

# ***SIAM***

Society of Indian Automobile Manufacturers

## ANNUAL REPORT 2021-22

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*Building the Nation, Responsibly*





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# PRESIDENT'S MESSAGE



A country's economic health has a very close co-relation with the health of its automobile sector. Indian Automobile Industry is a key driver of economic growth in the country. It is the largest sector within manufacturing, contributing to about one-third in the manufacturing GDP of the country. This Industry gives employment to over 3 Cr people directly and indirectly and contributes to about 12% of the country's total GST collection.

While these are facts, there is another reality. And that is, that the growth of Indian Automobile Industry has been slowing down. Indian Automobile Industry has been facing a deep structural slowdown even before the Covid-19 pandemic started.

In the decade of 1990 to 2000, Passenger Vehicle market grew at a CAGR of 12.6%. This came down to 10.3% in the next decade from 2000 to 2010 and further down to just 3.6% in the decade from 2010 to 2020. If we look at 5-year periods, the drop is much steeper. During the last 5 years before Covid, from 2015 to 2020, the passenger vehicle segment growth was negligible, a CAGR of just 1.3%.

Similarly, Two-wheeler segment was growing at a CAGR of 9.8% during the decade of 2000 to 2010. In the next decade from 2010 to 2020, this growth rate fell to 6.4%. During the same decadal periods, Three-Wheeler segment CAGR fell from 9.8% to 3.8% and Commercial Vehicle segment fell from 12.7% to just 3%.

Passenger Vehicles have had a domestic sales volume of 3.06 million in 2021-22, it is still below the domestic sales numbers in the years 2017-18 which was 3.28 million and in 2018-19 which was 3.37 million.

In 2021-22, some segments have started to see some improvement in demand. However, entry level and mass segment passenger cars and two-wheelers are facing major affordability issues owing to high raw material prices, high taxation, impact of recent regulations, etc.

Two Wheelers have had a domestic sales number of 13.4 million in 2021-22, which is the lowest in last 10 years, it is below 13.79 million units sold in the year 2012-13.

Three Wheelers have had a domestic sales number of 2.61 lacs in 2021-22, which if we do not include the Covid affected year of 2020-21, is the lowest since 2003-2004 when it had touched 2.84 lacs. Just before Covid, Three



Two-Wheeler domestic sales were more than 6 lacs units, 6.36 lacs in 2017-18; 7.01 lacs in 2018-19 and 6.37 lacs in 2019-20.

Commercial Vehicles have had a domestic sales number of 7.17 lacs in 2021-22, which is still lower than 8.57 lacs in 2017-18 and 10 lacs in 2018-19.

Contributing to Make in India, Industry has made some good progress in Exports. Passenger Vehicle segment exported 5.78 lac units in 2021-22. Two-Wheeler reported the highest ever Exports of 4.44 million in 2021-22. During the same year, Three-Wheeler Exports stood at 5 lac units and Commercial Vehicle at 92 thousand units.

While on one hand there have been demand challenges, on the other hand the aftermath of Covid pandemic and now the conflict in Ukraine has put severe strain on the supply chain. Industry witnessed huge spikes in costs of Steel, Nickel and several other commodities and precious metals. The shortage of Semi-conductors was a major setback with which the industry is still dealing. Even the shortage of shipping containers and high freight rates posed a big challenge for the industry.

Increase in the Long-term Insurance rates, and multiple hikes in repo-rates are also adding to the ongoing challenges

Moreover, due to the ongoing global turmoil, prices of Fuel have increased manifold in the last one year, posing affordability issues for the customers. SIAM is appreciative of the Government of India for taking some timely important decisions like reducing central excise duty on petrol and diesel. But on CNG the prices have increased disproportionately as compared to that of petrol & diesel. Support to reduce CNG prices will catalyse the transition to clean green environment.

### **Enablers for Sustainable Growth**

Industry has identified some key enablers for a long-term sustainable growth such as:

- Sustainable Mobility

SIAM is working closely with Government of India and various stakeholders to develop innovative policies that promote Sustainable Mobility in the country. There are two main pillars of Sustainable Mobility which is Road Safety and De-Carbonization.

SIAM has planned various initiatives to create awareness about 'Road Safety'. This includes road shows, engagement with state governments, plan to educate school children, organising talk shows, educating drivers and leveraging various social media platforms to spread awareness.

The other important pillar of 'De-Carbonization' aims to support the country's carbon reduction journey leading to Hon'ble Prime Minister's commitment of Net Zero by 2070. It is focused on reducing India's oil import dependence and improving the environment by adopting all feasible alternative technologies like CNG, CBG, Ethanol, Flex Fuel, Hybrid Electric, EVs and Hydrogen.

Auto Industry is committed to manufacture E20 material compliant vehicles from 2023 and is also committed to introduce Flex Fuel Vehicles in phases to enable use of higher blends of Ethanol. In this regard SIAM has already signed MoU with the Brazilian Sugar Industry, UNICA to learn and adopt best practices of Brazil in India. Campaigns for promoting Ethanol Blended fuel for use in vehicles, includes Talk shows with leading media personalities, celebration of Bio-Fuel Day, interaction with Sugar Industry, engaging with stakeholders in USA & Brazil and culminating with Ethanol campaign during Auto Expo 2023.



There has been significant increase in share of CNG vehicles in the last couple of years and this has been aptly supported by Government of India by augmenting the CNG Infrastructure across the country. Apart from lower CO2 emissions and local pollutants, higher mileage and the lower cost of operating a CNG vehicle, encourages the consumers to consider moving from conventional Petrol / Diesel fuel to CNG. Government's intervention for keeping the cost of CNG fuel low would go a long way in making CNG one of the clean green alternative to ICE.

- Long-term Regulatory Roadmap

SIAM has pro-actively prepared a long-term regulatory roadmap for the Indian Automobile Industry keeping the best interest of the nation and our national commitments for environment and safety. The roadmap captures the visions of key industry stakeholders and have considered global regulations and timelines.

We envisage such a balanced long term Road map in addition to ensuring long term stability will encourage new investments, would facilitate faster localization, and would contribute to sustainable growth of the industry.

With a road map in place, SIAM will continue to engage constructively with all critical stakeholders and the policy makers. This would also give a clarity to the policy makers about the long-term plan of the industry, thereby avoiding any surprises on both sides.

- Production Linked Incentive Scheme

I am thankful to the Government for launching the Production Linked Incentive Scheme for the Auto and the Auto Component Industry for about Rs 26,000 Crores and also providing about Rs 18,000 Crores for PLI scheme for Advanced Chemistry Cell (ACC). Identification of more than 100 Advanced Automotive Technologies has given direction to the Technology providers for the support that would be available, to enable them commit resources and invest in India to manufacture advanced technology components for Automotive applications. This scheme has therefore attracted 76% more investment than the planned target. I have learnt that 20 Automakers and 75 component manufacturers together have proposed to invest Rs 74,850 crore in the country over the next five years.

Even the scheme for semiconductors and electronic components is set to attract foreign investments and local manufacturing of these critical components.

With all such initiatives and much more, Auto Industry is set to align with the Government of India's vision in Amrit Kaal and aspires to grow by more than 20 times to a US\$ 2 Trillion Industry by 2047 and be one of the top two manufacturer in each vehicle segment globally.

Industry is working progressively in line with these enablers to maximise production and sales. Each enabler has its own set of challenges in terms of viability, infrastructure, etc.

Industry would continue to engage with the Government to seek their guidance, support and contribute towards a stronger industry and a stronger economy.

### **Key Highlights of 2021-22**

I complete my two years as the President of SIAM this September. These two years were not only challenging but also a great learning experience for me personally. I am grateful to the valuable guidance from Past Presidents and support from all other members during my tenure.



Taking over the role in 2020 during the pandemic, the biggest challenge was to bring back the health of the industry. Starting with the objective of Sound Development of the Industry, we took up various structural reforms to strengthen the overall working of SIAM. I am happy that many of these structural changes have been fruitful for the industry.

Segment wise CEOs Councils have been empowered and are meeting regularly on segment specific issues and reporting at every SIAM Executive Committee meeting.

Communication & Engagement team has been successfully engaging with policy makers, media and various other stakeholders and are sharing the comprehensive perspective, contribution of the auto industry with research and facts.

I am also glad about some 'first-ever' developments in SIAM including a message from the Hon'ble Prime Minister himself, addressing the Auto Industry at SIAM Annual Convention, a comprehensive Localisation Roadmap study done jointly with ACMA, and a Long-Term Regulatory Roadmap.

Major efforts were undertaken to further strengthen and deepen industry's engagement with the Government at the highest level, with Hon'ble Prime Minister, Hon'ble Minister of Road Transport & Highways, Hon'ble Finance Minister, Hon'ble Minister for Heavy Industries, Hon'ble Minister for Petroleum & Natural Gas, Niti Aayog, etc.

There were about 35 critical policy areas wherein government accepted/ accommodated SIAM's request.

These included revised implementation schedule for OBD II for Two Wheelers and Three Wheelers, multiple deferments on various QCOs, aligning SIAM's roadmap for Flex Fuel Vehicle with Government policies, extension of FAME India Phase II Scheme for the period of 2 years, change in reference average weight for CAFÉ Phase-2 which has come into force from 1<sup>st</sup> April 2022, permitting loading of two wheelers in three decks during transportation, listing of 100+ Advanced Automotive Technologies under Auto Component PLI Scheme, inclusion of E-Quadricycle in Auto PLI etc.

With the support of Past Presidents, the Rules of SIAM could also be amended in a very exhaustive manner to make the operations of SIAM smoother and simpler.

### **International Engagements**

SIAM continued its active participation in both OICA and IMMA. SIAM also actively participated at meetings of WP.29 and its various GR groups.

We continued our active partnership with JAMA (Japan) with the annual SIAM JAMA Meeting being held virtually for the first time. The meetings discussed issues related to safety and emissions regulations pertaining to various vehicle segments.

We also had meetings with KAMA (South Korea) to discuss the Covid Impact on the Auto industry and the policy development for electric vehicles in both the countries.

In the last 2 years, SIAM has been engaged very closely with Ceylon Motor Traders Association (CMTA), Sri Lanka

SIAM continued to work closely with the German Automotive Industry Association, VDA and coordinated along with VDA, Indo German Joint Working Group meeting with Ministry of Heavy Industry and German Government.



## **Society for Automotive Fitness & Environment (SAFE)**

SIAM -SAFE has been carrying out various public policy activities in the field of road safety and the environment.

Aligned with the vision of sustainable mobility, the SAFE and SIAM conducted an International Virtual Conference on the theme “Sustainable Mobility: Ethanol Perspective” to commemorate World Environment Day 2022.

During the year 2021-22, SIAM-SAFE supported Delhi Traffic Police in the area of educating school & college students on roads safety

### **Conclusion**

As I conclude my tenure as SIAM President, I would like to extend my sincere appreciation and gratitude to the Government, Policy Makers, Bureaucrats, friends in the Media, SIAM members including Past Presidents, and Colleagues in the SIAM Secretariat. I would particularly like to thank all the members of SIAM Executive committee for an excellent participation in all our meetings.

I take pride in all that we have achieved together through our focus on “Sound Development of the Industry”.

With warm regards,

Kenichi Ayukawa  
President





**Mr Kenichi Ayukawa**

President, SIAM &  
Executive Vice Chairman,  
Maruti Suzuki India Ltd.



**Mr Vinod Aggarwal**

Vice President & Treasurer, SIAM &  
Managing Director and CEO,  
VE Commercial Vehicles Ltd.



Attending the meeting with the Hon'ble Minister of Road Transport & Highways, Mr Nitin Gadkari



MoU Signing Ceremony in the presence of Mr Hardeep Singh Puri, Hon'ble Minister of Petroleum & Natural Gas and Mr Bento Albuquerque, Hon'ble Minister of Mines and Energy from Brazil



At the Executive Committee Meeting of SIAM



# SIAM

The Society of Indian Automobile Manufacturers (SIAM) is an apex national body representing all major vehicle and vehicular engine manufacturers (44 companies) in India. It is a society with charitable objectives registered under the Societies Registration Act, 1860. Its objectives include enhancing the contribution of automobile industry to the growth and development of Indian economy, assisting the automobile industry to meet its social obligations and encouraging the efficiency of industry in general and automobile industry particularly in India. SIAM focuses on activities related to improvement of environment and ensuring safety and protection of automobile vehicle users and public at large. Recognising these objectives, SIAM has been granted registration under the Income Tax Act, 1961 as an institution with charitable purpose.

To meet these objectives, SIAM works closely with stakeholders in the formulation of the economic and commercial policies, regulations and standards relating to automobiles. It provides economic and statistical information as well as technical and public policy services to the stakeholders on behalf of Indian Automobile Industry. It publishes Monthly Industry Statistics, Monthly Commodity Price Monitor and other periodic reports. SIAM organises seminars and workshops on the subjects of topical relevance and interest to the industry. It also carries out various public policy activities, particularly in the field of Road Safety and Environment.

SIAM works closely with various Government departments, both at Central and State level and with international bodies like International Organisation of Motor Vehicle Manufacturers (OICA), International Motorcycle Manufacturers Association (IMMA) and coordinate with other counterpart international associations.

SIAM, jointly with ACMA and CII organises Auto Expo, a widely awaited biennial auto exhibition showcasing the trends in the Auto Industry. SIAM also organises regional, as well as segment specific shows across the country.

SIAM aims to promote trade, competitiveness, expansion of market, safety, environment compliance and growth with responsibility.



# Performance of The Automobile Industry in 2021-22

## Production

The industry produced a total 22.93 million units of vehicles including Passenger Vehicles, Commercial Vehicles, Three Wheelers, Two Wheelers, and Quadricycles in financial year 2021-22, as against 22.66 million units in financial year 2020-21.

## Domestic Sales

Total Passenger Vehicle Sales increased from 2.71 million to 3.07 million units. Sales of Passenger Cars decreased from 1.54 million to 1.47 million units, while sales of Utility Vehicles increased from 1.06 million to 1.49 million units in FY 2021-22 compared to the previous year. During the same period 1.13 lac units of Vans were sold compared to 1.08 lac units in FY 2020-21

The overall Commercial Vehicles sales increased from 5.69 lac to 7.17 lac units. Sales of Medium and Heavy Commercial Vehicles increased from 1.61 lac to 2.41 lac units and Light Commercial Vehicles increased from 4.08 lac to 4.76 lac units in FY 2021-22 compared to the previous year.

Sales of Three Wheelers increased from 2.19 lac to 2.61 lac units in FY 2021-22 compared to the previous year.

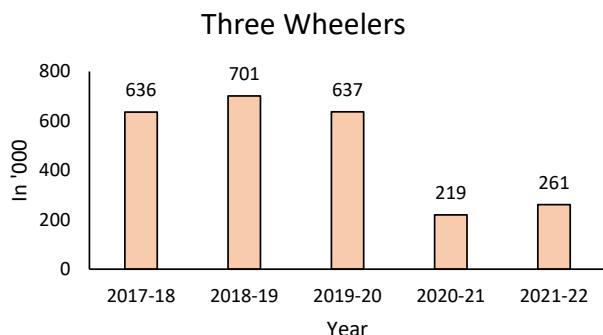
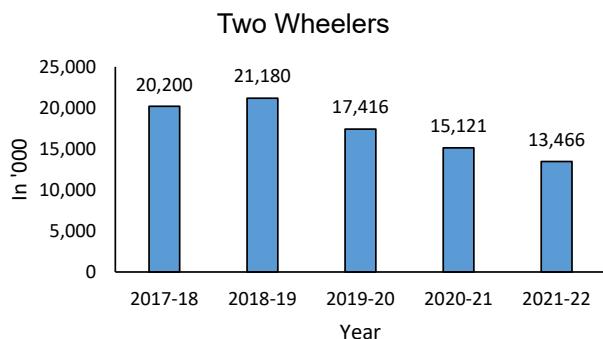
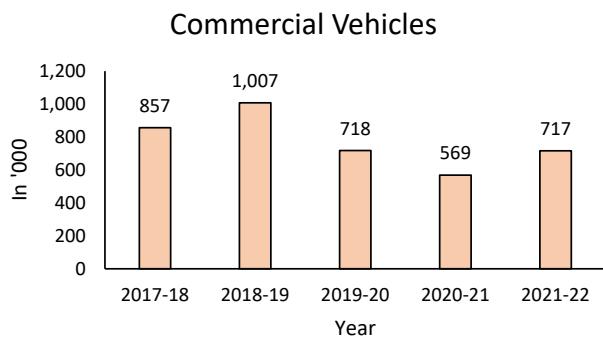
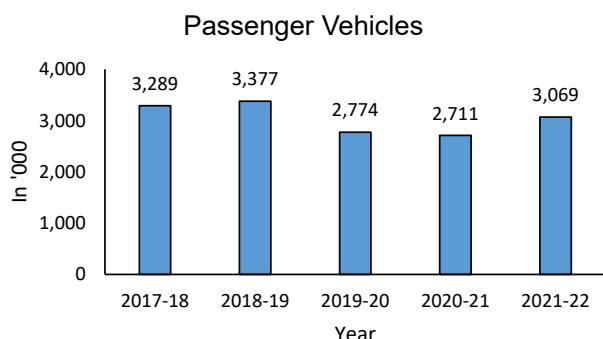
Two Wheelers sales decreased from 15.12 million to 13.47 million units in FY 2021-22 over same period last year.

## Exports

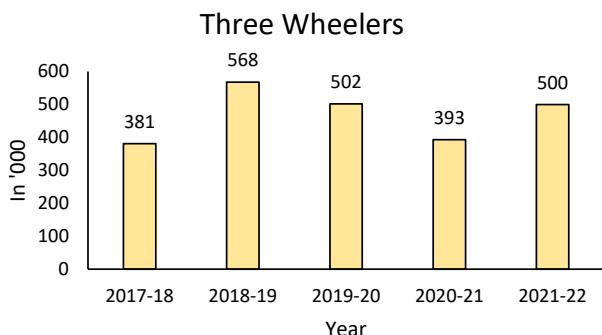
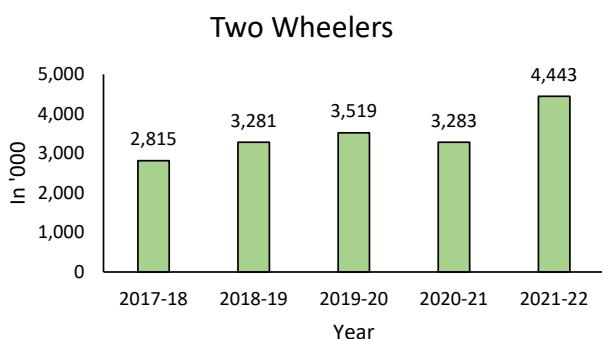
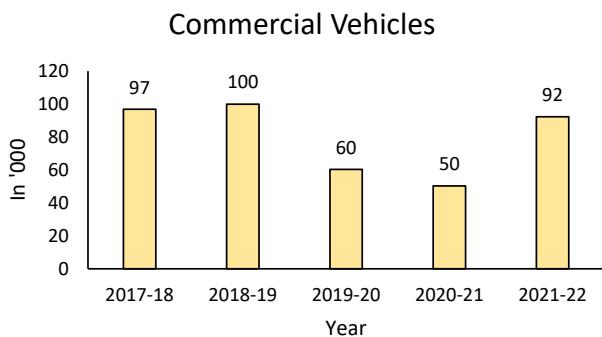
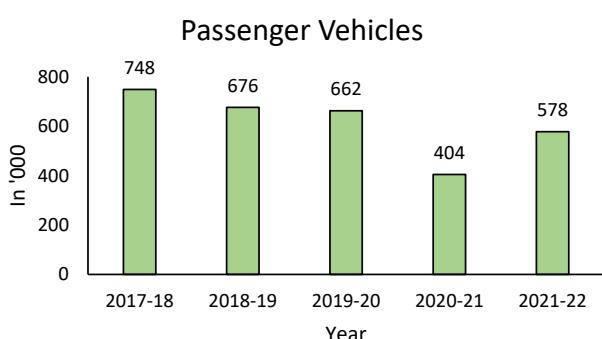
In Financial year 2021-22, Passenger Vehicle Exports increased from 4.04 lac units to 5.8 lac units, Commercial Vehicle Exports increased from 50,334 to 92,297 units, Three Wheeler Exports increased from 3.93 lac to 5 lac units and Two Wheelers Exports increased from 3.3 million to 4.4 million units in FY 2021-22 over the same period last year.



## Domestic Sales Trends



## Exports Trends



| Automobile Production Trends |                      |                    |                    |                    |                    |
|------------------------------|----------------------|--------------------|--------------------|--------------------|--------------------|
| Category                     | (Number of Vehicles) |                    |                    |                    |                    |
|                              | 2017-18              | 2018-19            | 2019-20            | 2020-21            | 2021-22            |
| Passenger Cars               | 27,46,658            | 27,11,160          | 21,56,868          | 17,72,972          | 18,44,985          |
| Utility Vehicles             | 10,93,346            | 10,99,780          | 11,36,209          | 11,82,144          | 16,91,081          |
| Vans                         | 1,80,263             | 2,17,531           | 1,31,487           | 1,07,164           | 1,14,632           |
| <b>Passenger Vehicles</b>    | <b>40,20,267</b>     | <b>40,28,471</b>   | <b>34,24,564</b>   | <b>30,62,280</b>   | <b>36,50,698</b>   |
| M&HCVs                       | 3,44,592             | 4,44,356           | 2,32,414           | 1,81,242           | 2,72,167           |
| LCVs                         | 5,50,856             | 6,68,049           | 5,24,311           | 4,43,697           | 5,33,360           |
| <b>Commercial Vehicles</b>   | <b>8,95,448</b>      | <b>11,12,405</b>   | <b>7,56,725</b>    | <b>6,24,939</b>    | <b>8,05,527</b>    |
| <b>Three-Wheelers</b>        | <b>10,22,181</b>     | <b>12,68,833</b>   | <b>11,32,982</b>   | <b>6,14,613</b>    | <b>7,58,088</b>    |
| Scooters                     | 71,17,795            | 70,95,164          | 60,27,198          | 45,59,222          | 43,51,535          |
| Motorcycles                  | 1,51,67,481          | 1,64,99,424        | 1,43,56,051        | 1,31,54,501        | 1,28,90,149        |
| Mopeds                       | 8,69,562             | 9,05,189           | 6,49,678           | 6,36,218           | 4,73,172           |
| <b>Two-Wheelers</b>          | <b>2,31,54,838</b>   | <b>2,44,99,777</b> | <b>2,10,32,927</b> | <b>1,83,49,941</b> | <b>1,77,14,856</b> |
| <b>Quadricycle</b>           | <b>1,713</b>         | <b>5,388</b>       | <b>6,095</b>       | <b>3,836</b>       | <b>4,061</b>       |
| <b>Grand Total</b>           | <b>2,90,94,447</b>   | <b>3,09,14,874</b> | <b>2,63,53,293</b> | <b>2,26,55,609</b> | <b>2,29,33,230</b> |

| Automobile Domestic Sales Trends |                      |                    |                    |                    |                    |
|----------------------------------|----------------------|--------------------|--------------------|--------------------|--------------------|
| Category                         | (Number of Vehicles) |                    |                    |                    |                    |
|                                  | 2017-18              | 2018-19            | 2019-20            | 2020-21            | 2021-22            |
| Passenger Cars                   | 21,74,024            | 22,18,489          | 16,95,436          | 15,41,866          | 14,67,056          |
| Utility Vehicles                 | 9,22,322             | 9,41,474           | 9,45,959           | 10,60,750          | 14,89,178          |
| Vans                             | 1,92,235             | 2,17,426           | 1,32,124           | 1,08,841           | 1,13,265           |
| <b>Passenger Vehicles</b>        | <b>32,88,581</b>     | <b>33,77,389</b>   | <b>27,73,519</b>   | <b>27,11,457</b>   | <b>30,69,499</b>   |
| M&HCVs                           | 3,40,781             | 3,90,732           | 2,24,428           | 1,60,688           | 2,40,577           |
| LCVs                             | 5,16,135             | 6,16,579           | 4,93,165           | 4,07,871           | 4,75,989           |
| <b>Commercial Vehicles</b>       | <b>8,56,916</b>      | <b>10,07,311</b>   | <b>7,17,593</b>    | <b>5,68,559</b>    | <b>7,16,566</b>    |
| <b>Three-Wheelers</b>            | <b>6,35,698</b>      | <b>7,01,005</b>    | <b>6,37,065</b>    | <b>2,19,446</b>    | <b>2,60,995</b>    |
| Scooters                         | 67,19,909            | 67,01,430          | 55,65,958          | 44,82,305          | 40,09,076          |
| Motorcycles                      | 1,26,20,690          | 1,35,98,190        | 1,12,13,662        | 1,00,21,231        | 89,84,186          |
| Mopeds                           | 8,59,518             | 8,80,227           | 6,36,812           | 6,17,247           | 4,73,150           |
| <b>Two-Wheelers</b>              | <b>2,02,00,117</b>   | <b>2,11,79,847</b> | <b>1,74,16,432</b> | <b>1,51,20,783</b> | <b>1,34,66,412</b> |
| <b>Quadricycle</b>               | -                    | 627                | 942                | (12)               | 124                |
| <b>Grand Total</b>               | <b>2,49,81,312</b>   | <b>2,62,66,179</b> | <b>2,15,45,551</b> | <b>1,86,20,233</b> | <b>1,75,13,596</b> |

| Automobile Exports Trends  |                      |                  |                  |                  |                  |
|----------------------------|----------------------|------------------|------------------|------------------|------------------|
| Category                   | (Number of Vehicles) |                  |                  |                  |                  |
|                            | 2017-18              | 2018-19          | 2019-20          | 2020-21          | 2021-22          |
| Passenger Cars             | 5,80,153             | 5,13,912         | 4,75,801         | 2,64,907         | 3,74,986         |
| Utility Vehicles           | 1,66,317             | 1,58,251         | 1,83,468         | 1,37,842         | 2,01,036         |
| Vans                       | 1,896                | 4,029            | 2,849            | 1,648            | 1,853            |
| <b>Passenger Vehicles</b>  | <b>7,48,366</b>      | <b>6,76,192</b>  | <b>6,62,118</b>  | <b>4,04,397</b>  | <b>5,77,875</b>  |
| M&HCVs                     | 44,093               | 48,676           | 22,333           | 17,548           | 32,181           |
| LCVs                       | 52,772               | 51,257           | 38,046           | 32,786           | 60,116           |
| <b>Commercial Vehicles</b> | <b>96,865</b>        | <b>99,933</b>    | <b>60,379</b>    | <b>50,334</b>    | <b>92,297</b>    |
| <b>Three-Wheelers</b>      | <b>3,81,002</b>      | <b>5,67,683</b>  | <b>5,01,651</b>  | <b>3,93,001</b>  | <b>4,99,730</b>  |
| Scooters                   | 3,14,284             | 3,98,316         | 3,69,998         | 2,32,020         | 3,50,330         |
| Motorcycles                | 24,83,307            | 28,65,851        | 31,35,548        | 30,42,453        | 40,82,442        |
| Mopeds                     | 17,412               | 16,674           | 13,859           | 8,313            | 10,246           |
| <b>Two-Wheelers</b>        | <b>28,15,003</b>     | <b>32,80,841</b> | <b>35,19,405</b> | <b>32,82,786</b> | <b>44,43,018</b> |
| <b>Quadricycle</b>         | <b>1,605</b>         | <b>4,400</b>     | <b>5,185</b>     | <b>3,529</b>     | <b>4,326</b>     |
| <b>Grand Total</b>         | <b>40,42,841</b>     | <b>46,29,049</b> | <b>47,48,738</b> | <b>41,34,047</b> | <b>56,17,246</b> |



# Global Auto Industry Performance in 2021

Over the last one-year, global Automobile industry, despite facing strong headwinds owing to plant shutdowns, spike in commodity prices, semiconductor shortages, geo-political tension due to Russia-Ukraine war, supply-side inflation, displayed resilience and managed to keep its head above the water.

With strong determination, Auto manufacturers tried their best to help the industry recover, against the backdrop of market contraction in 2020, with the help of new product launches and several other measures. Demand continued to outstrip Supply primarily due to semiconductor shortages across vehicle segments.

Global Commercial Vehicle sales grew at a reasonable rate of 6%, from around 25 million units in 2020 to 26 million units in 2021, whereas Passenger Cars market grew from 54 million units to 56.3 million units, for the

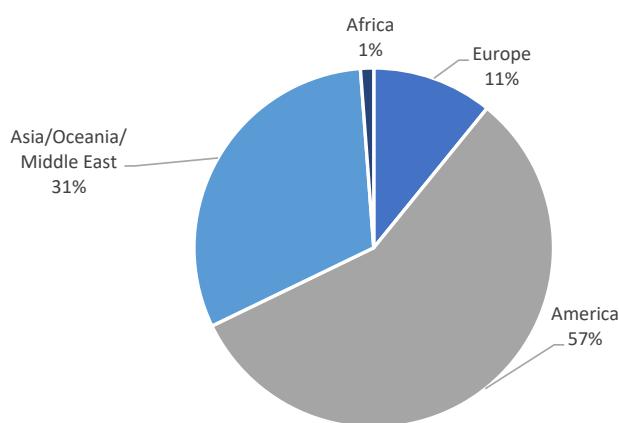
same period, clocking a moderate growth of 5%, year-on-year basis. However, the industry needs to cover a significant ground to match the pre-covid sales figures of 2019.

Commercial Vehicles sales were dominated by America, which contributed about 57% of total sales followed by Asia/Oceania/Middle East at 31% and Europe at 11%.

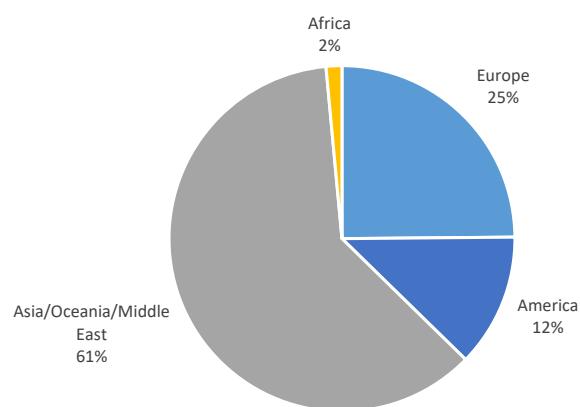
While sales of Passenger Cars were dominated by Asia/Oceania/Middle East, contributing 61% of total Global sales, followed by Europe and America at 25% and 12% respectively.

India's ranking improved from 5<sup>th</sup> in 2019 to 4<sup>th</sup> in 2021 for Passenger Car sales, whereas for Commercial Vehicle sales, India maintained its 5<sup>th</sup> rank over the last three years.

**Commercial Vehicle Sales – Region wise (2021)**



**Passenger Car Sales - Region wise (2021)**



## Passenger Car Sales (In Numbers)

| SI. No. | country                      | 2019               | 2020               | 2021               |
|---------|------------------------------|--------------------|--------------------|--------------------|
| 1       | CHINA                        | 2,14,72,091        | 2,01,77,731        | 2,14,81,537        |
| 2       | JAPAN                        | 43,01,091          | 38,09,981          | 36,75,698          |
| 3       | UNITED STATES OF AMERICA     | 47,19,710          | 34,01,838          | 33,50,050          |
| 4       | INDIA                        | <b>29,62,115</b>   | <b>24,33,473</b>   | <b>30,82,279</b>   |
| 5       | GERMANY                      | 36,07,258          | 29,17,678          | 26,22,132          |
| 6       | FRANCE                       | 22,14,280          | 16,50,118          | 16,59,005          |
| 7       | UNITED KINGDOM               | 23,11,140          | 16,31,064          | 16,47,181          |
| 8       | BRAZIL                       | 22,62,073          | 16,15,942          | 15,58,467          |
| 9       | RUSSIA                       | 15,67,743          | 14,33,956          | 14,83,444          |
| 10      | SOUTH KOREA                  | 14,97,035          | 16,18,333          | 14,68,873          |
|         | <b>ALL COUNTRIES/REGIONS</b> | <b>6,40,35,567</b> | <b>5,39,17,153</b> | <b>5,63,98,471</b> |

## Commercial Vehicle Sales (In Numbers)

| SI. No. | country                      | 2019               | 2020               | 2021               |
|---------|------------------------------|--------------------|--------------------|--------------------|
| 1       | UNITED STATES OF AMERICA     | 1,27,68,444        | 1,14,79,518        | 1,20,58,515        |
| 2       | CHINA                        | 43,24,840          | 51,33,338          | 47,93,283          |
| 3       | CANADA                       | 14,79,594          | 12,67,724          | 13,84,245          |
| 4       | JAPAN                        | 8,94,125           | 7,88,634           | 7,72,642           |
| 5       | INDIA                        | <b>8,54,743</b>    | <b>5,05,102</b>    | <b>6,77,119</b>    |
| 6       | BRAZIL                       | 5,25,777           | 4,42,495           | 5,61,384           |
| 7       | MEXICO                       | 5,96,215           | 4,45,217           | 5,26,593           |
| 8       | FRANCE                       | 5,41,448           | 4,49,912           | 4,83,279           |
| 9       | THAILAND                     | 5,38,914           | 4,48,652           | 4,36,380           |
| 10      | UNITED KINGDOM               | 4,25,419           | 3,33,596           | 3,96,910           |
|         | <b>ALL COUNTRIES/REGIONS</b> | <b>2,71,91,615</b> | <b>2,48,57,167</b> | <b>2,62,86,317</b> |

Source: OICA

Two-Wheelers has always been a means of mass and affordable mobility in developing countries, for day-to-day activities – both for Passenger and Cargo segments.

In 2021, China was the world's largest Two-Wheeler market in the world, by posting sales of around 17.85 million units, followed by India at around 14.5 million units.

Indonesia and Vietnam are also sizeable markets of Two-Wheelers and is estimated to have posted sales of around 5 million and 2.9 million units in 2021, respectively. Pakistan, Thailand, Philippines, and Taiwan are other important Two-Wheeler markets in Asia posting sales of around 1 million units each. In South America, it is estimated that Brazil and Mexico have posted sales of about 1.3 million and about 1 million units, respectively, in 2021.

## Building the Nation, Responsibly

The Indian Automobile industry is central to the country's economy, affordable mobility solution, employment generation, consumer confidence or attaining a global stature.

The industry is contributing around 6% of the country's GDP, employing over 4 million people directly and approximately 27 million people indirectly, through the backward and forward linkages.

India is amongst the top-2 Two-Wheeler manufacturers, 4<sup>th</sup> largest Passenger Vehicle manufacturer and 7<sup>th</sup> largest Commercial Vehicle manufacturer in the world.

