

# Promise 2030 - Challenges on scalability of electrification in India

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14

of 20 most polluted world-cities in India

## Air quality in Indian cities

36%

NOx emissions due to vehicles

20%

PM2.5 emissions in Delhi due to vehicles

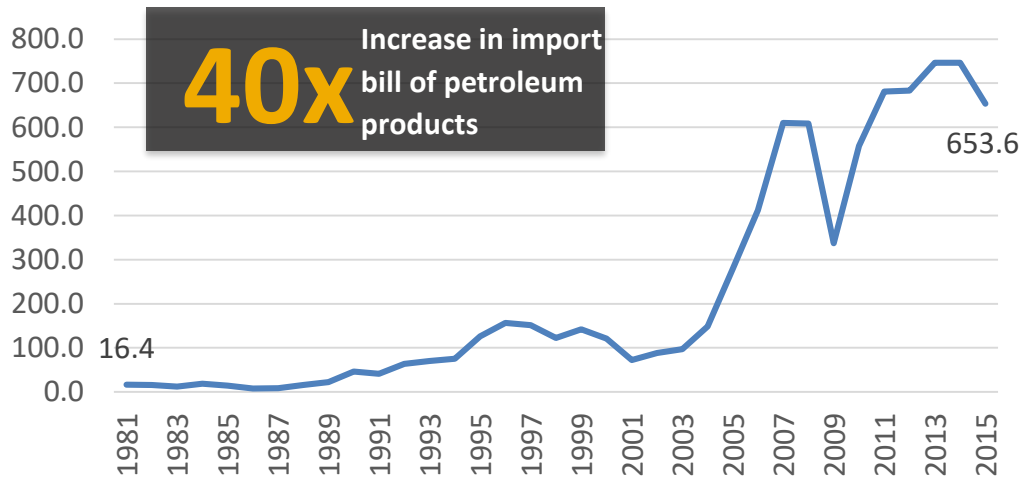


Reuters

# Why so much interest in EVs?

- EV is **four-times** as energy efficient as ICE; has **50 times** less moving parts
  - ICE efficiency: 22% to 23% Vs EV motor energy efficiency: 90%

India's Import Bill for Petroleum Products from 1981 – 2015 (in INR Billions)



Petroleum consumption up from 32.5 mill tons in 1981 to 184.7 mill tons in 2015

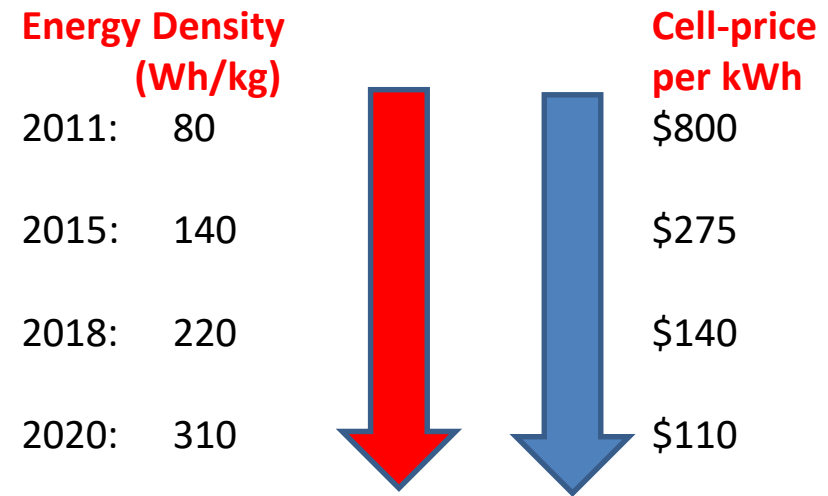
# Where is the problem to switch to EVs?

