International Federation of Electric Vehicle Association

IFEVA Green Energy Foundation

EXECUTIVE BRIEF

BHARAT MAHA EV RALLY 2025

Key findings and priorities from 100 days of electric mobility across India

KNOWLEDGE PARTNER **PROLOGUE.**
STRATEGY & GROWTH ADVISORY

LAUNCH EDITION | TERMINATOR 5.0, GREATER NOIDA | OCTOBER 2026

ABOUT THE INITIATIVE

IFEVA and the Bharat Maha EV Rally

Programme scope, stakeholder engagement and field-learning context.

The International Federation of Electric Vehicle Association (IFEVA) is an association for development and policy advocacy in electric mobility. It brings together EV manufacturers, MSMEs, charge-point operators, testing and certification specialists, academia and policymakers, and operates through a network of national, state and international representatives. IFEVA is led by **Dr Shailendra Saroj**, Founder, and **Dr Rajeev Mishra**, President.

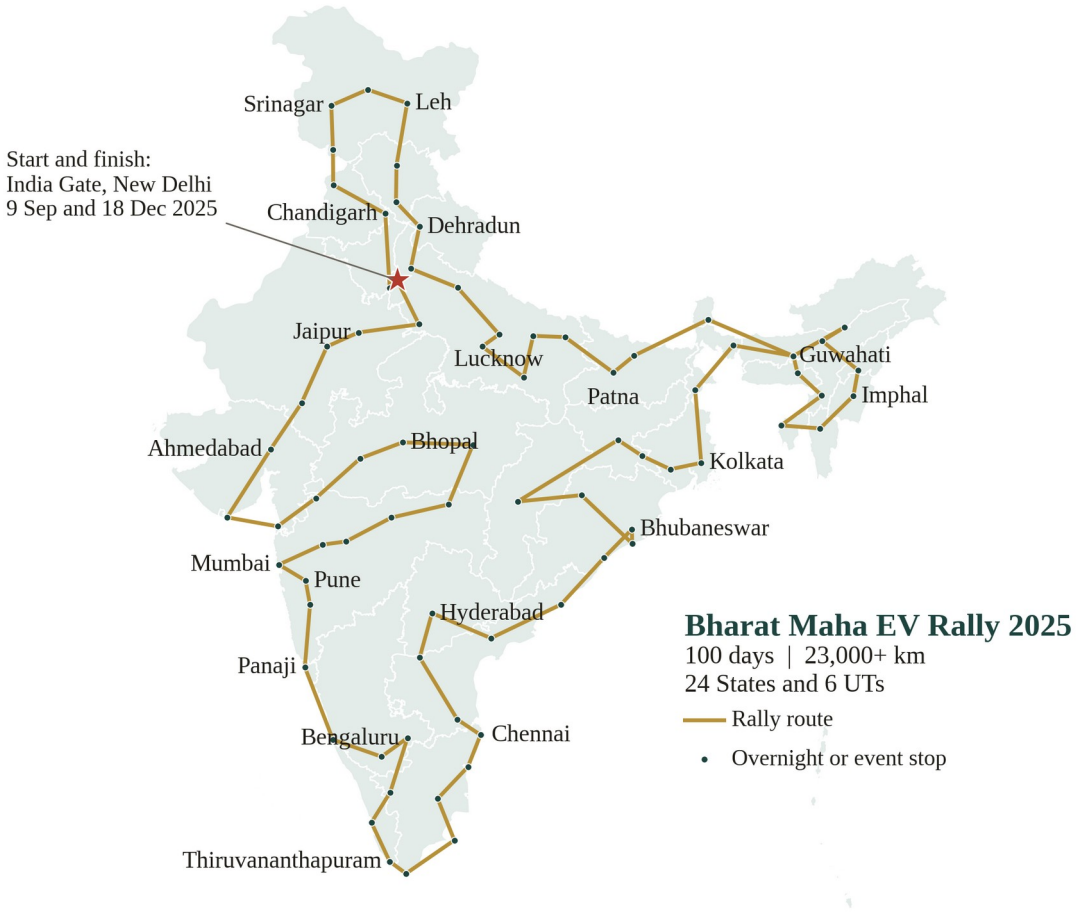
The Bharat Maha EV Rally 2025, undertaken by IFEVA through the IFEVA Green Energy Foundation, was flagged off from India Gate on World EV Day, 9 September 2025, marked its 100th day at ICAT Manesar on 17 December and concluded in Delhi on 18 December. It combined long-distance electric passenger-car travel with structured engagement at universities, technical institutes, public offices and roadside events.

