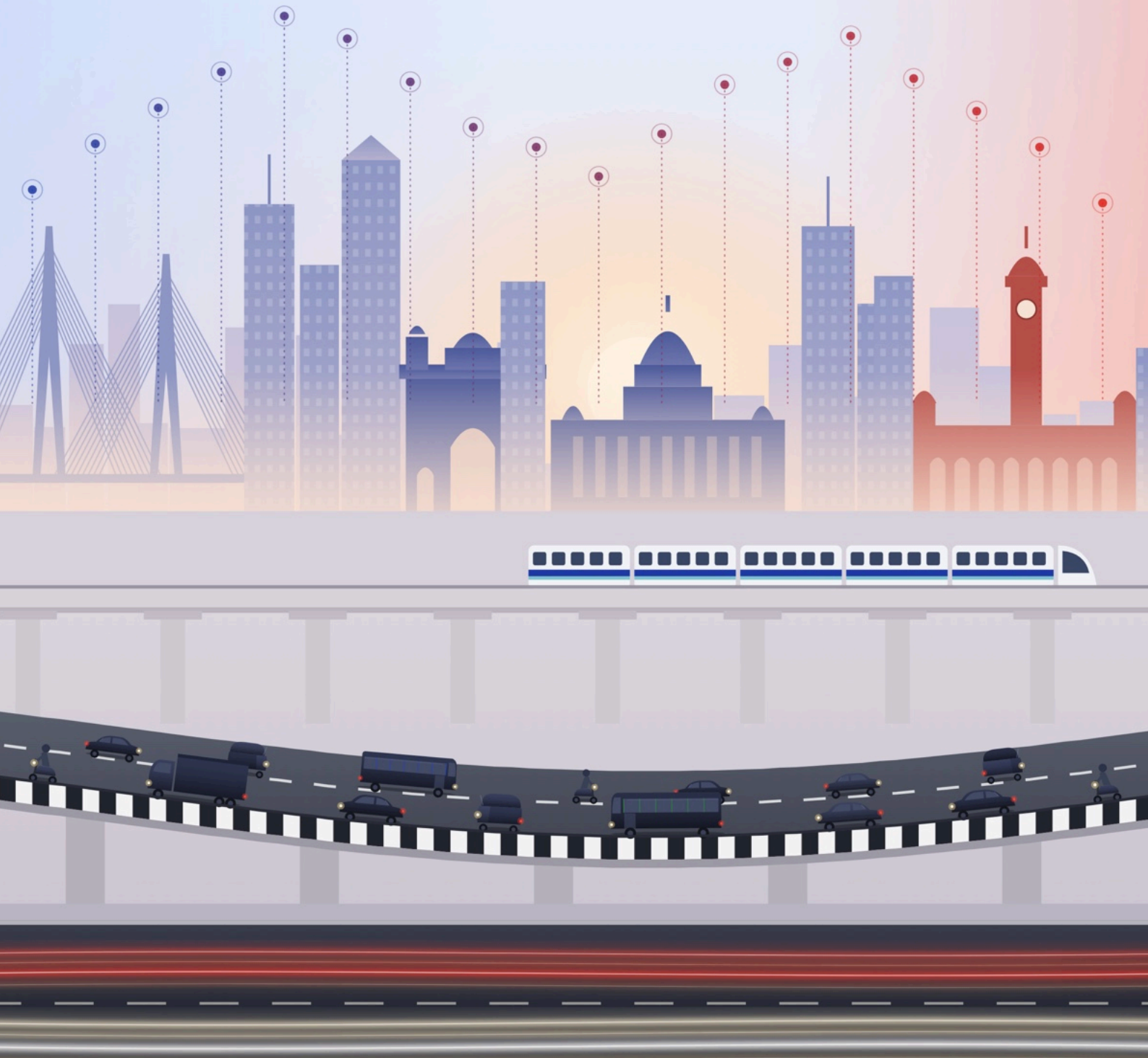
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THE FLYING CAR INDEX