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- Batteries: energy-storage
  - **Energy-density** of Li-Ion battery-cells is continuously **increasing** and is in between **250 to 300 Wh/kg** today
    - But much less than that for petrol at 9000 Wh/kg
  - Even taking into account four times higher drive-efficiency
    - **Battery weight per km is 8 to 9 times higher** than that of petrol-tank per km
    - Same with the size
- And Cost of battery is **inversely** related to its energy density
  - Higher energy-density: lower use of materials like Lithium, Cobalt, Nickle
  - Higher energy density will have **higher safety concerns**

# Increasing Energy Density → Affordable Batteries

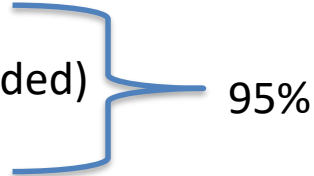
- **Energy density increasing rapidly**: main driver for cost reduction
  - Li Ion Battery: up to 300 Wh/kg available
    - Towards 400 to 500 Wh/kg in coming years
    - NMC with Graphite-Silica anode
      - LFP is limited to 160 Wh/kg
  - Other variants of Li-battery may emerge to drive energy density higher
  - Higher energy-density: higher safety concerns
- EV with large battery to overcome range anxiety (several hundred kms in a car) is still **1.7 to 2 times that of ICE car**



*Compute battery pack cost per km, taking into account its life-time, depreciation and interest*

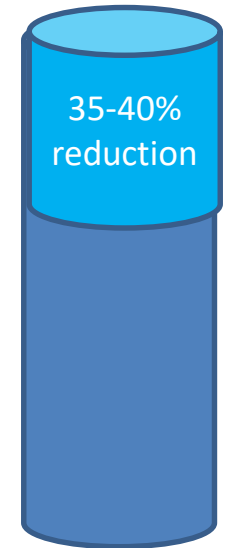
# But are EVs affordable today?

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- India's auto-segment different from that in most of the world: **small and affordable vehicles**
  - Domination of 2-wheelers: 79%
  - Autos including small goods vehicle: 4% (rickshaw not included)
  - Economy Cars costing below ₹1 million: 12%
  - Premium Cars costing above ₹1 million: **2%**
  - Buses and large goods vehicle (including trucks): 3%
- **98% of public and affordable vehicles:** not the focus of the rest of the world; India would attempt to get leadership here
- **2% vehicles (premium four-wheelers):** similar to that in rest of world; India would learn and adopt; encourage multinationals to manufacture them in India
  - Less than 0.5% costs more than ₹1.5 million
  - Will help us build a stronger ecosystem for components and subsystems

# Increase Energy-efficiency of EV

- Battery Dominates the cost of EV
- Focus on higher energy-efficiency: *Kitna deti hai* for EVs (kms/litre of petrol)
  - Lower the energy (Wh/km) used per km, lower is the **battery size and its cost** to drive certain range
    - size and weight of the battery reduces: in fact enhancing efficiency further
  - Efficiency improved by improving Motor and Controller efficiency, better tyres (lower rolling resistance), better vehicle-aerodynamics and lower weight
- Battery size reduced by 35% to 40% over last two years in India
  - For e-autos: from 70 to 80 Wh/km to 45/50 Wh/km
  - E-buses: from 1600 Wh/km to 900 Wh/km

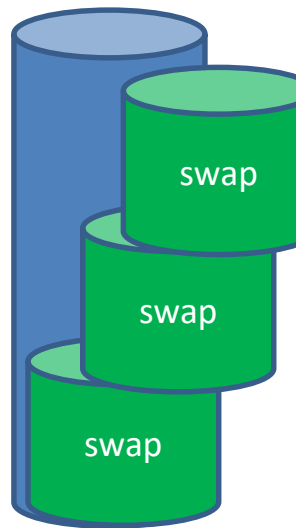


Battery size without range anxiety

# Approach I: Business viability for Public Transport

- To make Public Electric Vehicles more affordable
  - **Split battery** into smaller size (one third) and **swap**
    - No waiting time to charge battery: **no public infrastructure** required
    - Smaller Battery size makes EV highly affordable as compared to petrol vehicles
      - no further economic challenge or technical challenge
    - Engineering Challenges for battery-swapping need to be overcome
  - Battery-life severely affected by Fast Charging at **45 deg C**
    - **Swapped battery** can be charged in conditioned environment and in two hours to maximise its life
  - **Separate** vehicle business (without battery) & energy business (Energy Operator)
    - **Capital and operation cost (₹/km)** similar to that for petrol / diesel vehicle
      - WITH limited SUBSIDY, electric autos and buses can compete today with ICE vehicles