The Rally was conceived as a demonstration with a field-learning component, observing charging infrastructure, highway and road conditions and service availability along the route. The findings in this Executive Brief draw on that programme, together with official data, published sources and wider market and policy analysis.

100	23,000+	24 + 6	2
programme days	km travelled	States and Union Territories	neighbouring countries: Bhutan, Nepal

EXHIBIT 1 Bharat Maha EV Rally 2025 Route

Route across India covered during the 100-day programme



Source: IFEVA route-planning workbook; completed journey 23,000+ km across 24 States and 6 Union Territories, with engagements extending to Bhutan and Nepal. Bhutan and Nepal stretches are not shown on this map. Map outline: @svg-maps/india, CC BY 4.0.

Prepared by IFEVA with **PROLOGUE.** as Knowledge Partner



A Rally car entering Ahmedabad, Gujarat.



Rally car at Rajiv Gandhi Proudyogiki Vishwavidyalaya, Bhopal.

WHY THIS MATTERS NOW

Charging Readiness and the Next Phase of Electric Mobility

For long-distance passenger-car mobility, network reliability and the charging experience are becoming as important as installed capacity.

India's electric-vehicle market has moved beyond early adoption in several vehicle segments. More than 2.3 million EVs were registered in 2025, public charging stations have grown nearly sixfold in three years, and the PM E-DRIVE scheme has committed Rs 2,000 crore to about 72,000 new public chargers. Decisions over the next two to three years will shape how that investment is deployed and the service standards it supports.

Electric passenger cars remain under 6% of EV registrations. For passenger-car buyers, charging availability, compatibility, payment and reliability are becoming increasingly important alongside vehicle capability. The Rally completed its journey across 24 States and 6 Union Territories, and its observations provide practical context for these issues.

This brief sets out field observations from a 100-day national programme that are relevant to the choices facing government, operators, manufacturers, testing bodies and investors.

> **Charging-network quality is becoming increasingly important to the next phase of passenger-car adoption, particularly across regions and corridors.**



Shri Nitin Gadkari, Union Minister of Road Transport and Highways, with the IFEVA delegation led by Dr Shailendra Saroj, Founder, and Dr Rajeev Mishra, President, New Delhi.



Flag-off of the Rally car at an institutional stop on the route.

KEY FINDINGS

Key Findings

Charging readiness, network concentration and adoption patterns across India.

1. **Charging readiness is becoming central to long-distance EV confidence.** The journey highlights recurring considerations around availability, reliability, route planning and charging experience.
2. **Public charging is geographically concentrated.** Five states account for 56% of public charging stations, while thirteen states and UTs have fewer than 100 each.
3. **Installed capacity does not automatically translate into inter-city readiness.** Around 70% of public stations are slow chargers, while long-distance passenger-car use depends more heavily on fast charging.
4. **State highways and secondary corridors remain an important gap.** Rally observations indicate that charging availability is generally stronger on major national corridors and weaker on state highways and district roads.
5. **Network reliability is not yet visible in national datasets.** Official statistics report installations, but not whether listed chargers are operational, available or usable when drivers arrive.
6. **EV adoption varies by vehicle mix and use case.** High-penetration states are not necessarily those with the largest public charging networks, reinforcing the need for segment-specific planning.
7. **Direct engagement remains relevant to adoption.** Campus sessions, demonstrations and public interactions provided prospective users with practical exposure to EV use, charging and ownership.

> **India now has a rapidly expanding EV market, a supportive policy framework and significant charging investment. The next phase will require further network expansion alongside improvements in fast-charging availability, corridor coverage, reliability, interoperability and user experience.**



Flag-off at Maulana Azad National Institute of Technology (MANIT), Bhopal.