OCTOBER 2026



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PHD Chamber of Commerce and Industry (PHDCCI) has been working as a catalyst for the promotion of Indian industry, trade and entrepreneurship since 1905. It is a forward looking, proactive and dynamic PAN-India apex organization. As a partner in progress with industry and government, PHDCCI works at the grass roots level with strong national and international linkages for propelling progress, harmony and integrated development of the Indian economy. Under the aegis of its State Development Council (SDC), PHDCCI essentially carries forward the mission of "Empowering States" to strengthen India's federal structure of governance and create global partnership linkages.

Authors
Atri Prasad Rout, Anjana Leena Sathy, Anuraag Kumar Nair, Suraj Paswan, Dr. Samira Sarah Abraham and Vedika P.

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Overview

On October 15, 2026, Tesla unveiled its next-generation Roadster at a SpaceX test facility in Texas.[1] The car used suction to climb a steep ramp, spun off it, flipped in mid-air and used air jets to land. Elon Musk called it a flying car and said production would begin in 2028. He also admitted the car may not be legal everywhere – and was not "optimised for safety".[2]

This report does not deal with flying cars. Its title is meant to evoke the idea of the frontier. Since 'mechanically propelled vehicles' are a concurrent subject in the Indian Constitution, this report focuses on enabling transportation policies and safety measures at the state-level. Through this lens, it seeks to answer a question that alternative transport technologies like flying cars presuppose: are Indian states ready, in their roads, rules and public services, to support next-generation transport?

New technologies need supporting ecosystems. Electric vehicles (EVs), for instance, need charging networks. Hydrogen vehicles need fuelling stations. All vehicles need safe roads, clear regulation, traffic management and emergency services.

Discussion on the future of Indian transport has centered on EVs. Hybrids, hydrogen cars and other alternative technologies have attracted some interest. A 2020 Autonomous Vehicles Readiness Index evaluated by KPMG, ranked India as the second least prepared country for driverless vehicles. The Index evaluated 30 countries across four parameters, including policy and regulations, technology and innovation, infrastructure and consumer acceptance.[3] [4] India scored the least in formulation of Autonomous Vehicle centric regulations, as policy attention and investment have remained focused on EV adoption. EVs provide environmental, financial, and operating benefits which depend on suitable road networks, last-mile connectivity, clear regulation and effective traffic management.

A systematic review of literature on the drivers of electric vehicle adoption identifies that emerging markets encounter difficulties related to infrastructure constraints and financial access, whereas developed areas focus on advancing technology and policy development.[5] At the same time, technology plays an important role in the enforcement of road safety rules. Latest research reveals the role of artificial intelligence empowered enforcement systems in significantly reducing fatal accidents.[6]

States hold much of this responsibility. They build and maintain roads, run public bus services, register vehicles, enforce traffic rules and manage emergency response. Some states have already prepared for alternative technologies. Others are still assessing their feasibility and infrastructure needs. As a result, states differ in how prepared they are.

Against this backdrop, the index ranks 18 major states across five pillars: capacity/infrastructure, intent through future ready policies, safety, emergency management, and tech enforcement. It seeks to demonstrate which states have the foundations new vehicle technologies need, and where gaps remain. The index allows states to compare their position with other states. It identifies the policies and investments that distinguish early movers. It also gives states a basis for long-term transport planning beyond EV sales targets.