Battery size  
without range  
anxiety



# Approach II: Private Vehicles (4W/2W)

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- Batteries **dominate** the cost of an EV: Tesla uses battery with 540 kms range
  - Increasing the **vehicle weight** (reducing the **energy efficiency or kms/kWh**)
  - On the other hand, Smaller battery creates **range anxiety**
    - Public Fast Charger: **waiting time** + **public charging infrastructure**: takes an hour to charge battery
    - Fast Charge in **15 to 20 minutes**: needs expensive batteries (life impacted as temperature crosses 40°C)
- **Suppose EVs have a small** low-cost battery with limited range built-in: **Affordable**
  - Example: 100/ 50 km range for e-car / e-scooter: **Enough** within cities for **90% of days**
  - Use only night-time **Slow** Charging: **maximising** battery life
- When one needs to drive longer distances (10% of days)
  - use a **RANGE EXTENDER battery to** completely overcome range anxiety
    - **Swap-in** a second (swappable) battery **doubling the range** at a petrol pump (**3 to 5 minutes**)
    - **Swap** the swappable battery again for still longer range (**300 kms or 400 kms**)
    - Swapping carried out by **Energy Operators**



# Approach III: Conventional Approach

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- Choose **right size** batteries
  - Slow-charge normally
  - Fast Charge when needed: **may impact battery-life**
- Needs chargers to be standardised: **what standardisation?**
  - Connector: plugs and sockets
  - Voltage, current and power (maximum)
  - Communication to vehicle?
  - Communication to charger management: charging operator or utility manager
  - Metering: how does one bill customer
  - protection



# Do we have Charging Infrastructure?

Energy Operators could set up Charging /  
Swapping Infrastructure

# Charging Strategy for **best battery-life**

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- Best Charge: SLOW AC at homes in nights (requires on-board chargers)
  - or two to three hours SLOW charging at **office or parking lots**
    - **15 Amp single phase** charging (up to 3 kW) for two-wheelers, three-wheelers or small four-wheelers
    - Three phase charging (6 kW to 20 kW) for larger vehicles with **larger battery**
- Only occasional FAST charging
  - Long-distance trips, vacations, restaurant visits
  - Need to consider that fast charging may impact **battery-life**
    - Especially for low-cost batteries
- Buses and Taxis may need regular FAST charging

# Charger for Public places: Where?

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- Petrol pumps: NO SPACE -- pumps designed for servicing a vehicle in **3 to 5 minutes**
  - Vehicles need to keep moving IN and OUT
  - **Swapping** at petrol pumps in three to five minutes is OK
- Office/Street parking, Parking lots, multi-storied buildings: **Yes**
  - Slow Public Chargers: can be same as used in multi-storied building
  - Fast Chargers: how fast? What kind of vehicles and batteries
- DC Fast Charging: industry need to have a common answer to
  - What **voltage and Power**?
    - Connector?
    - Protocols between vehicle - charger and charger - utility back-end
  - Costs about **₹10000 per kW**
    - 50 kW charger will cost ₹500,000: When will there be a business case?

