

# TCS Future-Ready eMobility Study 2025

How EV influencers are shaping  
sustainable mobility



# Executive summary

EV influencers — a diverse group including researchers, policymakers, advocacy groups, and thought leaders — play a crucial role in accelerating sustainable mobility adoption.

By bridging gaps between consumers, industry, and government, influencers are catalyzing a holistic approach to sustainable transportation that considers technological, environmental, and societal impacts.

To better understand how influencers and other key stakeholders are navigating the EV transition, TCS conducted a global survey in August – September 2024 of five segments that play a critical role in shaping a successful EV transition.

Our survey results show that many EV influencers face challenges such as public misconceptions, policy inconsistencies, and affordability concerns. Despite these obstacles, they remain firmly committed to the global EV transition.

## Essential takeaways



84% of EV influencers expect hybrid vehicles to see the most growth in the next one-to-three years



58% of EV influencers expect EVs to compose the majority of new vehicle sales in their own countries within five years



48% Nearly half of EV influencers say the global transition to EVs has been a tougher transition than expected so far



# Momentum builds despite challenges

In spite of the industry’s well-documented setbacks, EV influencers see an easier road ahead. Only 16% expect industry outlook to worsen in the near future, and 50% expect it to improve, making this segment the most optimistic of all five (see Figure 1).

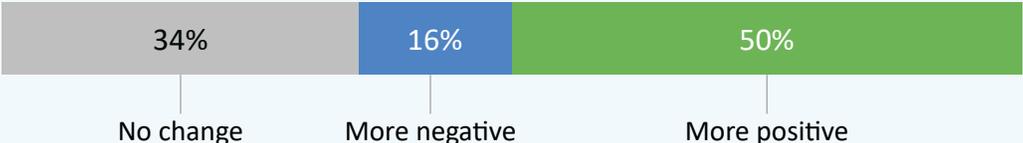


Figure 1. How do you expect the EV industry outlook to change over the coming 12-24 months?

However, an optimistic outlook doesn’t prevent EV influencers from seeing the reality of the EV transition. Nearly half (48%) say it’s been a tougher transition than expected so far. Around a third have had an easier time, saying the transition has been as expected or even faster (see Figure 2).

## EV influencers – the most optimistic of the EV stakeholders surveyed – say the global transition to EVs has been tougher than expected



Figure 2. How would you describe the global transition to EVs so far?

Further, EV influencers do not expect the transition to end anytime soon. Nearly two-thirds anticipate it will take more than five years for the majority of new vehicle sales globally to be EVs.

Still, that leaves more than a third (37%) who expect EVs to represent the majority of sales globally within five years. EV influencers are even more enthusiastic when it comes to their own countries: within five years, 58% expect the majority of new vehicles in their country will be EVs (see Figure 3).

## EV influencers say it will be several years at least before the majority of new vehicle sales in their own country will be EVs and will take even longer globally

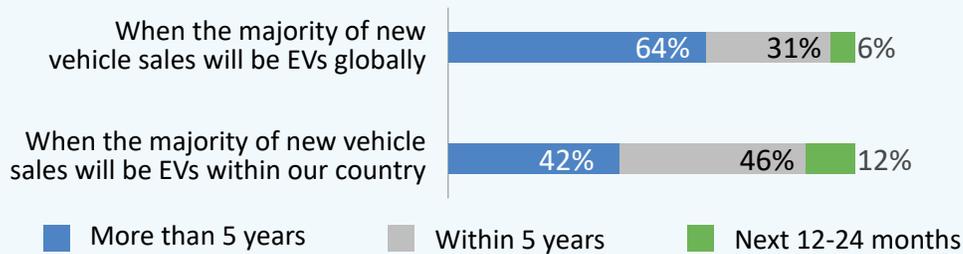


Figure 3. When do you expect EVs to compose the majority of new vehicle sales globally? When do you expect EVs to compose the majority of new vehicle sales in your country?

What’s impeding adoption? EV influencers view range anxiety and high costs as the likeliest impediments impacting the pace of EV adoption. (see Figure 4).