The Five Pillars

Although frontier innovations in transport include autonomous vehicles, hybrids, hydrogen cars, and other alternatives, India is currently focused on increasing the adoption of electric vehicles. Thus, data availability for frontier technologies barring electric vehicles remain limited. The index has therefore been constructed on the basis of five key dimensions, majorly focusing on electric vehicles, and discussed below:

1. **Infrastructure:** This pillar measures a state's progress towards e-mobility transition by examining the extent of commercial EV adoption, availability of charging infrastructure and the extent of transport innovation. The pillar primarily focuses on EVs and e-mobility because national policy discourse, incentives, and investment are currently focused on EV adoption and the infrastructure required to support it. Each of the following indicators contributes to a state's overall score under this pillar :

    - **Adoption:** Adoption indicates local consumer preferences as well as the extent of public transport fleet electrification.
    - **Charging availability:** Determines whether such a transition is sustainable as consumers might postpone purchases in regions where supporting charging infrastructure is scarce.
    - **Installed renewable energy capacity:** This parameter further determines the extent to which the EV charging grid is serviced by renewable energy sources, keeping in line with the government's push to cut vehicle emissions and reduce reliance on fossil fuels.

    Taken together, these parameters separate states with durable, self-sustaining EV ecosystems from those with early EV uptake but inadequate supporting infrastructure needed to maintain it. The EV sector is capital intensive and requires long-term planning, so timely infrastructure commitments are key to closing institutional gaps and ensuring lasting advantages in investment, industry, and employment.

2. **Road Safety Outcomes:** Expanding the number of next-generation vehicles without matching improvements in road quality and traffic management increases short-term and long-term exposure to traffic accidents and congestion. For policymakers, road safety is a measure of the human toll of transport and how well local governments perform. This pillar therefore uses two indicators:

    a. **Road fatality rates:** Measures total road accident fatalities per 10,000 vehicles.
    b. **Road density:** Measures total built density of roads per 1,000 sq km.

    Together they assess whether existing road networks can sufficiently support vehicles. The two parameters separate states with persistent road safety problems from those actively working to improve. It also ensures that states successful in EV policy implementation are not rewarded where road conditions remain poor.

3. **Policies for the Future:** A state's willingness to adopt future-ready policies shows how it prioritises EV frameworks and supplementary infrastructure, but the key distinction is between adoption and implementation. Every state in the index has adopted some policy for e-mobility transition, but only some have moved towards implementation with defined deliverables and timelines. Scoring states on their respective capabilities and institutional capacity to enact independent policy mandates showcases the extent of institutional cohesion. Strong policies with active, forward-looking implementation act as a clear determinant in charting out well-defined timelines and incentives for in-state manufacturers, investors, and consumers.

4. **Emergency Response:** This pillar measures a state's capacity in effectively responding to emergencies by cumulatively scoring ambulance response times across states. While state-wise averages for response times have been calculated, concern arises in the differing response times between urban areas and rural areas. Urban areas generally record faster response times, despite traffic congestion issues. Outdated traffic management infrastructure, ageing roads, and increased emphasis on private transport congest localities. They also prevent authorities and emergency medical service (EMS) personnel from responding to emergencies. This stands as a key determinant in how effective a state's existing network is to accommodate for more private vehicles while ensuring consistent and minimal response times across localities.

5. **Tech Enforcement:** Intelligent Traffic Management Systems (ITMS) and their enforcement increasingly depend on data-driven platforms such as Integrated Command and Control Centers (ICCC) to coordinate traffic personnel and reduce traffic. An ICCC platform integrates data from various sources such as body-worn cameras (BWC), traffic cameras, Automatic Number Plate Recognition (ANPR) systems, signals, and sensors to ensure rules are enforced consistently and incidents are responded to in a timely manner. This pillar further supports other pillars such as Road Safety, Emergency Response and Policies for the Future as a nodal indicator for gauging a state's success in implementing its initiatives across all supplementary parameters.

The Index

The Index rests on five pillars and takes into consideration the eleven parameters described above. Each pillar is scored on a scale of 0 to 100, with 100 marking the best performer among the 18 states. A score therefore shows how a state compares with its peers and does not measure absolute performance.