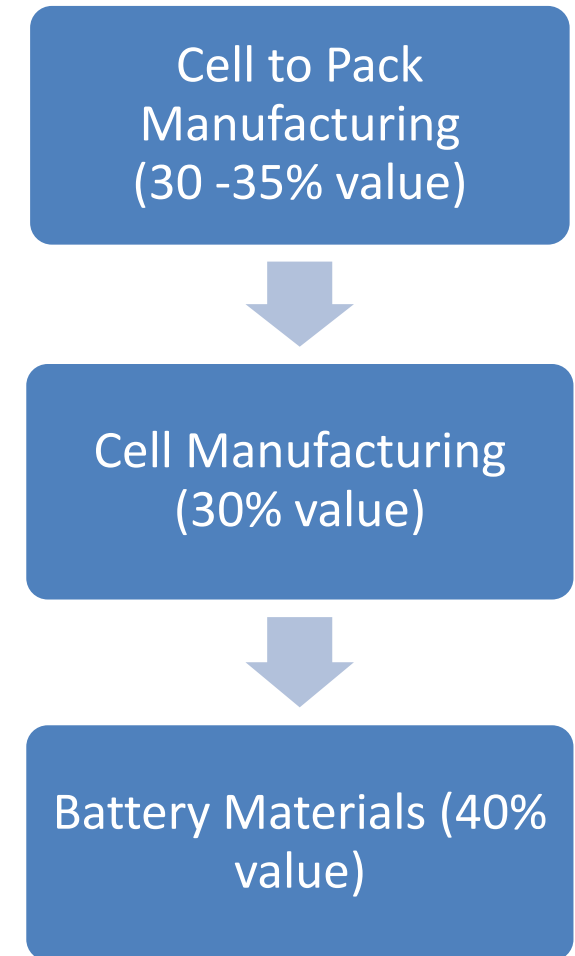


# Where will we get Lithium for batteries?

*or will we **for-ever import** Lithium, Nickle, Cobalt,  
Manganese and Graphite!*