### Top factors impeding the pace of EV adoption

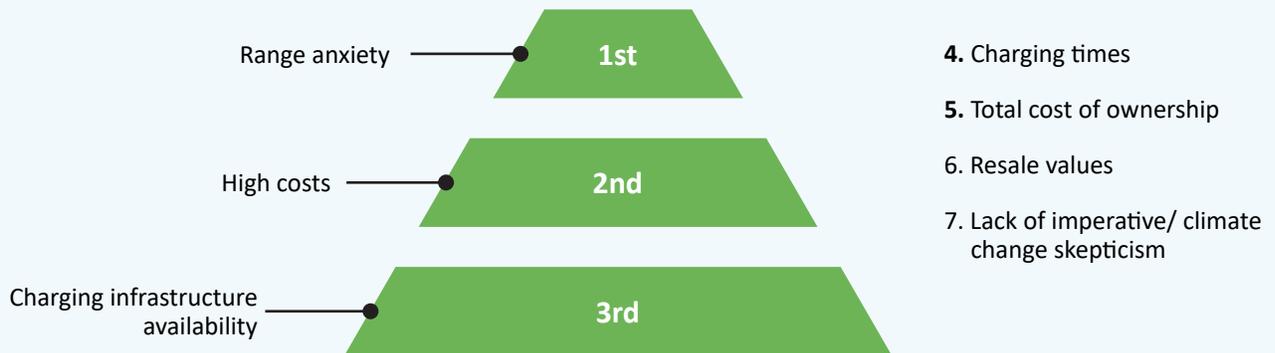


Figure 4. What factors are most impeding the pace of EV adoption?





When it comes to the vehicles, EV influencers say they expect battery technology advancements to have the greatest impact on the design and performance of EVs in the near term (see Figure 5).

### Battery technology ranks high among influencers' hoped-for EV advancements

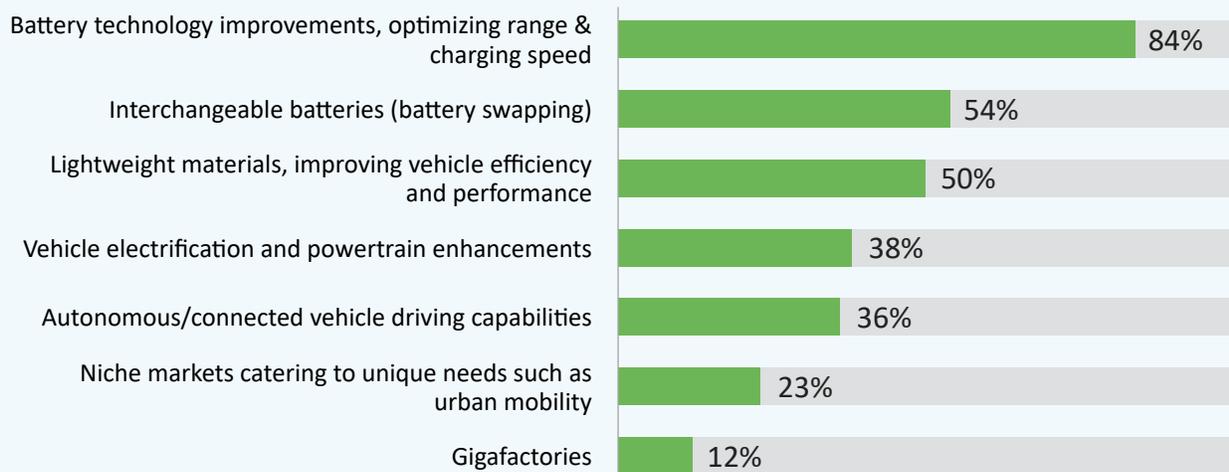
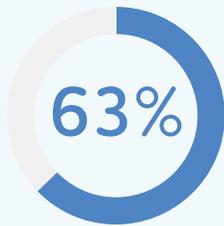


Figure 5. What technological advancements will have the greatest impact on EV design & performance in the near-term?

# Key motivators and incentives

Though sustainability goals remain critical, broader EV adoption has also taken the form of pragmatic approaches like financial incentives that can complement motivations based on environmental responsibility. For example, almost two-thirds (63%) of EV influencers say their primary motivation for EV adoption is to achieve net-zero goals/environmental sustainability and reduced carbon footprint.



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Yet they see financial incentives as the most influential factor to nudge EV adoption, with less than half saying the same of sustainability (see Figure 6).