The means are the initiatives that the industry has undertaken over the years, especially the last 15 years in:

- democratising mobility through public and private transport
- fostering "Brand India" worldwide
- ensuring energy security
- cohabiting with other industries
- adopting global standards in emissions, safety and manufacturing
- building sustainable communities
- facilitating continuous skill upgradation
- increasing consumer consciousness
- encouraging social green, sustainable development and environment conservation
- promoting Automotive Engineering prowess globally

The industry is the driver of growth for our country, from being one of the biggest employment generating sectors in India, to being one of the largest R&D and manufacturing hubs in the world. The Indian Auto Industry moves a billion people daily, for livelihood and recreation alike, and every single movement from one point to another, ends up adding to the economic activity and income generation. Over the years, the success story of India has been written through this sector's determination and dream to provide mobility to our masses and goods, and, therefore, bridging the gap between urban and rural landscape. We have come a long way in our journey from making mobility an aspirational thought, to an affordable reality.

It was through such united and empathetic efforts, the industry stood in solidarity for Building the Nation, Responsibly.

# SIAM Annual Activities & Milestones

## August 2021

- 2W CEOs Council Meeting
- LHV (PV CEOs Sub-Group) Meeting
- Executive Committee Meeting
- Monthly Industry Data Release
- Exports Group Meeting on RoDTEP Scheme
- Documents & Telecon #6 : Amd to AIS-137
- Catcon Market Survey - SIAM Activity Status & Open Points
- 10 Year Celebration of the Global Launch of Brand Hero
- AIS 129 Panel Meeting
- SIAM Three Wheeler CEOs Council Meeting
- Presentation by Consultants on ToR-City and Fuel Specific roadmap under Infrastructure spending (CV CEOs Council)
- Meeting of CV CEO council
- Meeting with MoPNG on E100 fuel run for 2 Wheelers
- Meeting with NITI Aayog on India's Methanol Economy Program
- Meeting with Brazilian Embassy on Ethanol
- 4<sup>th</sup> meeting of the Sub-group on Diesel white paper held on under the Chairmanship of Mr. Chandan Kardile, General Manager
- Sukh Da Sah Project - Anti Stubble Burning
- SIAM 16th Lecture Series on Draft Indian Vehicle Scrappage Policy 2021: Features and Implementation Planning
- SIAM-ATMA - Tri Road Safety Advocacy Series: 1<sup>st</sup>-Tyre Care & Road Safety
- 2021-08-26 GSR 595 Co Driver Air Bag implementation from 31 Dec, 2021

## September 2021

- Monthly Industry Data Release
- SIAM Human Capital Group Meeting
- Meeting on Madras High Court Order Mandating Bumper-to-Bumper Insurance Cover
- SIAM - ACMA Meeting on Semiconductor Shortage
- Finance, Leasing & Insurance Group Meeting
- Discussion on M15 test Objective drivability test trials
- Face to face meeting with ICAT on Catcon Market Survey
- 49<sup>th</sup> SIAM 2W Group Meeting
- TED 28 Meeting on ATD/VTS Panel
- 2<sup>nd</sup> Panel Meeting on Creation of new vehicle category L2e-P in line with EU 168/2013
- Sub Group (Legal) Members under CV CEOs Council-Level Playing Field for Buses and legal recourse
- Meeting for drafting LNG specifications.
- Discussions with Sub-group Chair on selection of consultants on ToR-City and Fuel Specific roadmap under Infrastructure spending (CV CEOs Council)
- Presentation by the Gas Based Mobility (CNG/LNG) Group/FIPI to the UP state on penetration of the Gaseous Fuel
- Discussion with ICAT on Uncertainty factor for vehicles more than 3.5 tons
- Meeting with Secretary, MoPNG
- BIS PCD 3:1,3:5 and PCD 3 Meeting
- SAFE Annual Convention 2021
- SAFE AGM & GC
- SIAM-ATMA - Tri Road Safety Advocacy Series : 2<sup>nd</sup> -Technology & Environmental Challenges
- 2021-09-23 GSR 652 Recognition, Regulation and Control of Automated Testing Station
- 2021-09-23 GSR 653 for vehicle Scrapping Facility
- Sukh Da Sah Project - Anti Stubble Burning
- Withdrawal of mandatory Bumper-to-Bumper Insurance for all vehicles through a representation by SIAM in the Hon'ble Madras High Court

## October 2021

- 2W CEOs Council Meeting
- Executive Committee Meeting
- Monthly Industry Data Release
- Meeting with Railway Board
- Meeting on Electric Vehicle Financing
- SIAM Styling & Design Group Meeting
- Meeting on Proposed Amendments to Consumer Protection (E-Commerce) Rules
- Meeting with Northern Railways
- Meeting with Mr G D Lohani, JS (TRU), Ministry of Finance
- Meeting with Central Board of Indirect Taxes and Customs (CBIC)
- Review of the Chapters of draft AIS 137
- 11<sup>th</sup> SIAM JAMA Two Wheeler Meeting
- Review of the SIAM JAMA Meeting presentations
- Flag off for M-15 2-wheeler durability trials
- Meeting of the CV CE-Legal Sub-group with Lawyers on level playing field
- Meeting with SIAM members on elimination of CH4 Emission for Heavy Duty Vehicles.
- Meeting of SIAM with SECY MOPNG on review of progress of LNG stations, future plans and conversion of diesel trucks to LNG
- Sub Group Meeting on Framework on MMLPs and Freight Corridors for evaluation of the consultant
- IRDE Committee meeting with ICAT on CF Finalisation
- Meeting with BEE on CAFE penalty provision
- 4<sup>th</sup> Meeting of SIAM-JAMA Emissions Group
- 56<sup>th</sup> Meeting of Emission and Conservation Group
- Sukh-da-sah PTC Advertisement Campaign
- SIAM-ATMA - Tri Road Safety Advocacy Series: 3rd - Regulations & Sustainability
- 2021-10-04 GSR 714 For increase in fees for renewal of Registration and Fitness
- 2021-10-05 GSR 720 on concession in road tax in lieu of certificate of deposit
- 2021-10-22 SO 4493 Wheel Rim QCO Extension upto 21<sup>st</sup> Sept 22 & Exemption as per Rule 126 of CMVR
- 11-10-2021 GSR 728 on inclusion of E12 & E15 labelling
- Sukh Da Sah Project - Anti Stubble Burning
- Microbial Phase II
- Streamlining of renting and hiring of Gross Cost Contract procurement of E-Buses to avail GST benefit

## November 2021

- 2W CEOs Council Meeting
- PV CEOs Council Meeting
- OICA General Assembly
- Monthly Industry Data Release
- Meeting with Reserve Bank of India
- Meeting on Container Shortage and Increase in Freight Rates
- Meeting with Revenue Secretary on Pre-Budget Memorandum 2022-23
- Meeting to discuss - Representation for CMVR alignment with Wheel Rims QCO
- Telecon on 2W OBD2 implementation Alternate options
- Telecon on Review of the Chapters of draft AIS 137
- 11<sup>th</sup> SIAM 3W Group Meeting
- Meeting to discuss - Representation for CMVR alignment with Wheel Rims QCO
- Panel meeting on new vehicle category L2e-P
- Sub Group Meeting on Framework on MMLPs and Freight Corridors for shortlisting of consultants and evaluation by Sub-group-Chair/Jury under CV CEO council.
- Meeting conducted by the sub-group Chair, Mr Arya with Jury for finalization of the consultant and financial closure.
- Meeting with SIAM members on elimination of CH4 Emission for Heavy Duty Vehicles.
- Discussion with FIPI for organization of CNG rallies during Oil and Gas conservation month in 2022
- 18<sup>th</sup> OICA Technical committee meeting
- Two-day webinar on Sustainable Mobility: Ethanol Talks II India
- Meeting on Ethanol Cooperation with Brazilian Embassy
- Meeting with IOCL for Ethanol blended gasoline with RON95
- 5<sup>th</sup> Meeting of Sub-Group on Diesel to review the draft white paper and finalization of the same
- Webinar on Future of Automotive Aftermarket Parts in India
- SIAM 17th Virtual Lecture Series on Sustainable Roadmap For Fuels In Automotive Sector
- SIAM 18th Virtual Lecture Series on Future of Automotive Aftermarket Parts in India
- Sukh-da-saah PTC Advertisement Campaign
- Sukh Da Sah Project - Anti Stubble Burning
- Microbial Phase II
- Identification of 100 plus Advanced Automotive Technologies for incentives under the PLI scheme
- Discounts offered on Freight Rates for distances less than 1,200 kms

## December 2021

- Executive Committee Meeting
- Monthly Industry Data Release
- SIAM Trade Fair Council Meeting
- Meeting with Alloy Steel Producers Association
- SIAM Exports Group Meeting
- Urgent telecon to discuss 2W OBD 2 implementation
- Telecon to discuss "SIAM response" to ICAT comments on draft AIS 137 Part 1 Chapter 6 OBD II
- 2W Group Telecon
- SIAM 3W CEOs Council Meeting
- first meeting with consultants on ToR-City and Fuel Specific roadmap under Infrastructure spending (CV CEOs Council)
- Subgroup meeting for Bharat VECTO under CV CEO Council
- Meeting of the legal group under CV CEO council regarding case on Level Playing Field in Delhi High Court
- Committee to deliberate issues relating to Production and marketing of Gasoline RON 95
- Fuel Subgroup meeting under ENC
- Meeting of SIAM-IAMA Fuel Subgroup
- Meeting with Brazil Automobile Manufacturer Association
- SIAM 19th Virtual Lecture Series on Vision Sustainable Mobility: Implications of CoP26
- SIAM 20th Virtual Lecture Series on Vehicle Inspection & Certification Challenges & Opportunities
- IMMA RSWG Meeting
- 2021-12-06 S.O. 5020 for reducing the industry average weight from 1145 kg to 1082 kg
- Extension provided by CSD for submission of Indemnity Bond by OEMs
- SIAM Completed 20 Lectures Series

## January 2022

- 2W CEOs Council Meeting
- PV CEOs Council Meeting
- Quarterly Press Conference on Industry Data
- Meeting for Inclusion of Extended Mobility Tyres (EMT) in the Quality Control Order
- SIAM Economic Research Group Meeting
- SIAM Looking Ahead Conclave
- Meeting with CMTA (Sri Lankan Association)
- SIAM CSR Group Meeting
- Discussion on draft AIS 137 Part 1 Chapter 6
- SIAM presentation on two wheeler OBD II implementation in line with SCOE decision
- 3W Panel Discussion - Looking Ahead Conclave
- BIS panel meeting for Formulating Standards for Base Oil and Reclaimed Base Oil Panel
- India-Brazil B2B Collaboration on Biofuels in Automobile sector
- Road Safety Competitions at schools
- 2022-01-27 G.S.R. 48(E) for Fire Protection System in Passenger Compartment of Buses
- 2022-01-27 SO 359 (E) Wheel Rim QCO Alignment with CMVR i.e. implementation from 21<sup>st</sup> Sept 2022
- Alignment of Custom Tariff Classification through representation in the Ministry of Finance

## February 2022

- Executive Committee Meeting
- Monthly Industry Data Release
- SIAM Human Capital Group Meeting
- 16<sup>th</sup> SIAM Styling & Design Conclave & 14<sup>th</sup> Automotive Design Challenge
- Meeting on Container Shortage and Increase in Freight Rates
- Bangladesh Joint Working Group Meeting
- Meeting with Ministry of Commerce on India-UK Trade Negotiations

- Meeting with Ministry of Finance on Post Budget Recommendations
- SIAM CSR Group Meeting
- 50<sup>th</sup> SIAM 2W Group Telecon
- Telecon on Draft SIAM proposals for Amendment 1 to AIS 137 Part 2-3W BSVI OBDII
- SIAM CV CEO Council Meeting
- 2<sup>nd</sup> Meeting of Sub Group with E&Y regarding study on "Auto Industry's Fuel/City Specific Roadmap as per GOI Priorities"
- 47<sup>th</sup> Meeting of PCD3
- Meeting with OMCs on Oxygen Content Increase in E10 & E20
- Meeting with DHI on debriefing and deliberations on E20 rollout
- 33<sup>rd</sup> Meeting of PCD3:1
- Meeting with MHI on Ethanol blending status
- 25<sup>th</sup> meeting of BIS Gaseous fuels subcommittee PCD 3:5
- Meeting with Empowered Group of Secretaries on Status of manufacturing and blending of Ethanol in India
- Road Safety Competitions at schools
- Road Safety Rolling Trophy handing over to School 2021
- 2022-02-25 GSR 161 Permission of Triple Deck Carriers for Carrying 2Ws
- 2022-02-10 Final GSR 620 E Safety Glass QCO Implementation Postponement to 1<sup>st</sup> April 2023
- 2022-03-29 S.O 1464 & S.O 1465 for fuel consumption norms implementation for HDVs
- Withdrawal of Antidumping Duties from all types of Steel through a detailed representation to Directorate General of Trade Remedies
- Extension granted for availing reduced Corporate Tax for new manufacturing facilities
- Enabled assembling of EVs through streamlining definitions of CKD and SKD

## March 2022

- 2W CEOs Council Meeting
- Monthly Industry Data Release
- Aatmanirbhar Bharat Sourcing Group Meeting
- Meeting on Dealer Point Vehicle Registration in Karnataka
- Meeting on Motor Third Party Premium Rates
- SIAM-CSR Group Meeting
- 01<sup>st</sup> Meeting of Hydrogen Working Group under MNRE
- Meeting of Technical Experts of CV Industry on Level Playing Field and Recall Trigger
- 01<sup>st</sup> Meeting of Hydrogen Working Group under MNRE
- Meeting with Energy Transition Advisory Committee (ETAC)
- Meeting of Sustainable Mobility Group organized on the various issues related to sustainable mobility and Suk Da Saah project including publicity campaign
- Train the Trainer program for Delhi Traffic Police Officials
- SAFE GC Meeting
- Achieved Highest Ever Exports of Two-Wheelers In FY-22
- 2022-03-31 SO 1533(E) Safety Glass QCO Alignment with CMVR i.e. implementation from 1<sup>st</sup> April, 2022
- Sustainable Mobility Group Meeting

## April 2022

- Executive Committee Meeting
- OICA Roundtable on Decarbonization of road transport
- Quarterly Press Conference on Industry Data
- Meeting on Long-Term Third Party Insurance
- SIAM-JAMA Secretariat Meeting
- SIAM Exports Group Meeting
- Meeting with Ministry of Commerce- India-Canada CEPA Negotiations
- Meeting with Himachal Pradesh Transport Authority on Uploading Vehicle Prices on Vahan
- NITI Aayog Dr Saraswat Meeting (virtual) Review the test results of ARAI on 2 wheeler & 4 wheeler with M15 fuel
- Discussion on road map and plan of presenting one demo FFV model
- SIAM 3W CEOs Council Meeting
- SIAM Meeting: Creating framework for setting up of the recycling zones and creating regulatory framework for certifying reusability of spares and critical
- Meeting with DoT MTCTE Clarification Note: Phase III and Phase IV. Chair: DDG (MTCT) DoT
- Meeting on M2M Consultative committee to address the concerns of M2M/IoT industry and academia. Chair: ADG (NT-III), DoT
- SIAM Pre Meeting (MS Teams): M2M Consultative committee to address the concerns of M2M/IoT industry and academia
- SIAM Pre Meeting (MS Teams): DoT MTCTE Clarification Note: Phase III and Phase IV
- Meeting with JS MoHIL on Postponement and Exemption from requirements of QCO for Wheel Rims
- 60<sup>th</sup> Meeting of CMVR-TSC
- SIAM Pre-Meeting: 60<sup>th</sup> Meeting of CMVR-TSC
- City and Fuel specific Roadmap study meeting with members
- Meeting of Sub-Group on Bharat VECTO under CV CEO council
- SIAM CV CEO Council
- Interaction session with India & Brazil on Bio energy & Biofuels
- MoU signing with SIAM & UNICA
- Meeting with Indian & Brazilian Delegation on Ethanol
- E20 Project Discussion with ARAI
- 64<sup>th</sup> Meeting of SCOE
- SIAM Pre-Meeting: 64<sup>th</sup> meeting of SCOE
- Meeting with the Director, MoEF&CC with selected members of the SIAM Technical Group to discuss the various aspects of draft BWMR 2022
- SIAM participation at MP Motor Show
- Train the Trainer program for Delhi Traffic Police Officials
- SIAM -JAMA Interaction Meeting
- Additional lead time given for implementation of QCO on Chemicals and Petrochemicals
- Calculation of Road Tax in Himachal Pradesh based on Ex-Factory Price reduced burden on customers

## May 2022

- APEC Automotive Dialogue Meeting
- Monthly Industry Data Release
- Review of Three Wheelers' Classification
- Human Capital Group Benchmarking Survey
- Meeting on Container Shortage and Increase in Freight Rates
- SIAM Logistics Group Meeting
- Meeting with MoRTH on BH Series Representation
- Meeting with Ministry of Finance on RoDTEP Rates
- Meeting with German Automotive Association (VDA)
- SIAM Taxation Group Meeting

- Meeting with Ministry of Commerce on Market access issues in Oceania Region
- Meeting with Ministry of Commerce on Technical Barriers to Trade in Korea
- 02<sup>nd</sup> Meeting of Hydrogen Working Group under MNRE
- SIAM Meeting on Understanding of DoT MTCTE Clarification Note: Phase III and Phase IV
- BIS TED 28 Meeting
- Pre-Meeting: 14<sup>th</sup> Meeting of TED 28
- SIAM Meeting: Driver Drowsiness Attention Warning System
- 10<sup>th</sup> SIAM Service heads Group Meeting on the Agenda of ICAT's Proposal on "Fire in Vehicles"
- City & fuel specific roadmap study-3<sup>rd</sup> meeting of the expert group.
- 1<sup>st</sup> meeting of National Logistics Policy and Multimodal Logistics Park: Commercial Vehicle Manufacturer's Perspective
- City & fuel specific roadmap study-4<sup>th</sup> meeting of the expert group
- 2<sup>nd</sup> meeting on National Logistics Policy and Multimodal Logistics Park: Commercial Vehicle Manufacturer's Perspective
- 02<sup>nd</sup> Meeting of Hydrogen Working Group under MNRE
- NITI Aayog Meeting to discuss the rollout of M15 fuel in India
- Meeting with DG, BEE on CAFÉ penalty
- Final Report on Feasibility and Production of Ethanol blended gasoline with RON 95
- Provision of calculating of Lower Road Tax across the country, on BH series without GST

## June 2022

- Monthly Industry Data Release
- Inter-Ministerial Committee (IMC) Meeting to review the tyre QCO Exemption List
- Meeting with CBIC on Clarification on SUV Definition
- Meeting with Ministry of Commerce- New Zealand Joint Trade Committee
- 01<sup>st</sup> Meeting of MNRE Subgroup III: Hydrogen fuelled Mobility Applications
- I&C Meeting at Delhi Transport Department
- Meeting Regarding sharing of CDR by M2M Service providers with overseas parent companies. Chair: DDG (SPPI) DoT
- SIAM Representation at Parliamentary Standing Committee
- Meeting With DDG ((Certification & CSM) Bureau of Indian Standards: Regarding QCO Audits
- SIAM Meeting: Meeting on CSMS (Cyber Security Management System) and SUMS (Software Update Management System)
- 49<sup>th</sup> SIAM CMVR & Safety Regulations Group
- 5<sup>th</sup> meetings of city & fuel specific roadmap study by E&Y
- 4<sup>th</sup> meeting of National Logistics Policy and Multimodal Logistics Park: Commercial Vehicle Manufacturer's Perspective
- 6<sup>th</sup> meetings of city & fuel specific roadmap study by E&Y
- Gas Based Mobility Group Meeting
- 01<sup>st</sup> Meeting of MNRE Subgroup III: Hydrogen fuelled Mobility Applications
- BIS sub panel meeting of Panel for formulation of standard for Pyrolysis Oil
- 48<sup>th</sup> Meeting of BIS PCD3:1
- 189<sup>th</sup> Meeting of the OICA Technical Committee
- World Environment Day Free PUC drives and Initiatives by members
- Conference : Towards Sustainable Mobility : Ethanol Perspective
- SIAM Green Tea : 1<sup>st</sup> Fireside Chat with Mr Vikram Kirloskar, Past President, SIAM & Vice Chairman Toyota Kirloskar Motor Ltd
- 2022-06-29 GSR 481 (E) OBD 2 Notification
- 2022-06-08 SO 2634 QCO Wheel Rim QCO postponement to 22 June 2023 SO 2634
- 2022-06-15 F.No. P13032(18)/7/2021-CC (E-39223) Amendment to National Policy on Biofuels-2018

## July 2022

- Executive Committee Meeting
- Monthly Industry Data Release
- BIS Meeting on Steel
- Meeting on Legal Metrology (Packaged Commodities) Amendment Rules
- Meeting with Government Counsel on Tyre QCO Exemption
- Meeting with Ministry of Commerce on UK and Canada Trade Negotiations
- QUAD Workshop by MNRE on RCS for Clean Hydrogen
- 03<sup>rd</sup> Meeting of MNRE Subgroup III: Hydrogen fuelled Mobility Applications
- 03<sup>rd</sup> Meeting of Hydrogen Working Group under MNRE
- 02<sup>nd</sup> Meeting of MNRE Subgroup III: Hydrogen fuelled Mobility Applications
- 2W Group CAFE Meeting
- Draft Amendment 11 to AIS 007 Rev 5
- 51<sup>st</sup> SIAM 2W Group Telecon
- SIAM 3W CEOs Council
- 12<sup>th</sup> SIAM 3W group meeting
- Meeting regarding old/existing vehicles HSRP fitment facilitation by SIAM Committee on Intelligent Transport System (ITS)/ Vehicle-to Everything (V2X), Ashim Dutta, IRRS' Dy. Wireless Adviser
- SIAM Meeting: Bharat NCAP review and way forward for its possible implementation
- SIAM Meeting: Supreme Court Judgement on Hyundai Airbag Issue
- 5<sup>th</sup> meeting of National Logistics Policy and Multimodal Logistics Park: Commercial Vehicle Manufacturer's Perspective
- SIAM CV CEOs Council Meeting
- QUAD Workshop by MNRE on RCS for Clean Hydrogen
- 03<sup>rd</sup> Meeting of MNRE Subgroup III: Hydrogen fuelled Mobility Applications
- 03<sup>rd</sup> Meeting of Hydrogen Working Group under MNRE
- 02<sup>nd</sup> Meeting of MNRE Subgroup III: Hydrogen fuelled Mobility Applications
- 68<sup>th</sup> Meeting of AISC
- Meeting with Indian Sugar Manufacturers Association (ISMA)
- SIAM CSR Conclave 2022
- SIAM Green Tea : 2<sup>nd</sup> Fireside Chat with Mr Vinod Agarwal, Vice President, SIAM & MD & CEO VE Commercial Vehicles Ltd
- SIAM Conference on the occasion of World Biofuel Day : Promotion of Biofuels: A Pathway for Low Carbon Mobility
- 2022-07-01 GSR 503 (draft) for mandating fuel consumption norms for Heavy Duty Vehicles

- Activity
- Milestone



# SIAM 61<sup>st</sup> ANNUAL CONVENTION 2021

Over the years, the Annual Convention of Society of Indian Automobile Manufacturers has assumed a distinct character and has become one of the India's most coveted automotive events. It has become a global event focused on issues influencing Indian Automotive industry's competitiveness and its integration with the global economy.

SIAM organised its 61<sup>st</sup> SIAM Annual Convention virtually, on the 25<sup>th</sup> of August 2021 under the broad theme, '*Building the Nation, Responsibly*'. Kenichi Ayukawa, President, SIAM and MD & CEO, Maruti Suzuki India Ltd. read out a message given by the Hon'ble Prime Minister of India, Shri Narendra Modi.



प्रधान मंत्री  
Prime Minister

## MESSAGE

It is heartening to learn that Society of Indian Automobile Manufacturers (SIAM) has organised its 61<sup>st</sup> Annual Convention through virtual platform on August 25, 2021.

The role of the automobile industry in India's economy and progress has been remarkable. From contributing significantly towards manufacturing to furthering exports, from creating numerous employment opportunities to adding to the ease of living for people, the sector has been a partner in India's growth story. Even during the nation's fight against COVID-19, the sensitive and active effort of the sector is deeply valued.

All the stakeholders have an important role in our Government's steadfast efforts to transform India into a global manufacturing hub. Presence of manufacturing units of global automobile manufacturers in India is reflective of a thriving ecosystem.

Modernity in mobility brings about a positive impact in almost every industry and every sector of the country. The 21<sup>st</sup> century India remains firmly committed to move forward with the goal of clean and modern mobility. Holistic steps are being taken for the value chain associated with auto manufacturing so that the industry becomes more productive and sustainable.

There are rapid changes taking place in technology, lifestyle and economy and old approaches and old practices have to be changed. It is also crucial to protect our environment, resources and raw materials. For this reason, India is not only emphasizing on exploring new possibilities, but also encouraging a circular economy. Recently launched National Automobile Scrappage Policy exemplifies this vision.

As India celebrates the 75 years of Independence, the next 25 years are very important for the country. We have to work together for next generation infrastructure, world class manufacturing and new age technology. India is committed to providing its citizens with global standards in terms of quality and safety. It is in this context that the theme of the Convention 'Re-building the nation, responsibly' acquires an even greater relevance.

May the deliberations and shared experiences at the SIAM Annual Convention help the stakeholders in charting a futuristic roadmap for the industry.

I extend my best wishes to everyone at SIAM for all success of the 61<sup>st</sup> Annual Convention.

(Narendra Modi)

New Delhi  
भाद्रपद 01, शक संवत् 1943  
August 23, 2021

**Shri Kenichi Ayukawa**  
President, Society of Indian Automobile Manufacturers and  
Managing Director & CEO, Maruti Suzuki India Ltd.  
Core 4-B, 5<sup>th</sup> Floor, India Habitat Centre  
Lodhi Road, New Delhi – 110003



The topics for discussion included sustainable growth of the automobile industry, the future outlook, and role of the industry in India's economic growth, future of mobility, scrappage and recycling, affordability of electric vehicles, regulatory policies, and technological advancements in the sector. The programme brought together all stakeholders like CEOs of automotive Industry, Government officials and representatives, eminent global speakers, etc.

- Special Plenary Session 1 – “Enablers for Sustainable Growth of Auto Industry in India”
- Special Plenary Session 2 – “Outlook of Indian Auto Industry and Its Role in India's Economic Growth”
- Special Plenary Session 3 – “Crystal Ball Gazing – Future of Mobility in India”
- Special Plenary Session 4 – “Technological Advancements in the World”

Mr Kenichi Ayukawa, President, SIAM and MD & CEO, Maruti Suzuki India. Ltd. addressed the gathering by reading out the message of the Hon'ble Prime Minister who acknowledged Automobile Industry's major role in India's manufacturing, exports, employment and ease of living for people. As India celebrates 75 years of independence, for the next 25 years the Hon'ble Prime Minister, Shri Narendra Modi, has motivated us to work together towards, new age technology, world class manufacturing, and next generation infrastructure, to achieve, sustainable and productive growth, with quality and safety, and protect our environment, resources and raw materials. We re-dedicate ourselves to this vision of Hon'ble Prime Minister. Focused efforts are to be made. He said, “SIAM and ACMA have together worked out a Localization Roadmap with a target of about 15-20% further localization in next 2 to 5 years. SIAM has prepared an approach paper for long term regulation roadmap that takes care of all aspects and gives clarity on future investments and the industry is working hard on New Powertrain Technologies. At the Convention, Mr Ayukawa thanked the Government of India for announcing the vehicle scrappage policy and the new PLI scheme.

Dr Mahendra Nath Pandey, Hon'ble Union Minister of Heavy Industries, Government of India spoke about the work his ministry is doing for the growth of automotive

sector. He acknowledged that increased localization supported by the PLI initiatives of Government would make the industry more robust. He emphasized on the need for developing EV charging infrastructure and also focus on manufacturing quality products so that Indian automobile industry is the best in the world.

During his address, Mr T V Narendran, President, CII & MD, Tata Steel Ltd said that India can still become 5 Trillion Dollar economy by 2025-26 if it is provided with the right kind of policy support. For Aatmanirbhar Bharat to be successful, it is important that the Indian manufacturing sector is strong, and for that, the Indian auto sector plays a pivotal role. The auto sector should focus on six key areas going forward.

The future direction for the industry is towards Shared, Connected and Electric Mobility. There are four prominent growth drivers that we should focus on. Firstly, we should expand investment in R&D. Then, we should focus more on innovation in small format mobility segment, establish massive charging infrastructure across the country and provide export impetus to the industry. Electric Vehicle is definitely integral in every OEM's plans, said Mr Amitabh Kant, CEO, NITI Aayog.

While delivering his speech, Mr Vipin Sondhi, Vice President, SIAM and MD, Ashok Leyland Ltd. highlighted that due to the impact of COVID 19, sales were subdued for the automobile sector, however, Ministry of Heavy Industries has done a remarkable job in creating world class testing and R&D infrastructure in all the auto hubs of the country. Our mission is to take advantage of localization, PLI scheme and EV charging infrastructure. All these efforts will contribute to the Government's initiative of Make in India and make us truly Atmanirbhar.

Mr Tarun Bajaj, Secretary, Revenue Secretary, Ministry of Finance appreciated India's Auto industry's contribution to GDP and GVA is immense and so is its contribution towards creating job opportunities for people. He requested that SIAM needs to do a deeper study on the specific impact of taxation on affordability and SIAM should also recommend measures on how Government of India can work together with all stakeholders for the growth of this industry.



Mr Arun Goel, Secretary, Department of Heavy Industry, Government of India expressed his optimism about the Indian Auto industry. All segments will grow in the coming times. The personal mobility segment will have the potential to grow by 30% and the freight segment will grow by 50% over the next decade. The industry will have to improve on two accounts with respect to in-house capabilities 1) Industrial skills 2) Technical Skills. The skill gap that exists in India can be ironed out by establishing skill councils guided by the industry. Most importantly, we need to develop technology indigenously. Further, EV is one of the biggest disruptions that happened to the Indian Auto industry, off late. I can vouch for the fact that Government is walking the talk when it comes to EVs. The revisiting of FAME guidelines is an example of this, and so is the recent PLI schemes that we have announced. Now is the time for the industry to walk the talk.”

In order to address economic and environmental challenges with regards to petroleum products in India, it is necessary to shift towards fuel options available in the country, such as focusing upon blending of fuels. He highlighted that around 8% ethanol blending is done across the country except in the North East and the aim is to now shift that number to 20%. Mr Kapoor said that the Government is targeting to install EV charging infrastructure across 50,000 retail outlets in the next 3 to 4 years. He further emphasized upon the advantages of hybrids, hydrogen, and other natural gas, said Mr Tarun Kapoor, Secretary, Ministry of Petroleum & Natural Gas.

Dr VK Saraswat, Member, NITI Aayog, elaborated on the emerging trends in mobility. He emphasized that electric vehicle is the way ahead for the country to address issues of climate change and crude import. He presented broad road map wherein it was evident that all technologies, such as electric, hybrid and fuel cell, all have good potential.

Appreciating the progress done by the automobile industry by leapfrogging from BSIV to BSVI emission norms in a short time frame. He mentioned that with immense capabilities, including the availability of skilled manpower through various engineering colleges, India is well poised to look at futuristic technologies for the automobile industry. He specifically emphasized on the need for adopting ethanol in a big way in the country and was open to look at hydrogen-based mobility in the future, said Shri Nitin Jairam Gadkari, Hon'ble Union Minister of Road Transport & Highways, Government of India

Mr Vinod Aggarwal, Treasurer, SIAM & Managing Director and Chief Executive Officer, VE Commercial Vehicles Ltd emphasized that vehicles today are increasingly becoming large smart devices with advanced technologies and better fuel efficiency, making mobility more safe, comfortable and efficient. The Indian Auto industry has come a long way in the last 3 to 4 years wherein we have moved from BS 4 in 2017 and to BS 6 in 2020. During these years, we have also met new safety and fuel efficiency regulations. The Hon'ble Prime Minister has formally announced the launch of the national hydrogen mission to accelerate plans to generate carbon free fuel from renewables, for India to achieve self-reliance in energy. The industry will be committed to work on these new areas.”

Mr Girish Wagh Chairman, SIAM Commercial Vehicle CEOs Council & Executive Director, Tata Motors Ltd. thanked all the dignitaries present for their insightful discussions around alternative fuel and the Government's push to circular economy. He also agreed that sustained supply of ethanol will make it a formidable alternative fuel, by converting it into hydrogen form. Ethanol would play a significant role in India as the country has a large farming community and a sustained supply will be able to supplement fossil fuel. The industry is committed to support the Government's vision to enhance utilization of ethanol.



# Indian Auto Sector's Journey in the "Amrit Kaal": Vision @2047

Addressing the country from the ramparts of the Red Fort in New Delhi, marking 75 years of the nation's independence, the Hon'ble Prime Minister gave a clarion call that we all must work towards turning India into a developed nation by 2047. He outlined India's achievements and challenges while rolling out this 25-year goal that has to be realized by the 100<sup>th</sup> year of the country's independence, with the framework of policies in place to make India self-reliant with the developed economy. In this regard, the Hon'ble Prime Minister exhorted countrymen to focus on the five pledges — a resolve of developed India; removing any trace of the colonial mind-set; taking pride in our legacy; our strength of unity; and fulfilling the duties of citizens with honesty so that India can attain the status of Developed Nation @ 2047. The Automotive sector is envisioned in 2047 as sustainable in terms of environment, social (no adverse impact on health), and economy (affordable).

## **Sustainable Mobility:**

Sustainable Mobility is any mode of transportation that is 'green' and has a low impact on the environment, is affordable, safe, and inclusive. Sustainable Mobility is also about balancing the current and future needs of people including coming generations. Examples of sustainable transportation include no or low emission vehicles, hybrid vehicles, carpooling, and car sharing. And perhaps the most tragic reality is this: approximately 1.3 million people die each year in traffic-related incidents, out of these, 1.5 lac deaths occur in India alone.

Sustainable Mobility is not an end in itself but rather a means, allowing people to access what they need: jobs, markets and goods, social interaction, education, and a full range of other services contributing to healthy and fulfilled lives. Without access to sustainable mobility, it will be much harder—if not impossible—to end poverty and achieve the Sustainable Development Goals 2030.

## **Aatmanirbhar Bharat:**

The automotive industry in India is the fourth largest vehicle manufacturing hub in the world as per 2021 statistics. The Government of India has taken several initiatives for making a self-reliant and state-of-the-art hub for manufacturing world-class vehicles. The Production Linked Incentive (PLI) Scheme for the Automobile and Auto Component industry envisages financial incentives to boost domestic manufacturing of Advanced Automotive Technology products and attract investments in the automotive manufacturing value chain. The scheme has two components - Champion OEM Incentive Scheme and Component Champion Incentive Scheme.

