The growing momentum of electric vehicles presents a host of opportunities for manufacturers and charging infrastructure developers. Over the past one year, the industry has seen a rapid decline in battery costs, technological advancements in the charging segment, innovative business models, policies and subsidies that have all played a pivotal part in enhancing the buzz around EVs. However, to be able to move to an electric mobility driven economy, the timely development of an enabling charging infrastructure ecosystem assumes prime importance.

This report will provide a comprehensive view of the EV charging infrastructure in India with emphasis on technology, policy and regulatory regime, cost economics and future outlook. It will also present an in-depth analysis of the present landscape and various demand creation efforts of state and central entities.

The report will provide detailed analysis on ownership structures along with information on city-level pilots and related case studies. It will contain profiles of key charging station operators and developers along with recent development plans of key stakeholders.

The Charging Infrastructure for Electric Vehicles report will help you to:

- Assess the EV charging landscape and available opportunities
- Learn about the various policies and regulations governing EV charging infrastructure
- Explore the available and upcoming technologies
- Assess the cost economics of EV charging infrastructure
- Gain outlook for power, battery and charging infrastructure demand up to 2025
- Learn about the various possible ownership structures and associated risks
- Identify the major stakeholders and their plans
- Learn from the operational experience of key charging station developers and city-level pilots

SECTION I: KEY TRENDS, EMERGING LANDSCAPE AND GROWTH PROJECTIONS

1. **EV Market Size and Opportunity**
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     - Three-Wheelers
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     - Buses
   - Market Dynamics
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     - PSU and City Administrators' led
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   - Tariff Categories, Standards, Business Models, etc.
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   - MoP's Guidelines for EV Charging as a Service
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     - By State
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- Without Subsidy
Competitive Fuel Analysis
Return Assessment

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- Revenue Side Impact
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  - By Technology
- Charging Station Demand Forecast
  - By Charging Type
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- Ultra Fast Charging
- Battery Swapping
  - By Use
  - Captive
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- Outlook and Insight

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  - Battery Swapping
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  - AC/ DC
- By Power Rating
  - 1/ 2/ 3
- By Charging Speed
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  - CCS, GB/T, CHAdeMO

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- Government Efforts
- Private sector Initiatives
- Projected Recycling Market by 2025

SECTION II: VALUE CHAIN, BUSINESS MODELS AND PLAYER PROFILES

10. Key Stakeholders: Recent Developments and their Plans
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- Auto OEMs
- Power Utilities
- Charging Infrastructure Developers
- Oil and Gas Companies
- Real Estate Firms
- Financiers
- Consumers

11. Ownership Structures and Associated Risks / Emerging Business Models (This will have detailed information on city-level pilots and project case studies)
- ULB Operated
- PPP-led
- Managed by Discoms and Power Generators
- Facilitated by Public Transport Corporations/ Aggregators
- Set up by Automakers and Battery Manufacturers

12. Key Charging Station Operators and Developers (This will have over 10 profiles including their details pertaining to city-wise operations, fleet count, the number and size of charging stations, key partnerships, investments, operational experience, key challenges, future plans, etc.)
- Ather
- BESCOM
- BSES
- EESL
- Fortum
- Hyderabad Metro Rail Limited
- Lithium Urban
- Mahindra Reva Electric
- NTPC
- OLA
- SmartE
- Tata Power
- Etc.

ABOUT US
The report is being published by India Infrastructure Publishing, which has over two decades of experience in the Indian power sector. The group publishes Power Line, the flagship magazine of the power sector and has extensive reach among state-level departments, PSUs and the private sector companies. While the subject of EVs and charging infrastructure is nascent, the group has conducted a number of workshops in this area and has the relevant knowledge to deliver high value research and insights on this theme.
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