

# **SIAM**

Society of Indian Automobile Manufacturers

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## ANNUAL REPORT 2015-16

*Building the Nation, Responsibly*





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# PRESIDENT'S MESSAGE



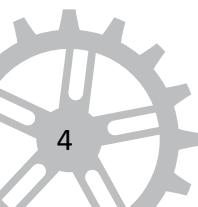
The long and arduous journey by the automotive industry, towards a full recovery, which began in 2014 after a prolonged slowdown, continued during the financial year 2015-16. The industry valiantly struggled to overcome the effects of three successive failed monsoons and the impact of a general crisis in the confidence of the industrial sector which had stifled investments and demand. The revival in growth hinged largely on the recovery in the urban markets as the rural markets continued to perform vastly below potential.

The year saw an overall growth of the automotive market of 3.78%. Production growth was marginal at 2.58% over the previous year.

The Passenger Vehicles market grew by 7.24% in April-March 2016 over the same period last year. Within the Passenger Vehicles, Passenger Cars, Utility Vehicles and Vans grew by 7.87%, 6.25% and 3.58% respectively during April-March 2016 over the same period last year.

Commercial vehicles continued on a strong growth path. Till last year, we had seen a smart recovery in the Medium and Heavy Commercial Vehicle segment, driven by replacement demand. Light Commercial Vehicle market, however, saw stagnation. The overall Commercial Vehicles segment registered a growth of 11.51% in April-March 2016 as compared to the same period last year. Medium & Heavy Commercial Vehicles (M&HCVs) registered a growth at 29.91% and Light Commercial Vehicles grew marginally by 0.30% during April-March 2016 over the same period last year. This was a result of positive movements in infrastructure development, mining, road building etc. In recent months, we have seen a slight lowering of the growth numbers, which hopefully is a temporary correction.

Three Wheelers sales stagnated with 1.03% growth in April-March 2016 over the same period last year. While Passenger Carrier sales grew by 2.11%, Goods Carrier sales declined by 3.62% during the year.



The two wheeler sector remained subdued with total Two Wheelers sales registering a growth of 3.01% during April-March 2016 over April-March 2015. Within the Two Wheelers segment, Scooters grew by 11.79% while Motorcycles and Mopeds dropped by 0.24% and 3.32% respectively in April-March 2016 over April-March 2015. This was mainly due to the muted rural demand.

Last year, India exported vehicles across the globe, almost 19% of passenger vehicles produced were exported, 13% of commercial vehicles and two-wheelers manufactured were exported, and 43% of three-wheelers manufactured were exported.

The 10 year Automotive Mission Plan 2006-16 concluded this year. The performance of the automotive industry in the mission period has been satisfactory despite multiple years of negative performance. The production targets for the concluding year of the mission period have been missed, due to the economic slowdown in 2008-2009, and its recurrence post 2012. However, if we look at the cumulative production target for the 10 year period and actual cumulative production numbers, we have produced more than our targets in most segments. The production of passenger vehicles (produced 27.91 million against a target of 27.75 million), commercial vehicles (produced 7.1 million against a target of 6.7 million) and three-wheelers (produced 7.8 million against a target of 7.2 million) surpassed the cumulative targets by 1%, 7%, and 9%, respectively. However, in the two-wheeler segment (produced 142 million against a target of 192 million), the cumulative target was missed by 25%.

The next phase of the Automotive Mission Plan, i.e. AMP 2016-26, will soon be launched officially. A curtain raiser of the AMP 2016-26 took place in the SIAM Annual Convention in September 2015, in which the salient features of the mission plan were released, which has quite ambitious plans for the next ten years.

With the forecast of a good monsoon and the various rural economy development schemes implemented by Government, along with the higher discretionary consumption due to the Pay Commission, it is expected that the auto industry would further reinforce its position during 2016-17 and regain the peak sales numbers it achieved in 2012.

However, during the last one year, the industry faced its own share of acid tests. Emission and safety issues took center-stage with Judiciary playing an active role in shaping the prospects of the industry. In a move, unprecedented anywhere in the world, Government took a decision to advance the implementation of BS VI emission norms by 2020, and to totally skip the BS V norms for all categories of vehicles. To further compound the challenge, the Supreme Court banned registration of diesel cars of engine capacity of 2000 cc and above in the NCR. The NGT which also addresses the issues of air quality is now trying to replicate the NCR order in other Cities and States of the country. The ambiguities resulting from the complex interpretation of the interim orders of NGT and Supreme Court claimed other casualties as some categories of commercial vehicles whose registration in NCR was halted. Such arbitrary moves, devoid of any scientific rationale, would not help in improving the air quality anywhere in the country, but will certainly hurt the confidence of the investors. Many global automotive giants who had invested in the country, based

on clear policy prescriptions, are now reviewing their future investment plans and some have already frozen new investment plans for India. The Make-In India clarion call by the Hon'ble Prime Minister stands seriously compromised by such sweeping policy reversals. Combating such judicial interventions, and "trial by media" without proper data, therefore, became a prime challenge for SIAM during the year. However, SIAM welcomes the Government's move towards cleaner air by proposing to incentivize voluntary scrapping of old vehicles.

In the area of safety, a number of new proposed regulations were finalized during the year. Fitment of ABS/CBS was made mandatory on two wheelers w.e.f. 2018/19. It is also proposed to extend mandatory ABS on all four wheelers, including passenger vehicles. Fitment of Speed Governors has also been made mandatory on all commercial vehicles despite the fact that it is not practical to do in some cases, and proposals are also there to include taxis in line with the Karnataka High Court orders.

The offset frontal crash, pedestrian safety has also been mandated from 2017-2020 for new and existing models. The fuel efficiency regulation and labeling requirement for passenger cars by Ministry of Power (BEE) under the Energy Act would further complicate the administrative complexities as it would require registration and permission from multiple Ministries before the vehicle can be introduced in the Market. The Fuel Efficiency regulation for commercial vehicles is being formulated by the Ministry of Petroleum which is going to introduce a new entity into our regulatory framework. Consequently, different Ministries are taking forward their individual agendas without taking a holistic view of the Industry. This would certainly impact the investment climate and employment unless a single nodal Authority is created for the sector. SIAM is pleased that our Government is working towards creation of a singular agency that would take a holistic view and set out a policy roadmap.

The bright spot during the year was the highly successful organization of the "Auto Expo 2016 – The Motor Show" in February 2016. The new venue for the Show shaped up very well with the erstwhile Hangers created for the 2014 Show getting converted into permanent air-conditioned Halls for the 2016 edition of the Show. The Show broke all records in terms of number of exhibitors, total space booked, and the overall exhibition area covered. Many of the new vehicles first displayed at the Expo received a fabulous response in the market, when they were commercially launched subsequent to the Show. The highlight of the Show was the industry's readiness with new drivetrains and alternative energy vehicles that would catapult the industry into the next era of Electrics and Hybrids.

The development of the VAHAN database was also taken to the next level, with discussions centering around the process to be adopted to share the database with different stakeholders in the country including with SIAM.

The FAME Scheme which was launched in April 2015 with a token budget of Rs. 75 crores, received a higher allocation of Rs. 123 crores in the 2016 Union Budget. The performance of the Scheme in its first full year has been commendable with more than 78,000 electric/hybrid vehicles being sold using the



demand side incentives. Companies put into the market the first generation of hybrid vehicles with clear plans to move on to higher levels of electrification once the new technologies proved their worth and were accepted by the consumers. The sales of full electric vehicles also saw a marked improvement during the period.

The Five Pillars of Road Safety were the cornerstones of the work carried out by SAFE during the year. This included incorporating road safety features into land-use, urban and transport planning; designing safer roads; improving the safety features of vehicles; promoting public transport; effective enforcement by the traffic police and improving post-crash care for victims of road crashes.

SIAM and SAFE also worked in the area of spreading awareness on road safety by organising programmes on environment protection, free PUC drives on environment day across the nation, educational campaign with students on road safety, driver's education and knowledge enhancement programs, interactions with Ministries and other stakeholders in exchanging ideas on road safety projects. All these activities were successfully implemented with the active support of members of SAFE and SIAM, the dealer community, NGOs, Corporates, Ministries, State Transport Department, Traffic Police, Pollution Control Board, Educational Institutions etc. I thank all of them for partnering with SAFE/SIAM in the important activity of promoting road safety.

During the year, the long standing recommendation of SIAM for bringing in a Fleet Modernisation Policy was accepted in principle by Government. Encouraged by the huge overall benefits of the Scheme as well as the alternative of judiciary enforced age based restrictions on old vehicles, MoRTH has now floated a draft policy based on incentives for scrapping old vehicles. This is currently a draft circulated for wide consultation.

In terms of economic activity, SIAM continued its close interface with the Ministry of Finance and Ministry of Heavy Industries on the Pre-Budget recommendations. As far as implementation of GST is concerned, we may well be seeing the final play taking place now. It is quite possible that by the time this report goes to print, we may see the final approvals from Parliament to the GST Bill. Industry certainly hopes for that and looks forward to an early announcement in this respect.

SIAM continued its international engagements by participating in various forums to ensure Indian industry voice is heard. SIAM delegation participated in activities of OICA, IMMA, and the APEC Automotive Dialogue. SIAM joined the Government and participated in the Indo-German Joint Working Group meetings and also mounted a delegation with the Commerce Minister to Algeria to resolve certain negative development in that export destination. SIAM continued to remain engaged with Gulf Corporation Council and successfully conveyed India's concerns.

SIAM had bilateral meetings with counterpart associations of Germany, UK, China, Japan, US and Korea. SIAM organised the Auto Trade Dialogue coinciding with Auto Expo which witnessed representatives from these countries.

SIAM continued to remain engaged in WP.29 through its various committees and sub-committees looking after various technical matters for furthering global harmonization of vehicle standards.

This being the terminal year of the AMP 2006-16, automobile industry has met many targets of AMP, especially in trade. From 2006-07 to 2015-16, passenger vehicle exports grew by 14%, Commercial vehicles by 8%, two wheelers by 17%, and three wheelers by 12% with overall exports growth registering 15% CAGR. Vehicle exports increased from USD 1.955 Billion in 2006-07 to USD 8.857 Billion in 2015-16 with continuous rise each year. Unlike other industries, where the exports have suffered during recessionary years, automobile industry has always seen year-on-year growth in exports.

This good performance is despite stagnation in the European market and has been made possible by moving export focus strongly towards Africa and Latin America. As per the draft Automotive Mission Plan 2016-26, vehicle exports can increase to INR 2,23,300 Crores (USD 33.3 billion at USD 1= INR 67) by 2026 on the conservative side, and INR 2,95,000 Crores (USD 44 billion at USD 1= INR 67) by 2026 on the optimistic side.

As I complete the first year of my tenure as President of SIAM, I am most convinced that the Indian automotive industry has perhaps the highest level of resilience amongst its peers all across the globe. The grit and determination displayed by all my colleagues in the industry in facing the overwhelming odds during the year is truly remarkable and commendable. I firmly believe that we need now to work even more closely as a group to build the brand of the auto industry. A salute to all of you as we go about “Building the Nation, Responsibly”.

I also take this opportunity to thank all our partner organisations – ACMA, CII, IMTMA etc. who have stood by our side during the year. Also, a very special thanks to the various Ministries and Government Departments for their close partnership and support.

This is the time to reiterate our resolve to make the auto industry an undisputed champion industry that will take our manufacturing sector to new heights in the years to follow.

I wish you all the best.