The PLI scheme also envisages a program for Advanced Chemistry Cell (INR 18,100 crore) and Faster Adaption of Manufacturing of Electric Vehicles (INR 10,000 crore) will enable India to leapfrog from a traditional fossil fuel-based automobile transportation system to more efficient Electric Vehicles (EV) based system to achieve imperatives of sustainable mobility.

The PLI scheme for the Automobile and Auto Component Industry has been a huge success in terms of the applications received from local as well as globally headquartered groups engaged in / proposing to manufacture Advanced Automotive Technology vehicles / products. The overwhelming response shows that the Industry has reposed its faith in India's stellar progress as a world-class manufacturing destination, which resonates strongly with the Hon'ble Prime Minister's clarion call for Aatmanirbhar Bharat - a self-reliant India.

## **Building the Nation, Responsibly:**

Globally the automobile industry is undergoing a transformation at an unprecedented pace and the role of associations needs to keep pace with the changes. SIAM has accordingly prioritized its actions and mandate toward furthering the cause of sustainable



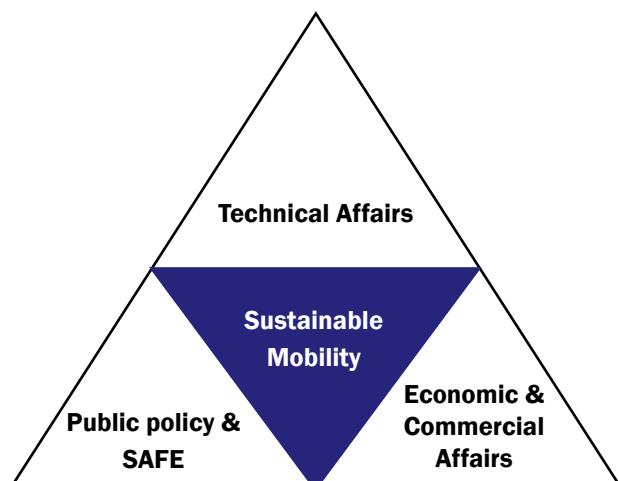
mobility. Last year SIAM espoused Aatmanirbhar- Self-Reliant India promoting vocal for local and favourable policy prescriptions.

The Indian automobile industry is central to the country's economy and contributes around 6% of India's GDP. India's Automobile sector has been at the vanguard in adopting advanced automotive technology and aligned with the international standards of manufacturing and providing sustainable growth with affordable mobility solutions, consumer confidence, and attaining a global stature.

Presently, the Indian automobile industry with a turnover of over INR 8.67 lakh crores contributes around 6% to the GDP (at constant prices), employing around 4 million people directly and 27 million people indirectly. The contribution of 35% of the manufacturing GDP (at constant prices) reflects the resilience of the automotive industry and its contribution of INR 1.79 lakh crore to the GST is significant.

India is amongst the top-2 Two-Wheeler manufacturers, 4<sup>th</sup> largest Passenger Vehicle manufacturer and 7<sup>th</sup> largest Commercial Vehicle manufacturer in the world.

Over the years, SIAM has been working on the vision of Sustainable Mobility. SIAM in order to carry out the activity works under the three main verticals:

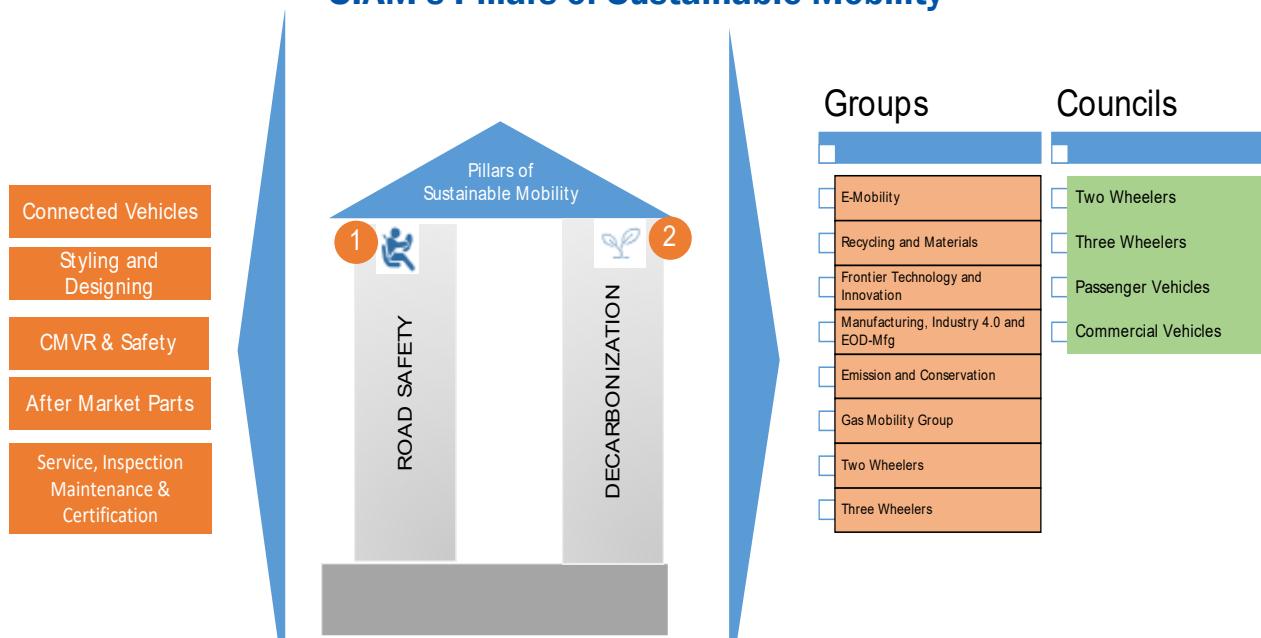


The three verticals of sustainable mobility define these pathways adopted in the manufacturing of vehicles in the country. Under each of the verticals, SIAM operates various groups and councils whose main objective is to follow the narratives of Safety and Decarbonization of the Indian Automotive sector.

### The paradigm of Sustainable Mobility

With a focus on safer, affordable, environmentally benign inclusive mobility, SIAM is also working with a focus on export production. As the evolution of mobility continues, it is identified that safety and decarbonization are the two main pillars of sustainable mobility.

### SIAM's Pillars of Sustainable Mobility



The various groups and councils work towards fulfilling these two objectives.

### **Pillars of Road Safety:**

1. Connected Vehicles
2. Styling & Design
3. CMVR & Safety
4. After Market Parts
5. Service, Inspection Maintenance & Certification

The above five groups define the overall framework of safety across vehicles and work towards customer comfort, safety and expectations, and consumer choices.

### **Pillars of Decarbonisation:**

1. E-Mobility
2. Recycling and Material
3. Frontier Technology & Innovations
4. Manufacturing, Industry 4.0, and EODB-Mfg.
5. Emission & Conservation
6. Gas-Based Mobility (CNG & LNG)
7. Two-Wheeler
8. Three-Wheeler

SIAM through these technical groups/ councils provides inputs to the Government on various technical issues governing the overall aspect of sustainable mobility and policy development. Issues related to current and future fuel choices, promotion of gas mobility, fuel efficiency regulations, manufacturing innovations, technological innovations, recyclability, material

efficiency, etc. are some of the core issues, which support the Government initiatives in this area. As climate resilience takes center stage, decarbonization of the transport sector has become a key focus area for the Government. The groups and councils' roles are to make informed decisions and propose the best available solutions to the Government commensurate with their policy options.

The following are the initiatives that the industry has undertaken over the years, especially in the areas outlined below:

- Democratizing mobility through public and private transport
- Fostering "Brand India" worldwide
- Ensuring energy security
- Cohabiting with other industries
- Adopting global standards in emissions, safety, and manufacturing
- Building sustainable cities and communities
- Facilitating continuous skill upgradation
- Increasing consumer consciousness
- Encouraging social green, sustainable development, and environment conservation
- Promoting Automotive Engineering prowess globally

### **SIAM's Approaches toward Policy Advocacy for Sustainable Mobility:**

One of the key mandates of SIAM is to device and promote innovative policy for sustainable mobility in

## **SIAM Policy Advocacy Pillars for Achieving Sustainable Mobility**



### **1. Talk Show**

- Green Tea: Low carbon fuels perspective
- Master Class: Flex fuel / ethanol fuel technology for 2W & 4W



### **3. Observing important days**

- World Environment day
- Bio fuel day



### **5. Conferences**

- Global ethanol policies
- Technology mapping



### **7. Technology Demonstration**

- Proof of concept of Flex fuel 2W
- Working proto of Flex fuel 2W



### **9. Tech Group Deliberations**

- Technical deliberations



### **2. Stakeholder engagement**

- Brazil MoE visits & MoU signings
- Exchange program: Brazil & USA and Technical meetings



### **4. Knowledge series**

- Debunking Myths around ethanol
- Circular Economy: A strategy for decarbonisation



### **6. Social media posts & ads**

- Reaching masses through media
- Advertisements on ethanol virtues



### **8. Roadshow & Expo**

- Ethanol pavilion @ Auto Expo'23
- Ethanol vehicle road shows



### **10. Council Deliberations**

- Thematic deliberations



the country through various instruments/pillars of advocacy. Starting with the World Environment Day 2020, SIAM embarked on a knowledge-building series and covered a host of topics on technical / regulatory, standards / environment including technological innovations. These topics synchronize with the vision of the Hon'ble Prime Minister Narendra Modi and a series of steps taken by the Government over the years to boost automotive growth and make India Self-Reliant through the Aatmanirbhar Bharat Mission. This is also in line with the Government's constant endeavour to transform various sectors of the economy including automobile sector into being more affordable, accessible, efficient, and sustainable.

**The aforesaid policy approaches for facilitating sustainable mobility and integrating sustainable imperatives in the automobile industry are highly critical. To achieve this stated objective, the stakeholders' involvement and their participation are**

**ensured across the value chain. SIAM's plan for the coming year to further enhance focus on Sustainable Mobility:**

With changing paradigms in the Automotive industry and a greater focus on improving safety and minimizing environmental impact, SIAM has been focusing on promoting Sustainable Mobility in India. Continuing its work in this area, SIAM in the coming year will be directing its efforts to improve road safety in India as well as supporting the decarbonization of the Automotive industry. SIAM has interalia identified four key areas, i.e. Road Safety, Ethanol, Electrification, and Scrappage, to achieve this objective. Across these four areas, SIAM plans to organize major activities and engagements throughout the year with different stakeholders. In the area of Road Safety, SIAM will continue its efforts toward education, working with Kendra Vidyalaya to increase awareness about road safety from an early age.



**ECONOMIC  
&  
COMMERCIAL  
AFFAIRS**

# International Relations & Trade Policy Group

SIAM International Relations and Trade Policy (IRTP) Group remained actively engaged with Government of India in providing recommendations through policy advocacy on International Trade.

Government of India signed two trade agreements viz. India-Australia Economic Cooperation and Trade Agreement (ECTA) in April 2022 and India-UAE Comprehensive Economic Partnership Agreement (CEPA) in February 2022. Through these agreements, Indian automobile sector has received zero duty market access into both the countries. The IRTP Group of SIAM was actively engaged in the trade negotiations of these recently concluded agreements and SIAM recommendations for the automobile sector were incorporated by the Government in the agreements.

Under the India-UAE CEPA, Government of India has offered tariff reductions broadly under the Two-Wheeler segment.

India also entered into a trade agreement with Mauritius in February 2021. The negotiations on additional market access are to be completed within two years of signing India-Mauritius Comprehensive Economic Cooperation and Partnership Agreement (CECPA). Government of India has sought inputs from SIAM on the automobile sector in order to expand the scope of the agreement.

SIAM IRTP group members also participated in stakeholder consultations for the upcoming Trade agreements viz. India-Canada CEPA, India-UK FTA, etc. The group has given its detailed recommendations on various chapters and clauses, which are a part of trade negotiations, such as Tariff Concessions, Rules of Origin, Product Specific Rules, etc. Government of India has also started looking at reviewing the previous existing trade agreements viz. India-Korea CEPA and India-Japan CEPA.

SIAM also worked with international counterparts in maintaining international trade dialogue and knowledge exchange with international associations, such as Ceylon Motor Traders Association (CMTA) of Sri Lanka, Japan Automobile Manufacturers Association (JAMA) of Japan, Korea Automobile Manufacturers Association (KAMA) of South Korea and Thailand Board of Investment. SIAM continued to work closely with the German Automotive Industry Association (VDA) and coordinated along with VDA for the Indo German Joint Working Group meetings with Ministry of Heavy Industry and German Government. As an important member of OICA (International Motor Vehicle Manufacturers Association), SIAM worked on developing a Position Paper on Carbon Neutrality by 2050.

## Annual Report Card (2021-22)

| S.No. | Deliverables  | Measures  | Owner  | Stakeholders              |
|-------|---|---|--|---------------------------|
| 1     | Build Relation with Global Auto Associations & Counterpart Associations | 1. Participated in the APEC Automotive Dialogue<br>2. Interaction with Automotive Associations VDA (Germany), CMTA (Sri Lanka), JAMA (Japan), KAMA (Korea), Indo-German Working Group         | International Relations & Trade Policy Group | Membership                |
| 2     | To Provide Trade Policy Recommendations                                 | 3. Recommendations on Tariffs for UAE, Australia, Canada and UK<br>4. Recommendations on robust Rules of Origin for Automobile, Product Specific Rules on CBUs under various trade agreements |  | Membership                |
|       |   |   |  | Government and Membership |
|       |   |   |  | Government and Membership |



## AUTOMOTIVE WEBINAR



16th September 2021



Thursday



11:30 AM- 1:30 PM  
(IST)

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# Exports Group

Covid-19 pandemic had severely impacted the Indian automobile sector including the Automobile exports. The year 2020-21 witnessed a huge decline in India's total automobile exports, however, automobile exports in the year 2021-22 have picked up, witnessing sharp recovery.

The export performance of the automobile industry during the last three years is given below:

| Segment/<br>Subsegment       | 2019-20          | 2020-21          | 2021-22          |
|------------------------------|------------------|------------------|------------------|
| Passenger Vehicles           | 6,62,118         | 4,04,397         | 5,77,875         |
| Commercial Vehicles          | 60,379           | 50,334           | 92,297           |
| Three Wheelers               | 5,01,651         | 3,93,001         | 4,99,730         |
| Two Wheelers                 | 35,19,405        | 32,82,786        | 44,43,018        |
| Quadricycle                  | 5,185            | 3,529            | 4,326            |
| <b>Total of All Segments</b> | <b>47,48,738</b> | <b>41,34,047</b> | <b>56,17,246</b> |

India's major export destinations for Passenger Vehicles in the year 2021-22 has been South Africa, Mexico, USA and Saudi Arabia. While top export destinations for Two-Wheelers have been Nigeria, Colombia, and Nepal.

With the recent signing of the Trade agreements with the UAE and Australia, Indian automobile industry will be able to export vehicles at 'NIL' duty into these markets thereby making Indian vehicle more competitive. The Export Group has prepared a tariff information matrix, in order to understand the tariff differential, between India and other competing automobile manufacturing countries, in major export destination markets of India.

Import restrictions in neighboring markets, namely Sri Lanka, Nepal, and Bangladesh amid their respective economic turmoil, continue to pose challenges for Indian automobile exports in these markets. SIAM has

also given detailed submission on the draft Automobile Policy prepared by Government of Bangladesh. The group has also been actively engaged with the Ceylon Motor Traders' Association (CMTA), Sri Lanka to discuss various issues, including difficulties being faced by businesses for exports of spare parts to Sri Lanka. CMTA has sought SIAM's assistance in preparing a regulatory roadmap for the Motor Vehicle industry in Sri Lanka.

SIAM Exports Group has also taken up some of the operational challenges that are faced from time to time in the ASEAN countries, namely Cambodia, Thailand, and Indonesia. SIAM actively participated in discussions with Government to look at options to increase market access in New Zealand, Korea, and Bangladesh.

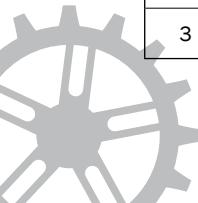
SIAM Exports Group has engaged with the Government of India for continuation of the EPCG Scheme that would make the Indian Exports competitive in the Global arena. The Group recommends inclusion of such export augmenting initiatives in India's Upcoming Foreign Trade Policy for the next 5 years.

The dynamics of global environment, viz. rising inflation and fuel prices, currency depreciation, tensions in Ukraine, etc. pose a threat to India's Automobile exports. To combat with the changing environment, the Group is putting efforts to ensure smoother operations and level playing field for Indian automobile exports. The possibility of engaging bilaterally to frame auto policies and rupee-based trade mechanism in some countries is also being explored.

SIAM Exports Group will continue to strengthen automobile exports by actively engaging with the Government and various other Stakeholders Globally to harness the potential of Indian Automobile exports.

## Annual Report Card (2021-22)

| S.No. | Deliverable   | Measures   | Owner         | Stakeholders              |
|-------|---|--|---------------|---------------------------|
| 1     | Resolve tariff and non-tariff barriers in exports markets | 1. Taken up issues for enabling market access in New Zealand, South Korea Cambodia, Vietnam and Indonesia                | Exports Group | Government and Membership |
| 2     | Tariff Overview of Competing markets                      | 2. Built a Tariff Matrix showcasing the Customs duties applicable in potential export markets to the competing countries |               | Government and Membership |
| 3     | Reduce internal inefficiencies                            | 3. Engaged with Government on Continuation of EPCG Scheme  |               | Government                |



# Economic Research Group

SIAM Economic Research Group (ERG) initiated a study to assess the contribution of Indian Automotive Sector in employment generation, with National Council of Applied Economic Research (NCAER). The study highlighted that the Automotive sector generated more than 30 million jobs, out of which more than 4 million were Direct jobs. In the next phase of the study, the SIAM Group is assessing employment generated in the economy due to vehicle production in a year and jobs being created by the existing vehicle parc. The Group has also undertaken a study along with NCAER to analyze the impact of Taxation on the market demand.

The 16<sup>th</sup> edition of SIAM Looking Ahead Conclave was organized virtually in January 2022. The theme of the conclave was “Automotive Industry: Working towards Resilience”. The conclave provided diverse perspectives on emerging trends in the automobile sector, challenges faced by the industry, specifically on supply side, and the way forward to make the

industry more resilient. The Conclave also provided sales projections for the next fiscal of different vehicle segments – Passenger Vehicles, Commercial Vehicles, Three-Wheelers and Two-Wheelers – in the Indian market for the year ahead.

ERG worked out a Vision for the Automotive Industry in the ‘Amrit Kaal’ from 2022 to 2047. The Indian Auto Industry, which is about USD 120 Bn in size in FY 2021-22 is expected to grow by 20 times and be one of the top-two manufacturers in the World in each of the vehicle segment by 2047.

An Economy Monitor, providing information on various Economic parameters impacting the Auto Industry, is shared with members on a monthly basis. Now a value-added report is being prepared that would also provide broad short-term projections of these parameters, to help decision makers see the likely trends that could determine the performance of the Auto Industry.

| Annual Report Card (2021-22) |                          |   |                         |                           |
|------------------------------|--------------------------|---|-------------------------|---------------------------|
| S.No.                        | Deliverable              | Measures  | Owner                   | Stakeholders              |
| 1                            | Industry Forecast        | 1. Looking Ahead Conclave for forecasting of FY2022-23 sales for all segments             | Economic Research Group | Membership and Society    |
| 2                            | Forecast for 3W Segment  | 2. Revised estimates for 3W sales forecast for FY2022-23 including estimation of Fuel mix |                         | Membership                |
| 3                            | Vision 2047 (Amrit Kaal) | 3. Estimated the growth pattern of the Auto industry for the next 25 years                |                         | Government and Membership |
| 4                            | Monitoring Economy       | 4. Initiated a Monthly Economy Report   |                         | Membership                |
| 5                            | Research Studies         | 5. Completed Study on Estiamtion of Employment Generation in Auto sector                  |                         | Membership                |
|                              |                          | 6. Studying the Impact of Taxes on Demand of Vehicles                                     |                         | Membership                |



# 16<sup>th</sup> Looking Ahead Conclave

Automotive Industry: Working Towards Resilience

**SIAM**  
Society of Indian Automobile Manufacturers  
*Building the Nation, Responsibly*



## WELCOME ADDRESS

**Mr Rajesh Menon**  
Director General, SIAM



## OPENING REMARKS

**Mr N Raja**  
Chairman, SIAM Economic Research Group & MD, Toyota Financial Services

## SESSION 1 - Making Robust Supply Chain



### MODERATOR

**Mr Rajeev Singh**  
Partner & Automotive Leader, Deloitte



**Mr Veeraraghavan R**  
Head-Strategic Sourcing, Mahindra & Mahindra



**Mr Pradeep Mishra**  
Sr VP-Purchasing & Supply Chain, VE Commercial Vehicles



**Mr Kalpesh Pathak**  
Auto Industry Expert

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21<sup>st</sup> January 2022

1:30 PM TO 5:30 PM

Virtual



**SIAM** *Building the Nation, Responsibly*

# Taxation Group

The SIAM Taxation Policy, Procedural and Direct Tax Group works actively towards resolving all the taxation issues faced by the automobile industry including the matters of direct and indirect taxation. The Group has been keenly involved in reducing the redundancies, compliances and has also been working towards interpreting the new provisions introduced in the Taxation Policy by the Government.

The Group has had a several round of discussions during the year and worked on the Memorandum of Suggestions for the Union Budget 2022-23. The Pre-Budget Recommendations were formally submitted to the Ministry of Finance in October. Thereafter, Pre-Budget interactions were held with Ministry of Heavy Industries and Ministry of Finance, Chaired by Revenue Secretary. SIAM delegation was led by President, SIAM along with Treasurer, SIAM. Pre-Budget consultation was also held with Hon'ble Finance Minister in December 2021.

The key pre-budget recommendations comprised of the following:

- **Custom Duty**

1. Clarification with regards to Customs Classification in tariff Lines Concerns arising out of the Westinghouse Judgement of the Supreme Court
2. Request for clarity on CKD Definition of Electric Vehicles
3. Allowance of depreciation for imported capital goods under Manufacturing and Other Operations in Warehouse Regulations, 2019 (MOOWR)

- **Income Tax**

1. SIAM has sought Clarification on applicability of Equalization Levy, on transactions between international parent company with its manufacturing subsidiary in India (due to digital communication relating to physical import of goods on applicable customs duty)

2. SIAM has requested extension of New Manufacturing Company, start of Production date from March 2023 to March 2025, for seeking Corporate Tax benefits.

- **GST**

1. SIAM has requested Ministry of Finance to issue clarification on the Definition of SUVs as Summons are being issued to manufacturers and dealers seeking to demand additional 2% GST Compensation Cess (Cess paid at 20%, being sought at 22%).
2. Need for ITC on passenger motor vehicles upto 13 Seating Capacity used for Research & Development activities by manufacturers of motor vehicles.

The Government of India announced a growth-oriented budget focused on Building Long-Term Strength using Investment as the growth lever, while maintaining policy stability and inclusivity. Some of the key announcements of the Union Budget 2022-23 were:

- There was 35% increased Capex outlay, major infrastructure projects like 25,000 kms Road Construction, 100 Cargo Terminals, Project GatiShakti, 5G network, Optic Fibre Cable laying and the recent PLI schemes were the major positives
- Anti-Dumping Duties on certain Steel products were removed – This move has helped the entire manufacturing sector
- Impetus was given in the Budget to set up charging infrastructure and energy storage systems. Government support in R&D for clean energy, green mobility and semiconductors would help the auto sector
- As desired by SIAM, the definition of CKD of Electric Vehicles was modified and made much clearer
- Though SIAM had asked for 2 years, announcement of extension by one year to 31<sup>st</sup> March 2024, for



starting of operations for the New Manufacturing companies for reduced Corporate Tax, would provide necessary support to the industry.

- Government has intended to minimize litigations by committing those new appeals where there is a question of law, would be deferred for identical issues, which are pending in High Courts and Supreme Court. This was a welcome Announcement for the Auto Sector.
- INR 2,908 crore was allocated for the FAME scheme in 2022-23, against INR 800 crore allocation in 2021-22. Further, INR 2,057 crore was allocated towards procurement of Medium and Heavy vehicles by Defense in 2022-23.
- Higher Excise Duty on Non-Blended Fuel from 1<sup>st</sup> October 2022 has been announced in the Budget.

SIAM Taxation group has also been involved in addressing the new issues that cropped up during the year:

- The New Provision of Section 194 (R) has been notified which has implications on transaction being done by members with their Dealers
- Government of Himachal Pradesh issued a circular mandating the entering of ex-factory prices on the Vahan Portal for the purpose of calculating the road taxes. This led to the issue of registration of new vehicles in Himachal Pradesh strikethrough arising and, because the prices entered on Vahan Portal did not match with the invoice price. SIAM

along with its members addressed this issue to the State Government and assisted in streamlining it.

- SIAM remained actively engaged with the RoDTEP committee and made a representation to the Ministry of Finance for the reconsideration of RoDTEP rates for the auto mobile sector.
- The Ministry of Road Transport and Highways issued a notification for vehicles with BH Series number, road tax on which had to be paid every two years in the state of residence. Road Tax for the purpose of the same had to be calculated on Invoice price, without GST.
- SIAM, therefore, coordinated with MoRTH and NIC to modify the Homologation Portal of Vahan, for Automobile OEMs to upload two different vehicle prices: 1) As per the requirements of State/UT and 2) For BH series vehicles.
- Applicability of Service Tax on Salaries of Expatriates working as Employees of Indian companies due to an Hon'ble Supreme Court Order, has been a concern.
- SIAM also represented that the Levy of Infrastructure Cess / NCCD should not be applied on Stocks as on 30<sup>th</sup> June 2017 as GST was already paid on these vehicles.
- SIAM took up the issue of reduction in GST rate on EV charging service as EV charging services continued to be taxed at the higher rate of 18%.

| Annual Report Card (2021-22) |  |  |                |                           |
|------------------------------|--|--|----------------|---------------------------|
| S.No.                        | Deliverable  | Measures   | Owner          | Stakeholders              |
| 1                            | To review and analyse policy changes in the country's taxation structure and gauge its impact on automobile industry               | 1. Analyse the announcements made in Union Budget and provides suitable recommendations  | Taxation Group | Government and Membership |
|                              |  | 2. Pre-Budget & Post Budget recommendations to the Government  |                | Government and Membership |
| 2                            | Work towards simplifying and reducing cost impact of Taxation policy & procedural developments in both Direct & Indirect tax space | 3. Applicability of Equalisation Levy, Applicability of Section 194 (R)  | Taxation Group | Government and Membership |
|                              |  | 4. Increase in RoDTEP Rates from segments, Interpretation of SUV for applicability of Compensation Cess, Alignment of calculation of Road tax on pan India basis for BH Registration on Vahan, Exemption from Levy of Infra cess/NCCD on vehicles lying in stock as on 30.06.2017, Exemption of Service Tax on Salaries of Expatriates |                | Government                |





SIAM Taxation Group Meeting, Lonavla



SIAM Taxation Group Meeting, Lonavla



Meeting at Ministry of Finance



Meetings with Ministry of Finance on Taxation Matters



# Finance, Leasing & Insurance Group

One of the major challenges that Automobile industry continued to experience during the last fiscal was the credit unavailability for vehicle financing, especially for Three-Wheelers and Small Commercial Vehicle segments, majorly due to their unique customer profile and repaying capabilities.

Three-Wheeler segment continued to face financing challenges; however, the situation improved since financiers started focussing more on the electric variants.

Ministry of Road Transport & Highways (MoRTH) hiked the long-term insurance premium rates for new Cars ranging from 1% (for vehicles exceeding 1,500 cc) to 23% applicable for entry level Private Cars (not exceeding 1,000 cc), which contribute significantly to industry's sales volume. For Two-Wheelers, the growth in premium ranges from 16% (exceeding 350 cc) to 178% (not exceeding 75cc). SIAM, however, had requested the Ministry to postpone the revision in rates, for atleast one year, as the sector was still facing headwinds.

The issue of long-term third-party insurance rates, introduced by the Hon'ble Supreme Court of India from 1<sup>st</sup> September 2018 onwards, was again discussed at senior level and it was decided to approach the Chairman - Supreme Court Committee on Road Safety and senior officials of MoRTH, to explore the possible solutions for reducing the duration of long-term insurance. On the same topic, SIAM submitted a detailed representation to Joint Secretary, MoRTH and requested for his intervention.

Hon'ble Madras High Court Order in its order, dated 4<sup>th</sup> August 2021, mandated Bumper-to- Bumper and Personal Accident Insurance Cover for 5-years, for all new vehicles sold with effect from 1<sup>st</sup> September 2021

onwards. However, the order was kept in abeyance till 13<sup>th</sup> September 2021 on the intervention of General Insurance Corporation (GIC), in order to provide clarity for implementation.

During the hearing held on 13<sup>th</sup> September 2021, Mr N. Vijayaraghavan, SIAM Advocate, highlighted that adequate insurance policies are available to provide cover for Passengers and there is no need for any new coverage, as it further adds to the financial burden for the consumers. Therefore, the mandatory requirement of Bumper-to-Bumper and Personal Accident Cover for 5 years be withdrawn. The Madras High Court agreed to withdraw the earlier order of 4<sup>th</sup> August 2021, with respect to the mandatory Insurance for new vehicles.

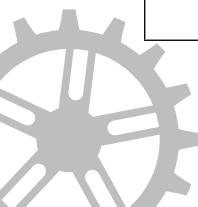
SIAM also remain engaged with IRDAI for other vehicle insurance related matters.

Reserve Bank of India (RBI) proposed introduction of Prudential Norms on Income Recognition, Asset Classification and Provisioning pertaining to Advances. The change in these norms might impact a significant part of Commercial Vehicle Customers, especially SCV segment. The customers are typically first time users / individuals with low credit strength. The flexibility offered by NBFCs currently helps these customers in managing cash flows through uncertain times.

SIAM submitted a representation to the RBI, subsequently, these guidelines (upgradation of NPA account to Standard) were deferred that was supposed come into force from 12<sup>th</sup> November 2021, till 30<sup>th</sup> September 2022. This provided additional time to NBFCs to educate customers to repay their entire dues on time. However, no relaxation/exemption was provided to NBFCs.

## Annual Report Card (2021-22)

| S.No. | Deliverable   | Measures  | Owner                              | Stakeholders           |
|-------|---|---|------------------------------------|------------------------|
| 1     | To rationalise the impact of developments on the Vehicle Insurance & Vehicle Finance domain | <ol style="list-style-type: none"><li>SIAM made a representation to MoRTH to retain the Third-Party Rates for Motor Vehicles for one more year.</li><li>SIAM participated in the Madras High Court Case related to Bumper-to-Bumper and Personal Accident Insurance Cover for 5-years.</li><li>Submitted a detailed representation to MoRTH on Long-Term 3<sup>rd</sup> Party Insurance</li><li>In response to proposed introduction of Prudential Norms on Income Recognition, Asset Classification and Provisioning pertaining to Advances by RBI, a representation was submitted by SIAM</li></ol> | Finance, Leasing & Insurance Group | Membership and Society |



# Logistics Group

With an objective to promote operational efficiencies in finished Vehicle Transportation, SIAM Logistics Group not only worked to minimise the challenges faced by automobile manufacturers, but also promoted alternate modes of transportation like Railways, including Dedicated Freight Corridor, and Waterways.

The efforts put in by the Group over the years have translated into establishing Railways as an alternate mode of transportation, especially for Passenger Vehicles. At the same time, Railway Board has also been equally supportive towards the Auto sector in providing necessary infrastructure, increasing the rolling stock and maintaining the freight rates.

As-of-now, the country has around 130 dedicated rakes for automobile transportation taking the market share of Railways in passenger vehicle transportation to around 16% in FY 22 from 4.5% in FY 18.

Railway Board also accepted the SIAM proposal for providing discounts to promote distances less than 1,200 Kms, to make Railways economically viable and competitive in comparison to Road. However, members have requested Railway Board to consider discounts for longer routes as the rates were revised recently.

Railway Board informed us that two wagon designs were being discussed for loading SUVs in both decks. This has been a long-pending request made by SIAM as SUVs is a growing segment in the country.

Side-Loading of Two-Wheelers in Auto Rakes has also been considered by the Railway Board for faster loading / unloading, however, the design is still in discussion phase.

Transit times have improved significantly in the recent years. However, availability of rakes was a major concern

faced by members – both for domestic distribution and exports. Railways are also being used for exporting vehicles to Bangladesh and Nepal. Railway Board has also been approached for additional rakes to meet the demand.

Timely maintenance of rakes is another issue under discussion with Railways.

The Logistics Group organised 8<sup>th</sup> edition of Automotive Logistics Conclave on 18<sup>th</sup> August 2022 in New Delhi. The theme of the conclave was “Automotive Logistics: Transitioning Towards a Sustainable Future”. Amongst many, a few of the notable speakers who attended the conclave were Mr Sanjay Bandopadhyaya, Chairman, IWAI; Mr Mudit Chandra, Executive Director (Freight Marketing), Railway Board; Mr Nanduri Srinivas, Director (Operations & Business Development), DFCCIL; and Mr Sanjeev Patil, Vice-President (Logistics), NHLML. Deliberations focused on how to make various modes of transportation not only cost effective, but also sustainable in terms of reduction in carbon emissions, reduction in transit time, promote return load through collaboration, usage of Multi-Modal Logistics Parks (MMLP), etc.

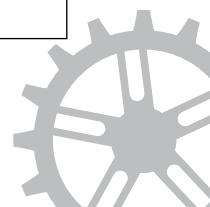
Automobile sector supports the GatiShakti initiative of the Government that promotes development of 35 MMLPs in the country, to reduce the overall Logistics Cost, which currently stands at 14% of the GDP.

In this regard, a study was commissioned by the Commercial Vehicles CEOs Council to assess the potential MMLPs have in revival of Commercial Vehicles sales in the country.

The Group would continue to work closely with concerned stakeholders to promote sustainable, safer and cost-effective transportation of vehicles.