## EV influencers recognize that consumers need financial incentives and an infrastructure to adopt EVs

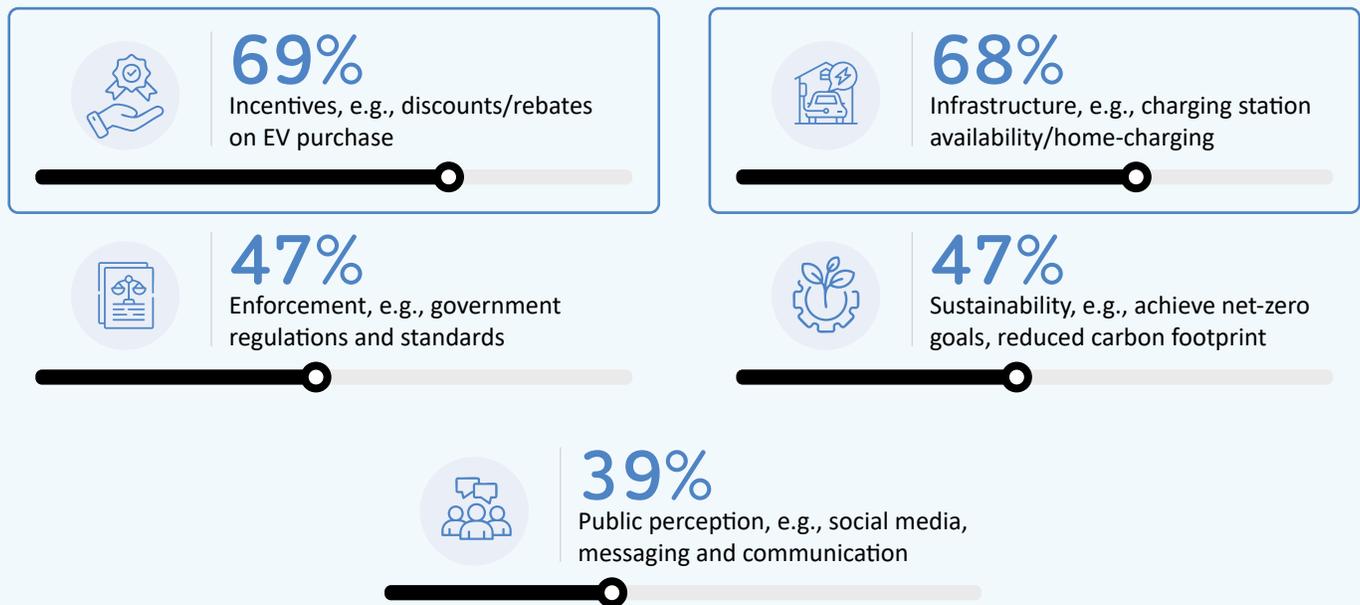


Figure 6. What factors do you consider most influential to EV adoption?

While EV influencers have a clear environmental sustainability motivation for EV adoption, interestingly the environmental benefits do not match the expectations of many EV influencers. Nearly half of EV influencers think EVs increase overall carbon output as much as they reduce it; a tenth even say EV adoption is negatively impacting the environment (see Figure 7).

### Whether EVs ultimately have a positive impact on the environment is still very much up for debate among industry influencers

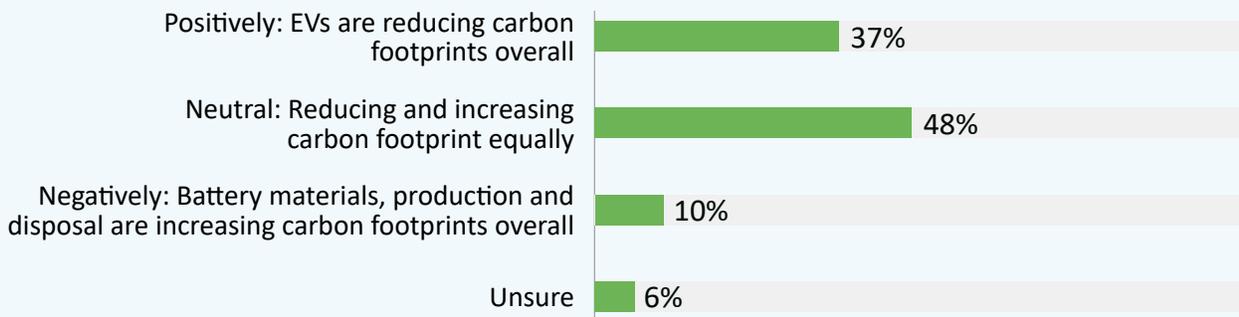


Figure 7. What is your perception of how EVs are meeting sustainable transportation needs?

## Transition models: Bridging the gap with hybrid

Though they may slow BEV sales in the short term, hybrids may be the stepping-stone to mobility electrification. EV influencers say they expect hybrids and BEVs will experience the most significant growth in the next one to three years.

Their optimism in the transition toward sustainable alternatives extends even to hydrogen vehicles, which they predict will see more growth than traditional internal combustion engine (ICE) vehicles (see Figure 8).