Vinod K. Dasari



**Mr Vinod K Dasari**

President, SIAM &  
Managing Director,  
Ashok Leyland Ltd



**Mr Ravi Pisharody**

Vice President, SIAM &  
Executive Director  
(Commercial Vehicles),  
Tata Motors Ltd



**Mr Kenichi Ayukawa**

Treasurer, SIAM &  
Managing Director & CEO,  
Maruti Suzuki India Ltd



Mr Vinod Dasari, President SIAM after taking charge from  
Mr Vikram Kirloskar, immediate Past President SIAM



(L-R) – Mr Vinod Dasari, President SIAM, Mr Vishnu Mathur, Director General  
SIAM & Mr S Sandilya, Past President SIAM at the SIAM Executive  
Committee Meeting



Mr Vinod Dasari, President SIAM (centre) taking over from Mr S Sandilya, Past President AIAM(Left) & Mr Vikram Kirloskar, immediate Past President – SIAM (right)  
at the SIAM Executive Committee Meeting.

# SIAM

The Society of Indian Automobile Manufacturers (SIAM) is a not for profit apex national body representing all major vehicle and vehicular engine manufacturers in India.

SIAM works towards supporting sustainable development of the Indian Automobile Industry with the vision that India emerges as the destination of choice in the world for design and manufacture of automobiles. It works towards facilitating enhancement of the competitiveness of the Indian Automobile Industry, reducing cost of vehicles, increasing productivity and achieving global standards of quality.

SIAM provides a window to the Automobile Industry in India and 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. It also organises seminars & workshops on the topics of topical relevance and interest to the industry. For carrying out various public policy activities, particularly in the field of road safety and environment, SIAM has partnered with other stakeholders and set up the Society for Automotive Fitness & Environment (SAFE).

SIAM works closely with the Government and with international bodies like International Organisation of Motor Vehicle Manufacturers (OICA), International Motorcycle Manufacturers Association (IMMA) and coordinate with other counterpart international associations like, German Association of the Automotive Industry (VDA), Japan Automobile Manufacturers Association (JAMA), The Society of Motor Manufacturers and Traders (SMMT), China Association of Automobile Manufacturers (CAAM), Korean Automobile Manufacturer Association (KAMA), The Thai Automotive Industry Association (TAIA), Malaysian Automotive Association (MAA), Indonesian Automotive Industry Association (GAIKINDO), ASEAN Automotive Federation (AAF), etc.

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 safety, address air quality improvement, compliance with standards and promotes growth with responsibility.

To achieve this, SIAM focuses on several areas:

- Improve Indian automotive industry's competitiveness
- Promote development of a sustainable mobility eco-system
- Promote development of Alternative Energy Vehicles
- Achievement of leadership in innovative technology



# Performance During 2015-16

## Industry Overview

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2015-16 saw the second straight year of overall growth of the industry, across production, domestic sales and exports. Except for minor dips in a few categories / sub-categories over a two-year horizon, the positive market and consumer sentiments have helped overcome what quite a few analysts had predicted to be a longer term decline starting 2012-13. The specific rebounding of the passenger car and heavy commercial vehicle sectors coupled with the continuing rise of the scooter segment are confidence boosters. The ever evolving and maturing consumer continues to prove that with the right product portfolio and relationship management, India continues to be the one sustainable and rapidly maturing automobile market of choice, in the world.

### **Production grew by 2.58% in 2015-16**

The industry produced a total 23,960,940 vehicles including passenger vehicles, commercial vehicles, three wheelers, two wheelers and quadricycles in April-March 2016 as against 23,358,047 in April-March 2015, registering a growth of 2.58 percent over the same period last year.

### **Domestic sales witnessed growth in all sectors in 2015-16**

The sales of Passenger Vehicles grew by 7.24 percent in April-March 2016 over the same period last year. Within the Passenger Vehicles, Passenger Cars, Utility Vehicles and Vans grew by 7.87 percent, 6.25 percent and 3.58 percent respectively during April-March 2016 over the same period last year.

The overall Commercial Vehicles segment registered a growth of 11.51 percent in April-March 2016 as compared to the same period last year. Medium & Heavy Commercial Vehicles (M&HCVs) registered a growth at 29.91 percent and Light Commercial Vehicles grew marginally by 0.30 percent during April-March 2016 over the same period last year.

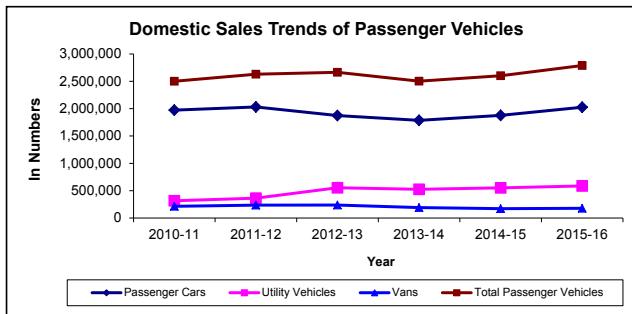
Three Wheelers sales grew by 1.03 percent in April-March 2016 over the same period last year. Passenger Carrier sales grew by 2.11 per cent & Goods Carrier sales declined by (-) 3.62 percent respectively in April-March 2016 over April-March 2015.

Two Wheelers sales registered a growth at 3.01 percent during April-March 2016 over April-March 2015. Within the Two Wheelers segment, Scooters grew by 11.79 percent while Motorcycles and Mopeds dropped marginally by (-) 0.24 percent and (-) 3.32 percent respectively in April-March 2016 over April-March 2015.

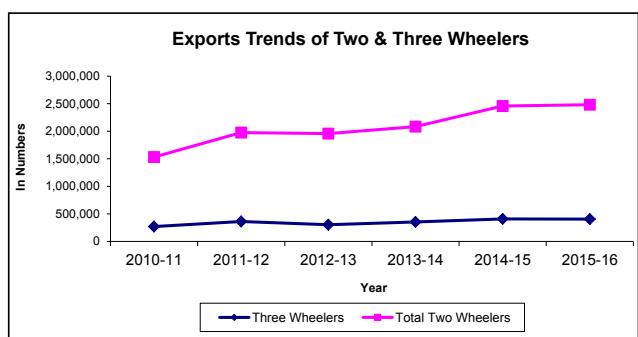
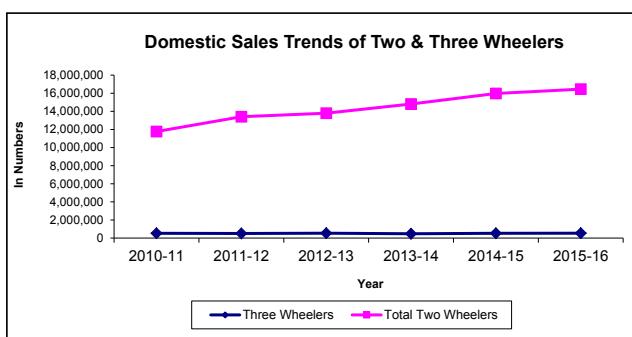
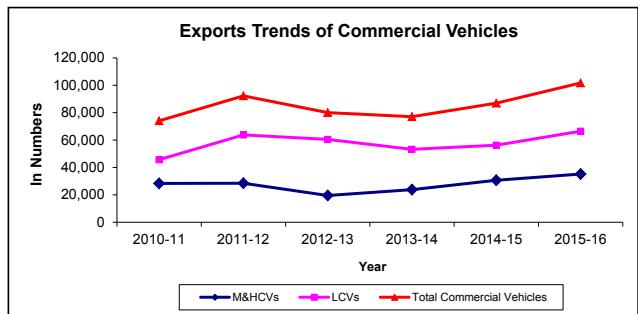
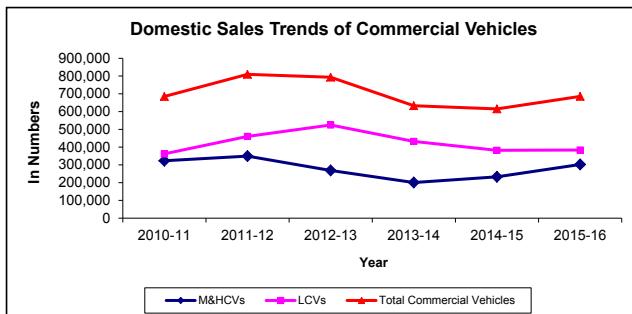
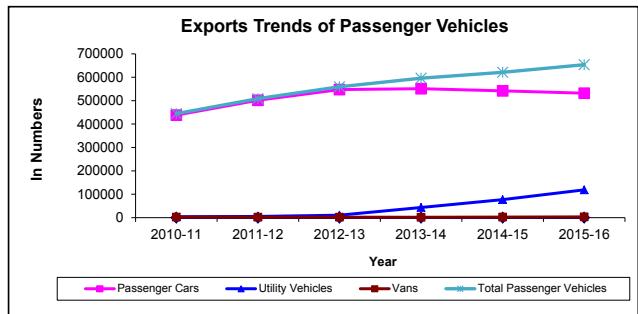
### **Exports grew by 1.91% in 2015-16**

In April-March 2016, overall automobile exports grew by 1.91 percent. Passenger Vehicles, Commercial Vehicles, Three Wheelers and Two Wheelers registered a growth of 5.24 percent, 16.97 percent (-) 0.78 percent and 0.97 percent respectively in April-March 2016 over April-March 2015.

## Domestic Sales Trends



## Export Trends



Automobile Production Trends						
Category	(Number of Vehicles)					
	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16
Passenger Cars	2,453,097	2,537,170	2,423,086	2,322,578	2,422,158	2,519,444
Utility Vehicles	313,142	370,945	568,538	568,692	626,296	711,830
Vans	216,533	237,954	239,434	196,703	172,965	182,585
<b>Total Passenger Vehicles</b>	<b>2,982,772</b>	<b>3,146,069</b>	<b>3,231,058</b>	<b>3,087,973</b>	<b>3,221,419</b>	<b>3,413,859</b>
M&HCVs	345,818	384,801	280,677	221,556	268,558	341,181
LCVs	414,917	544,335	551,972	477,479	429,740	441,633
<b>Total Commercial Vehicles</b>	<b>760,735</b>	<b>929,136</b>	<b>832,649</b>	<b>699,035</b>	<b>698,298</b>	<b>782,814</b>
<b>Three Wheelers</b>	<b>799,553</b>	<b>879,289</b>	<b>839,748</b>	<b>830,108</b>	<b>949,019</b>	<b>933,950</b>
Scooters	2,134,585	2,659,340	3,026,512	3,676,213	4,722,747	5,275,888
Motorcycles	10,510,189	11,982,669	11,925,690	12,474,626	13,011,219	12,816,012
Mopeds	704,575	785,523	791,954	732,210	755,345	737,886
Electric Two Wheelers	-	-	-	-	-	-
<b>Total Two Wheelers</b>	<b>13,349,349</b>	<b>15,427,532</b>	<b>15,744,156</b>	<b>16,883,049</b>	<b>18,489,311</b>	<b>18,829,786</b>
<b>Grand Total</b>	<b>17,892,409</b>	<b>20,382,026</b>	<b>20,647,611</b>	<b>21,500,165</b>	<b>23,358,047</b>	<b>23,960,409</b>