## Annual Report Card (2021-22)

| S.No. | Deliverable  | Measures  | Owner           | Stakeholders              |
|-------|--|---|-----------------|---------------------------|
| 1     | To Enhance Efficiencies in Outbound Logistics in Automobile Sector | <ol style="list-style-type: none"><li>SIAM engaged with Railway Board on multiple areas related to usage of Railways for Automobile Transportation</li><li>Interacted with Railways on rationalising the Freight Structure for Auto Wagons</li><li>As per SIAM recommendations, Railways is working on Wagon Design for loading of Utility Vehicles and Two-Wheelers in Double-Deck format</li><li>SIAM interacted with DG (Shipping) on Container Shortage and Increase in Ocean Freight Rates</li></ol> | Logistics Group | Membership and Government |





8<sup>th</sup> SIAM Automotive Logistics Conclave, New Delhi



# Aatmanirbhar Bharat – Sourcing Group

Automotive industry, in the last fiscal also, continued its endeavour to foster domestic manufacturing with an increased focus on Localization across the supply-chain. The SIAM Group remain committed towards taking the Aatmanirbhar Bharat initiative of the Government a step forward.

SIAM Group was actively involved in issues related to Localisation of Supply-Chain, Procurement of Raw Material and Components, Quality Control Orders, Standard Formulation at BIS, Shortage of Semiconductor and Containers, etc.

During the year, the Group initiated a Follow-up Study of the Localisation Roadmap, to assess the progress the industry has made to reduce the import content in the last two years.

As an after effect of the Covid pandemic, the industry was already witnessing numerous supply-side challenges like increase in commodity prices, semiconductor chip shortage, container shortage, delays in export-import shipment, etc. The conflict in Ukraine only aggravated the situation further. The geo-political situation arising out of the war adversely impacted the supply-chain of a few key raw materials, leading to rise in supply-side inflation.

The global Semiconductor Shortage continued its impact on vehicle production last year, leading to delays in availability of critical components required for production and deliveries to end-customers. Amidst all the challenges, announcement of the PLI scheme for Semiconductors by the Government provided much needed traction for the manufacturers of semiconductor in India. Subsequently, several corporations have announced their plans to set-up Semiconductor units

in the country. This will largely reduce India's reliance on imports.

Government is also looking at the Possibility of Localising of Leather, used in vehicle production.

Formulation and review of various steel standards were done through the Metallurgical Department Committees (MTD-4 and MTD-16) of BIS.

SIAM revived in the Inter-Ministerial Committee (IMC) on Tyres and Tubes, chaired by Additional GDFT, that examines the Tyre sizes to be included or deleted from the Exemption List of Pneumatic Tyres and Tubes Quality Control Order of 2009. New Tyre sizes as required by SIAM members would be suitably added in the Exemption List.

The exemption provided to Auto OEMs from the purview of the Tyre QCO has been challenged in the Delhi High Court and a petition was filed in 2011. SIAM was informed about this case by DPIIT recently; the final hearing of the case is yet to happen.

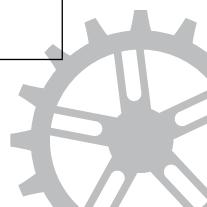
SIAM has also made a representation to the Department of Consumer Affairs highlighting the issues concerning the Legal Metrology Amendment Rules of 2021 and 2022. The Legal Metrology Amendment Rules will come into effect from October 2022.

SIAM submitted inputs to Ministry of Chemicals and Fertilizers related to Quality Control Orders issued on several Chemicals and Petrochemicals, used in vehicle production and some of them were appropriately deferred.

SIAM Group will continue to work towards making the Automotive supply-chain more robust to bring the industry back on the growth path.

## Annual Report Card (2021-22)

| S.No. | Deliverable                                       | Measures   | Owner                                | Stakeholders              |
|-------|---|--|--------------------------------------|---------------------------|
| 1     | To Mitigate Challenges in Automotive Supply-Chain | <ol style="list-style-type: none"><li>Remained engaged with Government departments on promoting Localization in Auto sector</li><li>Interacted with DPIIT and DGFT on updating the Exemption List of Pneumatic Tyre QCO</li><li>Participated in BIS meetings related to Review and Formulation of Steel Standards</li><li>Made representation to Department of Consumer Affairs on Amended Legal Metrology (Packaged Commodities) Rules</li><li>As per the suggestions from members, the Commodity Price Monitor was suitably modified</li></ol> | Aatmanirbhar Bharat - Sourcing Group | Membership and Government |



# Vehicle Classification, Sales Reporting & Analysis Group

The Vehicle Classification Group of SIAM remain engaged with members to make the SIAM Classification, followed in statistical reports, more robust and meaningful by incorporating the evolving vehicle categories and segments.

A new sub-category has been created within Three-Wheelers to capture the data of E-Rickshaw and E-Cart separately, in statistical reports. A few SIAM members have been producing E-Rickshaw and E-Cart to promote last mile Electric Mobility in the country.

One of the crucial sales channels for the Automobile Industry is the Canteen Stores Department (CSD) through which the industry is able to serve the vehicle requirements of Indian Armed Forces. In October 2020, CSD introduced an Indemnity Bond clause, to be submitted by Auto OEMs for continuing business through this channel. While the submission of the bond had been deferred several times until June 2022, the industry remains engaged to achieve a common ground with CSD. The recommendation of SIAM is to exempt Automobile sector from the purview of the Indemnity Bond.

In August 2021, MoRTH had issued a notification to permit the registration of Private Vehicles with BH series, customers of such vehicles provide a declaration that his / her organisation has offices in four States/ UTs or more. It is also mentioned that in the case of fully built non-transport vehicles, the Motor Vehicle Tax shall be calculated electronically through the portal on the basis of Invoice Price excluding Goods & Services Tax (GST).

SIAM, therefore, coordinated with MoRTH and NIC to modify the Homologation Portal of Vahan, for Automobile OEMs to upload two different vehicle prices – 1) As per the requirements of State/UT and 2) For BH series vehicles.

In the last fiscal, SIAM coordinated with members on the requests from State Transport Departments of several States for uploading of vehicle prices of motor vehicles by automobile manufacturers. This is required for accurate collection of Road Taxes from new vehicle customers and to ensure there are no losses to State's revenue.

## Annual Report Card (2021-22)

| S.No. | Deliverable  | Measures  | Owner  | Stakeholders                       |
|-------|--|---|--|------------------------------------|
| 1     | To review the Vehicle Classification on a regular basis for accurate publishing of Statistical Reports | 1. A new sub-category was created within Three-Wheelers to capture the data of E-Rickshaw and E-Cart separately in SIAM statistical reports | Vehicle Classification, Sales Reporting & Analysis Group | Membership                         |
|       |  | 2. SIAM facilitated Uploading of Accurate Vehicle Prices on Vahan portal for States/UTs and for BH series                                   |  | Membership, Government and Society |
|       |  | 3. SIAM made a submission to Canteen Stores Department (CSD) for Exemption of Auto sector from the purview of the the Indemnity Bond        |  | Membership, Government and Society |



# Human Capital Group

SIAM Human Capital Group works on various issues related to HR, IR, Labour, Benchmarking, Rewards & Performance, etc.

The Group regularly interacts with Automotive Skills Development Council (ASDC) to look into their activities, guides them on policy directions and also support few activities. Some of the members of SIAM Human Capital Group represent SIAM in the Governing Council of ASDC.

A Rewards and Performance Study is conducted every year within SIAM members since 2008. SIAM partnered with Deloitte India to conduct the Annual Performance

and Rewards Study. The objective of the study is to assess the rewards competitiveness of Members and help them to take data backed increment and rewards decisions. More than 20 members have participated in the survey this year. Besides compensation trends, the survey also provides value addition in terms of industry performance outlook, performance management practices, productivity studies, etc.

Benchmarking on various policies of HR is also conducted as per members' requirement from time-to-time that help members in reviewing the different HR policies of their company.

| Annual Report Card (2021-22) |                                     |  |                     |             |
|------------------------------|-------------------------------------|--|---------------------|-------------|
| S.No.                        | Deliverable                         | Measures   | Owner               | Stakeholder |
| 1                            | To work on HR and IR Related issues | <ol style="list-style-type: none"><li>1. Annual Performance and Rewards Study was conducted by Deloitte India, facilitated by SIAM. The following modules were included in the study:<ul style="list-style-type: none"><li>• Compensation - Level Report</li><li>• Compensation - Level Function Report</li><li>• Benefits Benchmarking Report</li><li>• Pan India Executive Remuneration Report</li><li>• Executive Compensation Report</li><li>• Productivity Analysis Report</li><li>• Performance Management Benchmarking</li><li>• R&amp;D Study</li><li>• Sales &amp; Service Study</li><li>• Workforce &amp; Increment Trends</li><li>• Campus Hiring Trends Report</li></ul></li><li>2. Benchmarking survey on practices followed in the industry for submission of documents for Income Tax purposes of employees was conducted</li><li>3. An overview of the new labour codes for the Auto Industry was presented to members by Deloitte India. The focus was on wages and workforce categorization and the way forward.</li></ol> | Human Capital Group | Membership  |



# CSR Group

SIAM CSR Group organises the CSR Conclave every year, highlighting important aspects of Health & Sanitation, Skills Development, Road Safety and Environmental Rejuvenation. This year the SIAM CSR Group organized its 6<sup>th</sup> Annual SIAM CSR Conclave, themed "CSR Rewired: Post Covid 19 Scenario", with an emphasis on sharing of best practices & learnings from the various CSR interventions by the Indian Automobile Industry in the context of the Covid-19 pandemic and the increasing importance of mental health and well-being. The conclave witnessed the participation of key industry leaders speaking on the inclusive development of the society, while protecting the ecology.

Dr. Mahendra Nath Pandey, Hon'ble Minister of Heavy Industries and Chief Guest at the CSR Conclave assured Government of India's active partnership with the Auto Industry towards strengthening the CSR initiatives. Hon'ble Minister also spoke about the Indian Automobile Industry being a major contributor to the economy and the society as it holds a major share in the GDP. Looking forward, in the PLI scheme the Government is providing economic support of about INR 26,000 crores to industry. All OEMs have played a huge role in helping society through their CSR initiatives, including during the Covid pandemic. He emphasised that going forward, industry should focus more on labourers and small technicians, work more

closely with NGOs, strengthen their focus on Health, Safety, Environment, and Skilling initiatives, share its experiences so that the larger community can learn, and lastly, the industry must think big but implement locally - Local communities in the neighbourhood of Auto Factories must get benefited.

In the keynote address, Dr. R A Mashelkar, renowned eminent scientist, shared his perspective on CSR 2.0 and talked about four new pillars of CSR in the present world. He also highlighted the Power of CSR and Gandhian engineering.

A panel discussion led by Mr. Arindam Lahiri, CEO, Automotive Skills Development Council, was also organised that emphasised on "Skill Development through CSR Initiatives".

The session on mental health and wellbeing was led by Sister B K Shivani, Brahma Kumaris World Spiritual Organization, who emphasized on inner peace and imparting clarity in moving toward a peaceful and healthy mind. Sister Shivani also talked about the importance of timely meals and de-cluttering of mind for a healthy lifestyle, post the pandemic.

The conclave concluded with the presentation of 4<sup>th</sup> SIAM CSR Awards to the NGOs working with SIAM members on various CSR activities.

## Annual Report Card (2021-22)

| S.No. | Deliverables           | Measures  | Owner     | Stakeholders                              |
|-------|------------------------|---|-----------|---|
| 1     | SIAM CSR Conclave 2022 | 1. Organised 6 <sup>th</sup> edition of annual SIAM CSR Conclave - CSR Rewired - Post Covid 19 Scenario | CSR Group | Membership, Government and Society        |
|       |                        | 2. Best practices shared by members on New Approach to CSR and Learnings                                |           | Membership, Government, Society and Media |
| 2     | SIAM CSR Awards        | 3. Organised 4 <sup>th</sup> SIAM CSR Awards for NGOs working with Member companies                     |           | Membership and Society                    |





**SIAM CSR CONCLAVE**  
CSR Rewired: Post COVID-19 Scenario

21<sup>st</sup> July 2022 | 1 PM – 5 PM | Virtual

**Inaugural Session**

**CHIEF GUEST**  
Dr Mahendra Nath Pandey  
Union Minister of Heavy Industries,  
Government of India

**WELCOME ADDRESS**  
Mr Sushant Naik  
Chairman, SIAM CSR Group and  
Global Head, Government Affairs,  
TATA Motors

**KEYNOTE ADDRESS**  
Dr R A Mashelkar  
Eminent Scientist

**MODERATOR**  
Mr Rajesh Menon  
Director General, SIAM

**CLOSING REMARKS**  
Ms Devdutta Mulchandani  
Co-Chair, SIAM CSR Group and General Manager  
& Head, CSV, Hyundai Motor India

**SIAM**  
Society of Indian Automobile Manufacturers  
Building the Nation, Responsibly



**SIAM CSR CONCLAVE**

CSR Rewired: Post COVID-19 Scenario

21<sup>st</sup> July 2022 | 1 PM – 5 PM | Virtual

**Session on: New Approach to CSR and Learnings**

|   |  |  |
|---|--|--|
| <b>EDUCATION TO EMPLOYMENT</b><br>Ms Anu Mehta<br>Head, CSR, Honda Cars India   | <b>ROAD TO SCHOOL - HOLISTIC CHILD DEVELOPMENT MODEL</b><br>Mr Sashikumar T<br>VP, CSR & Corporate Affairs, Ashok Leyland  | <b>CSR BEYOND PHILANTHROPY</b><br>Ms Garvita Sandhu<br>Head, Administration, MG Motors India   |
| <b>CSR APPROACH AND NEW LEARNINGS</b><br>Mr R Venkatakrishnan<br>VP, Group Head, EA(State),<br>CSR & PR, Toyota Kirloskar Motor | <b>CHANGING LANDSCAPE OF INDIAN PHILANTHROPY</b><br>Ms Devduttai Mulchandani<br>Co-Chair, SIAM CSR Group and General<br>Manager & Head, CSR, Hyundai Motor India | <b>MORE FROM LESS FOR MORE - TATA MOTORS WAY TO SUSTAINABLE DEVELOPMENT</b><br>Ms Pinakshi Sonpal<br>Senior Manager, CSR,<br>TATA Motors |

**SIAM CSR CONCLAVE**

CSR Rewired: Post COVID-19 Scenario

21<sup>st</sup> July 2022 | 1 PM – 5 PM | Virtual

**Special Session on: Mental Wellbeing**

|  |   |
|--|---|
| <b>SPECIAL ADDRESS</b><br>Sister B K Shivani<br>Brahma Kumaris<br>World Spiritual Organization | <b>MODERATOR</b><br>Mr Sushant Naik<br>Chairman, SIAM CSR Group and<br>Global Head, Government Affairs, TATA Motors |
|--|---|

**Followed By**  
SIAM CSR AWARDS 2022

**SIAM CSR CONCLAVE**

CSR Rewired: Post COVID-19 Scenario

21<sup>st</sup> July 2022 | 1 PM – 5 PM | Virtual

**Session on: Panel Discussion on Skills Development through CSR Initiatives**

|  |   |   |  |
|--|---|---|--|
| <b>PANELISTS</b><br>Mr Rama Shankar Pandey<br>MD, Hella India Lighting | <b>PANELISTS</b><br>Mr Niraj Hans<br>COO (Automotives),<br>Sandhar Technologies | <b>PANELISTS</b><br>Mr Apurv Choubey<br>CHR Officer,<br>Bridgestone India | <b>MODERATOR</b><br>Mr Arindam Lahiri<br>CEO, Automotive Skills<br>Development Council |
|--|---|---|--|

# **TECHNICAL AFFAIRS**

# Sustainable Mobility - A Road to Future

## **SIAM Vision for Sustainable Mobility: “Driving into a new era of cleaner and sustainable mobility”**

India with its population of over 1.3 billion people, is one of the fastest-growing economies in the world. Its GDP measured by purchasing power parity is currently the third largest in the world after China and the United States. There is a trend toward urbanization and hopes of improved quality of life in India.

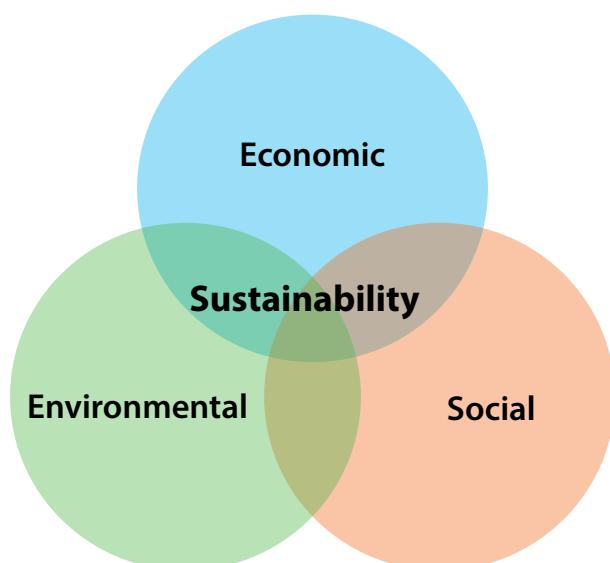
The Indian auto industry is recognized as a sunrise industry, which is the fastest-growing sector over the years. The industry produced a total 22,652,108 vehicles including Passenger Vehicles, Commercial Vehicles, Three Wheelers, Two Wheelers and Quadricycles in April-March 2021 as against 26,353,293 in April-March 2020, registering a de-growth of (-) 14.04 percent over the same period last year.

India in 2021 is the 4<sup>th</sup> largest car manufacturer, 2<sup>nd</sup> largest manufacturer of buses, 4<sup>th</sup> largest manufacturer of trucks, 7<sup>th</sup> commercial vehicle manufacturer and one of the two largest manufacturers of two-wheelers in the world. Further, India is a prominent auto

exporter of vehicles, which stood at about 4% of the total exports.

Currently, the automotive industry contributes about 6% to the total GDP and provides employment to about 32 million people, directly and indirectly. Strong domestic demand coupled with supportive government policies has led to the Indian Automotive industry climbing up the ranks to be one of the global leaders. Just like across the globe, the Indian Auto industry is witnessing major changes in the form of electric vehicles (EVs) and low-carbon transportation, to alleviate existing concerns of air pollution, climate change, affordability, etc.

Further, the landscape of sustainable mobility encompasses manufacturing, value and supply chains supplemented with CSR initiatives. At the same time, what enables the industry to successfully achieve obligations, envisaged under the national policy, legislative framework, and relevant international agreements, including commitments made at CoP-26 in Paris and Glasgow viz. *Panchamrit* along with sustainable development goals-2030.



Sustainable mobility has been on the agenda of corporate policy, however, it has recently come under the sharp focus of corporate citizenry, investors, and Government as well as consumers. Here, it needs to be mentioned that the automotive industry is progressively and steadily making strides toward sustainability with a holistic LCA-based concept that depends on the three pillars viz. (i) environment, (ii) social, and (iii) economy. Therefore, the industry needs to envision and adopt a sustainability roadmap for achieving





The role of transport in sustainable development was first recognized at the 1992 United Nations' Earth Summit and reinforced in its outcome document – Agenda 21. The UN General Assembly further highlights the context of infrastructure, public transport systems, affordability, efficiency, and convenience of transportation, as well as improving urban air quality and health, and reducing greenhouse gas emissions. Further, sustainable mobility is mainstreamed across several SDGs and targets, especially those related to food security, health, energy, economic growth, infrastructure, and cities and human settlements. Sustainable development encompasses three verticals viz. environment, social & economy.

### **Sustainable Mobility & SDGs:**

The agenda 2030 states that “sustainable transport systems, along with universal access to affordable, reliable, sustainable and modern energy services, quality and resilient infrastructure, and other policies that increase productive capacities, would build strong economic foundations for all countries” The SDGs include five targets that are directly related to the transport sector and seven other targets that are indirectly related to the transport sector.

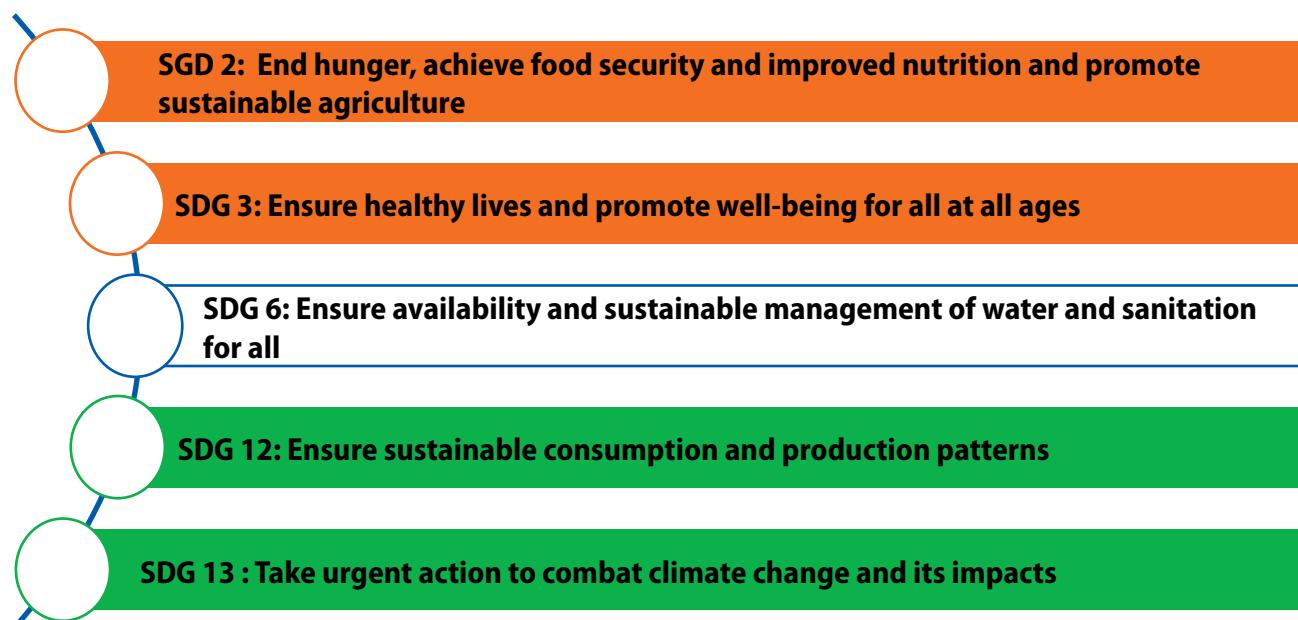
### **Direct Targets of the Sustainable Development Goals**

Transport contributes directly to five targets on road safety (Target 3.6); energy efficiency (Target 7.3); sustainable infrastructure (Target 9.1), urban access (Target 11.2), and fossil fuel subsidies (Target 12.c) emphasize that sustainable transport facilitates the achievement of following SDGs viz.:



## Indirect Targets of the Sustainable Development Goals:

Transport also contributes indirectly facilitating the achievement of seven SDG targets on food security (Target 2.3), air pollution (Target 3.9), access to safe drinking water (Target 6.1), sustainable cities (Target 11.6), reduction of food loss (Target 12.3), climate change adaptation (Target 13.1), and climate change mitigation (Target 13.2) as outlined below:



## Sustainable Mobility & ESG

In India, ESG reporting was started way back in 2009 by the Ministry of Corporate Affairs (MCA) which issued the Voluntary Guidelines on Corporate Social Responsibility, introducing and mainstreaming the

concept of business responsibility. Since then, the reporting landscape has come a long way with the introduction of Business Responsibility Reporting (BRR), Corporate Social Responsibility (CSR), IR, National Guidelines on Responsible Business Conduct (NGRBC), and now Business Responsibility and Sustainability Report (BRSR) (introduced through a SEBI circular dated 10 May 2021)

**Sustainable than ever before:** India adopts ESG and their compliance. 95% of S&P 500 companies now have an ESG strategy. That means putting ESG at the heart of their business and, for long-term success, that will help turn their organizations greener and more socially conscious.



Corporates are increasingly mandated with adapting to new and emerging changes to the business landscape by developing responsible and sustainable strategies, business models, operations, and investments. With ESG matters now factored into corporate performance, they are no longer seen as “soft” issues, but as business strategies and imperatives that can contribute positively to improved company performance and brand.



### **ESG envisages the following:**

- The environmental criteria in ESG, include the energy, company takes in and the waste it discharges, the resources it needs, and the consequences for living beings. It encompasses carbon emissions and climate change. Every company uses energy and resources; every company affects and is affected by the environment.
- The social criteria in ESG, address the relationships, company has and the reputation it fosters with people and institutions in the local communities. It includes workers with diversity and inclusion. Every company operates within a broader, diverse society.
- The governance criteria in ESG, envisage the internal system of practices, controls, and procedures in order to govern itself, make effective decisions, comply with the law, and meet the needs of external stakeholders. Every company, which is itself a legal creation, requires governance.

Broad strategies for compliance inter-alia include measures for the fulfilment of ESG are outlined below:

- Create a purpose for business that fosters ESG development with top management's buy-in

- Focus on the top priority issues that make the greatest impact on the business and stakeholders
- Build proactive ESG governance with sufficient board oversight
- Identify and address ESG-related risks
- Develop vision-led and goal-driven sustainability strategies
- Develop a robust data management system for progress tracking and target setting
- Communicate the sustainability report vision and performance with stakeholders regularly
- Develop and publish a sustainability/ESG report annually in line with local and international reporting standards
- Engage a third party to conduct an independent appraisal of the sustainability/ESG report and data

### **Decarbonization of the automobile sector:**

Major decarbonization pathways for transportation include switching to lower-carbon fuels, improving vehicle efficiency, and improving system-wide efficiency, including through the use of autonomous vehicles and vehicle sharing. What does the term "low carbon" mean? Low carbon simply means fewer emissions of carbon dioxide (CO<sub>2</sub>) or CO<sub>2</sub> equivalent GHG emissions. Carbon dioxide is a key greenhouse gas that drives global climate change.



1. Raw material conservation i.e., producing more from less
2. Panchamrit for decarbonization through low or no-carbon fuels, and electrification of vehicles
3. Water Conservation- implement the 3 Rs concept
4. Pollution Prevention- Pollution mitigation and GHG reduction
5. Fuel Efficiency- CAFÉ II norms
6. Promotion of renewable energy like biofuels, biomass energy, alternative energy
7. Reuse, reduce, Recycle-Circular economy,
8. Indigenization of Fuel Technology & Vocal for Local



## Pathways to Net Zero Emissions in India- a Framework:

### Key strategies:

Overall, achieving the decarbonizing targets requires adopting pathways for the decarbonization of the automotive sector. However, the decarbonization of the automobile industry will take time. That is why India stated at CoP 26 at Glasgow the 2070 target for decarbonization of the Indian economy with certain caveats. It will require continued investment and growth that matches the curtailment of carbonized activities. A low-carbon transportation sector in the future and other sectors of the economy will get India there; it's just a matter of investment, technology, and the right implementation.

### Way Ahead:

At the COP26 climate summit in Glasgow in November 2021, India committed to achieving net-zero emissions by 2070. This was one of the five major commitments or panchamrit to mitigate climate change. The rest are as follows:

- India will bring its non-fossil energy capacity to 500 GW by 2030

- India will bring its economy's carbon intensity down to 45 percent by 2030
- India will fulfil 50 percent of its energy requirement through renewable energy by 2030
- India will reduce 1 billion tonnes of carbon emissions from the total projected emissions by 2030

Many of the leading vehicle manufacturers are implementing plans for attaining sustainability goals, ESG, and carbon neutrality in line with Panchamrit envisaging decarbonization, minimizing emissions, light-weighting, use of renewable energy, material eco-efficiency, etc. throughout production processes, and ensuring that a high percentage of the material going into vehicles is recyclable.

In India to achieve resilient and inclusive sustainable mobility, it is necessary to continuously plan for a carbon neutrality model of growth, rather than focusing on physical infrastructure for vehicle mobility alone. The need is to build integrated transport planning with all the tools and measures for inclusive sustainable mobility.



In this regard, the automotive industry has accepted the model shift to embrace the imperatives of environment, social and economic apart from the circular economy for attaining sustainable mobility. Recent advancements in technology create opportunities for sustainable mobility, ESG compliance, and decarbonization through various defined pathways. Leading companies recognize this opportunity. They drive new revenue streams and harness new clean technologies to lower the cost while responding to consumer demands.



# Sustainable Mobility Group

The former Clean Fuel Technology Group was envisioned and renamed Sustainable Mobility Group in a meeting held on 6<sup>th</sup> May 2019 with a view to broadening its scope and making it more inclusive. While speaking in the said meeting, the Chairman of the Group stated that the Indian automotive sector is undergoing a transition rapidly into a new paradigm of cleaner and sustainable mobility. Therefore, the Chairman with the consensus of the members rechristened the Group as a sustainable mobility Group. Accordingly, the mandate of the Group is focused on the key priority area of the automotive sector viz. advanced engine technology, cleaner fuels, emission treatment technologies material eco-efficiency, restricting the use of hazardous substances and green manufacturing, recycling, and circular economy. Thus, the sustainable mobility group is an overarching Group fostering principles of accessibility, equity, affordability, social inclusiveness, sustainability, health, and ecological integrity.

The highlights of the key activities implemented during the last year are summarized in the following paras:

## **2. Implementation of Sukh Da Saah (SDS) project by deploying in-situ crop residue management:**

Sukh Da Saah (SDS-1): SIAM has been implementing the SDS-1 project since 2018 in the larger interest of social cause by adopting best agricultural practices for improving air quality and minimizing GHG emissions. The project showcased environment-friendly in-situ technology in 9 villages of Patiala District on 7400 acres of agricultural land under 3 farmers' co-operatives in Jasso Majra. The SDS-1 project has been immensely successful in achieving a 71% reduction in stubble burning in 2018-19, 81% in 2019-20, and 92% in 2020-21. The overall outcome of the SDS-1 project has been remarkable despite the pandemic and farmers' protests.

The objectives of the ongoing project are (i) to demonstrate best agricultural practices and improve air quality, (ii) to showcase the project as a testimonial of building the nation, responsibly, (iii) to validate the

in-situ technology before specific target stakeholders like farmers, policymakers, judiciary, activists, and media, and (iv) allow feasible replication in other areas. The report of SDS-1 of 2020-21 has been finalized and will be circulated in due course. Technically, the SDS-1 project is complete and only monitoring is being done by partners at the ground level.

SDS-2: The proposal of expanding the SDS project in 7 additional villages in Jasso Majra, Nabha was approved by the group in 2020 for expanding the implementation of in-situ technology. The number of farmers covered under the expansion project is 1100 covering 4900 acres of farmland in adopted villages. The total cost of the project is INR 29,67,300/- lakhs which is shared with CII on a 50:50 sharing basis. To date, 100% of SIAM share has been released to CII for 2021-22. The outcome of the implementation of SDS-2 during 2020 reported an impressive 88 % reduction (as per ground data) in stubble burning in these additional 7 villages. A report on SDS-2 for 2021-22 is being finalized for dissemination amongst the stakeholders including the Government.

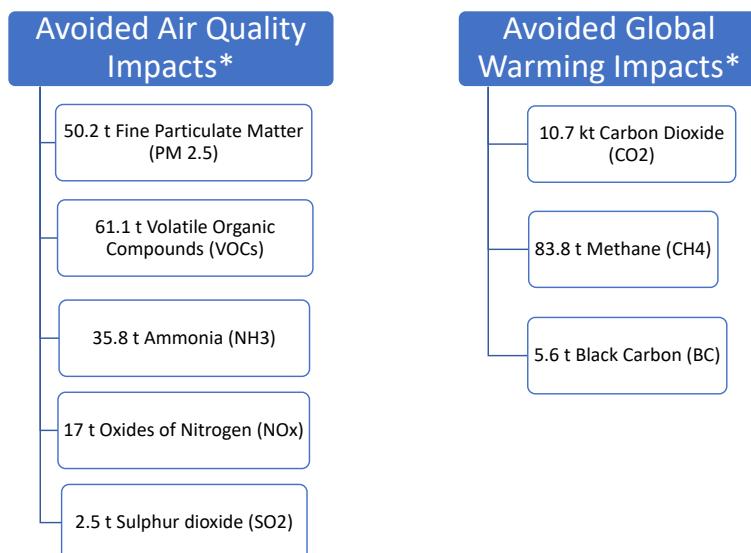
**Key Successes of SDS-1 & SDS-2 Projects:** Both SDS-1 and SDS-2 projects have achieved outstanding results due to well-thought-out strategies and enablers like helping farmers with 46 equipment and several technical pieces of training and workshops organized for farmers with agriculture scientists, experts, government officers from various agriculture colleges, agriculture department, and equipment manufacturers, as a part of handholding and skill development. This enabled the farmers to understand the technology, equipment handling, efficient crop waste management methods, effective harvesting, and meeting other challenges. The handholding of farmers on regular basis has been the key element for the stupendous achievements of the project. The SDS projects have been successful on the social, environmental, and economic fronts.

The environmental benefits of both the SDS projects have been shown below tables:



## Environmental Impact Across SIAM- 9 Village Jasso Majra Cluster

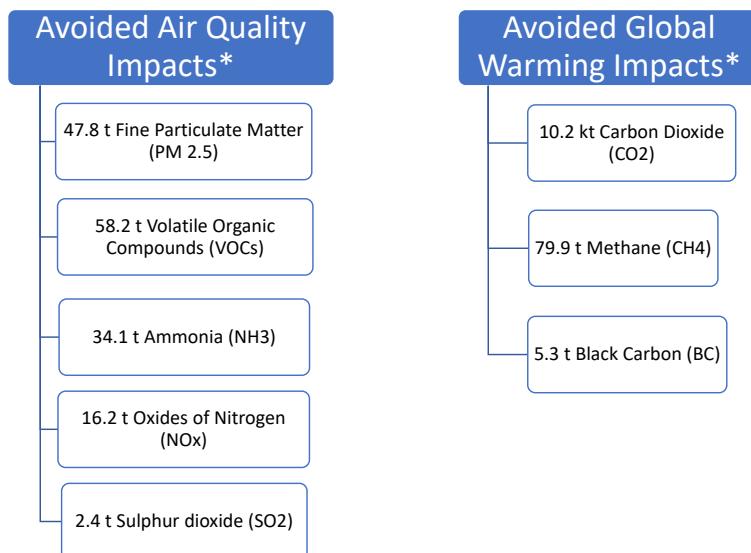
- Total intervened area across 9 villages is about 5850 acres.
- **Based on field data compiled with support of village volunteers 87% of the total area is managed by adoption of sustainable practices of rice straw management.**
- Intervention in 2021 led to incorporation almost 11,805 tonnes of rice straw was avoided from being burnt.



\* Source: CII-CESD analysis based on emission factors from Shrestha et al (2012)

## Environmental Impact Across SIAM -7 village Aloohra Cluster in Patiala

- Total intervened area across 7 villages is about 5209 acres.
- **Based on field data compiled 91% of the total area is managed by adoption of sustainable practices of rice straw management.**
- Intervention in 2021 led to incorporation almost 11,249 tonnes of rice straw was avoided from being burnt.