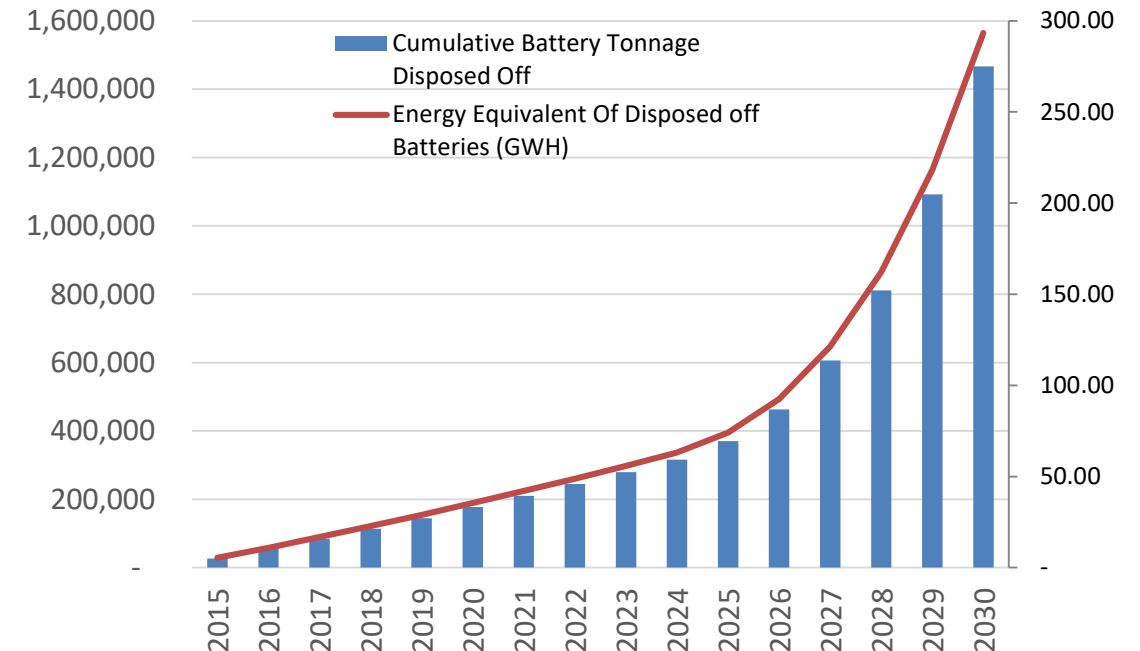
# Li Ion Batteries for EV

- **Battery-pack** development involves
  - thermal design as per **Indian** temperature and driving conditions
    - Low-cost Cooling mechanism to withstand 45°C ambient
  - **mechanical design** to ensure cells do not bulge
  - **Battery Management Systems** to get the best out of each cell
  - Safety is a major concern: handled by BMS
  - **established and start-ups making waves in making BMS**
- Cell manufacturing: technology changes every two years
  - Need technology which stays ahead in energy density
  - \$50M per GWh Capital investment: **JV with external tie-ups**



# Materials for Batteries

- Li-Ion batteries today use