Automobile Domestic Sales Trends						
Category	(Number of Vehicles)					
	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16
Passenger Cars	1,972,845	2,031,306	1,874,055	1,786,826	1,877,706	2,025,479
Utility Vehicles	315,123	363,772	553,662	525,839	552,135	586,664
Vans	213,574	234,761	237,298	190,844	171,395	177,535
<b>Total Passenger Vehicles</b>	<b>2,501,542</b>	<b>2,629,839</b>	<b>2,665,015</b>	<b>2,503,509</b>	<b>2,601,236</b>	<b>2,789,678</b>
M&HCVs	323,059	349,216	268,689	200,618	232,755	302,373
LCVs	361,846	460,283	524,522	432,233	382,193	383,331
<b>Total Commercial Vehicles</b>	<b>684,905</b>	<b>809,499</b>	<b>793,211</b>	<b>632,851</b>	<b>614,948</b>	<b>685,704</b>
<b>Three Wheelers</b>	<b>526,024</b>	<b>513,281</b>	<b>538,290</b>	<b>480,085</b>	<b>532,626</b>	<b>538,092</b>
Scooters	2,057,604	2,558,981	2,923,424	3,602,743	4,500,920	5,031,678
Motorcycles	9,013,888	10,073,303	10,085,000	10,481,115	10,726,013	10,700,466
Mopeds	697,418	776,866	788,761	722,920	748,628	723,767
Electric Two Wheelers	-	-	-	-	-	-
<b>Total Two Wheelers</b>	<b>11,768,910</b>	<b>13,409,150</b>	<b>13,797,185</b>	<b>14,806,778</b>	<b>15,975,561</b>	<b>16,455,911</b>
<b>Grand Total</b>	<b>15,481,381</b>	<b>17,361,769</b>	<b>17,793,701</b>	<b>18,423,223</b>	<b>19,724,371</b>	<b>20,469,385</b>

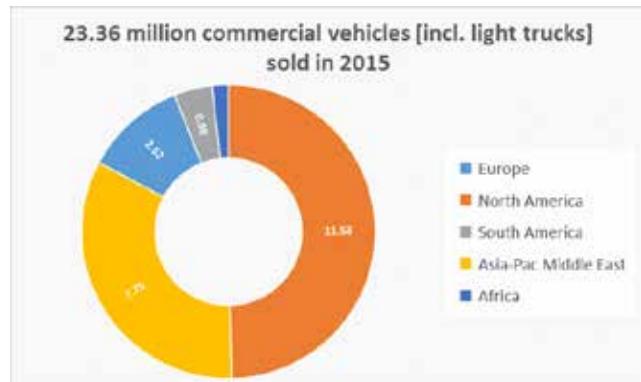
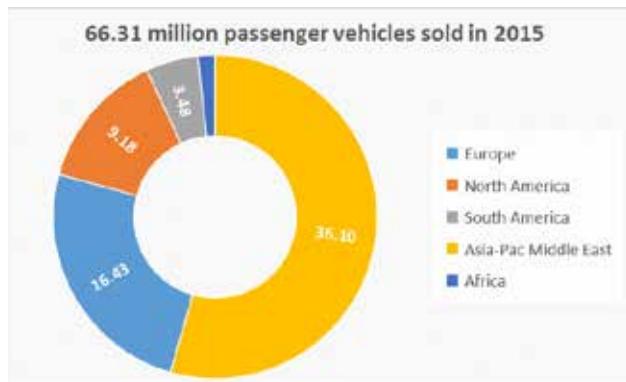
Automobile Exports Trends						
Category	(Number of Vehicles)					
	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16
Passenger Cars	438,214	501,546	547,222	551,218	542,112	532,053
Utility Vehicles	3,746	5,221	10,423	43,433	77,025	118,721
Vans	2,366	2,016	1,769	1,491	2,204	3,115
<b>Total Passenger Vehicles</b>	<b>444,326</b>	<b>508,783</b>	<b>559,414</b>	<b>596,142</b>	<b>621,341</b>	<b>653,889</b>
M&HCVs	28,349	28,495	19,524	23,813	30,652	35,192
LCVs	45,694	63,763	60,503	53,237	56,287	66,497
<b>Total Commercial Vehicles</b>	<b>74,043</b>	<b>92,258</b>	<b>80,027</b>	<b>77,050</b>	<b>86,939</b>	<b>101,689</b>
<b>Three Wheelers</b>	<b>269,968</b>	<b>361,753</b>	<b>303,088</b>	<b>353,392</b>	<b>407,600</b>	<b>404,441</b>
Scooters	50,646	94,440	91,062	93,931	195,407	257,481
Motorcycles	1,474,678	1,871,595	1,862,008	1,982,817	2,252,066	2,208,932
Mopeds	6,295	9,076	3,308	7,252	9,993	14,780
Electric Two Wheelers	-	-	-	-	-	-
<b>Total Two Wheelers</b>	<b>1,531,619</b>	<b>1,975,111</b>	<b>1,956,378</b>	<b>2,084,000</b>	<b>2,457,466</b>	<b>2,481,193</b>
<b>Grand Total</b>	<b>2,319,956</b>	<b>2,937,905</b>	<b>2,898,907</b>	<b>3,110,584</b>	<b>3,573,346</b>	<b>3,641,212</b>



# Global Auto Industry Performance in 2015

The world saw an increase in sales of a bit over 2% in passenger and commercial vehicles in 2015 to reach very close to 90 million over the previous year, excluding two-wheeler and three-wheeler sales.

Passenger Vehicles sales clocked 66.31 million units with the region of Asia-Pacific & Middle East accounting for more than 50%. Indian market has become more than 4% of global passenger vehicle market. The 3-year trend shows an encouraging upward journey though some question the rate of growth being slower than most estimates. Sales in the European region were led by Germany, France, UK, Italy, Spain and the former East European block to offset the drop in sales in Russia by more than 50% over 2014. In North America, the rise in Mexico helped cover up the marginal drops in US and Canada, whereas in South America the shrinking of markets in Brazil, Chile, Colombia and Peru brought a drop of nearly 0.8 million units. Africa saw a similar drop in the region due to a fall in numbers in Algeria, Egypt and South Africa. The Asia-Pacific & Middle East region saw an increase of close to 1.5 million units led by China, India, South Korea and Malaysia to offset the drops in Japan and Thailand.



Commercial Vehicles sales rose marginally to 23.36 million units in 2015 led primarily by the buoyant light truck market in North America. Europe has seen a 3-year growth led again by the traditional markets of France, UK, Germany, Italy and Spain. Russia has again been a worry in 2015. North America has added more than 1.2 million units over last year across US, Canada and Mexico. South America sales dropped led by markets in Brazil and Argentina getting smaller. In Africa, the sales dropped marginally due to Algeria and Egypt, the fall being lessened by South Africa. Asia-Pacific & Middle East saw a slight drop to 7.75 million units from 8.01 in 2014 led by China and Japan with the fall offset by Australia and India. India contributes to almost 3% of global trucks and buses sale.

The Big 7 of Passenger Vehicles Market (in million units)	
China	21.14
USA	7.57
Japan	4.21
Germany	3.2
<b>India</b>	<b>2.77</b>
UK	2.63
Brazil	2.12

The Big 7 Commercial Vehicles Market (in million units)	
USA	9.90
China	3.45
Canada	1.23
Japan	0.83
<b>India</b>	<b>0.65</b>
Australia	0.64
Thailand	0.49



# Building the Nation, Responsibly

The Indian automobile industry is central to the country's economy, be it sales growth, increased purchasing power, reflection of consumer confidence or our position in global hierarchy.

The automobile industry is 7% of the country's GDP [47% of manufacturing and 25% of industrial output].

It employs 2 million people directly and over 30 million people indirectly, through the backward and forward linkages.

We are the second largest two wheeler maker, second largest bus maker, fourth largest heavy truck maker, sixth largest car maker and fifth largest commercial vehicle maker in the world.

The numbers above are the outcome of the journey the industry has set upon itself.

They are the end and not the means.

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
- ensuring energy security
- cohabiting with other industries
- adopting global standards in emissions, safety and manufacturing
- building sustainable communities
- continuous skill upgradation
- increasing consumer consciousness
- social green and safety initiatives

## The industry is...

Not just about numbers. But empathy.

Not just about diversity. But inclusiveness.

Not just about exports. But national pride.

Not just about vehicles. But mobility.

Not just economic contribution. But nation building.

Not just building the nation. But building it responsibly.

# SIAM Annual Activities

## JULY 2015

- GST Workshop
- Human Capital Group Meeting
- Emission and Conservation Group Meeting
- SIAM Executive Committee Meeting

## AUGUST 2015

- Sourcing Group Meeting
- Anti-Counterfeiting Group Meeting
- Taxation Group Meeting
- Diesel Round Table
- HDPE Sub Group Meeting
- Frontier Technology Group Meeting
- Panel Meeting on BNVSAP & Crash

**More than 250,000 Two-Wheelers exported in a month for the first time**

## SEPTEMBER 2015

- 55th Annual Convention
- Human Capital Group Meeting
- Taxation Group Meeting
- EPPR Group Meeting
- Automotive Design Working Group

## DECEMBER 2015

- Automotive HR Conclave
- SIAM-ACEA Workshop
- Information Technology Group Meeting
- ELV Workshop
- National & International Regulations Council Meeting
- Auto Expo Press Conference
- FAME Eco Drive Rally
- SIAM Executive Committee Meeting
- Trade Fair Group Meeting
- Two-Wheeler Group Meeting

## JANUARY 2016

- National Road Safety Week
- International Business Council Meeting
- SIAM Executive Committee Meeting
- HDPE Sub Group Meeting
- Looking Ahead Conclave
- Auto Expo Press Conference
- Frontier Technology Group Meeting

**Industry accepted the challenge to skip to BS V and go straight to BS VI emission norms from April 2020**

## APRIL 2016

- SAFE Annual Convention
- Styling & Design Group Meeting
- Automobile Safety & Technology Workshop
- Two-Wheeler industry moved to BS IV emission norms**

## MAY 2016

- Anti-Counterfeiting Group Meeting
- Trade Workshop
- Economic Research Group Meeting
- Sourcing Group Meeting
- SIAM Executive Committee Meeting
- Emission and Conservation Group Meeting
- Taxation Group Meeting

# ities & Milestones

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## OCTOBER 2015

- Annual SIAM-JAMA Meeting
- Frontier Technology Group Meeting
- CMVR & Safety Group Meeting
- Anti-Counterfeiting Group Meeting
- Human Capital Group Meeting
- SIAM Executive Committee Meeting
- Road Safety Program

**Sales of Scooters crossed half a million in a month of first time**

## NOVEMBER 2015

- Automobile Logistics Workshop
- Styling & Design Group Meeting
- Human Capital Group Meeting
- Global Road Safety Conference
- Auto Expo Press Conference
- Taxation Group Meeting
- HDFE Sub Group Meeting
- FAME Eco Drive Rally

## FEBRUARY 2016

- Auto Expo - The Motor Show
- "Asliman" mascot launch by Anti-Counterfeiting Group
- Styling & Design Conclave
- Automotive Design Challenge Awards
- Auto Trade Dialogue
- JASIC-India Forum
- Road Safety Conference
- Taxation Group Meeting
- Emission and Conservation Group Meeting
- Automotive Design Workshop

**Automobile industry committed fitment of AHO or DRL for Two-Wheeler safety**

## MARCH 2016

- Taxation Group Meeting
- SIAM Executive Committee Meeting
- Two-Wheeler Group Meeting
- Automotive Design Workshop

**Automobile industry committed fitment of ABS/CBS for Two-Wheelers**

## JUNE 2016

- Human Capital Group Meeting
- Two-Wheeler Group Meeting
- Automotive Logistics Conclave
- CSR Committee Meeting
- AutoDX Group Committee Meeting
- Taxation Group Meeting
- EPPR Group Meeting

## JULY 2016

- FAME Annual Convention
- Commercial Vehicles Council Group Meeting
- Two-Wheeler Group Meeting
- Trade Fair Group Meeting
- Taxation Group Meeting
- Frontier Technology Group Meeting

# SIAM 55<sup>th</sup> ANNUAL CONVENTION 2015



Dr R.S. Katoch, Secretary, Ministry of Heavy Industries and Public Enterprises, and other eminent dignitaries at the Inaugural Session of the SIAM Annual Convention 2015

The 55<sup>th</sup> Annual Convention was held on 2nd September 2015 in New Delhi focusing on providing insights on Indian automotive industry's linkages with overall development of the economy. It also highlighted issues with regards to competitiveness, growth and its integration with the global economy. Senior industry experts from all over the world, including CEOs and senior representatives from the Indian / Global OEMs and component manufacturers, participated in the convention. This event was also attended by the policy makers and the decision makers of the Government of India, including Ministers and Secretaries, apart from other stakeholders including the media. Over the years, this event has become India's most important annual automotive convention.