### Influencers anticipate less demand for traditional ICEs

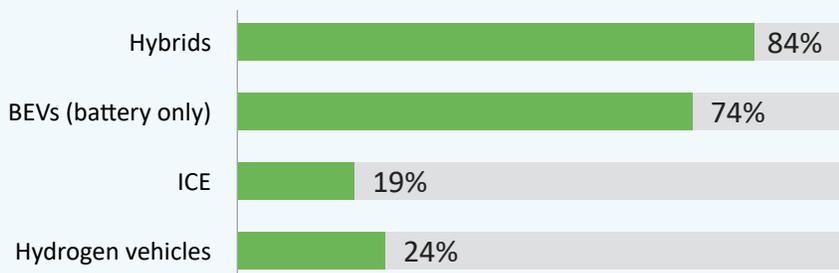


Figure 8. Which type of vehicle do you expect to see the most growth in the next 1-3 years?

## Progress, challenges, and the road ahead

Our analysis of the survey results shows that influencers are largely optimistic about the accelerating shift toward electrification but remain clear-eyed about the challenges ahead. They see concerns around charging infrastructure, technological advancements, and evidence of environmental benefits continuing to slow the path toward mainstream adoption, which has proved tougher than expected for many influencers.

Addressing these factors is essential for EV adoption, along with greater affordability to sustain long-term growth. Hybrid vehicles will likely serve as an important bridge, easing range and charging concerns for hesitant consumers. The path forward is promising, but continued progress will require coordinated efforts across all EV stakeholders to build a truly future-ready mobility ecosystem.