  - Lithium, Cobalt, Manganese, Nickel and Graphite
  - India does not have much of the mines for any these
  - Import bill could **sky-rocket : 25 GWh per year** by 2025
- Recycle used batteries (**urban mining**)
  - **90% of Li and Co**, Ni, Mn and Graphite being recovered
  - Need large number of recycling plants with **ZERO EFFLUENT**
- India could import used batteries and become the **urban-mining capital of the world** for Li-Ion battery-materials



**Over 1 Lakh tons of recyclable batteries are currently available in the market**

*EV threatens India's GDP (auto-sector 7.1% + 5% transport fuel processing / distribution) and large number of jobs*

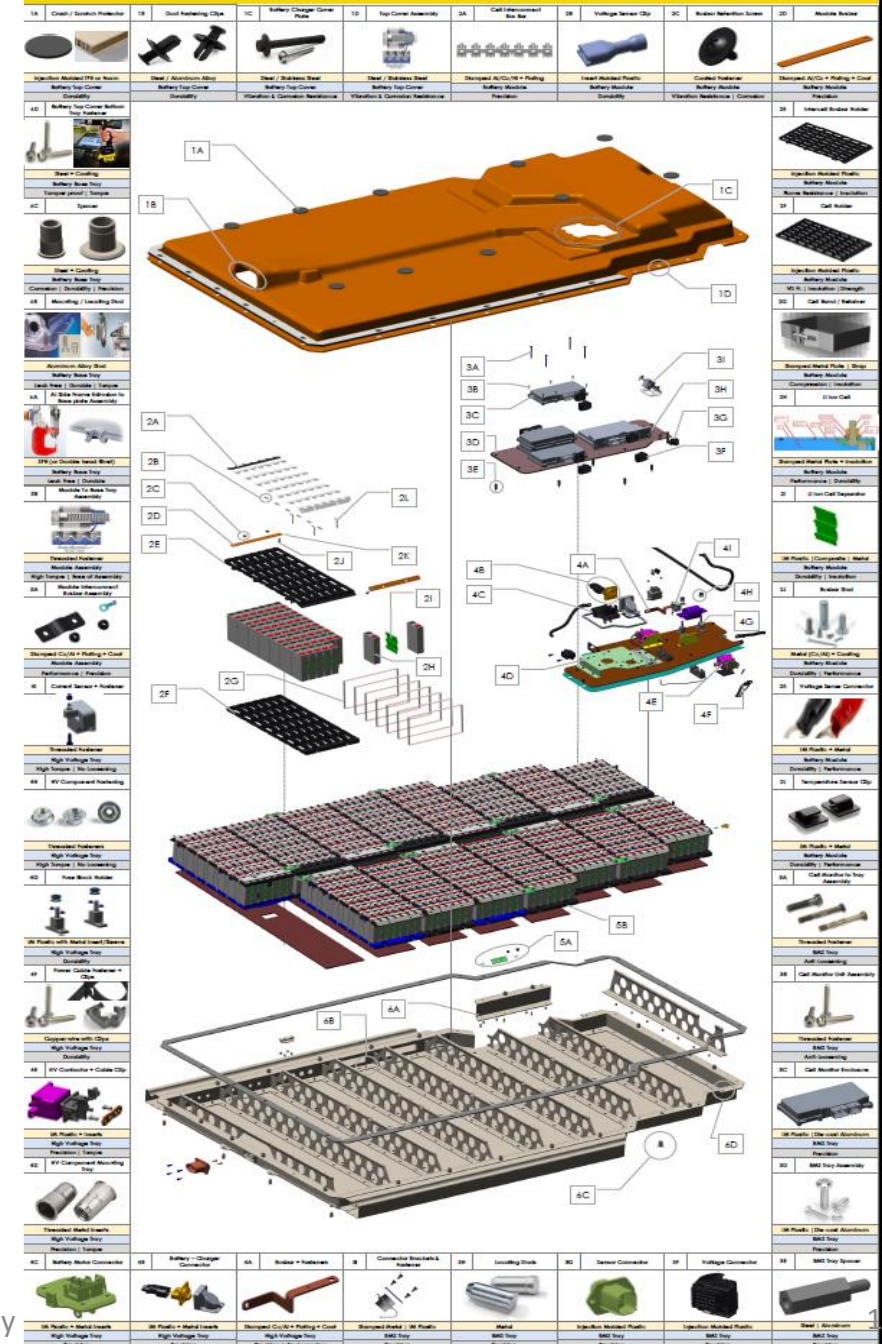
## Will we lose jobs and GDP?