Mr. Vikram Kirloskar, President, SIAM and Vice Chairman, Toyota Kirloskar Motor Pvt Ltd inaugurated the convention with a welcome speech addressing the challenges and achievements of Indian auto industry. He said, "The last three years have been very problematic for the Indian automotive industry. However, the ongoing fiscal has witnessed a turnaround. The numbers are definitely

better than what was expected. The monsoon has been better for the industry."

Talking about the challenges faced by the auto industry, he said, "Auto industry is a highly taxed sector. It would be of great help to the industry if GST is implemented, but it is disheartening to know that because of political problems we are not able to do that."

"India is the only country to achieve BS IV emission norms within a span of 10 years. Air quality will improve only if we consider all sources together and not on individual vehicles. Many safety norms have been introduced in India just because they have been implemented in other countries. Safety norms and regulations should focus on local situations and road conditions. In this sense we are looking forward to the new Road Safety Bill. We are looking at entering new markets like Latin America and Africa. For that we need to realign our FTIs with countries. The biggest achievement of the ministry so far has been the launch of FAME. Some OEMs have reported upto 25% growth in sales of electric and hybrid vehicles since the launch of the scheme and the industry is excited

in new opportunities like ethanol and bio diesel vehicles. The industry would not hesitate to invest in these, if given proper policy norms."

Mr. Sumit Mazumder, President, CII and Chairman & MD, TIL Ltd. said "Automotive industry is globally recognised because of its R&D efforts and as a green manufacturing sector. The industry has embedded quality and innovation in its design. Auto Expo has emerged as the largest Expo. CII and SIAM's joint efforts have contributed to auto industry's success."

Mr. Ramesh Suri, President, ACMA and Chairman, Subros Ltd. presented an overview of the performance by Automotive and auto component industry. In his speech he said "In 2014-2015, the auto component industry earned \$38.5 billion and grew by 11% over the previous year". He further added, "In order to become the engine of Make in India, auto component industry will create 1.6 million direct jobs. We must also strive for multiple investments, and this is our automotive mission plan 2026. If auto components' industry needs to grow from locally to globally competitive, relationships should become mutually beneficial in new areas, especially technology. India has all potential and capabilities to become a global auto player in the near future."

Mr. Takeshi Uchiyamada, Chairman of the Board of Directors, Toyota Motor Corporation talked about the collaboration between government and other industries. He said that "After PM Modi's coming, his initiative 'Make in India' has helped Indian economy a lot. Japanese industries have started coming to India. We have entered a new era in India - Japan relationship. Automotive industry primarily has three challenges - production and sale of eco-friendly vehicles, making of eco-friendly cars and promoting eco-friendly cars as part of sustainable mobility society."

Chief Guest for the day, Dr. R S Katoch, Secretary, Department of Heavy Industry, Ministry of Heavy Industries and Public Enterprises, Government of

India, cited "We have taken the first step towards introduction of ecofriendly vehicles with the FAME initiative. The key is now increasing competitiveness in global market."

Chairing the Special Plenary Session, Mr Nitin Gadkari, Hon'ble Minister of Road Transport, Highways and Shipping, Government of India, spoke about the developments which are taking place in road construction. He said that from a rate as low as 2 km per day for highway construction, it has now reached 14 km per day till March end. He said that he expects this to reach 30 km per day by next March.

In the 1st plenary session, the opening remarks were given by Mr. Kenichi Ayukawa, MD & CEO, Maruti Suzuki India Ltd. Stating, "India is a unique demography, geography and has its own set of challenges. India will make its own story and create own history. India has a challenge of energy security, infrastructure and congestion. We have to be fuel, space, cost, and weight efficient. India also has availability of huge talent."

Mr. Amitabh Kant, Secretary, Department of Industrial Policy & Promotion, Ministry of Commerce & Industry, Government of India said that auto industry would be a key growth driver for the country.

"If India has to grow by 7 - 8%, then automotive and auto component industry has to be the driver of this growth, not only in case of manufacturing but also innovation and frugal engineering. We are



(L-R) Mr Arvind Saxena, then President & MD, General Motors, Mr Nitin Gadkari, Hon'ble Minister of Road Transport, Highways & Shipping, Mr Pawan Munjal, Chairman & Managing Director, Hero MotoCorp & Mr KK Gandhi, Executive Director – Technical, SIAM at the Special Plenary Session at the SIAM Annual Convention 2015



Delegates at the 55<sup>th</sup> SIAM Annual Convention 2015

changing fast to urbanisation and the challenge right now is to make a planned process.

Mr. Nigel Harris, MD & President, Ford India Pvt. Ltd started the 2nd plenary session and said, "A number of things have to be improved if we are talking about safer and cleaner technology. We first need a holistic map regarding the whole process. Congestion on Indian roads is an issue."

In the 3rd plenary session Mr. Rajiv Bajaj, Managing Director, Bajaj Auto said that it was more about putting 'Global India' on brand platform. He said that in order to sell a brand, it either needed to be better than competition, different than competition, opposite to the competition or operate in a very niche segment.

The last Session of the SIAM Annual Convention, 2015 started with Mr. Vinod K Dasari, then Vice President, SIAM & Managing Director, Ashok Leyland, addressing the congregation, "The SIAM convention is the connecting link between government and the automotive industry. The industry is striving to move entirely to BS IV by 2017. It is expected to reach BS V in 2017 and BS VI by 2023."

Mr. R Raghutama Rao, Managing Director, ICRA Management Consulting Services (IMaCS) presented the Automotive Mission Plan 2016-2026 to the gathering. Talking about the key achievements of the AMP 2006-2016, he said that the investments under AMP 2016 exceeded by 1,

60,000 crores. The industry is poised to generate more than 35 million jobs by the end of 2016. The industry is on-course, as per the AMP 2016 to hit the base-case target of Rs. 5, 49,000 crores of industry revenue by the end of FY16.

By 2026, Indian automotive industry will be among the top three of the world in engineering, manufacture and export of vehicles and components. It is expected to contribute over 12% of India's GDP and to create an additional 65 million jobs. The objective of AMP 2026 is to make Indian automotive industry the central pillar of Make in India. The industry is striving to foster the promotion of Brand India by developing a sophisticated ecosystem of research, design, and engineering.

By 2026, the units of passenger vehicles is likely to increase between 9.4 - 13.4 million, commercial vehicles between 2.0 - 3.9 million, two-wheelers between 50.6 - 55.5 million and tractors between 1.5 - 1.7 million.

Mr. Vinod Dasari, Managing Director, Ashok Leyland was elected as President of Society of Indian Automobile Manufacturers (SIAM), Mr. Arvind Saxena, President and Managing Director, General Motors India was elected as the new Vice - President. Mr. Kenichi Ayukawa, Managing Director & CEO, Maruti Suzuki India Ltd was appointed the new Treasurer of SIAM. The election was held during the Executive Committee Meeting after the Annual General Meeting of SIAM.



Dr Abhay Firodia, Chairman Force Motors, with Mr Vikram Kirloskar, outgoing President - SIAM, at the Annual General Meeting held after the 55<sup>th</sup> SIAM Annual Convention

# AUTO EXPO – THE MOTOR SHOW 2016



(L-R) Mr. Vinnie Mehta, Director General, ACMA, Mr. Chandrajit Banerjee, Director General CII, Mr. Arvind Balaji, President, ACMA, Mr. Sumit Mazumder, President CII, Mr. Nitin Gadkari, Hon'ble Minister of Road Transport, Highways & Shipping, Govt. of India, Mr. Anant Geete, Hon'ble Minister of Heavy Industries and Public Enterprises, Govt. of India, Mr. Vinod Dasari, President SIAM, Mr. Yong Geun Kim, President OICA, Mr. Vishnu Mathur, Director General SIAM, Mr. Rama Raman, Chairman, GNIDA

Auto Expo – The Motor Show 2016 was jointly organized by Society of Indian Automobile Manufacturers (SIAM), Automotive Component Manufacturers Association of India (ACMA) and Confederation of Indian Industry (CII) at the India Expo Mart (IEML) in Greater Noida.

The show was made open to public from February 5<sup>th</sup> 2016 to February 9th 2016. A preview of the show was given to the media on the 3rd & 4th of February 2016.

The show was inaugurated by Shri Anant Geete, Hon'ble Minister of Heavy Industries and Public Enterprises, Govt. of India, and Shri Nitin Gadkari, Hon'ble Minister of Road Transport, Highways & Shipping, Govt. of India, on 4th February, 2016.

Spread over an exhibition area of over 73,000sqms, the show witnessed participation from more than 59 vehicle exhibitors who launched and unveiled a staggering 108 vehicles including the two-wheelers, three-wheelers, four-wheelers and commercial vehicles.

The show registered 601,000 visitors over a period of 7 days and saw the coming together of all the stakeholders – government, industry and public to make it a major success.

Simultaneously, the Component Show took place at the Pragati Maidan in New Delhi. The event showcased the best of technology the automotive component manufacturers had on offer witnessing footfalls of 114,000 during February 4<sup>th</sup> - 7<sup>th</sup>, 2016.

A total of 1901 media personnel accredited for the motor show with representation from 11 countries. This was done through an online process with barcode enabled photo identification.

Targeting the young, aspirational, ambitious and connected Indians, SIAM used social media activation very effectively. Using social media platforms well before the show to create excitement and anticipation to collaborating with radio stations, bus fleets, airlines and radio cabs were undertaken to help connect with the millions of Indians who looked forward to the show “for the love of the machine.”

The Auto Expo, like always, saw participation from celebrities from the entertainment and sports world, especially Bollywood and cricket, two of India's unifying religions.

Various manufacturers, bloggers and the media uploaded live videos of the events, stalls, press conferences, launches and the general



(L-R) Mr. Nitin Gadkari, Hon'ble Minister of Road Transport, Highways & Shipping, Govt. of India, Mr. Anant Geete, Hon'ble Minister of Heavy Industries and Public Enterprises, Govt. of India & Mr. Vinod Dasari, President SIAM

atmosphere. It was like a virtual tour of the Auto Expo, and over 28,000 views were clocked in a week.

### Concurrent events organized during Auto Expo – The Motor Show 2016

#### Anti-Counterfeiting activity and the launch of “Asliman”

SIAM'S Anti-Counterfeiting Group (ACG) had teamed up with all major auto players in the India, and through a series of activities at Auto Expo had engaged with visitors in its quest to spread awareness about counterfeit products infiltrating the auto industry. On the second day, SIAM unveiled the mascot “Asliman” for the Anti-counterfeiting

campaign. A pledging wall was also displayed to convince the people to commit against fake. As a part of their on-ground campaign ACG conducted the Campus initiative that saw participation of more than 300 students from over 9 colleges from around NCR.

#### Auto Trade Dialogue

SIAM organized its 7<sup>th</sup> Auto Trade Dialogue on 2nd February 2016 at Hotel Jaypee Greens, Greater Noida, Delhi NCR. Over the years, the Trade Dialogue has turned out to be an excellent platform for networking and exchange of information and ideas. This year the theme for discussion was “Auto Industry – Performance, Policy & Regulatory Framework”. The Event saw participation of Auto industry leaders from Canada, Japan, India, Korea, the UK, the US, and Malaysia.

