster adoption of technology and automation in MCE by end-users

Action for OEMs



Focus on OEM-led innovation, globalization, and financing.

- Develop modular equipment upgrades for faster technology adoption.
- Expand underground and multi mineral equipment portfolio.
- Develop export specific product portfolio.
- Develop tailored financing solutions.





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MEMORABLE MOMENTS





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IN THE MEDIA

Draft papers for two CIL arms' IPO to be filed soon: Official

PTI NEW DELHI

The process of listing of two subsidiaries of Coal India Ltd - BCCL and CMPDI - has begun and draft papers would be filed soon with Sebi, the company on Monday said.

Speaking to reporters on the sidelines of CII Mining and Construction Equipment Summit, Coal India Ltd (CIL) Director Business Development Debashish Nanda said, "We are going to file DRHPs for BCCL and CMPDI. We are working on the process of listing of two subsidiaries of Coal India Ltd - BCCL and CMPDI - has begun and draft papers would be filed soon with Sebi, the company on Monday said.

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खानाकाम आणि बांधकाम उपकरणे क्षेत्रात महत्त्वाची भूमिका बजावण्यास सज्ज

पुणे : काँग्रेस-इंडियन ऑफ इंडियन इंडस्ट्री (सीआयआय), पुणे तर्फे होटेल हयात रिजर्वीसी में माइनिंग और कन्स्ट्रक्शन उपकरणे क्षेत्र में अवसर इस विषय पर कार्यक्रम संपन्न के क्षेत्र में अवसर इस विषय पर कार्यक्रम संपन्न

Two CIL arms to file draft papers for IPO

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CIL arms' DRHP to be filed soon

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माइनिंग और कन्स्ट्रक्शन पर विशेष कार्यक्रम

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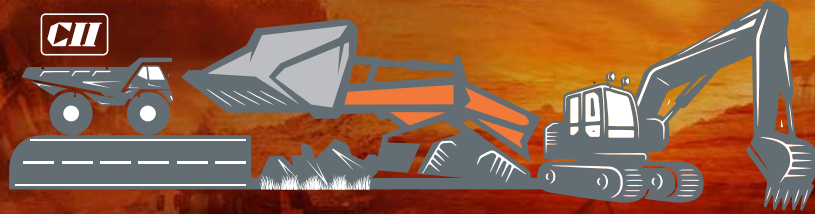
सीआयआय पुणे की ओर से 'माइनिंग और कन्स्ट्रक्शन उपकरणे क्षेत्र में अवसर इस विषय पर कार्यक्रम संपन्न

पुणे : काँग्रेस-इंडियन ऑफ इंडियन इंडस्ट्री (सीआयआय), पुणे तर्फे होटेल हयात रिजर्वीसी में माइनिंग और कन्स्ट्रक्शन उपकरणे क्षेत्र में अवसर इस विषय पर कार्यक्रम संपन्न के क्षेत्र में अवसर इस विषय पर कार्यक्रम संपन्न





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