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- RESEARCH CONTENT PROVIDED
- POLICY ADVISORY/REPRESENTATION
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- SITE VISITS
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- ISSUE RESOLUTION
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ELECTRIC VEHICLES
CHARGING TOWARDS GROWTH

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**ELECTRIC MOBILITY**

The automotive industry is at the brink of a massive paradigm shift. The change from internal combustion engines to zero-emission vehicles is one that has gained aggressive momentum in India.

The Central Government has announced a National Mission on Transformative Mobility and Battery Storage—which plans to drive clean, connected, shared, sustainable and holistic mobility initiatives. This necessitates attention and action by automakers, suppliers (including battery manufacturers), dealers and utility players alike.

**SECTOR HIGHLIGHTS**

- **National Mission on Transformative Mobility and battery storage** launched in March 2019. Incentives for Cell Manufacturing in draft stage.

- **USD 300 Bn** India’s EV lithium-ion battery pack market.

- **2,78,709** electric vehicles sold as of March 2019 (<2% of all vehicles).

- **Charging-as-a-service:** No licence required since April 2018.

- **8%** India to hold of the global EV 4W component market by 2025.
SECTOR HIGHLIGHTS

PHASED MANUFACTURING PROGRAM ANNOUNCED:

- Tariff rates for AC & DC chargers, engines & engine controllers, power controllers and other EV manufacturing components to be changed from the current 0% to 15% in April 2021
- Tax rate for the lithium-ion cells for EVs to be doubled to 10% in 2021
- Basic import tax rate for EV battery modules to increase from the current 8% to 15% in April 2021
- Basic import tariff rate for electric buses & trucks to be doubled to 50% in April 2020

IMPORT DUTIES CHANGED (JAN 2019 ONWARDS):

- For imports of raw material used in manufacture of Lithium-ion cells (falling under tariff item 8507 600), tariff decreased by 0-7.5% and dropped to 0%
- For Lithium-ion cells used in manufacture of Lithium-ion accumulators (other than Cellular phone battery packs & Power banks), tariff increased by 0% and stayed at 5%
- For battery packs for use in manufacture of EVs or hybrid vehicles, tariff increased by 0% and stayed at 5%
- For Knocked Down Kits of electrically operated vehicles, tariff has been set at 10-25%
1. **Central Policies:**

- **FAME India Phase 2** (Apr 2019 – Mar 2022)
  (Faster Adoption & Manufacturing of Hybrid & Electric Vehicles)

  **Total Budget:** USD 1.3 Bn

  **Target (in Units):**
  
  - 1,000,000
  - 500,000
  - 55,000
  - 7,090

  **Incentives:**
  
  - All vehicles (except buses): $145/kWh or 20% of cost
  - Buses: $290/kWh or 40% of cost

2. **State Policies**

- Maharashtra
- Uttarakhand
- Andhra Pradesh
- Karnataka
- Delhi (draft)
- Kerala (draft)
- Uttar Pradesh (draft)
- Telangana (draft)
- Odisha (draft)
KEY STAKEHOLDERS

1. **Industry Associations Specific to Electric Mobility**
   - Society of Manufacturers of Electric Vehicles (SMEV)
   - Indian Energy Storage Association (IESA)
   - Society of Indian Automobile Manufacturers (SIAM)
   - Automotive Component Manufacturers Association (ACMA)
   - The Automotive Research Association of India (ARAI)

2. **Government Ministry/Department**
   - Ministry of Heavy Industries
   - Ministry of Road, Transport and Highways
   - Ministry of Power
   - Ministry of Electronics and Information Technology
   - Department of Science and Technology
   - Ministry of New and Renewable Energy

RECENT INVESTMENTS
AUTOMOBILE CLUSTERS

**DELHI/NCR**
- JBM Group
- Hero Motocorp
- Bird Group
- Eicher Motors
- Borg Warner
- Terra Motors
- Honda
- Suzuki
- Exicom
- Coslight
- Fortum
- Hitachi
- Delta Electronics

**MUMBAI/PUNE**
- TATA Motors
- Tork Motorcycle
- Bharat Forge
- Bajaj Auto
- Okinawa Scooters
- Volkswagen
- Daimler
- Mercedes-Benz
- Exide
- Hella
- Enerblu
- Eaton

**BENGALURU**
- Mahindra Electric
- Greaves Cotton
- Sun Mobility
- Robert Bosch
- Ather Energy
- Volvo

**AHMEDABAD**
- Ashok Leyland
- BMW
- Renault-Nissan
- Hyundai
- Mitsubishi Motors
- Lucas TVS
- ABB
- Macdermid
- BYD

**CHENNAI**
- Maruti Suzuki
- AMW Motors
- Ford
- Honda