Among the guest speakers were Mr. Brad Duguid, Minister for Economic Development, Employment and Infrastructure, Govt. of Ontario, Mr Yong-Geun Kim, President, OICA and, President & CEO, Korea Automobile Manufacturers Association (KAMA), Mr Yoshihiro Yano, Vice President, International Affairs, Japan Automobile Manufacturers Association (JAMA), Datuk Aishah Ahmad, Chairperson, Automotive Federation of Malaysia (AFM), Mrs Tamzen Isacsson, Director for Communications and International, Society of Motor Manufacturers and Traders (SMMT), UK



Aerial view of IEML during Auto Expo – The Motor Show 2016

and Governor Matt Blunt, President, American Automotive Policy Council (AAPC), USA. Dr Surajit Mitra, Director & Vice Chancellor, Indian Institute of Foreign Trade also addressed the gathering and participated in the conference.

### **Styling and Design Conclave**

The 10th edition of the Styling & Design Conclave and the 08th Automotive Design Challenge (ADC) were held on 5<sup>th</sup> February 2016 at Hotel Jaypee Greens, Greater Noida, Delhi NCR. The conclave marked the opening with the overall theme, "Design for India" looking at Design as a significant contributor to 'AMP 2026' and eventually to 'Make in India'. There was active participation from 150 delegates from varied backgrounds.

The theme for the ADC was 'Vehicle for Planet Keplar'. More than 100 design students participated and after multiple rounds of evaluation, three students were finally chosen:

- First Prize Winner: MIT Institute of Design, Pune
- First Runners-up: National Institute of Design, Ahmedabad
- Second Runners-up: DSK-ISD Rubika, Pune

### **Vintage Pavilion & Bollywood Zone**

Along with the pavilion of vintage cars a special initiative "Bollywood Zone" was set up in Hall 16,



Mr. Rama Raman, Chairman, GNIDA visiting Auto Expo –  
The Motor Show 2016



Green Pavilion at Auto Expo – The Motor Show 2016

showcasing some of landmark vehicles from six of Bollywood's' most popular films.

### **Riderz Planet**

SIAM collaborated with "Riderz Planet" to get a host of superbike groups to the show starting from 5<sup>th</sup> February. A group of super bikers rode to the venue on their machines every day, put their bikes on display for the visitors, conducted sessions on road safety and interacted with the visitors.

### **NDTV'S Car N Bike Awards 2016**

NDTV along with SIAM presented the second edition of the Auto Expo Awards For Excellence. The awards recognize the significant efforts taken by manufacturers to turn the Auto Expo into the most important show in Asia that rivals the very best in the world in terms of look, feel, quality, infrastructure and presentation. Awards were presented in 14 categories ranging from the best concepts and launches to best pavilions and brand launches.

### **Zeegnition Auto Awards 2016**

3rd Edition of the Zee media's flagship automobile awards- Zeegnition Auto Awards in association with SIAM were held at the motor show venue recognizing the shining stars of the automobile Industry. This year awards were given in 37 categories in both 2 wheelers and 4 wheelers.





# ECONOMIC & COMMERCIAL AFFAIRS



(L-R) Mr Mohan Raghavan, Co-Chairman SIAM Taxation Procedural Group, Mr Sugato Sen, Deputy Director General SIAM, Mr Shekar Viswanathan, Chairman SIAM Taxation Policy Group & Mr D D Goyal, Chairman SIAM Taxation Procedural Group during Group meeting



Members in discussion during Taxation Procedural Group meeting

## Taxation Policy, Procedure and Direct Tax Groups

SIAM Taxation Policy, Procedure and Direct Tax Groups have been actively engaged with the various GST councils and committees in providing industry suggestions on the Model GST Law, apart from all issues pertaining to Direct and Indirect Taxes.

The Pre-Budget meeting was held in September, 2015 at which memorandum of suggestions was finalized and these were submitted to the Government in October 2015.

### Pre Union Budget Meetings and Submissions

SIAM was invited by Ministry of Finance & Ministry of Heavy Industries & Public Enterprises to present their suggestions for the Union Budget 2016-17. The main issues raised by SIAM were:

1. Introduce two excise duties for motor vehicles (12.5% and 20%)
2. MUV/SUVs should not attract higher duty. The excise duty should be reduced to 20%.
3. Excise duty on motor vehicles having carrying capacity of 10 to 13 persons including the driver and falling under tariff heading 8702 should be 12.5%
4. Excise Duty & Custom Duty Concessions on Identified parts of Hybrid/ EVs parts should be extended to certain additional parts and the

extension should be extended for a longer period instead of till March 2016.

5. Legislative amendment required to Central Excise Act - Excise duty should not be applicable on Sales Tax/VAT benefit given by state government
6. Retain Customs tariff on CBUs for Cars/ MUVs/ Passenger 3-wheelers under Tariff Heading - 87.03 and Two-Wheelers/ Goods Three Wheelers under Tariff Heading - 87.11, and increase applicable customs duty on Commercial Vehicles falling under Tariff Heading - 87.02 & 87.04 to 40%.
7. Introduce GST across all states, & taxes including road tax should be subsumed in GST.
8. Incentivize replacement of vehicles, which were registered before the year 2000 when the first emission norms were introduced in India.
9. 150% weighted deduction for expenditure incurred in skill development

### Union Budget 2016-17 – the positives for the industry

1. Clarification regarding payment of NCCD from accumulated cenvat for past period.
2. Basic custom duty on raw material used for manufacture of catalytic converters reduced from 7.5 per cent to 5 per cent.
3. Amendment suggested in Motor Vehicles Act to open up the road transport sector in the passenger segment is a welcome move.

4. Allocation of Rs 200 crores made to the FAME scheme and NATRIP.
5. Extension provided on the Excise Duty & Custom Duty Concessions on identified parts of Hybrid/ EVs on a long term basis.

### **Union Budget 2016-17 – the negatives for the industry**

1. An additional 1 per cent tax to be collected at source on purchase of motor vehicles exceeding value of Rs 10 lakhs.
2. The weighted tax deduction on R&D expense reduced from 200 per cent to 150 per cent from April 01, 2017 and it will further be reduced to 100 per cent from April 01, 2020.
3. Infrastructure cess of 1% on small petrol, LPG, CNG cars, 2.5% on small diesel cars of less than 1500 cc and 4% on other higher engine capacity vehicles and SUVs was levied with immediate effect.

### **Post Budget Submission**

SIAM Taxation Groups had met in March 2016 to discuss budget announcement and finalize submission of the following key recommendations for the post union budget submission.

1. For simplification and rationalization of tax structure-
  - i) The Infrastructure Cess should be abolished.
  - ii) In case it is not possible to abolish Infrastructure Cess, then it should be made Cenvatable.
  - iii) Consolidation of various Cesses under one Cess -Development Cess



Members in discussion during the Post-Budget meeting

2. Exemption from Payment of Infrastructure Cess on Export of Motor Vehicles
3. Deletion of 1% TCS under Sec. 206C on purchase of motor vehicles exceeding value of Rs 10 lakhs.
4. Extension of weighted deduction in respect of scientific expenditure [Section 35(2AB) of the Income Tax Act]
5. Additional budget allocation for FAME and NATRIP
6. Extension of Excise Duty & Custom Duty Concessions on Hybrid/ EVs parts to certain additional parts.

SIAM team met with Mr Atulesh Jindal, Chairman, Central Board of Direct Taxes (CBDT) and Ms Pragya Saxena, Joint Secretary, CBDT in May 2016 to get a clarification issued with regards to applicability of 1% TCS on purchase of motor vehicles exceeding value of Rs 10 lakhs. A clarification in this regard was issued by CBDT in June 2016.



Model GST Law meeting in progress



Members in discussion during the Model GST Law meeting



Mr. N. Raja, Co-Chairman SIAM Economic Research Group, addressing the members during the Group meeting

## Goods & Services Tax

Model GST Law was released by Empowered Committee of State Finance Ministers in June, 2016, post which the SIAM Taxation Group met to finalize views on the Model GST Law. A memorandum of suggestions was prepared and submitted to the Government in June 2016.

Key suggestions specific to the auto industry were made, as under:

1. The list of Acts being repealed and subsumed under GST should include relevant part of the Act that levies NCCD, Automobile Cess, R&D Cess on Import of Technology and Infra Cess.
2. Specific provisions for the used vehicles business should be made in the GST law as the pre-owned vehicles business will become unviable if full tax will be charged on the transaction value at the time of sale by the Registered Dealers.
3. Subsume Road tax in GST.

Suggestions were also made with regards to provisions of Time of Supply of Goods, Valuation, State Incentive, Refund, Basic Principle, Transition, Income Tax Credit & Litigation.

SIAM team also met GST officials from Maharashtra, Gujarat, Karnataka, apart from Central Government.

## Economic Research Group

SIAM Economic Research Group continued to produce industry related reports to cater to industry's research

requirements along with engaging into industry demand forecasting for the entire year.

Like in the last few years, the Looking Ahead Conclave was organized by this Group in January which attracted participants from various spheres of the industry. The Group also coordinated with the CRISIL Research Team for bringing out the demand forecast for the automobile industry with help of inputs from the member companies.

The Group met in May 2016 in Bangalore and provided feedback to CRISIL for improvisation in demand forecasting and discussed proposal of a study on impact of automotive industry and sectoral policies on Indian Economy, currently under consideration for being taken up in the future. The Group also provided feedback on the Economy Monitor Report, a document that presents historical and latest statistics on the economy, with analysis of the trends.



Panelists during the discussion on Demand Forecast for 2016-17



Participants during the SIAM 10th Looking Ahead Conclave



Mr. Arvind Saxena, Chairman, Trade Fair Group addressing the members about Auto Expo – The Motor Show 2016

A two-days training was organized on 'Forecast Modelling' in Bangalore in July, 2016. The training was conducted by professors from Indian Statistical Institute, Bangalore and saw participation from most of the member companies. The training provided hands-on experience on selected forecasting techniques, apart from a working knowledge on inherent technical and behavioral characteristics and challenges of time series data.

### Trade Fairs Group

SIAM continued to engage members during the preparation for the Auto Expo- The Motor Show 2016 and briefed members almost every month in elaborate briefing meetings prior to the show.

Post the successful completion of Auto Expo – The Motor Show 2016 in February, the Group met in July 2016 to discuss the feedback received from the

members, so as to improve upon all aspects of the event in future. The meeting was chaired by Mr Sanjeev Handa, Co-Chair, SIAM Trade fairs Group and Vice President - Marketing, Maruti Suzuki India Ltd.



Meeting on Auto Expo – The Motor Show 2016 with members of Trade Fair Group



Meeting on Auto Expo – The Motor Show 2016 with members of Trade Fair Group

It was decided that SIAM will organise a “Commercial Vehicle Show” in February/March 2017 at India Expo Mart, Greater Noida. The Group will ensure that this becomes the single definitive exposition for everything to do with the commercial vehicle industry in terms of technology, trends, solutions, knowledge and networking.

## Human Capital Group

SIAM Human Capital Groups works on various issues related to the ASDC, HR, IR, Labour, etc. In the last one year, several meetings took place and discussions were held on HR capability alongwtih IR Skills building of automotive vendors and dealers. The Group will be organizing workshops focusing on HR Capability Building and IR Skills Building of ACMA and FADA members. The programmes will define integration mechanism, goals, talent development, developing conceptual framework, strategies, etc. The Group is also planning to organize HR & IR Excellence Awards. The Group regularly interacts with Automotive Skills Development Council (ASDC) to look into their activities and also guides ASDC on overall policy directions.