\* Source: CII-CESD analysis based on emission factors from Shrestha et al (2012)

### 3. Microbial Digester Projects (2021-22):

SIAM partnered with the Punjab State Pollution Control Board (PPCB), IPS Foundation and Gujarat Life Sciences (P) Ltd., Vadodara have implemented three projects on the application of microbial digester as detailed out below:

- 2019-20: Microbial digester applied on 38 acres of farmland in 7 districts in Punjab,
- 2020-21: Microbial digester applied on 350 acres of farmland in 3 districts in Punjab,
- 2021-22 Microbial digester applied on 500 acres of farmland in 3 districts in Punjab,





The total cost of these projects is shared by the partners and SIAM contributed Rs. 5.83 lac toward these projects from the budgetary allocation under the BTNR and SAFE. The final reports of all 3 projects on microbial digester have been prepared by SIAM and published for circulation amongst the stakeholders. The microbial consortia- Re-life provided by the Gujarat Life Sciences (P) Ltd., Vadodara is an effective and eco-sustainable in-situ solution to crop residue management. SIAM feels that the microbial digester is ready for application on a large and commercial scale for in-situ management of crop residue in Punjab and elsewhere in the country.

The microbial project in 2021-22 was spread on 500 acres of farmland in 3 districts in Punjab and was highly successful and signalled the readiness of microbial digester is ready for commercial application in the field on a larger scale with help of the Government. It is the best available practical solution to prevent stubble burning in Punjab & NCR and reduce the emissions of air pollutants and GHGs.

#### **4. Mass-media Blitz Campaign for Promotion of in-situ Crop Residue Management:**

With the intensive and comprehensive multi-media campaign, SIAM, as well as the Sukh Da Saah project, are household names in rural Punjab. The education and awareness campaign launched in 2018 continued in 2021 from October-November for about 10 days each year through the PTC News and PTC Punjabi, the most popular TV channels in Punjab through video spots and TV debates to promote in-situ technology. Each year, the Mass-media Blitz Campaign for Promotion of in-situ Crop Residue Management is at least watched by 60 lakhs people in northern India, particularly in rural Punjab, Haryana, and NCR. The details of the multimedia campaign under the SDS project are outlined below:

- (i) In 2018-19: 270 video spots were shown on the PTC network from 24<sup>th</sup> October-13<sup>th</sup> November 2018,
- (ii) In 2019-20: 324 video spots from, 18 times every day from 30<sup>th</sup> September- October 2019,
- (iii) In 2020-21: 270 video spots, from 30 October- 13<sup>th</sup> November 2020,

- (iv) In 2021-22: 324 Video Spots, 50 sec each, 25 October- 9 November 2021-22.

The TV campaign launched by SIAM continuously for 3 years has generated much-needed awareness and positive impact on the masses particularly on the farmers of the region. In fact, the campaign for the prevention of stubble burning every year was a huge success and the annual campaign was watched by at least 60 lakh people in Punjab, Haryana, and NCR. The total viewership for the whole project duration is about 240.00 lakh people who watched these SIAM videos at least once.

#### **5. SIAM Virtual Environment Lecture Series:**

The Society of Indian Automobile Manufacturers (SIAM) has embarked upon a unique Environment Lecture Series launched on World Environment Day 2020 for integrating and mainstreaming the environmental imperative for attaining business sustainability in the automotive sector and sustainable development goals in general. The Environmental Lectures Series on Sustainable Mobility will inter alia envisage topics from the following themes:

- a) Material eco-efficiency, sustainable mobility & sustainable development,
- b) Road & vehicle safety, Restricting the use of hazardous substances, and Green Manufacturing,
- c) Infusion of advanced powertrain technology,
- d) Cleaner & alternative fuels,
- e) Low or no carbon emission, OBD, RDE and Electronic Control Systems,
- f) Life-cycle concept, recycling, and circular economy.



Out of these thematic areas, 20 lecture series have been organized so far. 15 lecture series were organized last year and the remaining 5 were organized in 2021-22. The list of organized lecture series is outlined hereunder:

- (i) 16<sup>th</sup> Lecture on Indian Vehicle Scrappage Policy 2021: Features and Implementation Planning 18<sup>th</sup> August 2021,
- (ii) 17<sup>th</sup> Lecture on Roadmap for Sustainable Fuels 12<sup>th</sup> November 2021,
- (iii) 18<sup>th</sup> Lecture on Future of Automotive Aftermarket Parts in India, 26<sup>th</sup> Nov 2021,
- (iv) 19<sup>th</sup> Lecture on Vision Sustainable Mobility: Connecting CoP26 initiatives, 10<sup>th</sup> Dec. 2021,
- (v) 20<sup>th</sup> Lecture on Vehicle Inspection and Certification: Challenges & Opportunities, 22 December 2021.

The objective of the lecture series is to disseminate domain knowledge, latest innovations, and technological advancements, share national and international experiences in key thematic areas in sustainable mobility to the stakeholders including Government, creating awareness of the policy / regulatory landscape of emissions, cleaner fuels, electric mobility, road & vehicle safety, imparting circularity of materials and elucidating a 'cradle to cradle' model aimed at eliminating waste through recycling and reuse of End-of-Life vehicles. In addition, the lectures will also delve into the economics of recycling, technology in designing materials, and developing recycling infrastructure in the country for decarbonization and low carbon economy.

## **6. White Paper on Diesel prepared by Sub-group on Diesel:**

The Sub-group on Diesel was constituted by the

chairman of SM Group Mr. Ashwath Ram, Managing Director, Tata Cummins Pvt Ltd, and Cummins India in the meeting held on 27 November 2020. The Sub-group was advised to prepare a 'White Paper' to capture attributes of Diesel as compared to Gasoline and other fuels, highlighting its importance and advantages to meet FE norms, the convergence of emissions post-BS-VI implementation from Diesel and Gasoline vehicles, to dispel the general perception about Diesel as being toxic and high on emissions. The Sub-group is headed by Mr. Chandan Kardile, TML with 20 members representing various OEMs and auto-component makers. The Sub-group so far held 4 meetings and constituted a 2-member drafting committee which has prepared the draft white paper showcasing the attributes of diesel in terms of fuel efficiency, power, drivability, benefits of CO2 emissions, etc. in comparison with other fuels and fuel blends and submitted to the Chairman, SM Group.

Present status of the white paper: The Chairman of SM Group in the meeting held on 1<sup>st</sup> March 2022 desired comments of all members of SM Group may be sought before the finalization of the white paper. Accordingly, the draft paper is in circulation among the members for views and comments. Comments from few members have been received and are being examined.

## **7. The World Environment Day 2022**

Aligned with the vision of sustainable mobility, the Society of Indian Automobile Manufacturers (SIAM) conducted an International Virtual Conference on the theme "Sustainable Mobility: Ethanol Perspective" to commemorate World Environment Day 2022. The programme was graced by Shri Kaushal Kishore, Hon'ble Minister of State Ministry of Housing and Urban Affairs Government of India, and Mr. Ashwini Kumar Choubey, Minister of State for Environment, Forest



The Indian automotive sector has been highly conscious of its responsibilities towards the environment and is an active partner in ameliorating the environmental quality in close coordination with the Government. The World Environment Day (WED) 2022 on the theme of 'Only One Earth', draws our attention towards playing our role effectively while living in perfect harmony with nature. The WED is the biggest UN-supported global environment event for environment protection and conservation.



and Climate Change and Consumer Affairs, Food and Public Distribution, Government of India, along with a distinguished panel of leaders from the automobile industry and conservation ecologists.

The presentations made by the panelists were highly impressive and informative, in addition, the panelists shared their rich experiences and recent advancements in respective thematic areas falling under the umbrella of sustainable mobility. The outcome of this thematic session will facilitate attaining transport sustainability with minimal adverse impact on the environment, economy, and ecology that sustain all forms of life-ecosystems of the World.

Launch of the Microbial Digester Report, 2021: On the occasion of WED 2022, Shri. Ashwini Kumar Choubey, Minister of State for Environment, Forest and Climate Change and Consumer Affairs, Food and Public Distribution, Government of India, launched the sustainability report which was painstakingly compiled by SIAM and its digitized version is available on the official website of SIAM and will also be circulated to all stakeholders for dissemination of agricultural best practices, implemented by SIAM members.

## 8. SIAM DECLARATIONS & ROADMAP

### 8.1 Declarations and salient features:

SIAM secretariat has prepared the following declarations in-house, as approved by the Group in the last meeting:

- (a) Declaration on hazardous material use in automotive sector 2022,
- (b) Declaration on Cleaner Mobility & Beyond 2020.

The declarations envisaged the salient features of the declarations and principles reflecting the intention of the automobile sector to decarbonize the activities viz. raw material extraction, manufacturing processes, and products to achieve sustainable mobility. It was clarified that these declarations are voluntary in nature.

### **SIAM Draft Declaration on hazardous material use in automotive sector 2022:**

Draft Declarations:

- **Declaration 1.** Preparing and maintaining a database on hazardous substances,
- **Declaration 2.** Establishment and Implementation of IMDS Regime,



Inaugural address & unveiling of Microbial report by Honourable Minister, MoEF&CC in SIAM Conference on World Environment Day





BASEL / ROTTERDAM / STOCKHOLM  
CONVENTIONS

The declaration on hazardous material is comprised of 11 key declarations viz. preparing and maintaining a database on hazardous substances, implementation of IMDS Regime, systems of GSDSL, REACH, RoHS, OHSAS 18001, and compliance with policies and guidelines for ELV recycling and circular economy. In addition, the declaration envisages compliance with international conventions like BSR and Minamata conventions including national regulations on the management of different waste viz. electrical & electronic equipment, battery waste, prevention & control of VOCs, phasing out the PCBs, and Market surveillance, oversight & monitoring the compliance.

- **Declaration 3:** Implementation and reporting systems: Global Automotive Declarable Substance List (GADSL), Restriction of Hazardous Substances (RoHS), International Organization for Standardization-OHSAS 18001, Registration, Evaluation, Authorization, and restriction of certain Chemicals (REACH),
- **Declaration 4:** Compliance with policies, and guidelines, for ELV recycling and circular economy,
- **Declaration 5:** Compliance with regulations of waste from electrical and electronic equipment,
- **Declaration 6:** Compliance with National Regulations and BSR Conventions,
- **Declaration 7:** Compliance with National Regulations and Minamata Convention,
- **Declaration 8:** Compliance with battery waste handling and management rules,
- **Declaration 9:** Prevention & Control of Volatile Organic Compounds (VOCs),
- **Declaration 10:** Phasing out the Polychlorinated biphenyls (PCBs),

- **Declaration 11:** Oversight & monitoring the compliance

#### 8.2 SIAM Declaration on Cleaner Mobility & Beyond 2020:

Framework: The framework includes strategies for prevention and control of environmental pollution as imperatives of sustainable mobility,

Strategies: Aligning cleaner mobility goals with sustainable development goals-2030;

Technology adoption: The adoption of technology inter alia include (i) Clean fuels/technologies, progressive emissions standards, fuel efficiency norms, material efficiency, low carbon fuels, gaseous fuels, electric and hybrid, and best management practices for achieving clean air objective, and (ii) Promoting all types of powertrain technology, BS-VI-2 emission norms, CAFÉ norms-2, cost-benefit analysis, fleets modernization, advanced material substitution, reuse & recycling, circular economy, etc.,

Material resource Conservation: The material resource Conservation includes (i) Raw material reduction,



The declaration on cleaner and sustainable mobility is comprised of 10 declarations, which envisage stricter vehicle emission standards, innovative engines design & technology, clean and low carbon fuels, ratcheting Fuel efficiency, enhancing material eco-efficiency, improving post-treatment technology, promoting Electric mobility, phase-out of hazardous chemicals in automobiles, Vehicle Fleet Modernization Program, incorporating LCA and recycling of End-of-Life Vehicles, and adopting ESG and sustainability.



fuel conservation, and economizing affordability, and (ii) Eco-efficiency, reducing environmental footprints, minimizing health impacts, etc.

**Institutional Framework:** The institutional framework cover (i) Government, regulatory bodies, and R&D institutions for implementing scientific and technologically sound solutions, and (ii) Capacity building & training across the automobile industry and supply chains for sustainable solutions

**Draft Declarations:**

**Declaration 1.** Compliance with stricter emission standards-migration to BS-VI &VI (ii)

**Declaration 2.** Adoption of innovative engines design & technology,

**Declaration 3.** Clean and low carbon fuels,

**Declaration 4.** Ratcheting Fuel efficiency,

**Declaration 5.** Enhancing Material ecoefficiency,

**Declaration 6.** Improving post-treatment technology,

**Declaration 7.** Promoting Electric mobility,

**Declaration 8.** Phase-out the use of hazardous materials with more eco-friendly materials,

**Declaration 9.** Vehicle Fleet Modernization Program,

**Declaration 9.** Incorporating LCA and recycling End-of-Life Vehicles,

**Declaration 10.** Adopting ESG and alignment with SDGs.

### 8.3 SIAM Roadmap of sustainable mobility and salient features:

One of the greatest environmental challenges we face today lies in mobility. People need a seemingly infinite network of vehicles and transportation systems to uphold societies and economies. Efficient mobility systems are essential facilitators of economic development – cities could not exist, and global trade could not occur without systems to transport people and goods cheaply and efficiently in a sustainable

manner. In this regard, the SIAM secretariat has attempted a draft SIAM Roadmap of sustainable mobility for consultation of the SM group members for finalization. Sustainable mobility work on the following three major verticals:

- **Social:** The social pillar assumes a sustainable society that has a well-cared social capital and a healthy society. Besides, it is important to provide an environment that stimulates legitimate and healthy work relationships, to favor personal and collective development including quality of life for all people involved.
- **Environmental:** the environmental pillar has its roots in environmental preservation, the natural resources, and the diminishing of the damage caused to the environment by industrial and developmental activities. It is at this stage that the companies study the ways to accomplish their operations by causing the least possible impact on the environment.
- **Economic:** it envisages the production, distribution, and consumption of goods and services. To have sustainability, companies cannot profit at the expense of work exploitation or irresponsible and criminal exploitation of the environment. The financial area benefits from sustainable attitudes because they reduce materials, energy, and water, also reducing their cost in the end viz. a cyclic process of benefits between sustainability and economy.

With technological innovation, each new challenge pushes the boundaries of the very definition of mobility. While mass public transport will remain the backbone of sustainable mobility solutions, the multiplicity of solutions is making the passenger transport market more complex. The SIAM sustainable mobility roadmap will delve on the various verticals of sustainable mobility and provide a framework for achieving sustainable development and its goals 2030.



## Annual Report Card (2021-22)

| S.No. | Deliverables  | Measures  | Owner                      | Stakeholders                                  |
|-------|---|---|----------------------------|---|
| 1     | Sukh Da Saah (SDS-1) project                        | <ul style="list-style-type: none"> <li>SDS-1 Project commenced in 2018 by deploying in-situ technology on 7400 acres in 9 villages in Jasso Majra.</li> <li>In the 1<sup>st</sup> year (2018-19) of implementation of SDS-1 achieved a 71% reduction in stubble burning,</li> <li>In the 2<sup>nd</sup> year (2019-20) of project implementation has achieved an 81% reduction in stubble burning,</li> <li>During the 3<sup>rd</sup> year (2020-21)-the culminating year of the project achieved a 95% reduction in stubble burning despite the pandemic,</li> <li>A cumulative Report for 2018, 2019 &amp; 2020 is being finalized for dissemination to all stakeholders.</li> </ul>  |                            | Membership,<br>Government,<br>Society & Media |
| 2     | Sukh Da Saah (SDS-2) project                        | <ul style="list-style-type: none"> <li>The proposal for the SDS-2 project in 7 additional villages in Jasso Majra, Nabha was approved by the group in 2020 for using in-situ technology,</li> <li>The number of farmers covered under the SDS-2 project is 1100 covering 4900 acres of farmland in adopted villages,</li> <li>The total cost of the project is Rs. 29,67,300 lakhs which is shared with CII on a 50:50 sharing basis,</li> <li>The implementation of SDS-2 during 2020-21 reported about 85% and in 2021-22, 88% reduction in stubble burning in these additional 7 villages.</li> <li>A report of the SDS-2 projects for 2020 is being finalized for dissemination amongst the stakeholders including the Government.</li> </ul>   |                            | Membership,<br>Government,<br>Society & Media |
| 3     | Implementation of the microbial project (phase-III) | <ul style="list-style-type: none"> <li>Re-life, a microbial consortium was applied on the 500 acres of lands by SIAM and its partners like PPCB and IPSF in Punjab,</li> <li>Cost of decomposer (Re-life) - 2000 lit. X INR 62.50 = INR 125000/- (SIAM)</li> <li>Transportation + implementation cost - INR 20000 + 200000 (Manpower cost = INR 2200000 (IPS Foundation)</li> <li>Sample analysis monitoring (experts visits) cost - INR 60000 + INR 60000 = INR 120000 (GLSL)</li> <li>Total project cost - INR 465000/- (approx.),</li> <li>As per the test results, the microbial application enhanced the availability of nutrients in the soil indicating the faster decomposition of stubbles in agricultural fields.</li> <li>The report of the microbial project (phase-III) is released by the Secretary, MoP&amp;NG on World Biofuel Day 2022.</li> </ul> | Sustainable Mobility Group | Membership,<br>Government,<br>Society & Media |
| 4     | Multi-media publicity campaign                      | <ul style="list-style-type: none"> <li>The multimedia campaign was first launched in 2018-19 through the most popular channels of Punjab viz. PTC Punjabi &amp; PTC News was continued this year 2021-22 too,</li> <li>In 2021-22: 324 Video Spots, 50 sec each, shown during 25 October- 9 November 2022</li> </ul> <p>The TV campaign launched by SIAM continuously for 4 years, generated much-needed awareness and positive impact on the masses particularly on the farmers of the region. The annual campaign for the prevention of stubble burning was watched by at least 60 lakh people in Punjab, Haryana, and NCR. The total viewership for the whole project duration (5 years) is about 240 lakh people who watched these SIAM videos at least once.</p>   |                            | Membership,<br>Government,<br>Society & Media |



## Annual Report Card (2021-22)

| S.No. | Deliverables  | Measures   | Owner | Stakeholders                                  |
|-------|---|--|-------|---|
| 5     | SIAM Virtual Environment Lecture Series               | <ul style="list-style-type: none"> <li>SIAM has embarked upon a unique Lecture Series for integrating and mainstreaming the environmental imperatives for attaining business sustainability in the automotive sector.</li> <li>The objective of the lecture series is to disseminate domain knowledge, the latest development, and technological advancements.</li> </ul> <p>20 lecture series have been organized so far. 15 lecture series were organized last year and the remaining 5 were organized in 2021-22. The list of organized lecture series is outlined hereunder:</p> <ul style="list-style-type: none"> <li>16th Lecture on Indian Vehicle Scrappage Policy 2021: Features and Implementation Planning 18th August 2021,</li> <li>17th Lecture on Roadmap for Sustainable Fuels 12th November 2021,</li> <li>18th Lecture on Future of Automotive Aftermarket Parts in India, 26th Nov 2021,</li> <li>19th Lecture on Vision Sustainable Mobility: Connecting CoP26 initiatives, 10th Dec. 2021,</li> <li>20th Lecture on Vehicle Inspection and Certification: Challenges &amp; Opportunities, 22 December 2021.</li> </ul> |       | Membership,<br>Government,<br>Society & Media |
| 6     | White Paper on Diesel prepared by Sub-group on Diesel | <ul style="list-style-type: none"> <li>The Chairman of SM Group constituted the Sub-group on Diesel to study its attributes in comparison with gasoline and other fuels in vogue</li> <li>Sub-group was instituted under the Chairmanship Mr. Chandan Kardile, TML with 20 members from OEMs, ACMA, and SIAM,</li> <li>Sub-group held 4 meetings and finalized the draft white paper which was circulated to members for comments/views,</li> <li>The final white paper will be submitted to the SM Group for releasing it officially.</li> </ul>  |       | Membership,<br>Government,<br>Society & Media |
| 7     | World Environment Day 2022                            | <ul style="list-style-type: none"> <li>On 8th June, World Environment Day 2022, celebrated by SIAM on 'Ecosystem Restoration: Initiatives by Indian Auto Industry' re-emphasizes cleaner, safer, and low carbon mobility, and sustainable development.</li> <li>the Society of Indian Automobile Manufacturers (SIAM) conducted an International Virtual Conference on the theme "Sustainable Mobility: Ethanol Perspective" to commemorate World Environment Day 2022. The programme was graced by Shri Kaushal Kishore, Hon'ble Minister of State Ministry of Housing and Urban Affairs and Mr. Ashwini Kumar Choubey, Minister of State for Environment, Forest and Climate Change.</li> <li>Mr. Choubey also virtually released the SIAM microbial report-II during the inaugural session of the conference.</li> </ul>  |       | Membership,<br>Government,<br>Society & Media |



# Electric Mobility Group

Rising concerns towards achieving sustainable mobility, pollution free eco drive and global discussions on clean mobility has fuelled the electric car market growth. As a result, sales of electric vehicles (EVs) doubled in 2021 from the previous year to a new record of 6.6 million. Indian automobile sector's EV market is also heating up with the strong push by Government (both central and states) through various fiscal and non-fiscal incentives for electric vehicle transition. Policy release by the state governments followed by the aggregation model from the public sector companies has led to change in manufacturing strategies of many leading automobile companies. The government is getting awakened to the reality of raw material availability, manufacturing ecosystem and the trade flow for critical components. As industry is largely dependent on rare earth materials for battery manufacturing, the ministry of mines is laying special focus on such issues.

Electric Mobility Group of SIAM has been continuously working to realise the vision of Government of India. The group's engagement and recommendations to Central Government and various State Governments

for effective implementation of various policies, rules and regulations relating to electrification have yielded better results. Some of the notable recommendations which were considered suitably by Govt. are as follows:

- PLI Scheme for Automobile and Auto Components will be implemented over a period of five years starting from FY 2022-2023.
- FAME II Scheme with an outlay of INR 10,000 Crore for a period of 3 years commencing from 1<sup>st</sup> April 2019 is extended till 2024. Out of total budgetary support, about 86 percent of fund has been allocated for Demand Incentive so as to create demand for xEVs in the country.
- Demand aggregation by EESL for 3W and electric buses.
- The group has been actively engaged in promotion of electric mobility transition through SIAM's campaign, 'Walk the Talk' towards electrification in the country. SIAM participated in the interaction of Hon'ble Minister Shri Mahendra Nath Pandey, MHI on FAME II and PLI policy scheme at Pune.

## Annual Report Card (2021-22)

| S.No. | Deliverables                                     | Measures  | Owner                   | Stakeholders              |
|-------|--|---|-------------------------|---------------------------|
| 1     | To ensure smooth transition to electric Mobility | 1. Engagement with state govt for interaction for inclusion of electric 3 Wheelers in their cleaner mobility plan                                 | Electric Mobility Group | Government and Membership |
|       |  | 2. Engagement with central government on challenges in electric mobility at Goa Summit.   |                         | Government and Membership |
|       |  | 3. Deliberations with Government to include electric batteries in Battery waste management rules  |                         | Government and Membership |
|       |  | 4. Submissions on swappable battery, charging infrastructure and other electric vehicle related standards, regulations and policies under ETD 51. |                         | Government and Membership |





FAME II & PLI Policy Interaction of Honourable Minister of Heavy Industries & Public Enterprises Shri Mahendra Nath Pandey at Pune

# Recycling & Materials Group

With a focus on sustainability and circular economy, the Government of India has announced the vehicle scrappage policy and issued a draft notification on the Registered Vehicle Scrapping Facility (RVSF) and draft Amendment 1 to AIS 129 standard for handling and management of ELV recycling in an environment sound manner. The Government has also formulated an Action Plan for Circular Economy: End of Life Vehicles, which envisages the responsibilities of key stakeholders with timelines. SIAM's recycling group is working in close coordination with the Ministry to provide necessary support on the initiative proactively, after due consultation with its members.

## **AIS 129 Recycling Standard Amendment work to extend scope to all categories**

It gives us a proud feeling that India is the first country to have automotive standard on ELV recycling of all categories and recycling group had participated wholeheartedly in this initiative.

SIAM recycling group had responded to government's call on enhancing Automotive Industry Standard - AIS 129 on ELV recycling and extended scope of this standard for all categories of vehicles. Accordingly, the scope of Recyclability, Reusability, regeneration (RRR) & use of Heavy Metal Restriction (HMR) design targets in AIS 129 had been amended to accommodate L, M & N categories.

## **Battery waste management rule (BWMR) by MoEF&CC to cover recycling of all types of batteries, including EVs.**

Ministry of Environment, Forest and Climate Change (MoEF&CC) is in process of finalizing the draft Battery Waste Management Rules (BWMR) 2022. Here, it is mentionable that the first draft of BWMR was issued by the MoEF&CC on 20<sup>th</sup> February 2020 for public and stakeholders' comments/views. In this regard, apart from SIAM written submissions, MoEF&CC has had several rounds of consultations with various stakeholders on virtual platform including a face-to-face meeting on 10<sup>th</sup> February 2022. The aforesaid submissions by SIAM to MoEF&CC were made after

due consultations with SIAM members of Recycling & Material Group and Electric Mobility Group.

Post submission as outlined above, SIAM Secretariat along with members of Recycling Group and Electric Mobility Group, met the Director and Joint Director, MoEF&CC on 26<sup>th</sup> April 2022 and discussed the concerns on the Battery Waste Management Rules e.g. deletion of prosecution actions clause, environmental compensation clarity, revision of collection/recycling targets, etc. MoEF took cognizance of the comments and has assured to address them in the final notification.

## **MoH& Niti Aayog's initiative on creating a regulatory framework for certifying the reusability of spares and framework for setting up of recycling zones**

SIAM and ACMA were requested to make a formal submission to MoRTH, MHI & BIS, identifying the current gaps and the further actions required for creating a regulatory framework for certifying the reusability of spares and framework for setting up of recycling zones.

SIAM Recycling group alongwith After-Sales Parts group and ACMA converged on the topic. SIAM's submission to government stated a need to have comprehensive framework in place to ascertain the quality of components salvaged from ELVs. It was also promoted that the reusability framework should be supported by strong Periodic Vehicle Inspection & certification so that safety and environment concerns are not compromised.

SIAM's framework proposal includes data driven approach, benchmarking study, effective traceability & monitoring to ensure robustness of framework and strong enforcement mechanism.

## **Sustainable material (BRS convention) submission to MoEF&CC**

India's commitment to various conventions on environment protection (BRS), the concerns about the dispersal of hazardous chemical substances like heavy metals and persistent organic pollutants (POPs) are increasingly becoming critical. While POPs are



regulated by MoEF, the heavy metals fall under the RRR regulations under AIS 129.

SIAM accords highest consideration towards obligations of India on environment protection and supports its objectives to reduce the emission of such chemicals into the environment.

Keeping this objective in mind, a subgroup on sustainable materials within recycling group of SIAM had submitted automobile industry's views on various chemicals such as persistent organic pollutants (POPs) and provided inputs to government for taking it up in such conventions effectively.

#### **Extended Producer's Responsibility (EPR)**

Recycling group advocates the implementation of the Shared Responsibility concept, as it brings together all stakeholders, with their share of clear roles &

responsibilities, which is essential to achieve the goals of the circular economy. The Shared Responsibility model is a successful EU model which involves sharing responsibilities by all economic operators (OEMs, Last owner, Dismantlers & Shredders, Government) on a common strategy for ELV recycling.

#### **Webinar**

The webinar was organised on the topic of “Indian Vehicle Scrappage Policy 2021: Features and Implementation Planning” with an objective to disseminate knowledge, best practices, and domain technological advancements to the participants, vis-à-vis creating awareness & education. The series discussed policy, regulations on recycling, imparting circularity of materials and Life-Cycle Assessment (LCA) model aimed at eliminating waste through recycling and reuse of end-of-life vehicles.

| Annual Report Card (2021-22) |  |   |                             |                        |
|------------------------------|--|---|-----------------------------|------------------------|
| S.No.                        | Deliverable  | Measures  | Owner                       | Stakeholder            |
| 1                            | Represent SIAM in forums responsible for vehicle recycling regulations and provide inputs for effective implementation | <ol style="list-style-type: none"> <li>Organised webinar on Policy, Regulations, &amp; Economic Impact of ELV Recycling, Environmentally Sound Management of ELVs in India.</li> <li>Involved in monitoring various activities under different ministries pertaining to vehicle recycling / scrapping along with a detailed examination of best practices and learnings of global vehicle recycling practices.</li> <li>SIAM's submission to AISC panel on amendment 1 to AIS 129 standard to enhance the scope to all categories of vehicles</li> <li>SIAM submission to MoRTH &amp; BIS on “Creating framework for setting up of the recycling zones and creating a regulatory framework for certifying reusability of spares”</li> <li>SIAM submission to MoEF&amp;CC on BWMR (Battery Waste Management Rule)</li> <li>Provide inputs to government on automobile industry's views related to various chemicals such as persistent organic pollutants (POPs) and support government inputs for taking it up in conventions effectively.</li> </ol> | Recycling & Materials Group | Membership and Society |





Vice President, SIAM delivering address in Green Tea with SIAM on Recycling



SIAM Lecture Series on Indian Vehicle Scrappage Policy 2021: Features and Implementation Planning

## SIAM LECTURES 2021

LECTURE #16 ON

### INDIAN VEHICLE SCRAPPAGE POLICY 2021: FEATURES AND IMPLEMENTATION PLANNING

18th August 2021 10:30 AM to 1 PM Virtual

#### Inaugural Session



Welcome Address  
**Mr Prashant K Banerjee**  
Executive Director, SIAM



Address by Chief Guest  
**Mr Amit Varodan**  
Joint Secretary, Ministry of Road Transport & Highways



Theme Presentation  
**Mr Shrikant Deshmukh**  
Chairman, SIAM Recycling & Material Group and GM, Mercedes-Benz India



Overview & Salient features of Draft  
Registered Vehicle Scrapping  
Facility (Scrappage Policy) 2021  
**Mr Paresh Goel**  
Director, Ministry of Road Transport & Highways



Vote of Thanks  
**Mr M S Anand Kumar**  
Co-Chairman, SIAM Recycling & Material Group and GM, TVS Motor Company

## SIAM 2021

LECTURE #16 ON

### INDIAN VEHICLE SCRAPPAGE POLICY 2021: FEATURES AND IMPLEMENTATION PLANNING

18th August 2021 10:30 AM to 1 PM Virtual

#### Thematic Session and Panel Discussion



Moderator  
**Mr Shrikant Deshmukh**  
Chairman, SIAM Recycling & Materials Group and GM, Mercedes-Benz India



Moderator  
**Mr Shovik Banerjee**  
Principal, Kearney



Progress with V-VMP Implementation and Pending Issue  
**Mr Masaru Akaishi**  
MD, Maruti Suzuki Toyotsu India



Scrappage Policy – Mobility Road map in Circular Economy  
**Mr Som Kapoor**  
Partner – Automotive Sector, Ernst & Young



Critical Analysis of the Draft Registered Vehicle Scrapping Facility (Scrappage Policy) 2021: A SWOT Analysis  
**Mr M S Anand Kumar**  
Co-Chairman, SIAM Recycling & Material Group and GM, TVS Motor Company



Advantages & Challenges of Re-use and Non-Re-usable parts  
**Mr Meenakshi Sundaram**  
CTO, Amalgamations Components Group



Learnings from Implementation EPR Regime under Various Waste Management Rules Notified by MoF&CC  
**Mr Anand Kumar**  
Additional Director, CPCB



**Mr Sanjay Mehta**  
President, MRAI

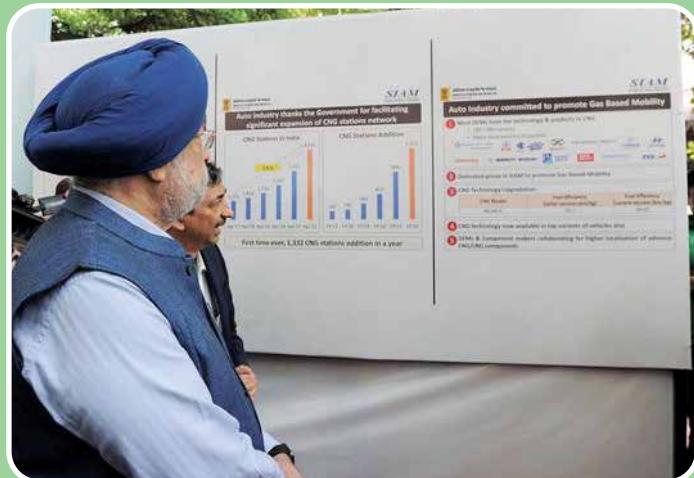
## Gas Based Mobility Group

Government of India has laid down the vision for a Gas Based Economy by increasing the share of Natural Gas from 6 % to 15 % by 2030 in India's energy mix. Climate change and global warming have become top global issues, with the transport sector being the major contributor using fossil fuels. Natural Gas is the cleanest option for the transport sector as a fossil fuel. Therefore, clean, affordable and renewable energy becomes a major pathway for the transport sector to reduce GHG emissions and achieve sustainability. SIAM's focus on sustainable mobility and creation of the Gas Based Mobility (GBM) group's objective was to collaborate with all stakeholders, including Government, Gas companies, Component makers, etc. to facilitate higher adoption of Natural Gas vehicles (CNG and LNG) in India and decarbonize the transport sector.

Following are some examples of the defined agenda of the GBM Group:

- 1,000 plus CNG stations were added in a single financial year for the first time ever. From statistical point of view, 1,331 stations were added in FY21-22 that brings total CNG stations in India to 4,433 as of April 2022. CNG stations were added across states.
- Demonstration of CNG Fleet at MoPNG, Shastri Bhawan on 15<sup>th</sup> July 2022 at the virtual inauguration of 166 CNG stations by Shri Hardeep Singh Puri, Hon'ble Minister of Petroleum and Natural Gas and Housing & Urban Affairs, Government of India.
- The group expects that GoI can achieve target of additional 10,000 CNG stations by 2027 and a much higher number by 2030
- Through GBM group, SIAM has requested states for rationalization of VAT and rationalization of taxes for CNG. Maharashtra and Kerala have announced VAT reduction on CNG. West Bengal Government has announced MV tax exemption on CNG vehicles
- In line with SIAM's request, many CNG / LNG components are included in the PLI scheme for auto components
- Focused interface with all related stakeholders like MoPNG, State Governments, FPI, Gas Companies, PNGRB, etc. to synergize efforts towards the objectives of Gas Based Mobility
- Keep SIAM Members informed about updates in CNG and LNG both on the infrastructure side and on the policy side
- To collaborate and support Gas industry / CGD industry in Infrastructure expansion across the country
- To deliberate and discuss all techno-commercial aspects (primarily commercial) with respect to CNG, LNG and HCNG
- Impress upon the OEMs to produce CNG vehicles across all products and variants





SIAM participation at Inauguration of CNG Stations by Hon'ble Minister, Shri Hardeep Singh Puri, MoPNG

# Manufacturing, Industry 4.0 and Ease of Doing Business - Manufacturing Group

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In the year 2020, SIAM's Executive Council constituted one specific group related to Manufacturing activity, viz., **Manufacturing, Industry 4.0 and Ease of Doing Business (EODB)-manufacturing**. This technical council was constituted with a focus on Sustainable Manufacturing, Industry 4.0 use cases and Ease of Doing Business. The purpose was to understand the contribution to the manufacturing GDP from automobile manufacturing.