Session with faculty and students during the Bhopal stop.

THE NATIONAL PICTURE

India's EV and Charging Landscape

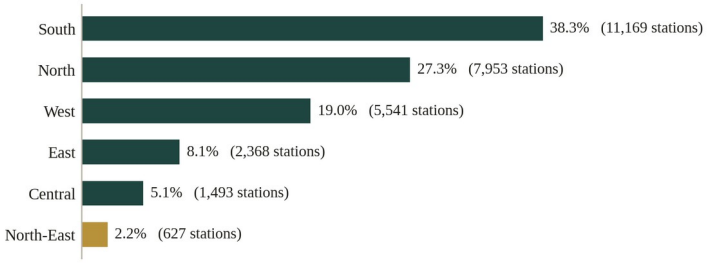
A sixfold rise in public chargers, concentrated in a few states and weighted to slow charging.

Indicator	Value
EV registrations, calendar 2025	2.34 million
Electric passenger cars as share of 2025 EV registrations	5.64%
Public charging stations	29,151
Fast chargers as share of public stations	30%
Share of stations in the five largest states	56%
Share of stations in the eight North-Eastern states	2.2%
PM E-DRIVE charging allocation	Rs 2,000 crore for about 72,000 stations
Highway charging norm	One station every 20 km, both sides

Sources: Government of India publications (Ministry of Heavy Industries, PIB, Ministry of Power), Vahan-based registration analysis and PROLOGUE. analysis. Detailed sources in the full report.

EXHIBIT 2 **Regional Distribution of Public Charging Stations**

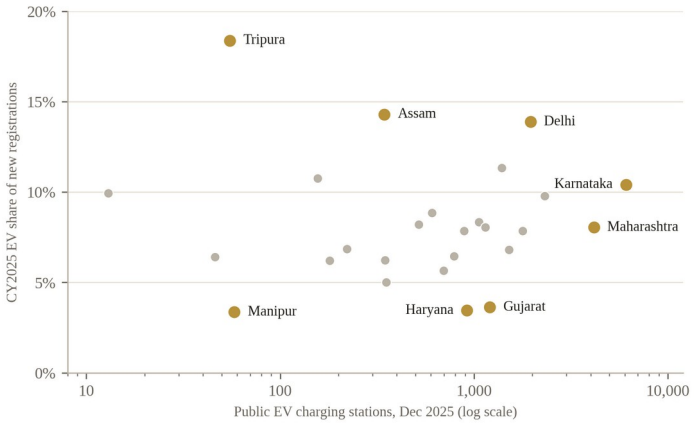
Share of national public charging stations by region, 16 December 2025, %



Source: PROLOGUE. analysis of MHI / PIB state data, 16 December 2025.

EXHIBIT 3 **State EV Adoption and Charging Infrastructure**

Relationship between EV penetration, vehicle mix and public charging availability, CY2025



Source: JMK Research CY2025; MHI / PIB, 16 December 2025. 26 states and UTs with published penetration.