The following activities have been piloted under the Group in 2015-2016:

### Blue Collar Workers’ Remuneration Survey

Remuneration Survey of Blue Collar Workers’ has been conducted by Employers Federation of India. The survey methodology covered enrolment of participating companies and data collection from them. The survey report covered employee strength, nature of job,



Mentoring Session on 3rd Dec 2015 in Pune

classification of wages, unions, wage settlement, absenteeism, performance bonus, conveyance, other benefits, insurance, etc.

### 3rd SIAM Automotive HR Conclave 2015

The 3rd SIAM Automotive HR Conclave 2015 with the theme ‘Make in India: Leveraging Human Capital’ was organized on 4th December 2015 at Pune. The HR conclave was designed to inspire the Auto Industry to explore how people power will contribute to “Make In India” in Indian Automotive sector. The conclave was attended by more than 200 HR professionals and students from local institutions.

### Mentoring Session

A Mentoring Session was also organized one day before of HR Conclave on 3rd December 2015 in Pune. The Mentoring was done on the following topics: Performance Management System, Talent Acquisition,



Mr. N V Balachandar, Sr. VP & Group Head (HR & CSR) Ashok Leyland Ltd., chairing the Human Capital Group meeting



Speakers at the 3rd Automotive HR Conclave on 4th Dec 2015 in Pune

Satisfaction to Engagement to Happiness, Leadership Development, Industrial Relations, Compensation & Benefits, Employee value proposition, HR Analytics, Learning & Development and Technology in HR. More than 100 students participated in the Mentoring Session.

### **Compensation and Benefits Survey**

Aon Hewitt has been conducting a compensation and benefits survey every year since 2008, facilitated by SIAM. The survey seeks to include all SIAM members to provide a comprehensive perspective in rewards domain in the Auto OEM industry. Survey typically covers 11 functions across 12 hierarchical levels predefined by Aon Hewitt for Auto OEM industry clients.

### **Benchmarking Survey**

SIAM Members have a common uniform process for sharing benchmarking data and feedback from members on various issues. In the past one year, members have shared data on Leave Policy, International Travel Policy, Flexible Working Hours, Maternity Benefits, Mobile Handset and Company Vehicle, etc.

### **Anti-Counterfeiting Group**

ACG teamed up with all major auto players in the India, and through a series of activities at Auto Expo engaged with visitors in its quest to spread awareness about counterfeit products infiltrating the auto industry. On the second day for Auto Expo - The Motor Show 2016, SIAM unveiled the mascot "Asliman" for the Anti-counterfeiting campaign – Be Genuine, Buy Genuine. A



Members in discussion during the Anti Counterfeiting Group meeting

pledging wall was also displayed to convince the people to commit against fake.

As a part of their on-ground campaign ACG conducted the "Campus Initiative" that saw participation of more than 300 students from over 9 colleges from around NCR. Students made best use of their experience and expertise in their respective fields in order to create projects that not only provide solutions for common industry problems, in the case of art and fashion, created expressive works that embodied the spirit of this campaign.

The Group in its recent meeting held in the month of May 2016 compiled the data for benchmarking of Key Performance Indicators (KPI) for automobile spare parts for the use by auto-industry against counterfeiting of spare parts of automobiles. The OEMs also shared the best anti-counterfeiting practices followed in India and abroad.



SIAM Anti Counterfeiting Group at the Asliman launch

### **Logistics Group**

SIAM Logistics Group organized the 3rd Automotive Logistics Conclave on 21st and 22nd June 2016 in New Delhi, on the theme "Optimising Operational Efficiency in Automotive Logistics". The event was graced by eminent national and international speakers with diverse backgrounds, such as Government, Automobile Manufacturers, Consultants, Logistics Service Providers, etc. The event was attended by more than 150 delegates.

The Group also organised a one-day workshop to discuss the current challenges faced in Automotive



Logistics Workshop held in New Delhi. L to R Prof Saurabh Chandra, IIM Indore, Mr Prem Verma Chairman Logistics Group, Mr Sugato Sen, Deputy Director General SIAM & Mr Sushil Kumar Senior Advisor SIAM

Logistics and to suggest the possible recommendations and policy assistance from the Government.

Logistics Group has been working with the Ministry of Shipping, Government of India, for the development of Inland Waterways and Coastal Shipping – for promoting transportation of finished vehicles. In early February this year, one of the members did a trial of Coastal Shipping by transporting 400 cars from Chennai to Pipavav port, Gujarat using coastal shipping.

SIAM submitted its comments on the Draft Notification on Vehicle Carrier Dimensions to Ministry of Road Transportation and Highways (MoRT&H), the final version of the notification is awaited from MoRT&H.

The Group followed-up with Dedicated Freight Corridor Corporation of India for an update on the development of the Eastern and Western corridors with an aim to understand the prospects for the automobile industry.



Mr Vinod K Dasari, President SIAM delivering the Inaugural Address at the 3rd SIAM Automotive Logistics Conclave

SIAM met the Railway Board, Ministry of Railways, several times during the year to discuss various measures to increase the percentage share of Railways in finished vehicle transportation. Discussions were also held on how to rationalize the freight structure, provide adequate infrastructure for loading/unloading of vehicles, induct more NMG rakes, etc. In the last Railway Budget, Mr Suresh Prabhu, Hon'ble Minister for Railways, announced the setting-up of India's first rail-auto logistics hub in Walajabad, near Chennai.

### Sourcing Group

Some of the important issues dealt with through the year by the Group are highlighted below.

BIS Marking on listed steel raw material was made mandatory in Dec 2015. Members faced problems regarding coverage of steel grades imported by them under the order. SIAM met the Min of Steel as well as



Meeting of Logistics Group with the Delegation from International Finance Corporation



Joint Meeting of SIAM Sourcing Group with ACMA. L to R Mr Sugato Sen, Deputy Director General, SIAM, Mr Vinnie Mehta, Director General, ACMA, Mr S. Ram, Vice President ACMA and Mr Hemant Sikka, Chairman, Sourcing Group.



Meeting of the SIAM Sourcing Group

BIS and convinced them to issue clarification exempting specific grades of imports from the Q C Order and extending the date of implementation for others. SIAM also assists BIS in deciding case by case clarifications for coverage under the Q C Order.

SIAM participated in the Inter Ministerial Committee meetings in the DGFT regarding notifying the list of tyre sizes permitted for import by members without BIS marking for service requirements. The latest list of 683 sizes has been notified in April 2016.

A Delegation of Sourcing Group members went to the China International Auto Products Expo (CIAPE 16) in Shanghai, China in September 2015. Another delegation visited the Thailand Auto Parts and Accessories (TAPA 2016), in April 2016.

The Govt. imposed Safeguard Duty on import of some steel coils. SIAM held meetings with various ministries to explain their view point. The govt. was convinced and has since exempted imports of specific high quality steel coils at prices higher than specified levels from the Safeguard Duty.

### Service Heads Group

The Group held meetings to finalise its comments on the draft notification released by the government regarding vehicle recall by manufacturers. SIAM has also proposed that the mandatory recall should be applicable for vehicles which are produced on/after the date of implementation of the said notification and be applicable for vehicles which are less than 7 years old from the date of Manufacturing/ Import. The

determination of a safety defect requires a proper risk assessment based on factors such as probability of occurrence of failure, severity of consequences of a potential failure as well as controllability by the driver of the vehicle and guidelines for risk assessment would need to be formulated so that common criteria are used. The Group is working on this document and would be submitting to the ministry.

### Information Technology Group

SIAM IT Group continued its work on Auto Data Exchange (Auto DX) a collaborative ACMA-SIAM initiative.

More than 1 million transactions have been achieved during the year and there is increasing interest by other members to join the initiative. The portal has benefited with reducing transaction cost, increased overall industry efficiency, reduced industry supply chain cost and bringing B2B integration capabilities.



AutoDX Governing Council meeting

The Group met on 22nd June 2015 where discussions were held with GSTN which would provide the gateway for the launch of GST in the country. With introduction of GST it is expected that more members from ACMA and SIAM would join the Auto DX to bring more efficiency in the system.

### International Relations & Trade Policy Group

SIAM International Relations & Trade Policy Group was active through the year in enhancing relations with international bodies for the automobile industry and providing feedback to Ministry of Commerce & Industry on various bilateral and multilateral talks including Comprehensive Economic Partnership Agreement



Mr Vinod K Dasari, President SIAM, presenting at the 10th IAA India Day 2015

(CEPA), Comprehensive Economic Cooperation Agreement (CECA), etc.

On the Trade Policy front, SIAM continued to emphasize need for supporting SIAM recommendations for negative list of items and robust rules of origin definition in the negotiations for India-EU FTA, Regional Comprehensive Economic Partnership (RCEP) negotiation, trade agreement with Australia, etc. SIAM also shared a list of countries with Department of Commerce with which it suggested that India should negotiate trade agreement to provide automobile industry access to the vehicle markets of these countries.

SIAM participated in multiple meetings of RCEP and provided its views on the negative list of items and Rules of Origin.



Mr Sugato Sen, Deputy Director General participating as a panelist at China Auto Forum 2016

As an on-going activity, SIAM remained engaged in dialogue with APEC AD, OICA, IMMA, JAMA, VDA, SMMT, KAMA, CAAM, TAIIA, AFM, etc. and exchanged information on current status of the industry, changes in policies and trade agreements being discussed globally, etc. SIAM-JAMA High-level meeting was held in October 2015 in Tokyo, Japan. SIAM organized the 7<sup>th</sup> Auto Trade Dialogue in February, 2016, on the sidelines of the Auto Expo – The Motor Show 2016 in Greater Noida. The Auto Trade Dialogue saw participation from Government and counterpart association officials from Canada, Japan, Korea, Malaysia, UK and USA.

### **China Auto Forum – April 2016, China**

SIAM participated in 2016 China Auto Forum, themed “Innovation, Green and Sharing—Open a New Development Stage in China Automotive Industry”, which was held in Beijing from April 25<sup>th</sup> to 27<sup>th</sup>. China Auto Forum is organized by CAAM (China Association of Automobile Manufacturers), supported by OICA (International Organization of Motor Vehicle Manufacturers) and World Economic Forum (Davos). SIAM gave a detailed presentation on “Overseas Merger & Acquisitions of Indian Automotive Industry”.

### **24th APEC Automotive Dialogue – May 2016, Philippines**

SIAM participated in the 24th APEC Automotive Dialogue meeting from May 25, 2016 to May 27, 2016 at Manila, Philippines as a guest where various trade related issues were discussed. These included updates on regional trade liberalization and integration, free trade agreements, automotive tax structures, regulation and



Indian Delegation led by Mr. Anant Geete, Hon'ble Minister of Heavy Industries and Public Enterprises, Government of India (Fifth from left), at Indo-German Joint Working Group Meeting in Frankfurt



Participants at the 23rd APEC Automotive Dialogue

standards, and updates on auto parts development. On May 25<sup>th</sup>, SIAM had a bilateral meeting with the US delegation understanding the issues that affect the automobile industries in both the countries.

SIAM made presentations on the current market situation in Indian automobile industry, the trade agreements which India has signed and is currently negotiating, tax structure in the country and an update on automotive policies and regulations. SIAM informed that the Automotive Mission Plan 2006-16 has come to an end and also apprised the APEC members that the next phase of the Automotive Mission Plan, AMP 2016-26, will soon be launched officially.

### Exports Group

SIAM Exports Group was involved in providing inputs on tariff and non-tariff concerns affecting automobile exports to various markets. A paper on the exports opportunity in Africa for automobile industry was submit-

ted to Department of Commerce for discussion during the 3rd India-Africa Forum Summit 2015 in October.