The pillar scores are combined into two versions of the Index. The first version, the primary index (8th column from the left) gives 25 percent weightage each to Infrastructure, Road Safety Outcomes and Policies for the Future, 15 percent to Emergency Response, and 10 percent to Tech Enforcement. Emergency Response and Tech Enforcement have lower weights as each rests on a single parameter and varies less across states. States are ranked on this primary index. The second version (9th column from the left) calculates an index with equal weightage for all the pillars. As it can be seen, the rankings across the two versions do not vary significantly. (For a detailed discussion of how the index has been constructed, please refer to the methodology section in Annexure A)

Ranks	States	Infra score	Road safety score	Emergency response score	Tech enforcement score	Policies for future score	Index: Different weights	Index: Equal weights
1	Karnataka	100	46	66	100	100	81	82
2	Tamil Nadu	72	40	79	100	100	75	78
3	Keralam	67	100	81	100	40	74	78
4	Maharashtra	93	50	45	100	60	67	70
5	Andhra Pradesh	56	29	54	100	100	64	68
6	Rajasthan	73	16	100	100	60	62	70
7	Haryana	40	32	87	100	80	61	68
8	Punjab	19	58	70	100	80	60	65
9	Uttar Pradesh	17	33	72	100	80	53	60
10	Gujarat	41	53	60	100	40	52	59
11	Madhya Pradesh	42	6	63	100	60	47	54
12	Assam	16	59	77	50	40	45	48
13	Telangana	31	28	82	100	20	42	52
14	Odisha	36	32	25	100	40	41	47
15	Uttarakhand	44	45	58	50	20	41	43
16	Bihar	0	28	66	100	20	32	43
17	West Bengal	3	49	66	50	0	28	34
18	Chhattisgarh	16	0	0	50	60	24	25

The results that follow are grouped into three sets of six states, ordered by rank, to show how states with similar profiles cluster. Overall scores range from 24 for Chhattisgarh to 81 for Karnataka, with a gap of 57 points. The three groups are separated by steady steps of about 18 points in their average scores, so each group has a distinct profile. Most of that separation comes from Infrastructure and Policies for the Future, which vary widely across states. The sections that follow look at what determines each group's position and highlights the key initiatives taken by the top-performers (the top three states in the index).

Results

Karnataka (81), Tamil Nadu (75), and Keralam (74) lead the Index, while West Bengal (28) and Chhattisgarh (24) trail. Karnataka and Tamil Nadu lead because they score well across several pillars. Both reach the highest scores (100) on Policies for the future and Tech enforcement, Karnataka is at 100 on Infrastructure. On the other hand, Keralam has the best road safety but scores modestly in Infrastructure (67) and Policy (40). Rajasthan, which sits within the top six, tops Emergency Response yet has weak road safety (16).

Infrastructure and Policies for the Future are pillars where states differ most. The Infrastructure score which captures electrification of transport fleets, integration of renewable energy, and preparedness of charging infrastructure is the lowest for Bihar and highest for Karnataka, with Maharashtra and Rajasthan near the top. States that have built e-mobility infrastructure also tend to offer incentives for manufacturing and R&D, so the two factors, infrastructure and policies, reinforce each other. While Karnataka, Tamil Nadu, and Andhra Pradesh attain the highest levels in policies, West Bengal, Bihar, Uttarakhand, and Telangana sit lower, with a need for forward looking initiatives.

Road Safety Outcomes, with an average score of 39, captures density of the road network and fatality rates. Keralam scores the highest with least fatalities and highest density, while Assam and Punjab also lead. With low levels of road density and relatively high fatality, Chhattisgarh and Madhya Pradesh score lesser on this pillar. Road safety remains the overall weak spot, with even the top six states averaging 47. For enhanced mobility, this suggests that safer roads need separate policy attention. Emergency Response is spread more evenly, with an average of 64. While Telangana and Bihar score well despite low overall ranks, Maharashtra and Odisha lag despite stronger overall positions. In Tech Enforcement, which displays least variability and carries the least weight in the index, fourteen of 18 states score 100. The more relevant gaps remain in physical infrastructure and policy depth.