Digital transformation has been one of the core issues in industrialized countries. The adoption of this concept by the Indian automotive industry has been the focal area of this group. The Industry 4.0 initiative of SIAM coincide with the Industry 4.0 initiative under SAMARTH Udyog Bharat 4.0 initiative of Ministry of Heavy Industry & Public Enterprises, Government of India under its scheme on Enhancement of Competitiveness in Indian Capital Goods Sector. The initiatives encompass manufacturers, vendors and customers as the main stakeholders with the objective of spreading awareness about I4.0 amongst the Indian manufacturing industries.

Digital Technologies have significantly marked their presence in the context of advanced manufacturing. It is proclaimed that Industrial Internet of Things (IIoT) and data analytics will serve a critical role in enabling the vision of smart machines and intelligent cooperation between multiple machines promoting sustainable operations. The digital interventions will transform the way that machines will be deployed, operated, monitored, and serviced in the future. The global IIoT market for discrete manufacturing is projected to reach \$40 billion by 2020. It is in this context that the group took several engagements with the stakeholders and created awareness to:

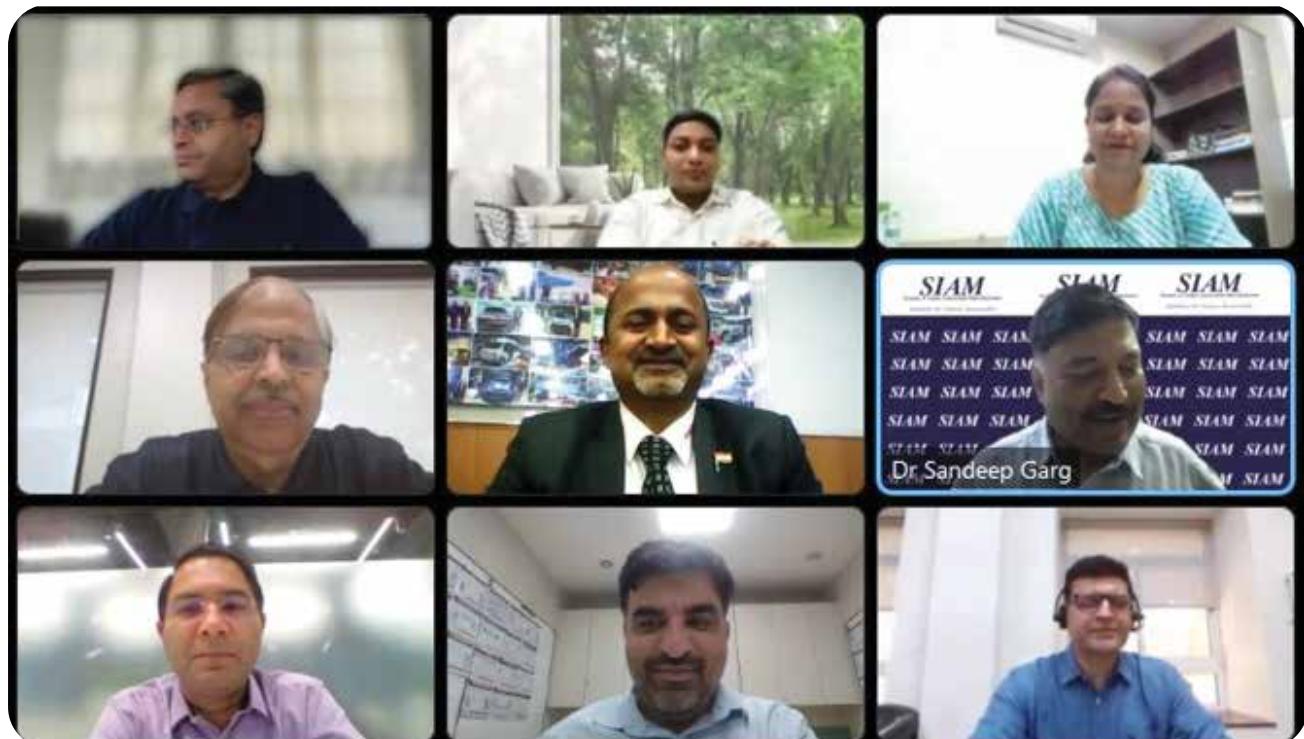
- Become familiarity with the concept and business principles of Industry 4.0.
- Understand the impact of Industry 4.0 emerging technologies on products, processes, people and organization as a whole.
- Understanding the various challenges and barriers in implementing Industry 4.0 technologies
- Application of Industry 4.0 technologies in various sectors like manufacturing and service sectors
- Become aware about other organizations / industries that made significant transformational changes using Industry 4.0
- Develop an ability to conceive and propose a framework for achieving sustainability across organizations.

As India is an emerging economy with a thrust on manufacturing under "Make in India" and other initiatives, there are opportunities to improve productivity, reliability, sustainability and profitability of these industries by adopting technologies such as artificial intelligence, data science, robotics and cyber-physical manufacturing. They will touch upon diverse functions within the organization including Operations, Supply Chain, Analytics, Marketing, Strategy and Information systems as they are impacted by Industry 4.0. Therefore, this group will also engage with the stakeholders to provide participants a better understanding and answers to some of the vital questions on human-machine communication for effective management of operations, strategies on designing and implementing lean principles, cyber-physical manufacturing systems and how they are transforming business models etc. contributing to workers' safety and operational sustainability.



## Annual Report Card (2021-22)

| S.No. | Deliverable  | Measures  | Owner   | Stakeholder |
|-------|--|---|---|-------------|
| 1     | <ol style="list-style-type: none"> <li>1. To provide guidance to industry with implementation and convergence of technologies envisaged in industry 4.0</li> <li>2. Transform manufacturing and all its related industrial operations from design to logistics to end-of-product-lifecycle into a more efficient and innovative customer-responsive manufacturing.</li> <li>3. Use the industry 4.0 tools to enhance interoperability across the supply chain and sharing data seamlessly and enhance productivity, safety and environmental compatibility.</li> <li>4. To engage with policy makers for incentivizing the digitalized manufacturing and ease of doing business with interventions.</li> </ol> | <ol style="list-style-type: none"> <li>1. Become familiar with the concept and business principles of Industry 4.0.</li> <li>2. Understand the impact of Industry 4.0 emerging technologies on products, processes, people and organization as a whole.</li> <li>3. Understanding the various challenges and barriers in implementing Industry 4.0 technologies</li> <li>4. Application of Industry 4.0 technologies in various sectors like manufacturing and service sectors</li> <li>5. Become aware about other organizations / industries that made significant transformational changes using Industry 4.0</li> <li>6. Develop an ability to conceive and propose a framework for achieving sustainability across organizations.</li> </ol> | Manufacturing, Industry 4.0 and Ease of Doing Business -Manufacturing Group | Membership  |



SIAM - IMT Ghaziabad Joint Workshop on Industry 4.0: Driving Towards Digital Transformation across organizations



## Emissions and Conservation Group

Automobile Industry has been continuously supporting the Government of India in its vision to decarbonize the transport sector by achieving a higher share of cleaner fuels in the transport sector. Comprehensive efforts and initiatives have been taken by the Government to achieve the target of 20% Ethanol (E-20) blending pan India by Ethanol Supply Year (ESY) 2025-26. CAFÉ phase II regulation was implemented in April 2022 and BS VI second stage norms are set to be implemented from April 2023. COVID-19 pandemic has impacted the R&D development, capacity building, and production which resulted in reduced volumes in the last consecutive two years. Shortage of semiconductor due to recent geo-political development, resulting in the scarce supply of technologies, such as intelligent energy management semi-conductor, map-controlled pooling with variable oil pump ECU, engine start-stop for automatic transmission and tyre pressure monitoring sensor, which were selected and validated for deployment in vehicles for CAFÉ II compliance.

EnC group has been continuously engaged with BEE in reducing the reference average weight by 63 kgs from 1145 kg to 1082 kg for M1 category vehicles thereby softening the CAFÉ phase II target for all Passenger Vehicles manufacturers by around 3 g/km of CO2. The Group worked continuously with IRDE committee in defining the conformity factor for RDE compliance. During 64<sup>th</sup> SCOE, SIAM's proposal to discontinue RDE on CoP & BS6 phase 1 models has been agreed and also SIAM push for rationalising CoP while transition from BS6 Phase 1 to Phase 2 was accepted by MoRTH and four months were granted. SIAM representation for phased implementation of OBDII for 2W & 3W was also accepted while releasing the draft notification.

SIAM members are manufacturing vehicles since 2008 which are material compatible with E10 fuel. SIAM and its members are completely aligned and

committed for meeting the Government of India milestones in manufacturing E-20 material compatible vehicles from 1<sup>st</sup> April, 2023 and E-20 Vehicles with optimized engine performance and optimised fuel economy from 2025-26. The vehicles which are manufactured from 2008 are material compatible with E10 fuel and supporting in consumption of E10 blended fuel already. The Group has also prepared a roadmap for introduction of Flex fuel vehicles by two-wheeler and passenger vehicles segments as well as the essential policy enablers to meet the suggested timelines.

In February 2022, Govt of India has mandated a joint Ministry of Heavy Industries (MHI) - SIAM Ethanol Awareness Campaign for Promotion of Ethanol as Transportation Fuel and accordingly SIAM has conceptualised Sustainability Mobility Advocacy Concoction namely Talk Shows, Stakeholder Engagements, Observing important days, Master Class, Knowledge Series, Conferences, Technology Demonstration, Roadshow & Expo, Social Media Promotion, Facility Visits (National / International), etc.

The Group has been in active consultation and engagement with OMCs to implement E10 with RON95 fuel across all the retail outlets of OMCs. Also the group has been persistent with BIS to amend the RON 95 as minimum requirement in IS 2796 (E10) specification and release the updated specifications.

The ENC group has engaged in development of WLTP test procedure standard for Type I, Type IV, RDE & Coast down, HDFE and LMDFE regulations, in-service conformity norms and has made submissions on emission and retro fitment norms for CNG vehicles and Quality Control Order for DEF/AUS32. The subject experts from the group also supported in preparation of Indian Standards and Automotive Industry Standards along with BIS, ARAI and ICAT for different fuels and emission tests.



## Annual Report Card (2021-22)

| S.No. | Deliverables   | Measures  | Owner                            | Stakeholders                     |
|-------|--|---|----------------------------------|----------------------------------|
| 1     | Transition towards BS VI Stage II and CAFÉ Phase II norms              | 1. Building consensus among members on SIAM's recommendations for defining Conformity Factors.  | Emissions and Conservation Group | Membership and Government        |
|       |  | 2. Deliberations with IRDE committee in defining conformity factors for RDE compliance  |                                  | Membership and Government        |
|       |  | 3. Discussion with Minister, Secretary, Joint Secretary of MoRTH, MoP, DHI and other stakeholders for deferment of CAFÉ II                                |                                  | Membership and Government        |
|       |  | 4. Deliberations with MoRTH, MoP, BEE for reducing the industry reference average weight from 1145 kg to 1082 kg  |                                  | Membership and Government        |
|       |  | 5. Deliberations with MoP and MoRTH for excluding tippers from LMDFE and HDFE norms   |                                  | Membership and Government        |
| 2     | Preparation for higher ethanol blends compatible vehicles introduction | 1. Deliberations with MoRTH, DHI, Test agencies for mandating E20 as mono fuel and range of flex fuel vehicles from E20-E85.                              | Emissions and Conservation Group | Membership and Government        |
|       |  | 2. Deliberations with MoPNG, MoRTH, Test agencies for continuation of protection grade RON 95 E10 fuel for existing vehicles till end of life             |                                  | Membership and Government        |
|       |  | 3. Building consensus among members for introduction of flex fuel vehicles.   |                                  | Membership and Government        |
|       |  | 4. Deliberations with NITI Aayog, MoPNG, MoRTH and DHI for introduction of E20 and flex fuel vehicles   |                                  | Membership and Government        |
|       |  | 5. Deliberations with MoPNG, MoRTH, DHI, Test agencies, BIS and OMCs for implementation of RON95 base gasoline fuel                                       |                                  | Membership, Government & Society |
|       |  | 6. Conducting study on impact of M15 fuel on existing vehicles with ARAI and IOCL, engaging with Niti Aayog   |                                  | Membership, Government & Society |
|       |  | 7. Conducting joint study on impact of E20 fuel on E10 compatible vehicles with ARAI and IOCL   |                                  | Membership, Government & Society |
| 3     | Preparation of IS and AIS standards                                    | 1. Preparation and submission of E20 reference fuel standard after due deliberations with test agencies, to be released by BIS.                           | Emissions and Conservation Group | Membership, Government & Society |
|       |  | 2. Support in preparing Anhydrous Ethanol standard IS 15464; 2022 (including 2G Ethanol) to be used in blending of Motor Gasoline.                        |                                  | Membership, Government & Society |
|       |  | 3. Taking lead in revising IS 16634: 2017 E85 Fuel (Blend of Anhydrous Ethanol and Gasoline).   |                                  | Membership, Government & Society |
|       |  | 4. Support to amend the E10 gasoline fuel spec as 9 to 11% with increased oxygen content limit (3.7 to 4.1%) after completion of proper emission studies. |                                  | Membership, Government & Society |
|       |  | 5. Taking Lead in revision of E20 fuel standard IS 17021 which will be released by Jan 2023.  |                                  | Membership, Government & Society |
|       |  | 6. Preparation of AIS 175 on implementation of WLTP for M & N Category vehicles having GVW<3.5 T  |                                  | Membership and Government        |



## Annual Report Card (2021-22)

| S.No. | Deliverables  | Measures  | Owner                            | Stakeholders                     |
|-------|---|---|----------------------------------|----------------------------------|
| 4     | International & National Engagement for knowledge sharing   | 1. MoU signing with UNICA, Brazil for promotion of Bio Energy   | Emissions and Conservation Group | Membership, Government & Society |
|       |   | 2. Engagement with US Grains Council for information exchange on Ethanol in 2021-22   |                                  | Membership, Government & Society |
|       |   | 3. Engagement with JAMA for understanding the emissions and fuel scenario in Japan in 2021-22   |                                  | Membership, Government & Society |
|       |   | 4. Engagement with Indian Sugar Mills Association (ISMA) for promotion of Ethanol Economy in India  |                                  | Membership, Government & Society |
| 5     | Stakeholders Engagements on emission testing procedures and fuel, DEF quality testing methodology | 1. Deliberations with MoRTH, Ministry of Chemicals & Fertilizers & SCOE for issuance of QCO on DEF / AUS32  | Emissions and Conservation Group | Membership and Government        |
|       |   | 2. Deliberations with MoRTH & SCOE for seeking exemption of THC emission measurement for vehicles less than & greater than 3.5T   |                                  | Membership and Government        |
|       |   | 3. Deliberations with MoRTH, SCOE and test agencies to mandate CNG retro fitment norms for In-use BSVI vehicles for vehicle categories L, M & N with GVW less than 3.5T |                                  | Membership and Government        |



SIAM CEOs Delegation with Honourable Minister of Road Transport & Highways, Mr Nitin Gadkari



SIAM delegation meeting with Shri Tarun Kapoor, Advisor to PM & Chairman Energy Transition Advisory Committee, Ex-Secretary MoPNG





SIAM at Empowered Group of Secretaries Meeting on Ethanol Blending Programme in India



SIAM Participation in 64<sup>th</sup> SCOE Meeting at ARAI, Pune



SIAM interaction with the Embassy of Brazil in India under Indo-Brazil Bioenergy Co-operation on Ethanol



SIAM Participation in Two-Day Webinar on Ethanol Organised by Embassy of Brazil

## Glances of SIAM Ethanol promotional activities as mandated by Government of India

**India-Brazil Business Interaction on Bioenergy and Biofuels**

21<sup>st</sup> April 2022 | New Delhi

Organized by  
GOVERNMENT OF  
INDIA  
EMBASSY OF  
BRAZIL

**SIAM**  
Society of Indian Automobile Manufacturers  
Building the Industry. Empowering the Community.

**Brazilian Petroleum  
Innovation 2022**

**Brasileiro IndianOil**

**MoU signed and exchanged between Mr Kenichi Ayukawa, President, SIAM and Mr Evandro Gucci, President, UNICA (Brazilian Sugarcane Industry Association) in the presence of Mr Hardeep Singh Puri, Minister for Petroleum & Natural Gas from India and Mr Bento Albuquerque, the Mines and Energy Minister from Brazil**



Business to Business Interaction with Indo-Brazil Stakeholders on Ethanol



Address by Chairman PV CEO Council in Green Tea with SIAM on Ethanol



Indian delegation (SIAM & ISMA) interaction with UNICA at Brazil



Indian delegation (SIAM & ISMA) visit to FFVs display at M/s Volkswagen plant, Brazil



Indian delegation (SIAM & ISMA) visit to FFVs display at M/s Toyota plant, Brazil





SIAM delegation visit to US Grain Council, USA



SIAM Presentation in 15th CITI ISO DATAGRO NY Sugar & Ethanol Conference at USA



SIAM-ISMA interaction on rollout of E20 vehicles at Hotel Oberoi, New Delhi



# Aftermarket Parts Group

SIAM Aftermarket Parts Group actively works towards spreading awareness on use of genuine parts. The four main pillars through which this group aims to work effectively are Consumer Awareness, Quality Standards, Enforcement and Common Digital Platform. Industry is plagued by the menace of counterfeit/sub-standard parts being sold in aftermarket. The Quality Control Orders (QCO) is a welcome step in the Group's endeavour to promote genuine parts. However, our endeavour has been to ensure that implementation of QCO does not affect the ease of doing business. Aiming to enhance affordability, the SIAM group has also worked on policy framework to include spare parts in recycling policy in line with EU standards.

Considering the nation's emerging emphasis on Quality, Atmanirbharta and Digitalization, the group organized SIAM Lecture Series (18<sup>th</sup> series) with two panels namely "Vocal for Local" and "Curb Counterfeit for Safer Mobility". The panels covered important areas like leveraging aftermarket & auto components under PLI scheme. There was a discussion on adoption of new age digital technologies like IOT, AI and ML affecting the aspects of aftermarket parts business viz Quintessential Quality, Curb Counterfeit, Vocal for Local, Simplify Supply-Chain, Amplify Access, Evaluate E-Commerce.

| Annual Report Card (2021-22) |                                 |  |                         |                           |
|------------------------------|---------------------------------|--|-------------------------|---------------------------|
| S.No.                        | Deliverable                     | Measures   | Owner                   | Stakeholder               |
| 1                            | To promote use of genuine parts | <ol style="list-style-type: none"><li>Continuous engagements on Lead OEM aftermarket business expansion</li><li>Augmentation by positioning of genuine parts during and after end of product life cycle at the best price within reach of every individual customer</li><li>Supporting 'Made in India' campaign within horizon of government policies.</li></ol> | Aftermarket Parts Group | Membership and Government |





**SIAM**  
Society of Indian Automotive Manufacturers  
Building the Nation, Responsibly

LECTURE #18 ON  
**FUTURE OF AUTOMOTIVE AFTERMARKET PARTS IN INDIA**

26th November 2021 3:00 PM to 5:00 PM Virtual

SESSION 1 | VOCAL FOR LOCAL



SESSION HOST

**Mr Prashant K Banerjee**  
Executive Director, SIAM



THEME PRESENTATION  
**Mr Saurabh Agarwal**  
Partner, E&Y

**Panel Discussion**



MODERATOR

**Mr Yashpal Sachar**  
Chair, SIAM Aftermarket Parts  
Group & GM, Honda Cars India

Panellists



**Mr Rama Shankar Pandey**  
Chair, ACMA  
Aftermarket Committee  
& MD, Hella India



**Mr Mustafa Wajid**  
Chair, E-Mobility  
and Charging  
Infrastructure, IEEMA



**Mr Saurabh Kapoor**  
MD, JSG Innotech



**SIAM**  
Society of Indian Automotive Manufacturers  
Building the Nation, Responsibly

LECTURE #18 ON  
**FUTURE OF AUTOMOTIVE AFTERMARKET PARTS IN INDIA**

26th November 2021 3:00 PM to 5:00 PM Virtual

SESSION 2 | CURB COUNTERFEIT FOR SAFER MOBILITY



SESSION HOST

**Mr Anup Mohnani**  
Co-Chair, SIAM Aftermarket Parts Group  
and Head (Parts Division, Stellantis)



THEME PRESENTATION  
**Mr Tanmay Jaswal**  
Founder & CEO, Chkfake

**Panel Discussion**



MODERATOR

**Mr Arpit Mahendra**  
Editor, Express Drives & Express  
Mobility, The Financial Express - Digital

Panellists



**Mr Pankaj Monga**  
Partner & Practice,  
Head - Brand Protection,  
Lali & Seth



**Mr Thomas Weiss**  
Founder & CEO,  
Authentic Vision



**Mr Shaleen Agarwal**  
Founder & CEO, Garaaz



**Mr Anubhav Amarnath**  
Founder & CEO, EngineGAL  
Technology



# CMVR & Safety Group

The automobile sector continues to be one of the most regulated sectors in India. The previous year saw many more regulations being mandated by the government, moving a step towards international harmonization for a safer and more efficient vehicular ecosystem.

SIAM CMVR & Safety Regulation Group is actively involved in preparing standards for the new technologies like DDAWS (Driver Drowsiness Attention Warning System), CSMS (Cyber Security Management System) and SUMS (Software Update Management System). Group is also actively involved in the Bharat NCAP review and the way forward for its possible implementation.

As the industry was slowly recovering from extenuating COVID induced circumstances, the CMVR & Safety Regulations group actively supported the SIAM secretariat in successfully advocating the industry position before the government. This policy advocacy initiative was instrumental in the government accepting

SIAM requests and granting extension of timelines for QCO's related to Safety Glass and Wheel Rims, Rollout of WVSCOP and Mandatory Passenger Airbags. The industry sought deferment for crucial quality control orders for safety glass and wheel rims, as domestic facilities were not operating at full strength and overseas travel restrictions did not permit the grant of licenses for those suppliers. Understanding the present Industry situation, the Department for Promotion of Industry and Internal Trade (DPIIT) granted an additional one-year lead time to obtain compliance to QCOs, while the Department of Heavy Industries granted the industry six months' additional time for compliance with wheel rims QCO, which was a much-needed relief.

SIAM has also taken upon the task to identify AIS standards that are yet to be converted to IS standards. Each AIS standard is being thoroughly checked by the industry for the purpose of alignment and likewise is being put up for adoption in BIS committees.

## Annual Report Card (2021-22)

| S.No. | Deliverable  | Measures   | Owner               | Stakeholder |
|-------|--|--|---------------------|-------------|
| 1     | Policy Advocacy for formulation of guidelines/policies and ease implementation hurdles in Automotive Regulations | <ol style="list-style-type: none"><li>Extension of safety glass QCO implementation on SIAM request to 1<sup>st</sup> April 2023.</li><li>Extension of wheel rims QCO implementation on SIAM request to 21<sup>st</sup> Sept 2023.</li><li>Obtained 18-month lead time for WVSCOP compliance.</li><li>Obtained four months lead time for Co-Driver Airbag implementation. New implementation date is 31<sup>st</sup> Dec, 2021</li><li>Actively involved in harmonization of AIS standards with IS standards</li><li>Supporting in development of the Vehicle Recall Portal under the aegis of MoRTH, in collaboration with SIAM Service &amp; IMC Group.</li></ol> | CMVR & Safety Group | Membership  |



SIAM Participation in 60<sup>th</sup> CMVR-TSC Meeting at ARAI, Pune



# International Harmonization Group

This group is responsible for promoting technical regulatory harmonization based on Indian / SIAM position. This group represents the position of the Indian Automobile Industry at UN/ECE, WP 29, OICA/ IMMA Technical Committee, ISO Technical Committee through BIS, WP1 Road Safety Committee etc.

This group also organises SIAM JAMA, SIAM VDA, GSO, and other countries' industry association interactions to discuss mobility solutions for Sustainable Mobility.

As we all know that India was earlier facing international pressure to sign the 1958 Agreement, SIAM conducted a study on its impact on the country's trade in 2016. The Group involved policymakers to evaluate possible effects of adopting the 1958 Agreement or Trade Impact of WP.29 on India.

Over the years, the absence of a long-term regulatory roadmap made industry suffer short~medium term policy impediments leading to disruptions in planning and investments. This group also completed a study on the relevance of advanced International Regulations in India.

This study clearly identifies all the international regulations along with their amendments - ECE Regulations & GTRs (WP.29) as well as understanding the regulatory landscape in India and the potential applicability of new regulations that would create an impact on Emission, Safety, Connected Mobility etc. based on Indian operating conditions

| Annual Report Card (2021-22) |   |   |                                   |                           |
|------------------------------|---|---|-----------------------------------|---------------------------|
| S.No.                        | Deliverable   | Measures  | Owner                             | Stakeholder               |
| 1                            | Policy Advocacy for formulation of guidelines/ policies and ease implementation hurdles in Automotive Regulations | <ol style="list-style-type: none"><li>1. Analysing the present and upcoming regulations in developed economies with the aim to draw out a more structured approach to regulation introduction so that technologies can be developed in India well ahead of implementation and ensuring the technologies are not imported.</li><li>2. Serves as a platform to discuss industry stance at OICA shadow groups of WP29.</li><li>3. Completed a study to develop a 10-year regulatory roadmap for the industry across all sectors.</li></ol> | International Harmonization Group | Membership and Government |



## Two-Wheeler Group

The two-wheeler segment in India has enjoyed a flawless run in the market despite of the challenging conditions incurring over the year, thanks to the wide variety of product choices it offers to its customer base. A slight and positive change over the sales trends has been observed this year which has put limelight to the Executive category of two wheelers as well other than the Economy Category which has always led the Indian two wheeler Industry which is a result of increased buying power of the consumer synergised with the advanced technologies and global level safety concerned regulations and policies focusing the Industry.

Today Indian two wheelers have not only caught up with latest international EU regulations but have surpassed in safety regulations, hence are most environment friendly and safest in the world.

Two wheeler group has logically been able to convince MoRTH for OBD2 to be passed in two phases in line

with EU direction without impacting environment. Apart from that the group has been actively engaged in major activities like ARAI-IOCL-SIAM Joint Study on E20 Fuel compatibility on very large part of existing vehicles on road, flex fuel vehicles roadmap foundation, M15 compatibility joint study by ARAI-IOCL-SIAM, industry wide study on Catcon Market Survey etc.

Indian two-wheeler industry proudly being the largest manufacturers around the world, has to take each and every step forward with utmost care and most cautiously which not only represents the will of the customer, but also keeps the environmental and safety factors into consideration. This is how the Indian 2W Industry has been going forward sustainably. The Indian two-wheelers are not only being delivered with the most advance safety features like AHO / ABS & CBS etc., but they are also having the best fuel efficiency globally whether it be for BSIV or BSVI vehicles.

### Annual Report Card (2021-22)

| S.No. | Deliverable  | Measures  | Owner             | Stakeholder            |
|-------|--|---|-------------------|------------------------|
| 1     | To ensure the growth of 2W industry in India in a sustainable manner and navigate the industry through regulation formulation. | <ol style="list-style-type: none"><li>Based on the representations made by the SIAM Two-Wheeler Group in line with EU direction, MoRTH issued the draft notification on Implementation of OBD II in two phases in which phase I implementation will take place from 1<sup>st</sup> April 2023 and phase II implementation from 1<sup>st</sup> April 2025.</li><li>Catcon Monitoring Market Survey with ICAT</li><li>The group worked to develop a holistic approach for high penetration and increased demand of 2W in the Indian market in the coming years.</li><li>India has taken over the chairmanship of the Brake Harmonization Group (BWG) at International Motorcycle Manufacturers Association (IMMA) for 2021-2024.</li><li>The following Automotive Industry Standards have been implemented successfully as per the representations made by SIAM:<ul style="list-style-type: none"><li>AIS 007 – related to OBD II norms.</li><li>AIS 137 Part 1 – related to test method and related procedures on OBD II implementation.</li></ul></li></ol> | Two Wheeler Group | Society and Membership |





ARAI, IOC-R&D & SIAM Interactions on Ethanol

## Three-Wheeler Group

As public transport closed due to COVID, the Indian 3W Industry was the worst hit in the last two years as can be seen by the sales numbers. As a strong pillar for industry support, SIAM has been constantly engaged in the betterment of the Industry. Continuous improvements have occurred in fields like emissions norms, alternate fuel norms and E-Mobility. Advanced safety features have been brought to Indian 3Ws to ensure passenger and vehicular safety. Aggregation models have also been adopted to uplift the 3W Electric category. As 3W MSME services fall under Priority Sector Lending scheme, financing of the sector is easy for customers. SIAM has a strong presence in monitoring and taking actions in each state on issues in the sector regarding tax benefits, registration fees, exemptions or any other kind of subsidy.

A long awaited notification on, On Board Diagnostics (OBD 2) was released in draft form on 29<sup>th</sup> June 2022 by

MoRTH. SIAM made continuous efforts to ensure that the notification was in line with the industry demands. In line with the OBD 2 notification, the 3W group has been proactively discussing the SIAM proposal for 3W next stage emission norms, test cycles, test procedures and OBD 2 (beyond 2025). Due to efforts of the group, Amendment 1 to AIS 137 (Part 2) – OBD 2 test procedures also got published. The increased penetration and varied demand of the customers has led to introduction of three new categories under 3W domain. The necessary formalities are nearing completion in CMVR for the following categories:

- Category L2eP (3W mopeds)
- Category L2-5 of Electric Powertrain (Combi Vehicle)
- Three wheeled Agricultural Tractor

| Annual Report Card (2021-22) |  |  |                     |                           |
|------------------------------|--|--|---------------------|---------------------------|
| S.No.                        | Deliverable  | Measures   | Owner               | Stakeholder               |
| 1                            | To ensure the growth of 3W industry in India in a sustainable manner and navigate the industry through regulation formulation. | <ol style="list-style-type: none"><li>1. OBD 2 Draft notification issued by MoRTH on 29<sup>th</sup> June 2022</li><li>2. Discussions for the way forward for SIAM proposal regarding 3W Next stage emission norms, test cycles, test procedures, OBDII etc</li><li>3. Amendment 1 to AIS 137 (Part 2) – OBDII test procedures have got published</li><li>4. Amendment to AIS 129 to be published soon</li></ol> | Three Wheeler Group | Government and Membership |



## Connected Vehicles Group

Recently, the need to develop intelligent mobility solutions for sustainable transportation has been recognized globally. As we all know that India is the largest manufacturer of two-wheelers in the World and the 5<sup>th</sup> largest market for cars, at present, the country is grappling with mobility challenges in the form of road safety, traffic congestion, fuel consumption issues, etc. in cities where concentrated growth has taken place over the years. Although OEMs in India have the necessary technology available with them to provide mobility solutions, India needs to develop the necessary policy and infrastructure along with incorporating the learnings from developed nations and also making all stakeholders joining hands together. Greater mobility with seamless last mile connectivity continues to be a governing factor that contributes towards the economic growth of the country.

As we are moving at a pace faster than ever, SIAM's Connected Vehicles Group acts as a forum to discuss the upcoming megatrends on the Internet of Things, Shared Mobility and Autonomous Vehicles for its members and deliberates the overall progress on such subjects. Such disruptive technologies are expected to lead to the successful introduction and rapid penetration of new mobility solutions.

SIAM's Connected Vehicle Group has formulated the Roadmap for the Introduction of ADAS Technologies in India. This roadmap was presented to the Bureau of Indian Standards as an India-wide recommendation for ADAS introduction in December 2020. It is also important that a standard framework for back-end (end to end) connectivity is developed. To streamline the aforementioned aspects, the group has held frequent interactions in the past with policymakers and other stakeholders.

The Group also pursued de-licensing of radio frequencies for automotive purposes that would act as enablers for

bringing in advanced V2X features such as collision avoidance, E-call, lane departure prevention, etc. Department of Telecomm was also requested by SIAM to integrate emergency number 112 at the National Level.

On the Machine to Machine (M2M) communication front, a detailed submission was made by SIAM to Dept. of Telecomm. regarding the registration process of M2M service providers and issues involved in the deployment of embedded SIM. Additionally, in order to spread more awareness among customers on M2M SIMs in cars and, especially at a time of ownership transfer, SIAM is also pursuing the addition of M2M SIM-related parameters on the Vahan portal and ensuring electronic linking of the same to the vehicle.

SIAM Connected Vehicles group members also interacted with MeitY to understand the requirements of CRO (Compulsory Registration Order), Phase V that notified automotive components such as camera, microphone, and speaker. Based on concerns raised by SIAM on the applicability of CRO on automotive parts as the automotive speakers are not Bluetooth / smart speakers and microphones are not wireless, all these components being used after wired connect, MEITY clarified that such components are not part of CRO; they also issued a clarification giving some relief on the applicability of CRO on cameras.

SIAM Connected Vehicles Group members also interacted with the Department of Telecom (DoT) requesting necessary relaxation from the MTCTE (Mandatory Testing and Certification of Telecommunication Equipment) requirements. On the request of SIAM, DoT postponed the MTCTE applicability by one year and issued clarifications on the exemption of genuine spare parts as replacements for CBUs whether for imported or locally manufactured vehicles.



## Annual Report Card (2021-22)

| S.No. | Deliverable  | Measures  | Owner                    | Stakeholder               |
|-------|--|---|--------------------------|---------------------------|
| 1     | Policy Advocacy for formulation of guidelines/policies and ease implementation hurdles in Automotive Regulations | <ol style="list-style-type: none"> <li>1. Established OEM authorised VLT suppliers on Vahan portal.</li> <li>2. Obtained much-needed clarification from DoT on MTCT on automotive parts.</li> <li>3. Regularly representing at TED, BIS Forums on Traffic Management, Cyber Security &amp; Functional Safety, ADAS, Bus ITS, Role of ITS in Autonomous, VTS and TPMS.</li> <li>4. De-licensing of radio frequencies for automotive purposes – ongoing</li> <li>5. Linkages of M2M SIMs related parameters to vehicles over Vahan portal – ongoing.</li> <li>6. Under study – National Transportation Policy</li> <li>7. Integrate emergency number 112 at the National Level - Ongoing</li> </ol> | Connected Vehicles Group | Membership and Government |



# Styling & Design Group

The SIAM Group has been actively working towards capacity and capability building in the area of Automotive Styling & Design in the country. The broad objective of the Group is to bridge the gap between Industry and Academia through information exchange amongst various stakeholders like Students, Academicians, Professional from Indian Design community and their Global counterparts.