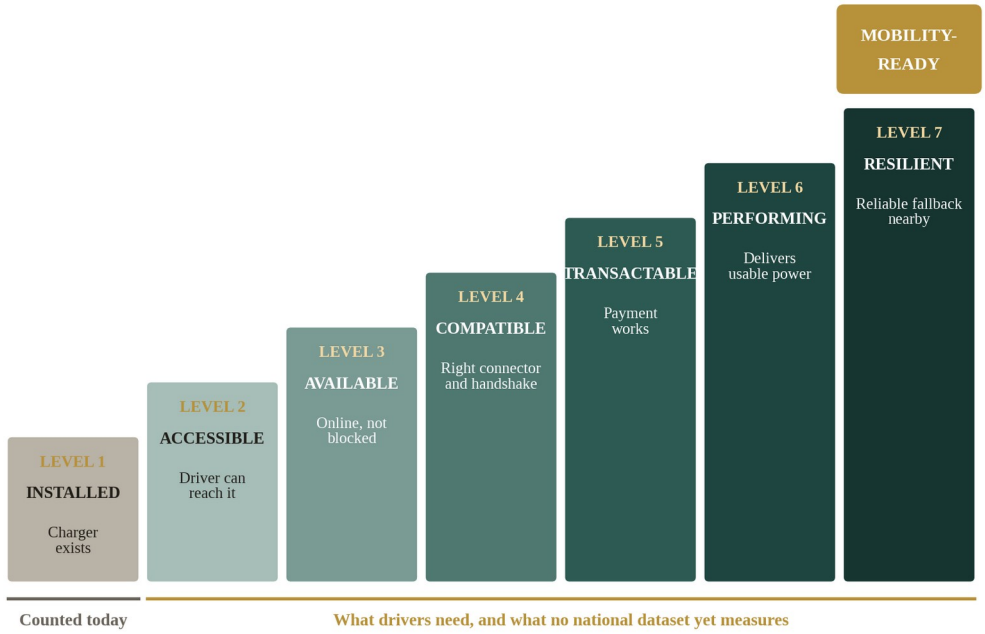
FIELD OBSERVATIONS

From Charger Count to Usable Capacity

Dimensions of charging availability, compatibility and usability.

EXHIBIT 4 **The Mobility-Ready Charging Framework**

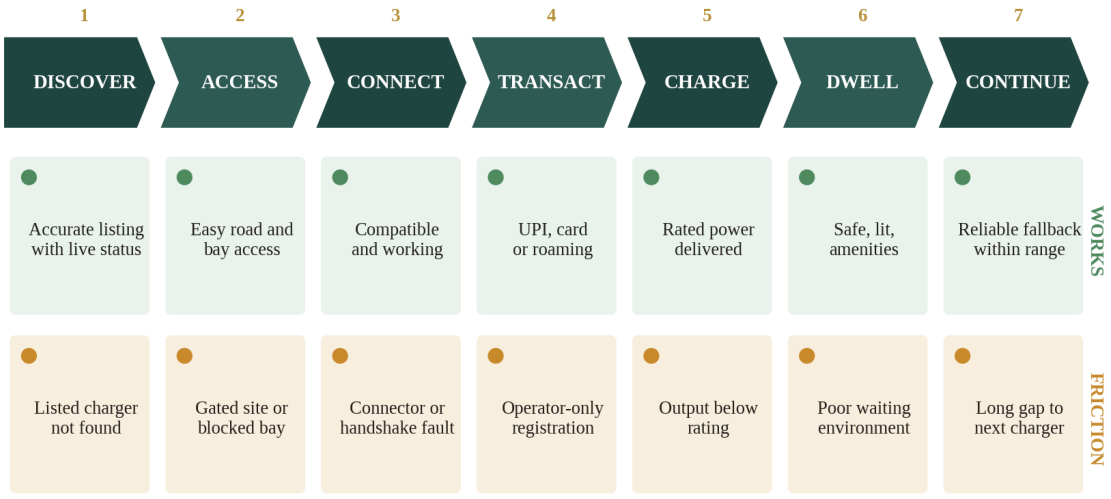
Dimensions that determine whether charging infrastructure is usable in practice



Source: PROLOGUE. framework.

EXHIBIT 5 **The EV Charging Journey**

Stages of a charging stop and points of user friction



Source: PROLOGUE. framework drawing on Rally observations.

STRATEGIC IMPLICATIONS

Implications by Stakeholder

Reliability and user experience are becoming increasingly important measures of progress.

Stakeholder	Key Implications
Government and regulators	Greater emphasis on verified uptime, live-status data and strategic corridor coverage
Charge-point operators	Reliability, service response and payment simplicity as important factors in utilisation and user experience
Vehicle manufacturers	Closer integration of charging access, routing and customer education
Testing and certification bodies	Expanded attention to interoperability and field performance
DISCOMs and energy companies	Faster connections and planning for distributed charging demand
Investors and financiers	Greater use of utilisation, corridor position and reliability data in evaluating charging assets

RELEVANCE TO TERMINATOR 5.0

The findings in this brief are relevant to charger testing, interoperability, standards and fault analysis, themes on the agenda of EV Charging 2.0.



IFEVA team members with the Rally car.