Overall, states appear to focus on policy first and infrastructure second. The step up from the group of bottom six (**Emerging states**) to the middle six states (**Advancing states)** comes mainly from having policies in place (average 27 to 63) alongside better emergency response and enforcement. However, the step up from the middle six to the top six states (**Frontier states**) is almost entirely driven by infrastructure (average 29 to 77). Haryana, Punjab, and Uttar Pradesh show this gap most clearly. All three score similarly on policy, but their difference in infrastructure scores decides their ranks. This suggests the importance of the scale and pace of infrastructure that has to match policy support.

Among states, Karnataka and Tamil Nadu come across as all-rounders, strong on both infrastructure and policy. Maharashtra and Rajasthan are infrastructure-led, with modest policy scores. Andhra Pradesh is policy-led, with modest infrastructure. Keralam leads with road safety, with significant additions required in policies and incentives.

Takeaways from the top-performers:

To interpret these rankings meaningfully, it is useful to look beyond composite scores and examine the factors that contribute to states' readiness and movement towards new vehicle technologies. Deconstructing this helps illustrate the breadth of capabilities that underpin high scores across the five pillars, and highlights the different pathways through which states can showcase their intention towards new technologies and innovation in transport.

Karnataka

Karnataka ranks first on the Index with a composite score of 81. Its lead comes from the breadth of its strengths. It performs at the top, with perfect scores, on infrastructure, future-ready policy, and tech enforcement, which few states manage together.

On infrastructure, Karnataka has one of the largest public charging networks in the country, second only to Maharashtra. This places it well ahead of the other South Indian states. It also received the highest number of charger approvals under PM E-DRIVE. Commercial transport sees momentum too - Bengaluru's city bus operator (BMTC) already runs a significant electric fleet accounting for about 25 percent of the total number. The Centre has further approved the electrification of another 63 percent of the total fleet. A strong renewable base supports this, as clean sources make up roughly two-thirds of the state's installed power capacity.

Its policy score reflects early and sustained intent. Karnataka was the first state to adopt a dedicated EV policy in 2017. Its Clean Mobility Policy 2025–2030 further sets investment and job-creation goals. The state has also approved a major e-bus programme financed by the World Bank. On enforcement, existence of AI cameras at key Bengaluru junctions mean most offences are now captured and registered without contact. The state is extending this automated enforcement to highways, feeding a central control room.

Karnataka is the perfect example of what a state would look like when EV infrastructure, policy intent, and technology led enforcement move together. Road safety and emergency response are its relatively weaker pillars, with scope to improve.

Tamil Nadu

Tamil Nadu ranks second on the Index with a composite score of 75. It pairs a strong policy framework with a deep manufacturing base. It also performs well on tech enforcement and emergency response.

Its EV policy is closely tied to its industrial strategy. Its strength lies in turning its manufacturing base into a policy-backed EV ecosystem. The 2023 policy sets ambitious investment and job targets, with dedicated EV parks planned near Chennai and Hosur. Six cities are also earmarked as potential EV hubs. The state also has a strong position on clean energy, with a significant solar and wind base together with the third largest solar manufacturing capacity in the country. On the demand side, it has 3,839 charging stations and 2.59 lakh EVs supported under PM E-DRIVE. Public transport is also seeing a shift towards EVs. Chennai has begun large-scale electric bus deployment with more at the planning stage. The state aims for 30 percent of its public bus fleet to be electric by 2030.

On enforcement, Chennai's number plate recognition cameras are linked to the national vehicle database and issue challans automatically. Chennai's ambulance response times are however below the state

average, and real-time tracking is being rolled out gradually across the state. Road safety is its weakest pillar, which the state has continuously worked on. The state has historically had high accident-fatality rates, although its data-driven approach to accident hotspots and trauma care achieved a sharp fall in deaths in 2018.