Depends upon whether we design and manufacture sub-systems within India



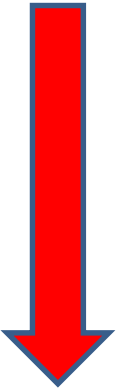
# BATTERY SYSTEM COMPONENTS

- Battery-pack manufacturing involves large number of components
  - Large number of ancillary industry
  - Large number of jobs
- Battery-packs need to be designed for India's environment conditions
  - Involves quality thermal design
  - Careful mechanical design
  - BMS to ensure cell life maximised and safe operations under all conditions



# Cell-manufacturing: Requires Large plants for

- India needs over 100 GWh of cell manufacturing every year
  - Prismatic, Pouch and Cylindrical
- Battery cell manufacturing like a large process industry
  - High investments
  - Technology changes very rapidly
  - Cost falling rapidly
  - Will require lots of ancillary industries
    - Lots of jobs

	Energy Density (Wh/kg)		Price per kWh
2011:	80		\$800
2015:	140		\$275
2018:	220		\$140
2020:	310		\$110



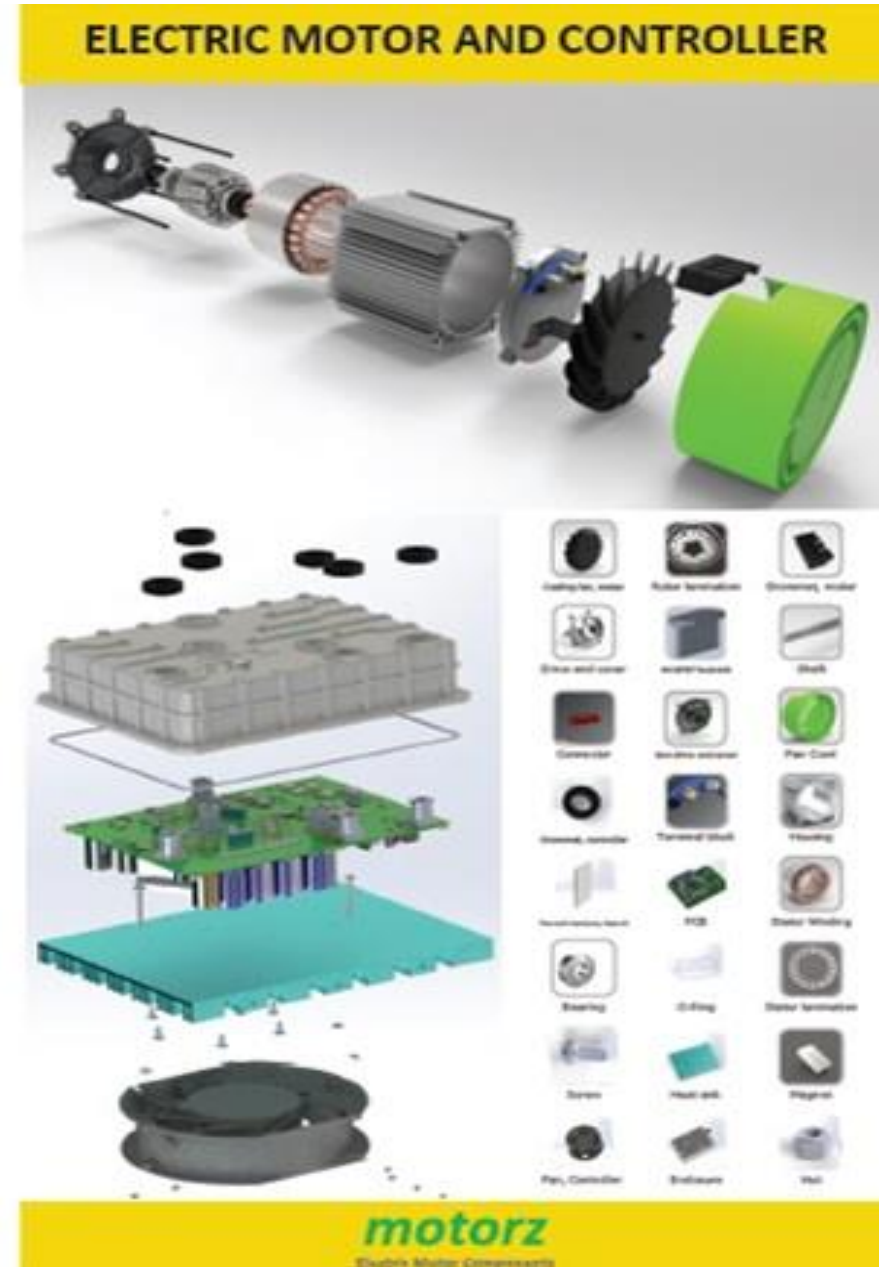
# Will we have to import all Battery raw materials?

- Not if we recycle all used battery with ZERO effluent
  - Can recover over 90% of Lithium, Manganese, Cobalt, Nickel and Germanium
  - And reuse in new batteries
- Highly manual-intensive work: will create huge number of jobs
  - India could become Urban mining capital of the world
    - Import used battery and recover materials
- Battery Recycling market: \$100M today, over \$1B by 2030
  - 1 lakh ton battery waste available today: 23 GWh of batteries
  - Near Term Driver: Consumer Electronics and laptop battery
  - Long term Driver: Electric Vehicles & Stationary Storage Energy