IFEVA leadership briefing senior officials on Rally outcomes and the proposed next edition.

PRIORITIES

Six Priority Recommendations

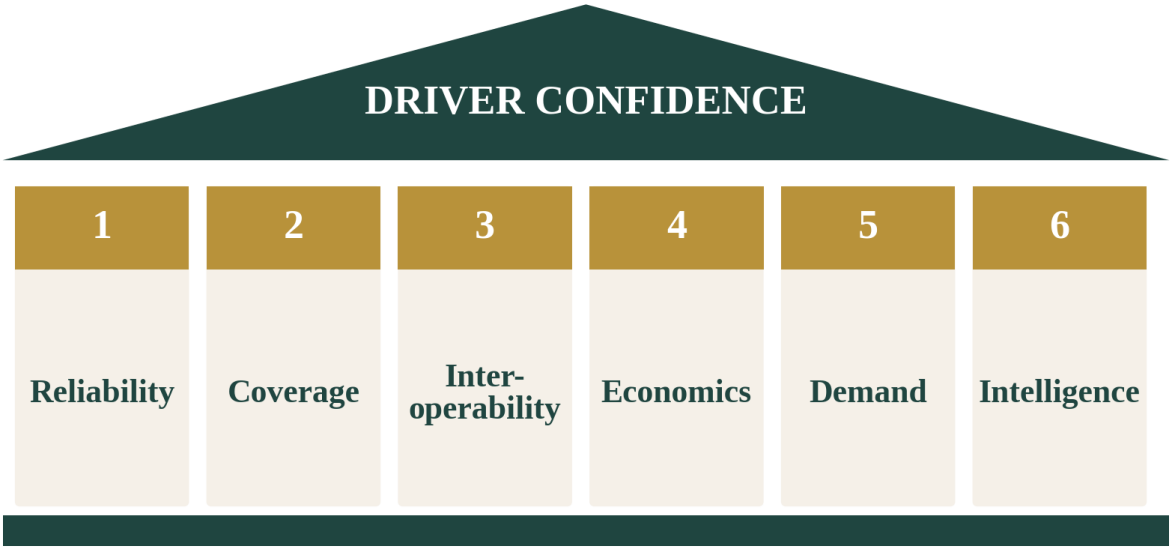
Six focus areas and their associated stakeholders.

Priority	Focus	Associated Stakeholders
1	Charger uptime and live-status visibility	Ministry of Power, BEE
2	Fast charging on state highways and strategic corridors	MHI, states
3	Integrated national EV and charging data	NITI Aayog, BEE, MoRTH
4	Interoperable roaming, payment and connector information	Ministry of Power, operators
5	Recurring field assessment through future Rally editions	IFEVA, BEE, ICAT
6	Campus EV engagement and awareness	IFEVA, AICTE, institutions

Stakeholders shown are indicative and do not imply institutional commitment.

EXHIBIT 6 **Recommendation Architecture**

Six levers for a mobility-ready EV ecosystem



Source: PROLOGUE. framework.

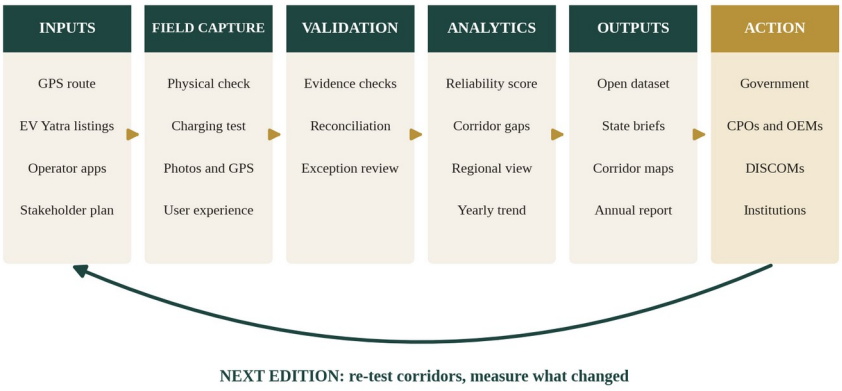
THE NEXT PHASE

National EV Observatory: Proposed Operating Model

Future editions could each build on the last, producing open, comparable data on charging quality.