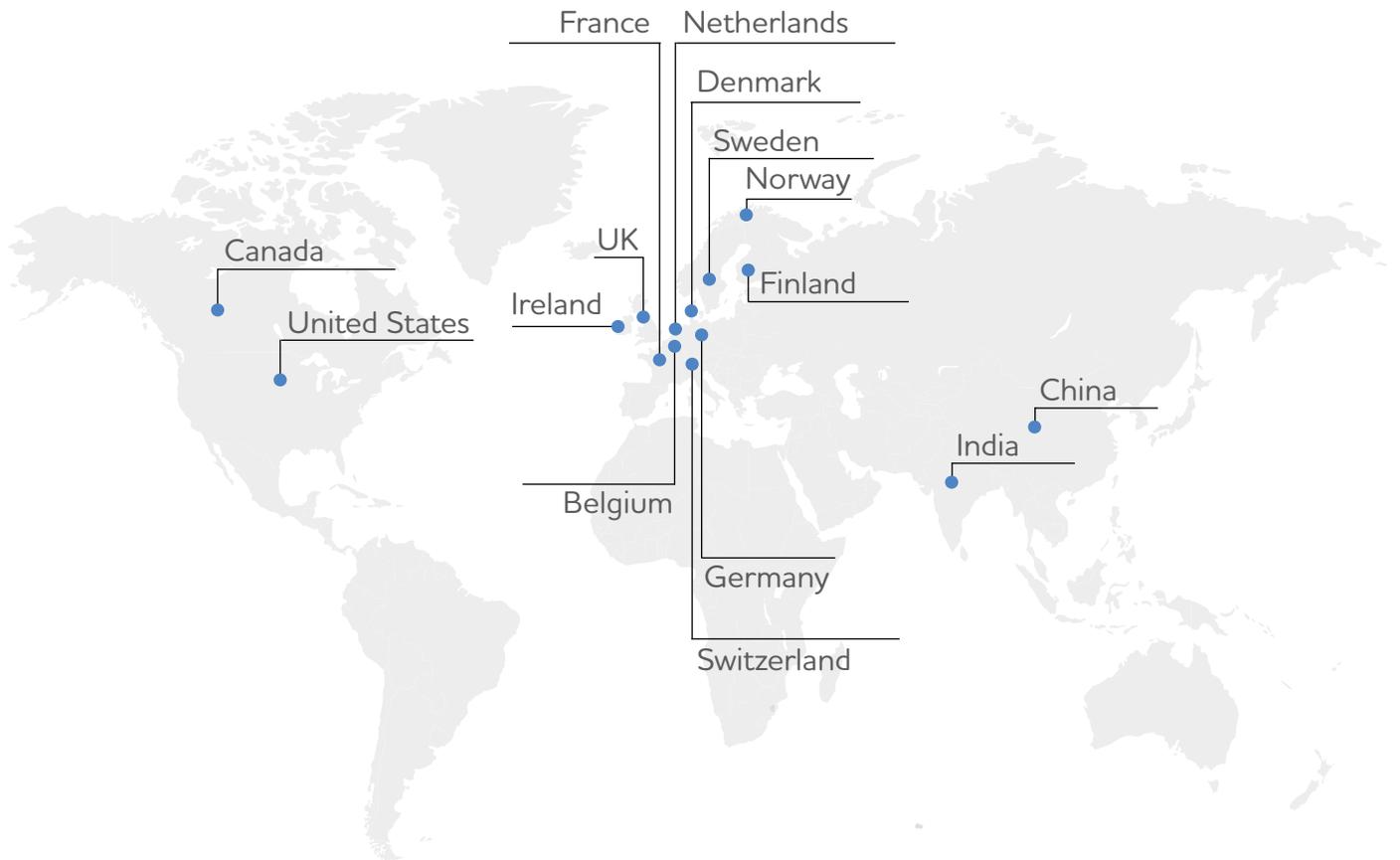
# Study Demographics

## EV Influencers

EV Influencers  
"the Influencers" (n=200)

- Financial services providers (including car insurance firms)
- Academic & research institutes
- Urban planners
- City authorities & elected officials
- Telcos (including network operations)
- Public health & advocacy groups
- NGOs focused on sustainability
- Alternate energy providers

### Country representation



## Executive champions

**Anupam Singhal**

President – Manufacturing, TCS

**Lakshminarayanan Parthasarathy**

Global Head – Smart Mobility, TCS

**Naresh Mehta**

Global Chief Technology Officer, Manufacturing, TCS

**Subhash Sakorikar**

Global Head – Manufacturing Industry Excellence, TCS

The executive champions would like to thank the following contributors to this study:

**Anant Haidale**

VP and Business Head – Manufacturing Americas, TCS

**Rakesh Devpura**

Business Head – Americas, Manufacturing, TCS

**Ramit Rastogi**

Business Head – Americas, Manufacturing, TCS

**KV Sarma**

VP and Business Head – Europe, APAC & MEA, Manufacturing, TCS

**Sudeep Mazumdar**

Business Head – UK, Manufacturing, TCS

**Gurudatt Trivedi**

Head – Strategy, Manufacturing, TCS

**Edzil Gonsalves**

Global Head – Automotive, TCS

**Nithin Thomas**

Director – Smart Mobility, TCS

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**Abhinav Kumar**

Chief Marketing Officer, TCS

**Rohaan Mishra**

Global Head of Marketing, Manufacturing, TCS

**Vikrant Gaikwad**

Global Head, Industry Marketing Group, TCS

Srilatha Bezgoan

Mansha Dhingra

Savio Sanjay Dmello

Matthew Hardeman

Pravir Kumar Rai

Laura Rudolph

Bhuvaneshwari K S

Swarnil Saxena

Tia Thomas

Sobha Varghese

## About the study

The TCS Future-Ready eMobility Study surveyed five segments that play a critical role in shaping a successful EV transition. The 1,300+ respondents from across 18 countries and 12 industries ranged from manufacturers and charging

infrastructure builders to consumer and commercial adopters and industry influencers. Comprising 233 of the 1,308 respondents, the EV influencers include financial service providers, academic and research institutions, urban planners, city authorities and elected officials, telcos, public health and advocacy groups, NGOs, and alternate energy providers.

## TCS Future-Ready Mobility

As the world accelerates toward electric mobility, TCS is committed to enabling manufacturers and other EV stakeholders to navigate the evolving landscape and thrive in this defining era. Our future-ready mobility vision is rooted in technological innovation, strategic collaboration, and deep domain expertise.

TCS drives transformative change across the mobility value chain, spanning vehicle design and development, gigafactory planning and execution, digital platform enablement, deployment of generative AI solutions, and hyper-personalized customer experiences. With a focus on driving sustainable mobility and delivering measurable value, TCS partners with customers to shape a bold and sustainable future. For more information, visit: [tcs.com/what-we-do/industries/manufacturing](https://tcs.com/what-we-do/industries/manufacturing)

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## About Tata Consultancy Services

Tata Consultancy Services is an IT services, consulting and business solutions organization that has been partnering with many of the world's largest businesses in their transformation journeys for over 56 years. Its consulting-led, cognitive powered, portfolio of business, technology and engineering services and solutions is delivered through its unique Location Independent Agile™ delivery model, recognized as a benchmark of excellence in software development.

A part of the Tata group, India's largest multinational business group, TCS has over 601,000 of the world's best-trained consultants in 55 countries. The company generated consolidated revenues of US \$29 billion in the fiscal year ended March 31, 2024, and is listed on the BSE and the NSE in India. TCS' proactive stance on climate change and award winning work with communities across the world have earned it a place in leading sustainability indices such as the MSCI Global Sustainability Index and the FTSE4Good Emerging Index. For more information, visit [www.tcs.com](http://www.tcs.com)