The Group remain engaged with Academia throughout the year and organised several activities for the benefit of design students.

16<sup>th</sup> edition of Styling & Design Conclave and 14<sup>th</sup> edition of the Automotive Design Challenge (ADC) was organised on 24<sup>th</sup> February 2022, through an online platform. Several eminent speakers from India and abroad participated in the event and shared their views and engaged with the audience. The theme of the conclave was – “Reimagining Mobility for the new Normal”. The event witnessed participation form more than 100 delegates.

This year's conclave has provided diverse perspectives on how the future of shared mobility will be for the Gen-Glass and how the passenger experience will evolve against the backdrop of various transformations happening in the auto sector. The conclave witnessed budding automotive designers showcasing the future of automobile styling in India.

The virtual conclave showcased the select top-five presentations of the Automotive Design Challenge (ADC) 2021 from design students, depicting new ideas on the future of Automotive Design. SIAM had initiated the challenge to provide a platform to the aspiring Automobile Designers to exhibit their talent and capitalize on the opportunities for future. The top-three winners of the ADC 2021 were announced during the conclave.

“Reimagining Multi-Use Transport for Small Group” was the theme of the ADC 2021 and its final evaluation took place during the Styling & Design Conclave. Students from several design colleges in the country participated in the competition and submitted their entries.

Following are top -3 winners of ADC 2021:

- First prize: Mr Avishkar Kumbhar from National Institute of Design
- Second prize: Mr Satya Sai Manoj from National Institute of Design
- Third prize: Mr Abhishek Ayush from IDC-IIT Bombay

It is an endeavour of the Group to work closely with the Design community in the country and take Automotive Design to the next level.

## Annual Report Card (2021-22)

| S.No. | Deliverable  | Measures   | Owner                  | Stakeholders           |
|-------|--|--|------------------------|------------------------|
| 1     | To promote Automotive Styling & Design domain in the country | 1. 16 <sup>th</sup> edition of Styling & Design Conclave was organised by SIAM in consultation with group members<br>2. Organised 14 <sup>th</sup> edition of Automotive Design Competition (ADC) for design students. Top-3 students were awarded | Styling & Design Group | Membership and Society |



# 16<sup>th</sup> STYLING & DESIGN CONCLAVE

Reimagining Mobility for the New Normal

24<sup>th</sup> February 2022

2 PM to 5 PM

Virtual

## OPENING SESSION

### WELCOME ADDRESS

**Mr Rajesh Menon**  
Director General,  
SIAM



### SETTING THE CONTEXT

**Mr Malo Le Masson**  
Chairman, SIAM Styling & Design Group and Head – Strategy, Hero MotoCorp



### KEYNOTE ADDRESS

**Mr David Carvalho**  
MD, Link2Concept and Former VP – Design, Pininfarina\*



## THEME SESSION

**Mr Aurelien Doisy**  
Head – European Design,  
TATA Motors



**Prof Pradeep Gururaj Yammiyavar**  
IIT Guwahati



**Mr Adrian Sellers**  
Head – Custom Motorcycle Design Program, Royal Enfield



**Mr Amin Thakker**  
Chief Designer, Transportation Design & Engineering and HMI, TATA Elxsi

## Presentation by Top 5 Finalists of Automotive Design Challenge 2021 ADC 2021 Award Ceremony

### CLOSING REMARKS

**Mr Nilesh Kirtane**  
Head – Design, Honda Motorcycle & Scooter India (HMSI)



\*Invited



# Frontier Technology & Innovation Group

India is a rising economic power and an important automotive hub of innovations. India's private sector is fast improving the quality of its products and services supported by scientific and technological innovations and is rapidly expanding global presence. The key aim of Frontier Technology and Innovations Group (FTIG) is to foster and recommend measures to encourage industry-oriented innovations and expand the skills and knowledge base in cutting-edge technology in the area of vehicle design, engine technology, treatment technology, sensors, batteries, alternative fuels, powertrain, vehicle configuration etc. The Group will establish strong networking with R&D institutions in the country.

With a focus on sustainability and decarbonization, the Government of India announced National Green Hydrogen Mission (NGHM) on August 15, 2021. The mission aims to aid and support the government in meeting its climate targets and to make India the global hub of Green Hydrogen production and export. Ministry of New and Renewable Energy (MNRE) under the National Green Hydrogen Mission constituted a Joint Working Group under the chairmanship of Secretary, MNRE to review the current regulatory framework, and it comprised of relevant government agencies,

industry stakeholders and experts. Accordingly, three thematic sub-groups were constituted by the Joint Working Group to work on the different aspects of standards & regulatory framework under the mission in a time-bound manner. SIAM is leading the subgroup III: Hydrogen fuelled Mobility Applications.

Accordingly, SIAM FTIG has formulated six panels: Technology & Interface, Commercial vehicles, Passenger cars, 2W / 3W, Marine & Gensets and Locomotive & CEV and the group is putting all its effort in meeting the objectives and timelines as stipulated by MNRE. The group is also in active engagement with various stakeholders such as the Indian Construction Equipment Manufacturers Association (ICEMA), Indian Diesel Engine Manufacturers Association (IDEMA), Indian Register of Shipping (IRS), Indian Oil Manufacturing Companies and Railway Board for drafting recommendations on regulations, codes, and Standards for transition towards Hydrogen Mobility.

The Group is also involved in exploring new areas of technologies in different aspects of the vehicles and automobile industry, motivating innovation, and supporting adoption of the most relevant and viable technology options.

## Annual Report Card (2021-22)

| S.No. | Deliverable   | Measures  | Owner                                  | Stakeholder               |
|-------|---|---|--|---------------------------|
| 1     | Establishing a robust framework of Regulations, Codes and Standards (RCS) related to hydrogen | <ol style="list-style-type: none"><li>1. Deliberations with MNRE, DPIIT, PESO, BIS, Testing Agencies for defining regulatory framework</li><li>2. Engagement with ICEMA, IDEMA, IRS and Railway board for understanding regulations scenario of CEVs, Gensets, Marine &amp; Locomotive applications related to hydrogen</li><li>3. Engagement with QUAD Members (Australia, Japan &amp; US) for understanding hydrogen regulations scenario.</li><li>4. Identification of global, national regulations, codes &amp; standards (RCS) and creation of online RCS library for hydrogen</li></ol> | Frontier Technology & Innovation Group | Membership and Government |





SIAM Participation in Quad Workshop on Regulations, Codes and Standards (RCS) for Clean Hydrogen Organised by MNRE



SIAM Convening Subgroup III (Hydrogen fuelled Mobility Applications) as constituted by MNRE



# Service & Inspection, Maintenance & Certification Group

To strengthen the cause of consumer safety and reduce road accidents in the country, the Ministry of Road Transport and Highways notified rules for mandatory recall of defective vehicles by the auto manufacturers. The rules came into effect on April 1<sup>st</sup> April 2021. SIAM Service & IMC Group has been working very closely and leading the deliberations on the Vehicle Recall Portal with MoRTH, ICAT and NIC. During the formulation of the portal, a small group under MoRTH worked towards creating a customer complaint portal and developed FAQs to make it easy for vehicle owners on queries related to the circumstances under which a vehicle would be recalled.

A committee is constituted for conferring statutory status to the 'Right to Repair' under the statutory framework for the Consumer Protection Act, 2019. The chairmanship of the committee is with the Ministry of Consumer Affairs comprising of various stakeholders including SIAM. The Group is actively engaging with the Ministry to evolve a code that is in the best interest of the Nation. With supportive legislation bringing service providers under its ambit on certain compliances to be

eligible to service, keeping in mind Safety, Environment & Security, the Right to Repair will be a win-win both for producers and consumers.

The recent spurt of vehicle fire incidences in all vehicle categories & fuels has resulted in Suo motu intervention from Government. Considering these instances, the government is initiating various actions to evaluate & curtail such incidents. The government has asked ICAT to create an elaborate online portal on MoRTH website for collecting the data of vehicle fire incidents in view of unavailability of comprehensive study / data related to vehicle fire incidents.

This Group regularly interacts to discuss the after-sales service issues and best practices like dry washing, proposing ideas to create awareness about fire hazards due to the use of non-approved fitments in automobiles & compliance of service workshops with environmental norms. World environment Day is another platform through which the SIAM Service and IMC group actively advocates sustainability and environment awareness via the vast dealer networks throughout the country.

| Annual Report Card (2021-22) |  |  |   |   |
|------------------------------|--|--|---|---|
| S.No.                        | Deliverable  | Measures   | Owner   | Stakeholder                                   |
| 1                            | To combat issues related to maintenance procedures and on-ground hurdles faced by OEMs post the sale of vehicles | <ol style="list-style-type: none"><li>Actively contributing in the development of the Vehicle Recall Portal under the aegis of MoRTH</li><li>As a proactive step, SIAM engaged in dialogue with its members to educate their customers on safe vehicle usage and maintenance practices - ongoing</li><li>Actively monitors various guidelines issued for Service Centres to carry out operations in an environmentally sound manner.</li><li>Provision for 'Right to Repair' - ongoing</li></ol> | Service & Inspection, Maintenance & Certification Group | Society, Government and Membership<br>Society |



## Two-Wheeler CEOs Council

The domestic sales for the Two-Wheelers in India stood at 13.47 million units in 2021-22, which was even lower than 2020-21 sales. The Two-Wheeler segment is continuing to see low demand. In the four months from April 2022 to August 2022, the Two-Wheeler segment posted sales of 6.66 million units, which is even below the numbers sold during the same period in 2016-17, i.e. about 6 years ago. The dismal performance of the Two-Wheeler segment is primarily due to low marked demand on account of high prices of the vehicles due to high input cost, new mandatory regulations and also due to the recent hike on the 5-year Long-term 3rd Party insurance premium.

SIAM Two-Wheelers CEOs Council had several rounds of discussions to develop an Industry proposal for

recommending timelines for implementation of OBD II for BS 6 Two-Wheelers in two phases.

SIAM Two-wheeler members also discussed the possibility of introducing vehicles compatible to higher blends of Ethanol and also introduce Flex Fuel Vehicles. SIAM Two-Wheeler members are committed to introduce and develop at least one model of Flex Fuel Vehicle, per company, having its manufacturing in India, Accordingly, expeditious timelines for Proof of Concept, Working Proto, Toolled up Pilot and finally mass Production of one model per manufacturer from September / October 2024 will be undertaken by the Industry.



SIAM Two Wheeler CEOs Council Meeting



## Three-Wheeler CEOs Council

Indian three-wheeler market is forecast to grow at double-digit CAGR as the need for last-mile connectivity is rising. Three-wheelers provide an inexpensive & eco-friendly alternative to taxis with better fuel economy. The three-wheeler industry segment is linked closely with most crucial (mass) sections of economic activities in India. Although India is the world's foremost producer, consumer, and exporter of three-wheelers, the segment has witnessed a major de-growth during pandemic times.

Despite the challenges faced by the Industry, the volumes of 3W have gone up over the last year due to the significant efforts of the industry. Last year 2,61,000 three-wheelers were sold in the country which is a 16% increase in sales compared to the previous year's sales of 2,19,000.

A gigantic 70% growth over last year's Q1 sales is reflected by sale of 54,000 units this Q1. The goods carrier segment also shows a positive picture with sales of 22,000 units, which is 59% higher than previous year numbers. The 2021-2022 export figures of more than 5,00,000 units also show a growth of approximately 21.4%.

While new sales strategies are required to ensure segment comeback, the council is focusing on demand generation through infrastructure development by government around multiple fuels. Thanks to the customer centric financing models, self-employment opportunity schemes, GST and other tax benefits provided by the Government, E-3Ws have penetrated the market through many small players who have garnered competitive sales figures. Automotive

Industry is completely committed toward exploring the new powertrain technologies and create a concrete roadmap for its implementation by year 2027. However, the industry intends to have a very strong stance against fuel specific discrimination by the governments at central and state level. Council is of opinion that all the technologies shall be treated at par unless it is BS VI compliant. Adequate support shall be taken to open permits for 3W without discrimination across states like Karnataka, Delhi and Maharashtra, etc. and providing requisite benefits.

The decisions and suggestions of the Council have always motivated SIAM to move forward by introducing global safety and emission regulations. Two phased implementation of the OBD can be counted as one of the most prominent achievements for the Council (OBD 2 implementation got released in draft form by MoRTH on 29<sup>th</sup> June 2022).

3W council is in line with Government's vision on the scrappage policy introduced for this segment. The council believes that a fitness based scrappage policy should be introduced for the segment. According to the council, no exemption on technical requirements i.e. HMR & RRR requirement spelt out in AIS 129 should be there. However, a suitable time frame needs to be defined so that industry can align themselves with the requirements.

The council met several times in the year and is working towards benefit of the 3W industry by defining a clear roadmap of engagement and decisions to move forward.



## Annual Report Card (2021-22)

| S.No. | Deliverable  | Measures   | Owner                       | Stakeholder |
|-------|--|--|-----------------------------|-------------|
| 1     | To review the industry performance and create actions for Demand creation.             | <ul style="list-style-type: none"> <li>a. Identified the measures for fuel specific roadmap under infrastructure spending. Developing Terms of reference for creating roadmap for alternate fuels like Ethanol etc.</li> <li>b. Support from MoRTH on the following issues <ul style="list-style-type: none"> <li>• Opening of permits</li> <li>• No discrimination based on the fuel type i.e. diesel</li> <li>• Reduction in the road taxes, registration fee etc.</li> <li>• Deferment of regulations</li> <li>• Priority sector lending</li> </ul> </li> </ul>                     |                             |             |
| 2     | Stop of Unauthorized / unregistered E- rickshaw operation                              | <ul style="list-style-type: none"> <li>a. To make a formal representation to MoRTH to advise states to strictly enforce operations of only registered and authorised e-rickshaws. Any unauthorized vehicle sale in place of an authorized vehicle sale should be taken up strongly. Testing agencies may also be directed to explore stricter norms for Conformity of Production for these vehicles in the interest of passenger and vehicle safety.</li> <li>b. There should not be multiple standards for compliance by different entities, a level playing is necessary.</li> </ul> | Three-Wheelers CEOs Council | Membership  |
| 3     | Maharashtra Transport Committee recommendation for electrification of 3W               | <ol style="list-style-type: none"> <li>1. Retro fitment of 3W with electric motors</li> <li>2. Battery swapping mechanism to be developed for making it financially viable to owners</li> <li>3. Extension of registration to be considered for retrofitted 3W.</li> </ol>   |                             |             |
| 4     | Provide corrections/ additions to the nodal ministry in the scrappage policy announced | <ul style="list-style-type: none"> <li>a. Identify the challenges of compliance</li> <li>b. Reduction of incentive on part of the manufacturer to be economically rewarding for stakeholders</li> </ul>  |                             |             |



SIAM Three Wheeler CEOs Council Meeting



# Passenger Vehicle CEOs Council

The domestic sales for the Passenger Vehicles in India stood at 3.07 million units in 2021-22. From April 2022 to August 2022, Passenger Vehicle Industry posted sale of 1.49 million units on the backdrop of slight improvement in availability of semi-conductors. Passenger Vehicle segment also exported 0.58 million units in 2021-22, which is a 43% increase compared to 2021. In the 5 months from April 2022 to August 2022, 0.27 million units of Passenger Vehicles were exported posting a growth of about 17% from the previous year for the same period.

Passenger Vehicle manufacturers deliberated on introducing Flex Fuel Vehicles, capable of operating on

varying blends of Ethanol. Considering the complexity of product mix and volume constraints for Passenger Vehicles, the Council decided that some manufacturers would bring one model of Flex Fuel Vehicle by 2025 / 2026 and multiple models per manufacturer would be available by April 2027.

The Council also deliberated on the implications of providing 6 Air Bags, as being proposed to be mandated from 1<sup>st</sup> October 2022. It was also suggested that consumer awareness through Bharat New Car Assessment Program through star rating of each vehicle model could also be considered for Passenger Vehicles



SIAM Passenger Vehicle CEOs Council Meeting



# Commercial Vehicle CEOs Council

COVID years from 2020-22 saw a slump in the Commercial Vehicle Industry, which necessitated the CV Council to identify measures to prop-up the demand of vehicles in this segment. The implementation of lockdown and movement restrictions implemented during the pandemic resulted in plummeting sales of these vehicles across various countries, creating challenges for the commercial vehicle industry. “The CV industry is on a recovery supported by replacement demand, recovery in economic activity and government spending on infrastructure. In the bus segment, growth was supported by the re-opening of schools and offices and the gradual return to normalcy after the pandemic. Intermediate commercial vehicle volumes also grew in double digits with a shift to more CNG-powered vehicles, driven by the e-commerce sector. Specific CV segments are on an upward trend with resumed infrastructural and logistical activities gaining prominence. The small commercial vehicle segment reported a single-digit growth as chip shortages caused some production issues. Increased thrust on infrastructure and rural development by the Central Government is likely to drive demand in the CV industry. But, soaring fuel prices due to external factors is a matter of concern.

CV industry's growth in 2021-22 was supported by increased activity in road construction, mining and improved infrastructure spending by the Central and State Governments apart from the boom in the e-commerce sector. Commercial Vehicle Market size is likely to witness substantial growth over 2021-2027. This growth is driven by the extensive development of road infrastructure networks in countries like India, to facilitate seamless transportation and travel. Also, the rapid growth of e-Commerce and the subsequent expansion of the logistics sector will further amplify the commercial vehicle demand.

To further forecast the demand measures, the council constituted a study “**City and Fuel Specific Roadmap under Infrastructure Spending**” for streamlining and strengthening the growth of CV segment. The intent of the study was to discuss multiple power train

technologies pushed by the Ministry of Petroleum and Natural Gas with appropriate scenario development. The study is complete. Further, to have larger interventions in the road logistic sector, the Council approved the study for ‘**Identification of interventions under National Logistics Policy & MMLP development framework to improve road logistics efficiency**’. The study will identify the key factors to focus on for improvement of the road logistic sector and subsequent intervention with the government to identify the area of engagement for improvement of CV share in the overall national freight. The study is expected to be completed by September, 2022.

With the rollout of the Fuel efficiency norms under the Energy Conservation Act, 2001 announced to be implemented from April, 2023, with the exclusion of tippers, the norm is in line with the request of the council for deferment till 2023. Further, the CV council constituted a specific group for development of Bharat VECTO tool to define the next stage of FE regulations which shall require engagement of the CV industry with the test agencies in future.

The CV CEO council tried to bridge the impasse on ease of doing business and enhance safety with creation of a level playing field by the OEMs and the private bus body builders. The representation from the council to the Hon'ble Minister suggested that the level playing field needs to be provided and the discrimination related to CMVR regulation, Type approval certification and Differentiation due to enforcement needs to be addressed. Similarly, CV industry's products are specific / niche and have a small volume. Therefore, trigger percentage needs to be looked at differently for this segment. The process is under consideration of MoRTH.

The council has met several times in the year and has been working towards promoting the interest of the CV industry by defining a clear roadmap of engagement and decisions to move forward.



## Annual Report Card (2021-22)

| S.No. | Deliverable  | Measures   | Owner                           | Stakeholder |
|-------|--|--|---------------------------------|-------------|
| 1     | To review the Industry performance and create actions for Demand creation.                     | <ul style="list-style-type: none"> <li>a. Completed the study: "City and fuel specific roadmap under infrastructure spending". The report has been developed with various scenarios of alternate fuels availability and powertrain development.</li> <li>b. To engage with the Ministry of Commerce for intervention required in the National logistic policy and Multi-Modal logistic park for increasing penetration of the commercial vehicle segment. The study is in progress.</li> </ul> |                                 |             |
| 2     | Measures taken to create a level playing field between OEM / Non-OEMs for compliance for buses | <ul style="list-style-type: none"> <li>a. Engaged with Government to provide level playing regulations for every stakeholder, in line with the spirit of the regulation and to ensure safety of the passengers.</li> </ul>   | Commercial Vehicles CEO Council | Membership  |
| 3     | FE regulations for Heavy and Light duty vehicles.  | <ul style="list-style-type: none"> <li>a. With sustained interventions, the regulations will be applicable from April 2023 onwards.</li> <li>b. Created specific study group to work closely with the test agencies in developing of Bharat VECTO tool for future Fuel efficiency compliance.</li> </ul>   |                                 |             |
| 4     | Provide improvement to the Vehicle recall policy.  | <ul style="list-style-type: none"> <li>a. Emphasised to the government that CV segment is specific/ niche and has small volume, therefore, trigger percentage needs to be looked differently for this segment.</li> </ul>  |                                 |             |



SIAM Commercial Vehicle CEOs Council Meeting



## Trade Fair Council

Auto Expo -The Motor Show was scheduled for the year 2022. Due to the Covid pandemic situation during that period, the SIAM Executive Committee and Trade Fair Council decided to postpone the show by one year.

The next Auto Expo - The Motor Show will now be held from 11<sup>th</sup> to 18<sup>th</sup> January 2023 at the India Expo Mart, Greater Noida, Uttar Pradesh.

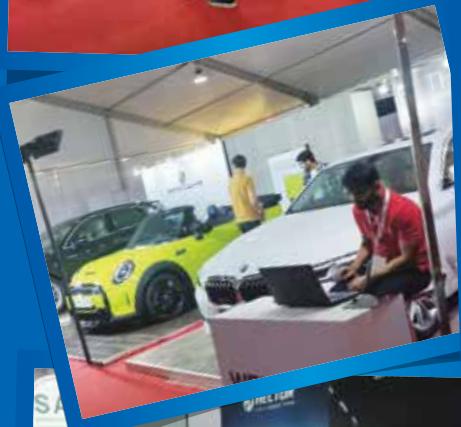


**13 - 18 JANUARY 2023**  
**INDIA EXPO MART, GREATER NOIDA, UTTAR PRADESH, INDIA**



**SIAM** *Building the Nation, Responsibly*

## MP Motor Show



# Initiatives of SIAM – SAFE

## Introduction

India recently marked its 76<sup>th</sup> Independence Day. In the last 75 years, the growth and development of the Indian road transportation sector has been remarkable. The growth in the number of vehicles on the road, different modes of transportation (both public and private), the road network straddling the length and breadth of the country, the number of players in the automotive ecosystem, automotive technology, the regulations governing the sector and the allied sectors, each has a story of tremendous progress amidst several challenges.

The twin challenges of clean air and safe motoring, while not insurmountable, are certainly ones that need unfailing attention and interventions given the growth of the sector. Over the years, all three arms of the State- Legislature, Executive and Judiciary have played a critical role in creating, amending and enforcing policies, regulations and deployment of solutions to address the challenges of environmental pollution as well as road traffic crashes and fatalities.

As government statistics suggest, road accidents are a leading cause of hospitalizations, deaths, and disabilities in the country. The major causes of accidents on Indian roads are over-speeding, lane indiscipline, jumping red lights, drunk driving, use of mobile phones, and avoiding the use of seat belts and helmets. On average, about 1,50,000 people perish due to road accidents in India annually, which emphasizes the severity and calls for ideas and initiatives to prevent road accidents.

## Some notable interventions for making Indian roads safer

Owing to the continuous efforts of MoRTH, SIAM as well as other concerned organizations who have been working together towards the common goal of road safety, the total number of road accidents has been declining since 2016 except for a marginal increase registered in 2018. The number of road accidents in 2020 has decreased by 18.46% compared to 2019.

The Hon'ble Supreme Court of India had set up the three-member panel under Justice K.S. Radhakrishnan on road safety in April 2014 which recommended the ban on the sale of alcohol near highways to restrain drunk driving to an extent. Adding to that, the panel also took the following steps :

- It directed states to improve enforcement on wearing helmets for two-wheeler riders.
- It stressed the importance of creating awareness among people on road safety rules.

The Hon'ble Supreme Court in 2017, issued several directives with regard to road safety that, *inter alia*, included:

- The constitution of a State Road Safety Council
- The setting up of a road safety fund
- Notification of a road safety action plan
- The constitution of a district road safety committee
- The establishment of trauma care centres
- Inclusion of road safety education in the academic curriculum of schools

## About SAFE

SIAM has partnered with various stakeholders and set up the Society for Automotive Fitness & Environment (SAFE) for carrying out various public policy activities in the field of road safety and the environment. SAFE has been organizing its Annual Convention in various states across India with relevant stakeholders in the road safety and the environment ecosystem, with an objective of disseminating information about the best practices, adopted nationally and internationally for the improvement of road safety and a cleaner environment. Since the inception of the pandemic, SAFE Annual Convention was organized virtually. The core objective of SAFE aims to enhance the Five 'E's' – Environment, Education, Enforcement, Engineering and Emergency services in the direction of road safety and a clean environment. SAFE's aim was to make an overall impact in the direction of road safety and a cleaner environment by inculcating safer driving habits and road discipline



among people, facilitating the engineering of safer vehicles and advocating safer roads and infrastructure for reducing casualties. SAFE's and SIAM's leadership and members have been involved in initiatives taken by some states to strengthen road engineering and enforcement projects.

### **Towards reducing the environmental impact of automobiles**

As regards to the environment, Stockholm Declaration in 1972 pushed India toward greater focus on ensuring environmental protection. The Ministry of Environment, Forest & Climate Change (MoEF&CC) instituted in 1985, is the apex body to regulate and ensure environmental protection in India. A constitutional amendment incorporated Article 48A and Article 51A (g) under Directive Principles of State Policy and Fundamental Duties, respectively, to strengthen the environmental laws in India. The MoEF&CC has created a well-evolved policy, legislative and institutional framework for the preservation and protection of the environment, forest, and biodiversity of the country.

In the environmental sector, SAFE is playing an influential role in taking initiatives towards mitigating pollution from the automotive sector as well as creating awareness amongst stakeholders for taking informed decisions to prevent and control pollution.

### **Activities & accomplishments of SAFE towards making the environment greener and safer**

Throughout the year, knowledge-sharing has been at the core of our work, despite the inherent difficulties posed by remote working necessitated by the pandemic. SAFE and SIAM promptly developed new virtual capabilities for spreading knowledge to inspire everyone who wishes to replicate SAFE's work. Many organisations have replicated our initiatives and have advocated for environment and road safety. Associations like ATMA, ACMA etc. have initiated interactive knowledge-sharing sessions with SAFE.

### **SAFE Annual convention puts 5 E's – Environment, Education, Enforcement, Engineering, and Emergency care – of road and vehicular safety in the spotlight**

In a bid to strengthen multiple stakeholder sensitization efforts toward the environment and road/vehicular safety, the Society for Automotive Fitness &

Environment (SAFE), a SIAM initiative, conducted its 22<sup>nd</sup> edition of the 'SAFE Annual Convention 2021' on a virtual platform.

With the theme of Environment & Road Safety: Enforcement & Compliance", the convention witnessed the participation of policymakers and bureaucrats from the central and state governments as well as the industry leaders, scholars and experts on the subject, to deliberate upon the pertinent environment and road safety challenges from the lens of regulation, enforcement, technology and environment.

The inaugural session was led by Mr. Rajesh Menon, Director General, SIAM. He read out the message sent by the Hon'ble Union Minister of Road Transport & Highways, Shri Nitin Jairam Gadkari. The Hon'ble minister congratulated SIAM and SAFE on the initiative and its participants and explained that road safety and the environment is the need of the hour and hence every stakeholder should come forward to resolve it.

Guest of Honour, Mr. K C Gupta, Additional Secretary, MoRTH, Commenting upon the road accident statistics, said "We (India) account for 11% of road deaths in the entire world, although we have only 1% of world vehicles in India. The US has 4.6 times higher road accidents than India, but when it comes to the number of deaths due to road accidents, their fatalities are 25% of India. India ranks high in road accident fatalities. This is a major concern for all of us and needs an immediate intervention of all stakeholders."

Guest of Honour, Mr. Rajesh Kumar Singh, Principal Secretary - Transport, Government of Uttar Pradesh, said "The matter of road accidents and fatalities cannot be resolved by enforcement solely. There are many factors responsible for these avoidable deaths like, road quality, safety measures in vehicles, etc. Every state has to devise a specific policy to eradicate the problem. The most trusted policy to do so is to enhance awareness."

Sharing an international perspective, Dr. Sudeshna Mitra, Transport Specialist, World Bank, USA, said "Over 69% of accident fatalities happen in the age group between 18 to 45. In South Asia, the rapid growth of a heterogenous mix of traffic and vehicles is making the roads unsafe and vulnerable for road users. We should have targeted enforcement. There needs to be an institutional ownership of the problem."



Followed by the inaugural session, the first panel discussion on “Strong Leadership by Enforcement Authority and improved Road Safety Management” was graced by Guest of Honour Mr. K C Gupta and Mr. Rajesh Kumar Singh. Other distinguished Panellists were Mr. Niju Azhakesan, Director - Technical Support Group, Kerala Road Safety Authority; Mr. Praveer Ranjan, IPS, DGP, UT Chandigarh; Mr L P Padalia, IAS, Commissioner, Road Safety Authority, Gujarat; Dr K K Srinath Raghavan, Chief Manager, RGB Labs, IIT Madras; and Mrs. Nidhi Singh, Joint Transport Commissioner, Government of Rajasthan. The session was moderated by Mr. Pankaj Doval, Senior Editor, The Times of India.

The second session on “Contribution of Corporates & NGOs in Protecting Environment & Road Safety” had experts debating upon the role of companies and civil society in ensuring adherence to road safety measures. The session was graced by Justice A M Sapre, Chairman, Supreme Court Committee on Road Safety, along with distinguished participants including Mr. Ravi Avalur, Head of Premium Segment Business Unit, Hero MotoCorp Ltd; Mr. Kartikeya Joshi, Vice President, Uno Minda Group; Mr N M Kulkarni, Global Technical Manager, Shell Technology Centre; Mr Rod King, Love 30 global campaign, UK; Mr Satish Parakh, President, IRF India Chapter; Mr Ramashankar Pandey, CEO, Hella India. The session was moderated by Mr Parikshit Luthra, Associate Editor CNBC TV-18.

Sharing from his experience and close observation to the matter, Justice A M Sapre, Chairman, Supreme Court Committee on Road Safety, appealed to one and all to take the issue of road safety as a mission. He expressed that “over-speeding, driving under influence, using of mobile phones were some of the leading causes of road accidents and fatalities. Police departments should enhance the efficiency of enforcement.” He emphasized that “road accidents are not the will of god, so are avoidable.”

### **The third session had experts discussing on the “Latest Development on Air Quality**

Improvement”. It was attended by Prof. (Dr.) Adarsh Pal Vig, Chairman, PPCB; Dr. Sudheer Chinta Palli, Scientist -D, MoEF&CC; Mr. V Sridhar, Senior Director, Purchase, Honda Motorcycle & Scooters; Mr. Ravindra K U, Senior

General Manager, Bosch Ltd and Mr Sudipta Basu, Executive Director, ECMA. The session was moderated by Mr Sumantra Barooah, Executive Editor, Autocar Professional.

Experts mentioned how leapfrogging to BSVI was a landmark step undertaken by the Government and the industry. They further discussed the recent scrappage policy which is another effective measure preventing environmental degradation and how it is a crucial step in reducing accidents due to old, unfit and obsolete vehicles. The panel deliberated upon the challenges of affordability of new vehicles and emerging electronic and hybrid fuel variants. The 22<sup>nd</sup> SAFE Annual Convention witnessed deep discussions and knowledge sharing from all the participants.

### **Some of the knowledge-sharing events organized last year were:**

- 20 online lecture series on Environment & Safety were organised round the year for sharing best practices which can assist in formulating future strategies for the protection of the environment; completed in December 2022.
- Interactions and programmes jointly with Delhi, Uttar Pradesh, Orissa, and Uttarakhand with reference to HSRP, VLTD, Driver Training Institutes have been discussed and executed.
- Series on Road Safety Advocacy for Tyres- To further the efforts on spreading the awareness about tyre maintenance and its role in road safety SIAM & ATMA/ITTAC collaborated together to expand the outreach by organizing programmes for engineers representing the tyre industry and OEMs, students in universities, officials from different Govt. sectors and other stakeholders. Tri Virtual Series were organised:

1<sup>st</sup> Series on Tyre Care & Road Safety on 20<sup>th</sup> August 2021

2<sup>nd</sup> Series on Technology and Environmental Challenges on 24<sup>th</sup> September 2021

3<sup>rd</sup> Series on Regulations and Sustainability on 28<sup>th</sup> October 2021.

The programs were very well received by the participants and stakeholders.



## **The World Environment Day 2022**

The Indian automotive sector has been highly conscious of its responsibilities towards the environment and is an active partner in ameliorating the environmental quality in close coordination with the Government. The World Environment Day 2022 on the theme of 'Only One Earth', draws our attention towards playing our role effectively while living in perfect harmony with nature.

Aligned with the vision of sustainable mobility, the SAFE and SIAM conducted an International Virtual Conference on the theme "Sustainable Mobility: Ethanol Perspective" to commemorate World Environment Day 2022. The programme was graced by Shri Kaushal Kishore, Hon'ble Minister of State Ministry of Housing and Urban Affairs Government of India, and Mr. Ashwini Kumar Choubey, Minister of State for Environment, Forest and Climate Change and Consumer Affairs, Food and Public Distribution, Government of India, along with a distinguished panel of leaders from the automobile industry and conservation ecologists.

The panelists shared their rich experiences and recent advancements in respective thematic areas falling under the umbrella of sustainable mobility. The presentations made by the panelists were highly informative and thought-provoking. The outcome of this thematic session will facilitate attaining transport sustainability with minimal adverse impact on the environment, economy, and ecology that sustain all forms of life- ecosystems of the World.

**Launch of the Microbial Digester Report, 2021-22:**  
On the occasion of WED 2022, Shri. Pankaj Jain, Secretary, MoP&NG Government of India, launched the sustainability report on 10<sup>th</sup> August 2022 on the occasion of World Biofuel Day 2022, the report was painstakingly compiled by SIAM and SAFE.

## **SIAM -SAFE and its members observed World Environment Day 2022**

Under the SAFE-SIAM common banner, members initiated World Environment Day Drive on 5<sup>th</sup> June 2022. A month-long Social Media Campaign was executed by SIAM for promoting environmental initiatives undertaken by Indian Automobile Industry. Media officials visit was organised at Delhi for showcasing the best practices / environment protection projects carried out by our members e.g. FREE PUC camps at

their dealer / Service Stations, Tree Plantations, Free saplings to customers, Dry wash of vehicles, Painting competitions, etc.