Keralam

Keralam ranks third on the Index with a composite score of 74. Its high ranking comes from its safety measures rather than on EV infrastructure or policy, where it trails the other two. It performs strongly on road safety and emergency response in the index scoring, and has a consistent approach to tech enforcement.

Keralam has the densest road network among the states, and its crash outcomes are better despite its high accident volumes. The fatality rate is low at 2.5 percent, which the Motor Vehicles Department attributes to high helmet and seat-belt use. Enforcement is also the state's strong suit; the Safe Kerala project installed 726 AI cameras statewide with officials reporting a sharp fall in road deaths. However, one criticism concerning its emergency response remains. Reports have pointed to the 108 ambulance service being unavailable at times. A World Bank assessment also identified the low rates of use of 108 after road accidents. This shows there is room to improve.

On infrastructure, Keralam boasts a sizable charging network, with the state electricity board running it. EV uptake has been consistent but consumer-led, with the vast majority (93 percent) of EVs on-road being personal vehicles. Only 190 of the public buses are electric, significantly affecting the policy score. The 2023 draft revision of the state EV policy also noted that EV penetration has remained low despite the dedicated framework in 2019.

Conclusion

The Index shows marked differences in how states are positioned for the transition to future-looking mobility. Frontier states combine stronger infrastructure, wider policy support, and effective command and control systems. Advancing states have built strong policy foundations and emergency response but have yet to build the infrastructure that would carry them forward. Emerging states are still putting their foundations in place, particularly in terms of policy support. Going forward, each group confronts distinct priorities:

- **Frontier states** should focus on deepening what they have built, in terms of improving road safety outcomes (which is their weakest pillar), and extending incentives for areas such as R&D and skilling.
- **Advancing states** need to close the gap between pillars. Many already have policy frameworks in place. Focus on electricity, charging, and mobility infrastructure may help them move to the level of their frontier peers.
- **Emerging states** should build the basics, with a focus on policy and incentive frameworks, emergency response, and infrastructure. Several already do well on one or two pillars, while priority to the rest can anchor wider progress.

Overall, the Index suggests that progress towards future mobility comes from strengthening these pillars cumulatively.

Data limitation remains a central consideration in assessing transport innovation in India. There exist gaps in publicly available verifiable data when examining certain parameters of interest. One of the key challenges in scoring states according to their performance in Emergency Response Times is the lack of cohesive government data on police response times. While certain states do publicly list police response times through official social media feeds or press releases, there is a lack of a comprehensive publicly-available repository by a government agency that is independently verified. Another key challenge is the lack of policy discourse and empirical research on alternative fuel vehicles (including hybrid vehicles), exploring consumer interest and domestic manufacturing feasibility. Mainstream attention predominantly remains centered on electric vehicles. Moving forward, broadening the scope of empirical research to account for alternative fuel vehicle categories can expand policy discourse on transport innovation.

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Annexure A: Methodology

For constructing this index, eighteen major states with a population of more than one crore were selected. The Index is built in two steps. First, a score for each pillar is calculated based on the value of the parameters. Second, the five pillar scores are combined into the final Index score. The pillar scores are built as follows:

1. Every parameter is standardised on a 0 to 100 scale. Parameters already published on a 0 to 100 scale are used as they are. Continuous parameters are rescaled with the minimum and maximum across the 18 states.
2. Each parameter has been oriented accordingly. Where a lower raw value is better (fatality rate, ambulance response time), the scale is reversed so that 100 always marks the best performer and 0 marks the worst performer.
3. In case of the pillar Emergency response, to address missing values, average value for states with more than five crore population has been taken as proxy for Bihar and Karnataka, and average value for states with one to five crore population has been taken as proxy for Andhra Pradesh and West Bengal.
4. While calculating scores for three pillars (infrastructure, road safety, and policies for the future), the parameters included within them have been treated with equal weight.
5. The Index score has been calculated using the weighted average of the five pillar scores. The weights are 25 percent each for Infrastructure, Road Safety Outcomes and Policies for the Future, 15 percent for Emergency Response and 10 percent for Tech Enforcement. As a check, we also compute the Index with equal weights of 20 percent per pillar.
6. Rankings are stable to the choice of weights. Basic checks on data have been performed using scatter plots and measures of central tendency and dispersion.

