

Beyond Teslas

How India Is Electrifying the Vehicles That Actually Run Its Cities

ELECTRIC MOBILITY · DELHI · MAHARASHTRA · TAMIL NADU · KARNATAKA · TELANGANA

One Bengaluru arterial: an electric city bus, electric autos and electric two-wheelers in the same lane. The shift arrived as fleets.

2W & 3W
lead adoption
not private cars

FAME I & II
target fleets directly
buses, 2W, 3W, commercial

5 states
run their own EV policies
incentives, scrappage, charging

Platforms
not OEMs, drive demand
Ola, Uber, Swiggy, Blinkit fleets

> India's electric vehicle revolution is not happening in driveways. It is on the scooter your delivery rider is riding, the auto-rickshaw that took you to the station, and the bus that pulled away.

Policy targeted the highest-mileage vehicles first. FAME I and II subsidised buses, two- and three-wheelers and commercial fleets directly, rather than waiting for private car buyers. Five states run substantial policies of their own.

The demand-side push comes from platforms, not carmakers: fleets electrifying because the running-cost arithmetic works for a vehicle doing eight hours a day. Electrification here is industrial policy wearing a climate costume.

THE SIGNAL TO WATCH Distribution-grid investment — the constraint nobody has costed.

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FIELD NOTES · SHEET 09 · ELECTRIC MOBILITY

Bring the cohort to the case.

Every sheet in this series is a place you can stand in. The dark store, the fab, the swap kiosk, the mandi, the GCC floor — all of them within a day of Bengaluru, and all of them take visitors.

Field Notes is a series on the forces shaping India now, designed to give decision-makers exploring India the right perspective before they commit to it. Each one takes a single force, gives you the argument and the four numbers that anchor it, and names the places in India where you can go and stand in front of it. The series is drawn from *The India That Is Unique*, Immersion India's field guide for global executive education.

ON THE GROUND — ELECTRIC MOBILITY

A city arterial at rush hour
Electric bus, autos and two-wheelers in one lane.

A fleet operator's depot
The cost-of-ownership sheet that drives the switch.

A state transport authority
Five states, five policies, one manufacturer.

THREE QUESTIONS FOR THE ROOM

01 India targeted the highest-mileage vehicles first. Compute the emissions arithmetic: one electrified auto-rickshaw versus one electrified private car.

02 Subsidies started adoption and cannot run forever. Design the exit.

03 Most drivers of these vehicles are informal, low-income workers. What does a just transition owe them beyond a newer vehicle?

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10 Battery Swapping

12 Climate & Just Transition

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