A workshop was held with officials from Department of Commerce, DGFT and SIAM members in May 2016 at New Delhi. Mr. Ravi Kapoor, Joint Secretary, Department of Commerce, Mr. D K Singh, Additional DGFT and Ms. Anita Praveen, Joint Secretary, Department of Commerce joined the inaugural session of the workshop. SIAM requested Government to pursue trade agreement with Algeria, Egypt, Nigeria, South Africa, Chile, Peru, Colombia, Philippines, Myanmar, Vietnam, Australia and New Zealand.

Ms. Ishita Ganguly Tripathi, Director, Foreign Trade (Europe), Department of Commerce, Mr. Balbir Singh, Under Secretary, Foreign Trade (Latin American Countries), Department of Commerce, Mr. Bipin Menon, Director (Foreign Trade), Department of Commerce and Mr. Abhijit Das, Director, Indian Institute of Foreign Trade (IIFT) joined for the technical session.



SIAM Trade Workshop in progress

There were several key suggestions made to the Government in order to boost exports like –

1. In view of declining exports to Africa because of unavailability of US dollar, India should engage in a rupee trade agreement with the African countries
2. Trade agreements negotiations should be initiated with key export markets, including Algeria, Egypt, Nigeria, South Africa, Peru, Colombia, Philippines, Myanmar and Vietnam
3. MEIS rate should be increased from 2% as it does not compensate adequately
4. Incremental Export scheme should be reintroduced

Mr. D K Singh informed the participants that MEIS of 2% for automobiles has been expanded to category C countries (which includes Sri Lanka and Bangladesh), which SIAM had been pursuing with Department of Commerce and DGFT since a long time. He also informed that landing certificate requirement had been removed to facilitate ease of doing business.

SIAM also continued its interaction with the Duty Drawback Committee to provide information and justifications for a higher duty drawback rate.

Meetings were organised with the officials from GSO (Gulf Standardisation Organisation) and members to enable members to seek clarifications on requirements of standards to be met by exporters of vehicles to the Gulf countries. This direct interaction between GSO and the OEMs was appreciated by the GSO well as members. Further interaction by way of visit of a delegation to GSO Riyadh is also contemplated.

## CSR Group

The Group met several times during the year under the chairmanship of Mr. Naveen Soni, VP - Govt. Affairs, Toyota Kirloskar Motors at New Delhi discussing the future course of action of the CSR Group. It was also discussed that to improve the image of the industry, members should come together to share their best practices in CSR as it is a very good platform for positive image building.

Three key focus areas in CSR that the members of the Group have identified are – [1] Sustainability = Environment (like tree plantation), [2] Health & Hygiene (like Sanitation) – connects with “Swachh Bharat” pro-



Mr. Naveen Soni, Chairman and Mr. Sushant Naik, Co-Chairman of SIAM CSR Group addressing the members

gramme and [3] Skill India (Road Safety) – connects with “Skill India” programme.

Apart from members coming together to carry activities under the above, a Compendium on CSR activities undertaken by SIAM members is being prepared and an Annual SIAM-CSR Conclave is planned in the month of November 2016

## Finance, Leasing & Insurance Group

This Group remained engaged with various stakeholders throughout the year and met with the representatives of Finance Industry Development Council (FIDC). FIDC members discussed with the SIAM Group about the challenges faced by NBFCs in doing business in the country with regards to Auto loans. They also expressed the need to have a continuous dialogue with the SIAM Group on topics of mutual interest.



Mr Ajay Seth, Chairman SIAM Finance, Leasing and Insurance Group, addressing the members during the Group meeting

## Vehicle Classification, Sales Reporting & Analysis Group

The Group remained engaged with various stakeholders throughout the year. It discussed the current scenario of Data uploading by the vehicle manufacturers on the Vahan 4.0 portal. SIAM informed the Group about the states/cities where the registrations of vehicles, using the Vahan 4.0 portal, have started. Members raised their concerns/queries and had detailed deliberations in order to streamline every step of the data uploading process.

As on date, Vahan 4.0 portal is being used by RTOs at various locations for registration of vehicles, such as New Delhi, Uttarakhand, Lucknow, Jammu & Kashmir, Meghalaya, etc. A few more RTOs at other locations would soon start using the Vahan 4.0 portal.



Vahan meeting of SIAM members

SIAM had a meeting with senior officials of MoRT&H on getting the access to Retail Sales data of vehicles available on the Vahan portal, the government finally agreed that SIAM being an industry body should get access to this data provided the entire data accessed by SIAM is widely circulated amongst members by SIAM free of cost.

## Styling & Design Group

The Group organized the 10th edition of the Styling & Design Conclave and 8th edition of the Automotive Design Challenge (ADC) on 5<sup>th</sup> February 2016 in conjunction with the Auto Expo – The Motor Show. The theme for the conclave was ‘Design for India’. The event was graced by eminent speakers from various backgrounds.



Mr Pratap Bose, Head - Tata Motors Design, addressing the audience during the SIAM Styling & Design Conclave 2016

In this edition of the conclave, SIAM Group commemorated the contributions of Mr. Mohd. Basha, Former Designer, TVS Motor Co., who played a significant role in advancing the cause of Automotive Styling & Design in the country.

The final round of the Automotive Design Challenge was also held on the same day and Gaurav Nandi, Student of MITID, Pune, won the first prize. The second and third prizes went to students from NID, Gandhinagar and DSKISD, Pune, respectively.

Three regional automotive design workshops were also organised at New Delhi, Bangalore and Pune by the Group with an aim to bridge the gap between academia and industry. Group members have also been in continuous touch with most of the design institutes in the country to understand their design curriculum, review students' portfolios and share knowledge with students related to Automotive Styling domain.

SIAM Group and MITID, Pune, faculty jointly launched the SIAM-MITID Clay Modelling programme. A Clay Modelling studio has been set-up at MITID, with one-time assistance of INR 1.00 million from SIAM. MITID will be offering this programme in two formats – an 8 months' Certificate Course and a 2 years' Diploma Course.

The Group is also planning to initiate a few short term courses for junior and middle management level design professionals employed in the automobile industry.

# TECHNICAL AFFAIRS

## Auto Infotronics

Intelligent Transport Systems (ITS) are globally proven to optimize the utilization of existing transport infrastructure and improve transportation systems in terms of efficiency, quality, comfort and safety. SIAM Infotronics Group is working with Government bodies and other organizations in India, towards implementing various ITS services across the country like RFID tags for the purpose of Electronic Toll Collection - ETC (Government of India mandated installation of Radio Frequency Identification (RFID) tags on the medium and heavy motor vehicles)

## CMVR and Safety Regulations

The SIAM Group on CMVR and Safety Regulations discussed various issues towards enhancement of safety regulations for the automotive sector such as Bus Body Code, Bharat NCAP (New Car Assessment Programme), Active and Passive Safety.

The Group interacted with the Ministry of Road Transport & Highways to discuss the timelines for implementing the crash regulations for passenger cars in the country. Industry recommendations for the timelines were considered by the Ministry to implement the same by 2018 / 2020 for new and all models, respectively.

The Group worked with the AIS Committee on formulating the fire safety standard for buses. As internationally there is no mandatory regulation for

Fire Detection and/or Suppression, the industry view on performance parameters and technology neutrality were taken as the basis for formulating the Indian standard. The standard specifies guidelines for detection and suppression systems for fires that may originate from engine compartment of buses. The buses fitted with Fire Detection and Alarm System (FDAS) & Fire Detection and Suspension System (FDSS) shall comply with the recommendatory requirements of this standard.

The Group continually engaged with the Ministry of Road Transport & Highways on safety rating mechanism viz. Bharat New Vehicle Safety Assessment Programme for passenger cars. The same is under discussion with the Ministry for finalization of the test parameters and criteria for implementation of Bharat NCAP. The voluntary implementation of safety rating as per the original plan was expected to commence from October 2016.

The Group has been providing technical assistance for finalizing the SIAM viewpoint on various PILs filed in different Courts in the country. This included subjects like noise regulations, speed limiting devices, crash Safety regulations etc. One of the PILs had resulted in suspension of registration of small cars in the State of Assam.

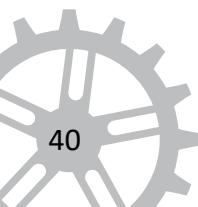
## Diesel Image

The SIAM Group on Diesel Image organized the 6th Conference in August 2015 at New Delhi at which Senior Govt. Officials, Industry Leaders, Testing Agencies discussed the impact of leapfrogging from BS IV to BS VI Emission Norms in India.

During the year, public perception and awareness on the rising level of pollution in Indian cities became almost a movement. For the first time in the history of Indian automotive industry, the Supreme Court took an unprecedented interim decision on 16th December 2015, to ban registration of 2000 cc and above diesel cars in the NCR. The passenger car industry presented a united front to counter this order. A number of meetings of the CEOs Council were held to decide on



Mr S Ravishankar, Chairman, CMVR & Safety Regulation Group addressing members during the Group meeting





Dignitaries at the 6th SIAM Diesel Conference at New Delhi

the available legal strategies to present the true picture of the sources of pollution and the contribution of the auto industry to this pollution.

The Hon'ble Supreme Court has allowed registration of diesel vehicles of 2000cc and above subject to deposit of 1% of Ex showroom cost as environment protection charge. In the meantime, MoHIL is undertaking a source appointment study based on which Government would assess if any cess should be levied on diesel cars.

The Principal Bench of NGT also got active on addressing pollution level in the States and sought pollution data from various State Governments. The Circuit Bench of Kerala under the Southern Bench of NGT also passed interim orders banning registration of 2000 cc and above diesel vehicles in May 2016. SIAM supported by member companies successfully took a stay on these orders from the Hon'ble High Court of Kerala.

Recently, NGT Principal Bench at New Delhi also took a decision to de-register more than 10 year old Diesel vehicles in National Capital Region (NCR) to minimize pollution from old vehicles. This order is likely to be contested by the Government.



Mr. Anant J Talaulicar, Chairman, SIAM Diesel Image Group, addressing the audience at the 6th Diesel Conference

### Emissions & Conservation

The SIAM Group on Emissions & Conservation continually engaged with various stakeholders towards enhancement of air quality and vehicular efficiency. The Group was actively engaged with concerned agencies in finalizing the SIAM proposal on procedural issues for the implementation of Bharat Stage VI emission norms for Two, Three and Four Wheelers

SIAM met Petroleum Federation (Petrofed), representing the Oil Companies to present the auto industry's view on BS VI fuel quality and the impact of diluting the fuel standards as being proposed by the oil industry. The Group discussed to arrive at a consensus on the fuel quality parameters to enable Government of India finalise the BS VI Fuel specification. During the discussions, Petrofed agreed to provide BS VI fuel by 2019 at selected outlets for the purpose of testing and validation of BS VI vehicles.

The Group also actively engaged in working with Test Agencies to look at additional new testing methodology for passenger cars which is likely to be introduced from BS VI onwards.



Members at the 38th SIAM Emission & Conservation Group Meeting



Meeting on Fuel Quality with Petrofied team, headed by Mr Sanjay Singh, Director(Refineries), IOCL

The Group also worked closely with the Ministry of Road Transport & Highways and Bureau of Energy Efficiency (BEE) in formulating the star rating mechanism on fuel efficiency of passenger cars. Procedures for implementing Fuel Efficiency Regulations for Cars are also to be notified by Ministry of Road Transport and Highways (MoRTH) for implementation from the year 2017.

SIAM has been engaged with the Petroleum Conservation & Research Association (PCRA) for the formulation of fuel efficiency regulation for Heavy Commercial Vehicles. The regulation is to be notified under the aegis of Ministry of Petroleum & Natural Gas. PCRA has recommended a Constant Speed Fuel Consumption method. SIAM, however, has highlighted to the Ministry to follow a simulation based approach for the said regulation to enable faster implementation as well as to align with other developed regions of the world. The technical aspects regarding implementation of the constant speed procedure are still under discussion with test agencies and the concerned ministry.