EXHIBIT 7 **National EV Observatory Operating Model**

Proposed process for field capture, validation, analysis and reporting

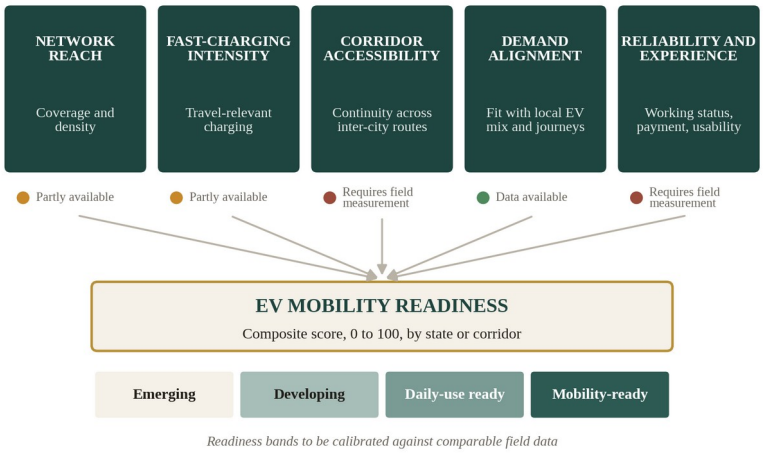


Source: PROLOGUE. framework.

Alongside a station-level reliability score, the full report sets out the architecture of an **EV Mobility Readiness Index**, developed by PROLOGUE., which assesses state and corridor readiness across network reach, fast-charging intensity, corridor accessibility, demand alignment and reliability. Scored results could follow once an Observatory edition provides verified field data.

EXHIBIT 8 **Proposed EV Mobility Readiness Index**

Index architecture and indicator groups



Source: PROLOGUE. framework.

ABOUT THIS BRIEF

About the Publication

This Executive Brief summarises **Bharat Maha EV Rally 2025: Impact and Policy Report**, published by IFEVA with PROLOGUE. as Knowledge Partner. The full report sets out field observations, state and regional analysis, ten analytical frameworks, twenty recommendations with associated stakeholders and indicative implementation horizons, and the proposed National EV Observatory.

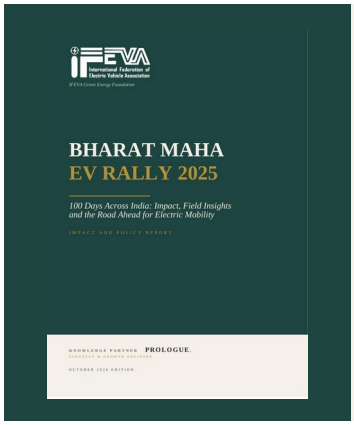
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THE FULL REPORT

Bharat Maha EV Rally 2025: Impact and Policy Report

Launch Edition, released at TERMINATOR 5.0, Greater Noida, 24 October 2026

Twelve chapters with supporting annexures covering the Rally record, India's charging and adoption landscape, field observations, charging economics, ten PROLOGUE. analytical frameworks, twenty recommendations and the proposed National EV Observatory.

CITATION

International Federation of Electric Vehicle Association (IFEVA) (2026). Bharat Maha EV Rally 2025: Executive Brief. IFEVA Green Energy Foundation, New Delhi. Knowledge Partner: PROLOGUE.

BASIS OF PREPARATION

This brief has been prepared using programme information and inputs supplied by IFEVA, supplemented by official government sources, institutional records and published material. Programme information and organiser-supplied data remain the responsibility of IFEVA and have been relied upon as supplied unless otherwise stated. Official statistics are reproduced as published in the sources cited in the full report. Analytical frameworks are developed by PROLOGUE. PROLOGUE. is the Strategy & Growth Advisory practice of Prologue Technologies Private Limited, Gurugram. Photographs: IFEVA.

BHARAT MAHA EV RALLY 2025

Executive Brief

The full Impact and Policy Report is available for download at www.fevaev.com

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