## **Implementation of Sukh Da Saah (SDS) project**

**Sukh Da Saah (SDS-1):** SIAM had implemented SDS-1 project in 2018 in the larger interest of social cause by adopting best agricultural practices for improving air quality and minimizing GHG emissions. The project showcased environment-friendly in-situ technology in 9 villages of Patiala District on 7400 acres of agricultural land under 3 farmers' co-operatives in Jasso Majra.

**SDS-2:** The proposal of expanding the SDS project in 7 additional villages in Jasso Majra, Nabha was approved by the group in 2020 for expanding the implementation of in-situ technology. 1100 farmers were touched across 4900 acres of farmland in adopted villages under the expansion project. The outcome of the implementation of SDS-2 during 2020 reported an impressive 88 % reduction (as per ground data) in stubble burning within these additional 7 villages.

## **Microbial Digester Projects (2021-22)**

SAFE- SIAM, in collaboration with the Punjab State Pollution Control Board (PPCB), IPS Foundation, and Gujarat Life Sciences (P) Ltd., Vadodara has been executing Microbial Digester Project since 2019.

- (i) 2019-20: Microbial digester applied on 38 acres of farmland in 7 districts in Punjab,
- (ii) 2020-21: Microbial digester applied on 350 acres of farmland in 3 districts in Punjab,
- (iii) 2021-22 Microbial digester applied on 500 acres of farmland in 3 districts in Punjab,

The microbial project in 2021-22 covered 500 acres of farmland in 3 districts in Punjab and was highly successful and it substantiates the readiness of microbial digesters for commercial application in the field on a larger scale with help of the Government. It is the best available practical solution to prevent stubble burning in Punjab & NCR and reduce the emissions of air pollutants and GHGs.

## **Mass-media Blitz Campaign for Promotion of in-situ Crop Residue Management**

The education and awareness campaign was launched in 2018 and continued in 2021 from October-November



for 10 days each year through the PTC News and PTC Punjabi, the most popular TV channels in Punjab through video spots and TV debates to promote in-situ technology. 324 minutes Videos messages were shown from 25<sup>th</sup> October- 9<sup>th</sup> November 2021.

The TV campaign launched by SIAM consistently for the last 4 years, generated much-needed awareness and a positive impact on the masses, particularly on the farmers of the region. The annual campaign was watched by at least 60 lakh people in Punjab, Haryana, and NCR. The total viewership for the whole project duration is about 240 lakhs. (people who watched these SIAM videos at least once)

#### **Road Safety Awareness drives**

During the year 2021-2022, SIAM – SAFE supported Delhi Traffic Police in the area of educating school & college students on roads safety perspective including advocating reduced speeds, checking drunken-driving and distracted driving among youngsters. More than 1500 schools and 18 Lakh students were addressed with the messages of road safety.

- Round the year education session and competitions were organised for students and they were awarded with prizes. SAFE-SIAM & Delhi Traffic Police Road Safety Rolling Trophy was awarded to Govt. Sarvodaya Kanya Vidyalaya, Alipur, Delhi-36 by Commissioner of Police, Delhi on 18<sup>th</sup> February 2022.
- A series of road safety awareness offline and online training workshops were organized for school and college students and others.
- For enhancing the knowledge of road safety trainers of Delhi Traffic Police, a weeklong “Train the trainers” program for these officials was organised with the objective of imparting innovative ways of training students, drivers and public on road safety.
- SAFE had interacted with many stakeholders across relevant sectors round the year to take forward its agenda of promoting road safety and cleaner environment.

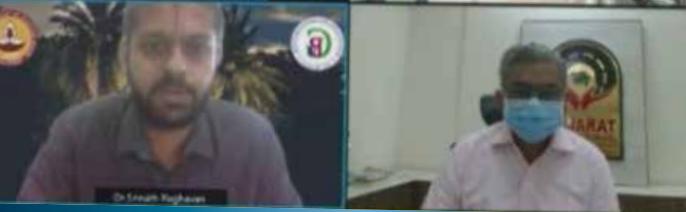
| Annual Report Card (2021-22) |   |  |                            |                         |
|------------------------------|---|--|----------------------------|-------------------------|
| S.No.                        | Deliverable   | Measures   | Owner                      | Stakeholder             |
| 1                            | Safety on road and fatality reduction (Policy intervention, awareness, training and education, accident data analysis and I, M & C) | SAFE & SIAM continued its interaction with State Governments on automobile technology.   | Initiatives of SIAM – SAFE | Membership              |
|                              |   | SAFE Annual Convention 2021 : SAFE convention puts 5 E's – Environment, Education, Enforcement, Engineering, and Emergency care – of road and vehicular safety in spotlight.   |                            |                         |
|                              |   | Environment protection campaign across the nation along with SIAM members and their dealer network was organized on 5 <sup>th</sup> June 2022, World Environment Day and a Conference 8 <sup>th</sup> June 2022 was organized on Sustainable Mobility: Ethanol Perspective" was also organized. 20 nos. virtual of Environment Lectures were organized from 2020-2021. |                            |                         |
|                              |   | Sukh Da Shah & Microbial Projects at Punjab  |                            |                         |
|                              |   | SIAM worked with IMMA's members to showcase best practices adopted worldwide in the area of two-wheeler safety   |                            |                         |
|                              |   | Along with Delhi Traffic Police, SIAM organized Road Safety School Virtual Outreach Programs, which included various competitions on road safety, for about 1,500 schools. Prizes were given to students and Rolling Trophy to the best school was given by Commissioner of Police, Delhi.   |                            |                         |
|                              |   | SIAM along with Delhi Traffic Police organized one week Train the trainers program for Delhi Traffic Police officials  |                            | Membership & Government |
|                              |   | SAFE-SIAM alongwith ATMA organized Tri Series on Road Safety Advocacy for Tyres  |                            | Membership & Society    |



## Glimpses of Expert Speaker at SIAM's Lecture Series



# SAFE Annual Convention 2021



नितिन गडकरी  
NITIN GADKARI



मंत्री  
सड़क यातायन एवं राजमार्ग  
मारत सरकार  
Minister  
Road Transport and Highways  
Government of India

## MESSAGE

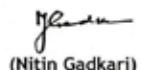
It gives me immense pleasure to note that Society for Automotive Fitness & Environment (a SIAM initiative) is organizing the 22<sup>nd</sup> SAFE Annual Convention 2021 on 'Environment & Road Safety: Enforcement & Compliance' through virtual platform on 17<sup>th</sup> September 2021.

I congratulate SIAM for organizing this initiative through the Society for Automotive Fitness & Environment (SAFE) for strong advocacy and creating mass awareness on the crucial aspect of sustainable mobility- the road safety, environment, and wellbeing of society. SIAM is an important partner in working together for the government's vision to adopt a holistic approach with the main thrust on the prevention and control of accidents, fatalities including environment through the globally accepted best practices.

The Government is working closely with all stakeholders including the automobile Industry for faster integration and adoption imperatives of sustainable mobility which is safe and affordable through five Es viz. (i) Education; (ii) Enforcement; (iii) Engineering; (iv) Environment and (v) Emergency care.

I hope that initiatives like SAFE will mobilize a movement towards safer vehicles with a commitment towards adopting best global practices for automobile engineering in India, to ultimately facilitate the goal for reducing at least 50% of road traffic deaths and injuries by 2025.

I extend my best wishes to the virtual 22<sup>nd</sup> SAFE Annual Convention 2021.



(Nitin Gadkari)

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# Glimpses of Road Safety Activities



# SIAM - ATMA Tri Series on Tyre Advocacy



**TRI-SERIES ON**  
**Road Safety Advocacy for Tyres**

**FIRST SERIES: Tyre Care & Road Safety**

20th August 2021 10 AM to 1 PM Virtual

Welcome Address  
Mr Prashant K Banerjee  
Executive Director, SIAM

Address By  
Mr Rajesh Menon  
Director General, SIAM

Address By  
Mr Anshuman Singhania  
Chairman, ATMA

Address by Guest of Honour  
Dr S S Gupta  
Sr Development Officer, DPIIT,  
Ministry of Commerce & Industry

Vote of Thanks  
Mr Rajiv Budhraja  
Director General, ATMA

**Technical Presentations Session: Tyre Care and Road Safety**

Moderator  
Mr V K Misra  
Past Chairman, ITTAC and Technical  
Director, JK Tyre & Industries

Moderator & Presenter  
Safety Durability and Failure  
Analysis of Tyres  
Mr Ravin Kurian  
Chairman, ITTAC and Sr GM, MRF

Tyre Care & Road Safety:  
Changing Perception  
through Awareness  
Mr Sudershan Gusain  
Sr Dy GM, Bridgestone India

Role of Tyre in Vehicle Design:  
Safety/Ride/Comfort  
Mr Deepak Sawkar  
Sr Advisor, Maruti Suzuki India

Tyre Testing: Impact on  
Safety & Reliability  
Dr B V Shamsundara  
Deputy Director (SHL), ARAI

Emerging Trends on the Requirements of  
Two-Wheeler Tyres  
Mr Harjeet Singh  
Chairman, JK Tyre & Industries



## Observing World Environment Day 2022



# Observing World Environment Day 2022



## SIAM - MoRTH Delegation at I&C Center, Chhindwara



# SIAM COUNCILS & GROUPS 2021-22

## A. COUNCIL ON INTERNATIONAL BUSINESS



**Chairman: Mr S S Kim**  
Managing Director & CEO,  
Hyundai Motor India Ltd.

### 1. INTERNATIONAL RELATIONS & TRADE POLICY GROUP



**Chairman: Mr Rahul Bharti**  
Executive Director,  
Corporate Planning & Govt. Affairs,  
Maruti Suzuki India Ltd



**Co-Chairman: Mr Ritesh Agrawal**  
Senior General Manager,  
Strategic Sourcing,  
Mahindra & Mahindra Ltd.

### 2. EXPORTS GROUP



**Chairman: Mr Rakesh Sharma**  
Executive Director,  
Bajaj Auto Ltd.



**Co-Chairman: Mr Anurag Mehrotra**  
Vice President, CV, International  
Business  
Tata Motors Ltd

## B. COUNCIL ON MARKET



**Chairman: Mr Anuj Kathuria**  
Chief Operating Officer,  
Ashok Leyland Ltd.



**Co-Chairman: Mr Veejay Nakra**  
President - Automotive Division,  
Mahindra & Mahindra Ltd.

### 1. VEHICLE CLASSIFICATION, SALES REPORTING & ANALYSIS GROUP



**Chairman: Mr R Ramakrishnan**  
Senior Vice President-  
Customer Care, CVBU,  
Tata Motors Ltd.



**Co-Chairman: Mr Narender Kukreti**  
Deputy General Manager  
(Corporate Affairs & Governance),  
Toyota Kirloskar Motor Pvt. Ltd.

### 2. LOGISTICS GROUP



**Co-Chairman: Mr Rakesh Sen**  
Vice President-SPOC,  
CRF & Inst Sales,  
Mahindra & Mahindra Ltd.



### 3. CSR & COMMUNITY SERVICES GROUP



**Chairman: Mr Sushant Naik**  
Global Head, Government &  
Public Affairs,  
Tata Motors Ltd.



**Co-Chairman: Mr D Balakrishnan**  
General Manager, Product Development,  
Ashok Leyland Ltd.



**Co-Chairman:**  
**Ms Devdatta Mulchandani**  
Head - CSR,  
Hyundai Motor India Ltd.

### C. COUNCIL ON TRADE FAIRS



**Chairman: Mr Gurpratap Boparai**  
CEO - Automotive Businesses Europe,  
Mahindra & Mahindra Ltd.

### 4. SERVICE & INSPECTION, MAINTENANCE AND CERTIFICATION GROUP



**Chairman: Mr Sanjoy Gupta**  
Vice President - Customer Care,  
Mahindra & Mahindra Ltd.

### D. COUNCIL ON ECONOMIC AFFAIRS



**Chairman: Mr. Gopal Mahadevan**  
Wholetime Director & CFO,  
Ashok Leyland Ltd.



**Co-Chairman:**  
**Mr Sriniwas Chakravarty**  
Head – Group Technical Service,  
SKODA AUTO Volkswagen India Pvt. Ltd.



**Chairman: Mr Sunil Kakkar**  
Sr. Executive Director - Supply Chain,  
Maruti Suzuki India Ltd.

### 5. GAS BASED MOBILITY GROUP (CNG & LNG)



**Chairman: Mr Ashish Chutani**  
Head – Government & Policy Affairs,  
Maruti Suzuki India Ltd.



**Co-Chairman: Mr Veeraraghavan R**  
Head - Strategic Sourcing,  
Mahindra & Mahindra Ltd.





**Co-Chairman: Mr Sachin Kulkarni**  
Chief General Manager – Sourcing,  
SKODA Auto Volkswagen India Pvt. Ltd.

#### 4. TAXATION PROCEDURAL GROUP



**Chairman: Mr D D Goyal**  
Executive Director – Finance,  
Maruti Suzuki India Ltd.



**Co-Chairman: Mr Jagadish Hegde**  
Director & Sr. Vice President,  
Isuzu Motors India Pvt. Ltd.



**Co-Chairman: Mr Rajeev Goyal**  
Chief Financial Officer –  
Auto & Farm Sector,  
Mahindra & Mahindra Ltd.

#### 2. ECONOMIC RESEARCH GROUP



**Chairman: Mr Narayan Swamy Raja**  
Managing Director,  
Toyota Financial Services India Ltd.

#### 5. DIRECT TAX GROUP



**Chairman: Mr Kausik Basu**  
Head (Accounting, Tax & Customs),  
Skoda Auto Volkswagen India



**Co-Chairman: Mr B Srinivas**  
Executive Vice President - Product  
Strategy & Purchasing,  
VE Commercial Vehicles Ltd.



**Co-Chairman: Mr Sanjeev Agarwal**  
Head – Taxation & Customs,  
BMW India Pvt. Ltd.

#### 3. TAXATION POLICY GROUP



**Chairman: Mr Vinod Aggarwal**  
Managing Director & CEO,  
VE Commercial Vehicles Ltd.

#### 6. FINANCE, LEASING & INSURANCE GROUP



**Chairman: Mr G. Parthasarathy**  
Sr. Vice President - Finance,  
TVS Motor Company Ltd



**Co-Chairman: Mr Rajesh Shukla**  
Head – Indirect Taxation,  
Tata Motors Ltd.



**Co-Chairman:  
Mr Surendra Srivastava**  
Chief Executive Officer,  
Maruti Insurance Broking Pvt. Ltd.



## 7 HUMAN CAPITAL GROUP



**Chairman: Mr R Anandakrishnan**  
Executive Vice President (HR & IT),  
TVS Motor Company Ltd.



**Co-Chairman: Dr N Saravanan**  
Chief Technology Officer,  
Ashok Leyland Ltd.



**Co-Chairman:**  
**Mr Stephen Sudhakar J**  
Senior Vice President – HR&GS,  
Hyundai Motor India Ltd.

## 1. ELECTRIC MOBILITY GROUP



**Co-Chairman: Mr Sushant Naik**  
Global Head, Government &  
Public Affairs,  
Tata Motors Ltd.

## 8. AFTERMARKET PARTS GROUP



**Chairman: Mr Yash Pal Sachar**  
Vice President (Corporate Affairs),  
Ashok Leyland Ltd.



**Co-Chairman: Ms Suman Mishra**  
Chief Executive Officer,  
Mahindra Electric Mobility



**Co-Chairman: Mr Anup Mohnani**  
Head – Parts Distribution,  
Stellantis



**Co-Chairman: Mr Vikram Gulati**  
Country Head & SVP  
(Extn. Affairs, CSR, PR, CG),  
Toyota Kirloskar Motor Pvt Ltd.

## 2. RECYCLING AND MATERIAL GROUP



**Chairman:**  
**Mr Shrikant Deshmukh**  
General Manager, Certification and  
Tech Regulations,  
Mercedes-Benz India Pvt Ltd.



**Co-Chairman: Mr M S Anandkumar**  
General Manager (R&D),  
TVS Motor Company Ltd.

## E. TECHNICAL COUNCIL



**Chairman: Mr K N Radhakrishnan**  
Director & CEO,  
TVS Motor Company Ltd.



### 3. SUSTAINABLE MOBILITY GROUP



#### Chairman: Mr Ashwath Ram

Managing Director,  
Cummins India Ltd.



#### Co-Chairman: Mr R Narasimhan

Head (Two-Wheeler Vehicle R&D),  
Bajaj Auto Ltd.



#### Co-Chairman: Mr Rajendra M Petkar

President and CTO,  
Tata Motors Ltd.

### 7. MANUFACTURING, INDUSTRY 4.0 AND EODB-MFG



#### Chairman: Mr Satyakam Arya,

CEO & MD,  
Daimler India Commercial  
Vehicles Ltd.

### 4. CONNECTED VEHICLES GROUP



#### Co-Chairman:

#### Mr Randeep Khokhar

Senior General Manager,  
Tata Motors Ltd.



#### Co - Chairman: Mr Mahesh Kaikini

Chief of Quality,  
Hero MotoCorp Ltd.

### 5. STYLING & DESIGN GROUP



#### Chairman: Mr Malo Le Masson

Head of Strategy,  
Hero MotoCorp Ltd.

### F. NATIONAL & INTERNATIONAL REGULATIONS COUNCIL



#### Chairman: Mr R S Sachdeva

Chief Operating Officer,  
VE Commercial Vehicles Ltd.

### 6. FRONTIER TECHNOLOGY & INNOVATION GROUP



#### Chairman:

#### Mr Pradeep K Thimmaiyan

Vice President (PE),  
Daimler India Commercial  
Vehicles Ltd.



#### Co-Chairman: Mr Abraham Joseph

Chief Technology Officer,  
Bajaj Auto Ltd.



## 1. EMISSIONS & CONSERVATION GROUP



**Chairman: Mr C V Raman**  
CTO,  
Maruti Suzuki India Ltd.



**Co-Chairman: Mr Suraj Agarwal**  
Operating Officer  
Honda Motorcycle and Scooter  
India Ltd.



**Co-Chairman: Mr R Velusamy**  
President- Automotive  
Technology and PD,  
Mahindra & Mahindra Ltd.

## 4. THREE WHEELERS GROUP



**Chairman: Mr V Pattabiraman**  
Associate Vice President,  
TVS Motor Company Ltd.

## 2. CMVR & SAFETY REGULATIONS GROUP



**Chairman: Mr Deepak Sawkar**  
Executive Advisor,  
Maruti Suzuki India Pvt. Ltd.



**Co-Chairman: Mr Arvind Kumbhar**  
Senior Manager (R&D),  
Bajaj Auto Ltd.



**Co-Chairman: Dr Venkat Srinivas**  
Sr. VP- Product Development,  
Mahindra & Mahindra Ltd.



**Chairman: Dr Tapan Sahoo**  
Executive Officer,  
Maruti Suzuki India Ltd.



**Co-Chairman:  
Mr J S Kutty**  
Sr. General Manager & Head-VATS,  
ERC,  
Tata Motors Ltd.



**Co-Chairman: Mr Anil Kumar C**  
Senior General Manager –  
Body & Trim Cars,  
Tata Motors Ltd.

## 3. TWO WHEELERS GROUP



**Chairman: Mr Harjeet Singh**  
Executive Advisor – Technical,  
Hero MotoCorp Ltd.



## G. COMMERCIAL VEHICLES CEOs COUNCIL



**Chairman: Mr Girish Wagh**  
Executive Director – CVBU,  
Tata Motors Ltd.

## J. PASSENGER VEHICLES CEOs COUNCIL



**Chairman: Mr Vikram Kirloskar**  
Vice Chairman,  
Toyota Kirloskar Motor Pvt. Ltd.

## H. THREE WHEELERS CEOs COUNCIL



**Chairman: Mr Diego Graffi**  
Chairman & Managing Director,  
Piaggio Vehicles Pvt. Ltd.

## K. SAFE – SOCIETY FOR AUTOMOTIVE FITNESS & ENVIRONMENT



**President: Mr Pankaj Gupta**  
Vice President (External Affairs & CSR),  
SKODA Auto Volkswagen India Pvt Ltd.

## I. TWO WHEELERS CEOs COUNCIL



**Chairman: Mr K N Radhakrishnan**  
Director & CEO,  
TVS Motor Company Ltd.



**Vice President: Mr D Balakrishnan**  
General Manager, Product Development,  
Ashok Leyland Ltd.



# SIAM EXECUTIVE COMMITTEE 2021-22

| COMPANY                                   | MEMBER                         | ALTERNATE MEMBER      |
|---|--------------------------------|-----------------------|
| Ashok Leyland Ltd                         | Dr N Saravanan                 |                       |
| Bajaj Auto Ltd                            | Mr Rakesh Sharma               | Mr Eric Vas           |
| BMW India Pvt Ltd                         | Mr Vikram Pawah                | Mr Vinod Pandey       |
| Cummins India Ltd                         | Mr Ashwath Ram (Co-opted)      | Ms Anjali A Pandey    |
| Daimler India Commercial Vehicles Pvt Ltd | Mr Satyakam Arya               | Mr Anshum Jain        |
| Fiat India Automobiles Pvt Ltd            | Mr Ravi Gogia                  | Mr Partha Datta       |
| Force Motors Ltd                          | Mr Prasan Firodia              | Mr Prashant V Inamdar |
| Hero MotoCorp Ltd                         | Dr Pawan Munjal                | Mr Vikram Kasbekar    |
| Honda Cars India Ltd                      | Mr Takuya Tsumura              | Mr Praveen Paranjape  |
| Honda Motorcycle & Scooter India Pvt Ltd  | Mr Atsushi Ogata               | Mr V Sridhar          |
| Hyundai Motor India Ltd                   | Mr U S Kim                     | Mr Puneet Anand       |
| India Yamaha Motor Pvt Ltd                | Mr Eishin Chihana (Co-Opted)   | Mr Ravinder Singh     |
| Mahindra & Mahindra Ltd                   | Mr Rajan Wadhera (Co-opted)    |                       |
| Mahindra & Mahindra Ltd                   | Mr Rajesh Jejurikar            | Mr Veejay Ram Nakra   |
| Maruti Suzuki India Ltd                   | Mr Kenichi Ayukawa             | Mr Rahul Bharti       |
| Mercedes-Benz India Pvt Ltd               | Mr Martin Peter Schwenk        | Mr Shekhar Bhide      |
| MG Motor India Pvt Ltd                    | Mr Rajeev Chaba                | Mr Jayanta Deb        |
| Piaggio Vehicles Pvt Ltd                  | Mr Diego Graffi                | Mr Saju Sudhakaran    |
| Simpson & Co. Ltd                         | Mr P S Rajamani                |                       |
| SKODA AUTO Volkswagen India Pvt Ltd       | Mr Piyush Arora                |                       |
| Tata Motors Ltd                           | Mr Shailesh Chandra            | Mr Sushant Naik       |
| Toyota Kirloskar Motor Pvt Ltd            | Mr Masakazu Yoshimura          | Mr Vikram Gulati      |
| Toyota Kirloskar Motor Pvt Ltd            | Mr Vikram Kirloskar (Co-opted) |                       |
| TVS Motor Company Ltd                     | Mr K N Radhakrishnan           |                       |
| VE Commercial Vehicles Limited            | Mr Vinod Aggarwal              | Mr B Srinivas         |

As on 01<sup>st</sup> August 2022



# PAST PRESIDENTS

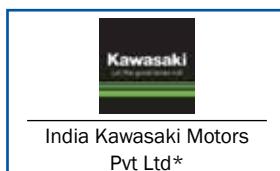
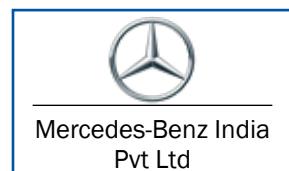
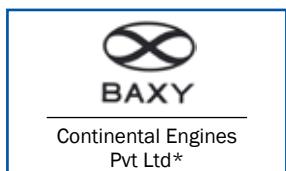
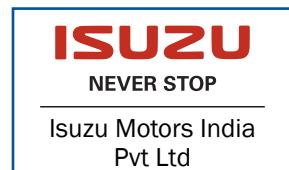
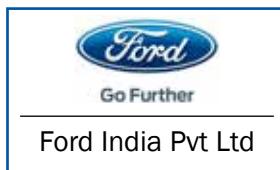
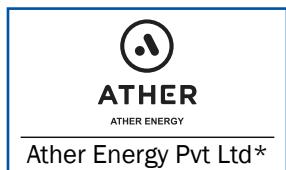
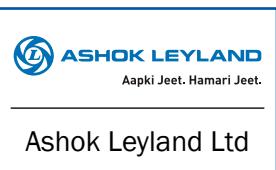
| YEAR               | NAME                      | COMPANY                                   |
|--------------------|---------------------------|---|
| 1960               | Mr Lalchand Hirachand*    | Premier Automobiles Ltd                   |
| 1961               | Sir L P Misra*            | Hindustan Motors Ltd                      |
| 1962 & 1963        | Mr A E L Collins*         | Ashok Leyland Ltd                         |
| 1964               | Mr Keshub Mahindra        | Mahindra & Mahindra Ltd                   |
| 1965 & 1966        | Dr M A Chidambaram*       | Automobile Products of India Ltd          |
| 1967 & 1968        | Mr K V Srinivasan*        | Standard Motor Products India Ltd         |
| 1969               | Mr A H Tobaccowala*       | TELCO Ltd                                 |
| 1970 & 1971        | Mr A Sivasailam*          | Simpson & Co. Ltd                         |
| 1972 & 1973        | Mr N K Firodia*           | Bajaj Tempo Ltd                           |
| 1974 & 1975        | Mr J E Talaulicar*        | TELCO Ltd                                 |
| 1976 & 1977        | Mr Rahul Bajaj*           | Bajaj Auto Ltd                            |
| 1978 & 1979        | Mr P N Venkatesan*        | Premier Automobiles Ltd                   |
| 1980 & 1981        | Mr C V Karthik Narayanan* | Standard Motor Product India Ltd          |
| 1982 & 1983        | Mr R J Shahaney*          | Ashok Leyland Ltd                         |
| 1984 & 1985        | Dr V Krishnamurthy*       | Maruti Udyog Ltd                          |
| 1986 & 1987        | Mr S L Bhatte*            | Hindustan Motors Ltd                      |
| 1988/89 & 1989/90  | Mr B De Souza*            | Mahindra & Mahindra Ltd                   |
| 1990/91 & 1991/92  | Dr Abhay Firodia          | Bajaj Tempo Ltd                           |
| 1992-1993          | Mr Subodh Bhargava        | Eicher Motors Ltd                         |
| 1993/94 & 1994/95  | Mr Vinod L Doshi*         | Premier Automobiles Ltd                   |
| 1995/96 & 1996/97  | Dr Brijmohan Lall*        | Hero MotoCorp Ltd                         |
| 1997/98 & 1998/99  | Mr V M Raval*             | TELCO Ltd                                 |
| 1999/00 & 2000/01  | Mr Venu Srinivasan        | TVS Motor Company Ltd                     |
| 2001/02 & 2002/03  | Mr R Seshasayee           | Ashok Leyland Ltd                         |
| 2003/04 & 2004/05  | Mr Jagdish Khattar*       | Maruti Udyog Ltd                          |
| 2005/06 & 2006/07  | Mr Madhur Bajaj           | Bajaj Auto Ltd                            |
| 2007/08 & 2008/09  | Mr Ravi Kant              | Tata Motors Limited                       |
| 2009/10 & 2010/11  | Dr Pawan Goenka           | Mahindra & Mahindra Ltd                   |
| 2011/12 & 2012/13  | Mr S Sandilya             | Royal Enfield (Unit of Eicher Motors Ltd) |
| 2013/14 & 2014/15  | Mr Vikram Kirloskar       | Toyota Kirloskar Motors Ltd               |
| 2015/16 & 2016/17  | Mr Vinod K Dasari         | Ashok Leyland Ltd                         |
| 2017/18            | Dr Abhay Firodia          | Force Motors Ltd                          |
| 2018 /19 & 2019/20 | Mr Rajan Wadhera          | Mahindra & Mahindra Ltd                   |
| 2020/21 & 2021/22  | Mr Kenichi Ayukawa        | Maruti Suzuki India Ltd                   |

\* Since deceased

Note: The names of the Companies are as they were known then.



# SIAM MEMBERS



# SIAM MEMBERS



Nissan Motor India  
Pvt Ltd



ŠKODA AUTO Volkswagen India Private Limited

SKODA AUTO  
Volkswagen India  
Private Ltd



Volvo Auto India Pvt Ltd



Okinawa Autotech Pvt Ltd\*



SML Isuzu Ltd



PCA Motors Pvt Ltd\*



Suzuki Motorcycle India  
Pvt Ltd



Piaggio Vehicles Pvt Ltd



Connecting Aspirations

Tata Motors Ltd



Renault India  
Pvt Ltd



Toyota Kirloskar Motor  
Pvt Ltd



Royal Enfield  
(A Unit of Eicher Motors Ltd)



Triumph Motorcycles  
India Pvt Ltd\*



Scania Commercial  
Vehicles India Pvt Ltd\*



TVS Motor Company  
Ltd



Simpson & Co. Ltd



A VOLVO GROUP AND EICHER MOTORS JOINT VENTURE

VE Commercial  
Vehicles Ltd

In alphabetical order

\*Associate Member

As on 30<sup>th</sup> April, 2022



## SIAM SECRETARIAT



Mr Amit Kumar

Mr Arindom Ghatak

Mr Arnab Chakraborti

Mr Atanu Ganguli

Mr B K Dutta

Mr Bhisham Prasad Rai

Mr Debasish Majumder

Ms Debi Sen Gupta

Mr Dinesh Patnaik

Mr Jitendra Rai

Ms Kanishka Chana

Mr Kartike Karwal

Mr Lokesh Mittal

Ms Manju Dhamija

Mr Manoj Das Mohapatra

Mr Mayank Bhatia

Ms Meenakshi Kukreja

Mr Prashant K Banerjee

Mr Philip Skaria

Ms Pooja Nagpal

Ms Ragmani Shukla

Mr Rajesh Menon

Mr Raju Kamat

Dr Rashid Hasan

Ms Ruby Ganguly

Dr Sandeep Garg

Mr Sundeep Sundli

Ms Supriya Sinha

Mr Tribhuvan Rai

Mr V K Pandey

Mr Vijaya Sankar Sakthivadivel

In alphabetical order



## LINKAGE WITH OTHER INSTITUTIONS IN INDIA

All India Motor Transport Congress (AIMTC)  
Alloy Steel Producers Association (ASPA)  
Aluminium Association of India  
Association of State Road Transport Undertakings (ASRTU)  
Automotive Component Manufacturers Association of India (ACMA)  
Automotive Skills Development Council (ASDC)  
Automotive Tyre Manufacturers Association (ATMA)  
Bureau of Indian Standards (BIS)  
Central Institute of Road Transport (CIRT)  
Central Road Research Institute (CRRI)  
Confederation of Indian Industry (CII)  
Delhi Transport Corporation (DTC)  
Delhi Metro Rail Corporation (DMRC)  
Federation of Automobile Dealers Association (FADA)  
Indian Auto LPG Coalition  
Indian Diesel Engine Manufacturers Association  
Indian Institute of Foreign Trade (IIFT)  
Indian Institute of Petroleum (IIP)  
Indian Institute of Technology (IIT)  
Indian Machine Tool Manufacturers Association (IMTMA)  
Indian Rubber Institute  
Insurance Regulatory and Development Authority of India (IRDAI)  
Institute of Road Traffic Education (IRTE)  
International Centre for Automotive Technology (ICAT)  
National Automotive Testing and R&D Infrastructure Project (NATRIP)  
National Council of Applied Economic Research, (NCAER)  
National Institute of Design (NID)  
National Skill Development Corporation (NSDC)  
Petroleum Planning & Analysis Cell (PPAC)  
Research & Information Systems for Non-aligned and Other Developing Countries (RIS)  
Society for Automotive Fitness & Environment (SAFE)  
The Automotive Research Association of India (ARAI)  
The Energy and Resources Institute (TERI)  
Tractor Manufacturers Association (TMA)  
Vehicle Research & Development Establishment (VRDE)

*In alphabetical order*



## OVERSEAS LINKAGE

African Association of Automotive Manufacturers (AAAM), South Africa  
Asia Pacific Economic Cooperation Automotive Dialogue (APEC AD)  
Associação Nacional dos Fabricantes de Veículos Automotores (ANFAVEA), Brazil  
AusTrade Commission, Australia  
Auto Alliance, USA  
Automotive Research & Testing Centre, Taiwan  
Bangladesh Automobiles Assemblers and Manufacturers Association (BAAMA), Bangladesh  
Bangladesh Motorcycle Assemblers and Manufacturers Association (BMAMA), Bangladesh  
Ceylon Motor Traders' Association (CMTA), Sri Lanka  
China Association of Automobile Manufacturers (CAAM), PR China  
Comité des Constructeurs Français d'Automobiles (CCFA), France  
European Automobile Manufacturers Association (ACEA), Europe  
European Association of Motorcycle Manufacturers (ACEM), Europe  
Federal Chamber of Automotive Industry (FCAI), Australia  
Federation of Asia Motorcycle Industries (FAMI), Singapore  
Gulf Cooperation Council (GCC)  
Indonesian Automotive Industry Association (GAIKINDO), Indonesia  
Indonesian Motorcycle Industry Association, Indonesia  
International Motorcycle Manufacturers Association (IMMA)  
International Organization of Motor Vehicle Manufacturers (OICA)  
Japan Automobile Manufacturer Association (JAMA), Japan  
Japan Automobile Standards Internationalisation Centre, Japan  
Korean Automobile Manufacturers Association (KAMA), South Korea  
Motorcycle and Scooter Assemblers and Distributors Association of Malaysia  
National Association of Automobile Manufacturers of South Africa (NAAMSA), South Africa  
National Highway Traffic & Safety Authority, USA  
Nepal Auto Dealers Association (NADA), Nepal  
Singapore Motorcycle Trade Association, Singapore  
Taiwan Transportation Vehicle Manufacturers Association, Taiwan  
Thailand Automotive Institution, Thailand  
The Society of Motor Manufacturers and Traders (SMMT), UK  
The Thai Automotive Industry Association (TAIA), Thailand  
The United Nations Economic Commission for Europe (UNECE)  
UK Trade & Investment (UKTI)  
Verband der Automobilindustrie e.v. (VDA), Germany  
Vietnam Register, Vietnam

*In alphabetical order*





# ***SIAM***

Society of Indian Automobile Manufacturers

Core-4B, 5<sup>th</sup> Floor India Habitat Centre, Lodi Road, New Delhi-110 003 (India)

Tel: +91-11-2464 7810-12, Fax: +91-11-2464 8222

Email: [siam@siam.in](mailto:siam@siam.in), Website: [www.siam.in](http://www.siam.in)