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Tata Motors, Ashok Leyland to gain from move to extend localisation deadline for EV motors

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The Centre has pushed the localisation deadline for key electric bus and truck components to September 1 under the PM E-Drive scheme, a move that's expected to provide relief to manufacturers such as Tata Motors, Ashok Leyland, Eicher Motors and EKA Mobility. These players are ramping up electric bus and commercial vehicle deployments across the country.

TRACTION MOTORS

The amendment gives vehicle makers additional time to domestically manufacture traction motors used in electric buses and N2-category electric trucks, with officials acknowledging that the revised timeline factors in supply chain disruptions flagged by OEMs, particularly shortages of rare-earth magnets used in high-efficiency electric powertrains.

The Ministry of Heavy Industries notified the change through a Gazette notification dated March 13, amending the phased manufacturing programme (PMP) roadmap for electric trucks in the N2 and N3 commercial vehicle categories under the PM E-Drive scheme.

REVISED NORMS

Under the revised norms, traction motors used in these vehicles must be manufactured domestically from September 1, with key processes carried out within India. According to the notification, domestic manufacturing must include processes such as magnet fitment, rotor and stator assembly, shaft fitment, bearing integration, enclosure fitment and connector, and cable installation.

The rules also mandate deeper localisation of integrated systems, including motor-transmission assemblies and traction motor controllers with inverters. For integrated traction motors used with transmissions, domestic assembly of motor-transmission systems, transmission controllers and software flashing must be undertaken locally from September. Similarly, traction motor controllers with inverters must undergo domestic manufacturing that includes PCB assembly with electronic components and semiconductors, high-voltage connector integration, heatsink fitment and firmware flashing.

Industry executives said the revised timeline reflects persistent global supply-chain constraints, particularly the limited availability of rare-earth permanent magnets, which are essential for high-efficiency traction motors used in electric buses and heavy commercial vehicles.