Annexure B: Definition of Parameters and Data Sources

The Index uses 11 parameters across five pillars. For each, this annexure gives what it stands for, the metric used and the source.

Infrastructure

Transport Electrification: The state's progress in adopting electric vehicles across private and commercial segments, together with the governance support behind it.
Metric used: Transport Electrification Progress score, out of 100.
Source: NITI Aayog and WRI India, India Electric Mobility Index (IEMI) 2025.

Charging Infrastructure Readiness: How well prepared the state is to support EV charging, through charger availability, power supply and enabling policies.
Metric used: Charging Infrastructure Readiness score, out of 100.
Source: NITI Aayog and WRI India, India Electric Mobility Index (IEMI) 2025.

Installed Renewable Capacity: The extent to which the state's power capacity comes from renewable sources, a marker of its ability to support clean charging.
Metric used: renewable share of installed capacity, in percentage.
Source: Central Electricity Authority, India Energy and Climate Portal, NITI Aayog.

Road Safety Outcomes

Road Fatality Rate: How deadly road accidents are in the state, where a lower rate means safer roads.
Metric used: total accident fatalities for 10,000 vehicles, for 2024, reversed so that the lowest rate scores 100.
Source: Road Accidents in India 2024, Ministry of Road Transport and Highways (MoRTH).

Road Density: The length of the road network relative to the state's area, a proxy for the infrastructure available to support safe vehicle movement.
Metric used: Road length per 1,000 sq km.
Source: Basic Road Statistics of India (2022), MoRTH.

Emergency Response

Ambulance Response Time: How quickly emergency medical services reach people in need, where a shorter time means a better response.
Metric used: Ambulance response time in minutes, converted to decimals, reversed so that the quickest state scores 100.
Source: 16th Common Review Mission Report, 2024, Ministry of Health and Family Welfare (MoHFW) and National Health Mission (NHM); state government documents.

Tech Enforcement

ICCC Implementation: The extent to which the state has put Integrated Command and Control Centres (ICCCs) to use across its cities.
Metric used: Graded rating, scaled to 100. A rating of 0 means no ICCC, 0.25 a pilot in one city, 0.5 implementation in one city (the capital) and 1 implementation in more than one city.
Source: ICCC platform, Ministry of Housing and Urban Affairs (MoHUA); state government disclosures and documents.

Policies for the Future

Charging Infrastructure Capital Subsidy: Whether the state offers financial support, in the form of a capital incentives, for setting up charging infrastructure.
Metric used: 1 if the incentive exists, 0 if not.
Source: Overview of State EV Policies, NITI Aayog, State electric vehicle policy notifications.

Skill Development Incentive: Whether the state's policy supports training and skilling of the workforce for electric mobility.
Metric used: 1 if the incentive exists, 0 if not.
Source: Overview of State EV Policies, NITI Aayog, State electric vehicle policy notifications.

R&D Incentive: Whether the state's policy offers incentives for research and development in electric mobility.
Metric used: 1 if the incentive exists, 0 if not.
Source: Overview of State EV Policies, NITI Aayog, State electric vehicle policy notifications.

Utilities Subsidy: Whether the state subsidises utilities such as electricity, water or both for businesses covered by its policy.
Metric used: 1 if the subsidy covers both energy and water, 0.5 if it covers one of the two (energy), 0 if none.
Source: Overview of State EV Policies, NITI Aayog, State electric vehicle policy notifications.

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