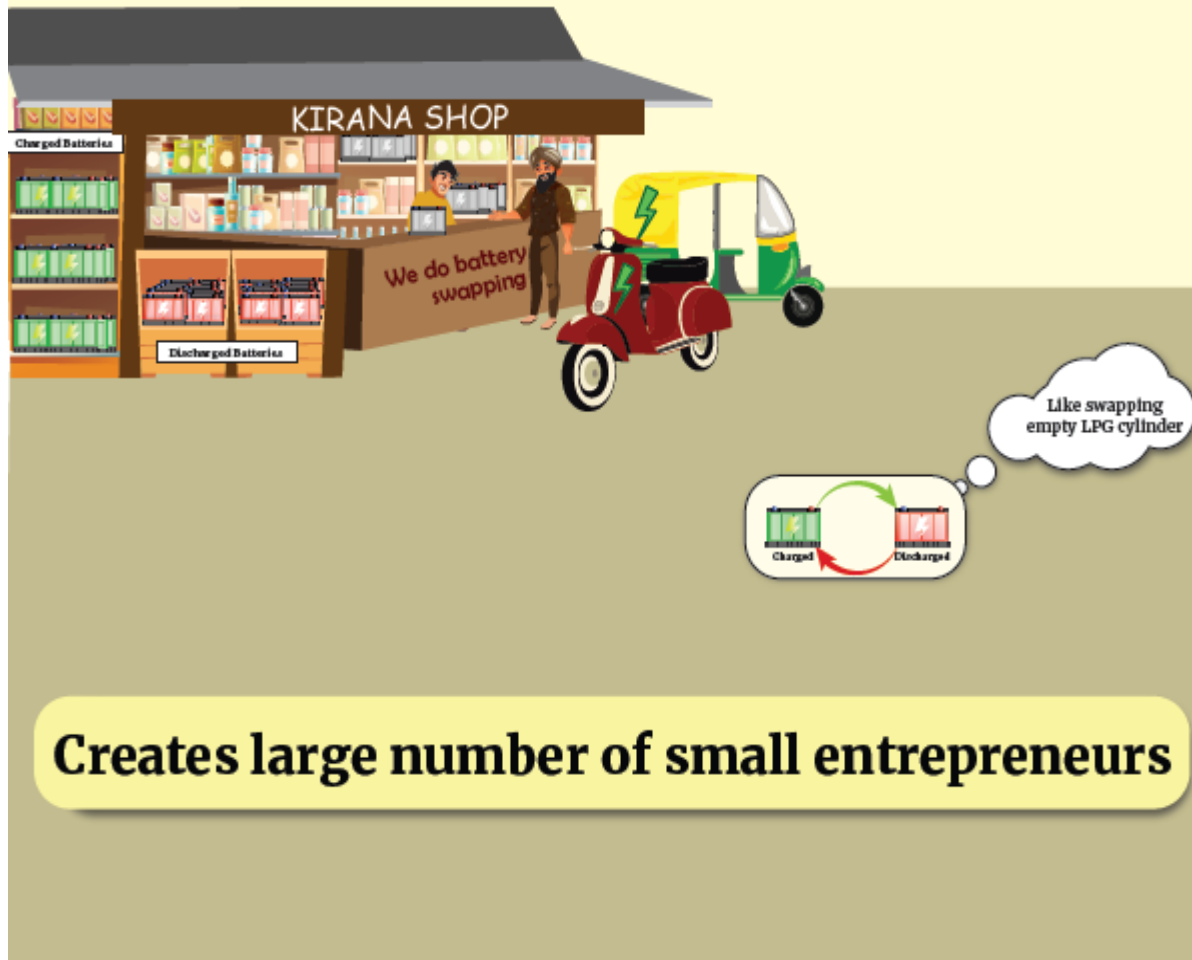
- Need to recycle each battery
- Ensure that all spent Li Ion batteries are sent for recycling
  - Manufacture's obligation

# Motors and Controllers

- Need motors and controllers for
  - Two-wheelers
  - Three-wheelers
  - Four-wheelers
  - Buses
  - Trucks
- Hundreds of components



# Battery Swapping at every Street Corner



- Create a large number of jobs
- Potential for small business

**Creates large number of small entrepreneurs**

# To Conclude

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- Possible to make two / three-wheelers EV affordable in India today: 4-wheelers will follow
  - Aided by FAME-II and GST subsidies and smaller swappable battery
  - Charging Infrastructure not a limitation
- Possible to make high energy-density battery affordable and safe
- Possible for India to recover Li, Co, Ni etc from used batteries: urban mining
- Will it impact our **GDP**? No, if we make all subsystems
- Time is of essence: In four years, may be **flooded with imported** EVs / subsystems
- Can we do it by 2030: **Certainly**

EV article in recent IEEE Electrification Magazine: <https://ieeexplore.ieee.org/document/8546812>

For deeper understanding, look at the blog “understanding the EV Elephant”: <https://electric-vehicles-in-india.blogspot.in/2017/12/>