Meeting Chaired by Hon'ble Minister of Road Transport, Highways & Shipping, Mr Nitin Gadkari with SIAM CEOs on BSVI emission roadmap

Discussions on alternative fuels for vehicles are also underway. Ethanol Blends of E85 and ED95 have already been notified as automotive fuels by the Ministry of Road Transport and Highways.

## Frontier Technology

### National Mission on Electric Mobility:

The Group continued its support to Government on the National Mission on Electric Mobility (NMEM) for implementation of the scheme namely FAME (Faster Adoption and Manufacturing of Hybrid & Electric Vehicles) India. FAME India scheme has been introduced as a pilot scheme for 2 years, covering all vehicle segments viz. 2-Wheelers, 3-Wheelers, 4-Wheelers, Light Commercial Vehicles and Buses and all xEV technologies viz. Mild Hybrid, Strong Hybrid, Plug-in Hybrid and Pure Electric.



Mr Ambuj Sharma, then Additional Secretary, DHI addressing the SIAM Group members

More than 75,000 hybrid and electric vehicles were sold under the FAME India scheme in the first year of its implementation ending on 31st March 2016. Procurement by various agencies of more than 50 hybrid and pure electric buses were also sanctioned for public transport application. The first year's allocation of Rs. 75 Crore was also fully consumed towards demand incentive, technology development projects and testing infrastructure in the country. In the Union Budget for FY 2016-17, Government of India allocated additional Rs. 123 Crore for implementation of FAME India for its 2nd year. Rs. 45 Crore was spent already till the publication of this report.



Joint session of SIAM Frontier Technology Group with the Dept. of Heavy Industries

The Group is making efforts to formulate consortium projects to develop common technology platform and to develop robust supply chain in India for the electric mobility. The Group has also engaged with relevant stakeholders to develop charging infrastructure. The Group has also supported the Ministry of Heavy Industries and Public Enterprises by organizing hybrid and electric vehicles rallies across cities in India

On 15<sup>th</sup> June 2016, SIAM along with ACMA organized the 2nd National Workshop on FAME India under the aegis of Ministry of Heavy Industries and Public Enterprises. Senior Govt. Officials, Industry Leaders and International Experts discussed in the Workshop the way forward to further the Mission on Electric Mobility.



Mr Ambuj Sharma, then Additional Secretary, Department of Heavy Industry, addressing the audience at EV Rally at Jaipur

The Group has submitted requests to the Ministry of Heavy Industries and Public Enterprises to extend the scheme FAME India on a long term basis until at least 2020-21.

*Development of Roadmap for Hydrogen as Automotive Fuel*

In 2012, the Ministry of New and Renewable Energy (MNRE) had formed a Steering Committee on Hybrid and Fuel Cells under the Chairmanship of Dr K Kasturirangan, Member (Science), Planning Commission (erstwhile) to advise the Ministry and steer the overall activities on hydrogen and fuel cells in the country. In its first meeting held in 2012, the committee has created various sub-committees. SIAM through the



Three-city rally of Hybrid & Electric vehicles, flagged-off at Jaipur by Mr Kali Charan Saraf, Hon'ble Minister of Education of Rajasthan

Frontier Technology Group has been providing various inputs in Transport Sub-Committee on Hydrogen and Fuel-Cells. Recently, in June 2016, the Steering Committee has finalized the recommendations from the various sub-committees and drafted a report namely 'Hydrogen Energy and Fuel Cells – A Way Forward'. The report is being approved by the Ministry.

In May 2016, SIAM also participated in the delegation led by the Ministry to study Solid Oxide Fuel Cells demonstration project at IT BHU for its feasibility to be used for 2-Wheelers and 3-Wheelers. The Group intends to continue its efforts to develop focus on hydrogen based mobility with the relevant stakeholders including the Ministry of New and Renewable Energy.

## INTERNATIONAL HARMONIZATION

SIAM participated in the GR Groups and WP 29 at Geneva as part of the India delegation and contributed in providing technical inputs for Environmental and Propulsion Performance Requirement (EPPR) and Worldwide Harmonized Light vehicles Test Procedures (WLTP) regulations. SIAM has also commissioned a study on the impact of signing the 1958 agreement on trade etc. to Indian Institute of Foreign Trade (IIFT).

## Recycling

The SIAM Group on Recycling actively worked with various stake holders to formulate standards for recycling and protocols for dismantling. SIAM has also suggested the government for setting up recycling centres across the country.

SIAM organized a workshop on "International Practices for Type Approval with Regard to Recyclability, Reusability and Recoverability (RRR)" in December 2015. The workshop was widely attended by senior government officials, Experts from European Automobile Manufacturer's Association (ACEA), testing agencies and SIAM members.

During the year, based on SIAM interactions with Ministry of Road Transport & Highways (MoRT&H), Government of India, released a Concept Note on the Voluntary Vehicle Modernisation Programme (V-VMP). SIAM had a detailed discussion with the senior officials of its member companies on various aspect of the V-VMP and submitted its comments.

SIAM had earlier submitted its proposal on V-VMP to MoRT&H and other Ministries.

SIAM has always supported the concept of incentivized vehicle scrappage in the country so that safer



SIAM ACEA Recyclability, Reusability and Recoverability (RRR) Workshop

and environment friendly technology vehicles are introduced.

## Two Wheelers

The SIAM Two Wheeler Group actively worked on developing the procedures for testing vehicles complying to BS VI emission norms based on the draft notification released by Government of India. The Two Wheeler Industry is also working towards implementing 'Automatic Headlight On' from 1st April 2017 onwards. For further enhancing the safety of two wheelers, implementation of Antilock Braking System and Combined Braking Systems have been mandated from the year 2018 onwards for new models. The Group participated in various international forums like WP.29 and meetings of the International Motorcycle Manufacturers' Association for harmonization of vehicular regulations.



(L-R): Mr R Narasimhan, Vice President, Bajaj Auto and Co-Chairman, SIAM 2 Wheeler Group; Mr Harjeet Singh, Vice President, Hero MotoCorp and Chairman, SIAM 2 Wheeler Group

BS IV emission norms for new models of two wheelers have been introduced since April 2016 and all models manufactured across India will have to be BS IV compliant by the year 2017.

The Ministry of Road Transport & Highways has taken up an ambitious target of reducing the road accident fatalities to half by 2020. As one of the initiatives, a committee has been formed under MoRT&H to come up with new designs of helmets which are safer, lighter and specifically designed for Indian climatic conditions.



(L-R): Mr Hardik Makhija (SIAM), Vice Secretary, Ms D Leveratto (IMMA), Secretary & Dr Adolfo Perujo (European Commission), Chairman, EPPR Working Group during the 14th Meeting at UNECE, Geneva

The Indian delegation has been actively participating in the Environmental and Propulsion Performance Requirement (EPPR) Sub-Group for L-category vehicles under the Sub-Group on Pollution and Energy of WP.29, the World Forum for Harmonization of Vehicle Regulations. The EPPR Working Group is preparing Global Technical Regulations (GTRs) for Two Wheelers, and has recently developed procedures for evaporative emission measurement, crankcase emission measurement and On-Board Diagnostics (OBD). SIAM has been providing Secretariat support to the EPPR working Group since January 2016. The working Group shall now develop and modify procedures for mass emission regulations, Idling Emission Regulations and regulations for CO<sub>2</sub> and fuel consumption for two wheelers under the existing GTR.



Two Wheeler Group meeting in progress



Delegates at the IMMA General Assembly

### IMMA General Assembly

The International Motorcycle Manufacturers Association, IMMA, has elected Mr Stephan Schaller as its new President during its last General Assembly held in Bali in May 2016. The decision was taken by IMMA's General Assembly, hosted by the Federation of Asian Motorcycle Industries (FAMI) and the Indonesian Motorcycle Industry Association (AISI). Mr Schaller, President of BMW Motorrad, who currently serves as President of the European Association of Motorcycle Manufacturers (ACEM), will hold the IMMA Presidency for a period of two years, from May 2016 to May 2018. He succeeds Mr Paul Jones from the United States Motorcycle Manufacturers Association (USMMA), who secured the IMMA Presidency from May 2014 to May 2016.

During the General Assembly, IMMA Strategic Planning exercise was discussed wherein a visual description of societal and political importance of policy issues impacting Motorcycle Industry worldwide was discussed

### Three Wheelers

SIAM Three Wheeler Group actively worked on recommending BS VI emission roadmap to Government of India. The Group is presently working on finalization of type approval procedure for compliance to BS VI emission regulation. Government has notified BS IV emission norms for new models of three wheelers from the year 2016 and all existing models across India

by 2017. BS VI draft emission regulations suggesting implementation of BS VI from the year 2020 has been notified by Government.

Type approval procedure for BSVI emission standards for three wheelers is also being drafted by members of SIAM Three Wheeler Group, for discussion with the ministry and test agencies.

### SIAM-JAMA Annual Meeting

The SIAM-JAMA annual meeting was hosted from 27<sup>th</sup> to 31st October, 2015 by JAMA in Tokyo, Japan. Experts from both the sides actively discussed topics including environmental regulations, safety regulations, harmonization with international standards and recent developments on certification procedure both in India and Japan.

Meetings commenced with the 4th Fuel Group meeting on day-1, with discussions on the survey results of India's market fuels by JAMA. Updates were also provided by SIAM on Bharat Stage III and IV market fuel policy. JAMA was updated on the notification of Ethanol Blends E85 and ED95 as automotive fuels by the Ministry of Road Transport and Highways. The ministry notified the technical specifications for testing, test requirements for Type Approval and extension for two, three and four-wheeled vehicles. The status and experience of ethanol blends in Japan and fuel specification for flex-fuel vehicles were also discussed. It was conclud-



10th SIAM JAMA Four Wheeler Group Meeting

ed in the fuel Group meeting by JAMA that nation-wide implementation of BS IV emission norms is a realistic and effective measure for improving air quality in India.

This was followed by the 10th Four-wheeler Group meeting on the second day. The major topics of discussion were the draft Road Transport & Safety Bill, Bharat NCAP, revisions in the noise regulation and India stance on the 1958 Agreement. Updates were also given on topics such as the status of safety regulations in the

country, new COP requirements and E-mobility.

The 5<sup>th</sup> SIAM-JAMA Two Wheeler Group Meeting held discussions on demerits of AHO and permitting DRL in Japan, regulation trend of advanced break and the current situation with GCC Standardization Organisation, to name a few.

On the sidelines, the Indian delegation also visited the Tokyo Motor Show.



5<sup>th</sup> SIAM JAMA Two Wheeler Group Meeting

# Public Policy



Mr Rajnath Singh, Hon'ble Minister of Home, Government of India and Mr Nitin Gadkari, Hon'ble Minister of Road Transport, Highways & Shipping, Government of India flagging off the Road Safety March on 11 Jan 2016

Road and Environment Safety awareness drives have been organised by SAFE with the support of SIAM members and their dealer network across the nation during the National Road Safety Week announced by Ministry of Road Transport and Highways [MoRTH] in the period of January 11-17, 2016.

With the support from MoRTH a road safety march was organised on 11th January 2016 at India Gate, New Delhi. which was flagged off by Mr. Rajnath Singh, Hon'ble Home Minister of India and Mr. Nitin Gadkari, Hon'ble Minister of Road Transport, Highways & Shipping in the presence of various senior leaders, Mr. B.S. Bassi, Commissioner of Police and senior officials from ministries, industries and road safety stakeholders.

- 4500 Automobile Dealers participated in National Road Safety Week 2016
- Road Safety Walk at India Gate

- Road Safety Walk / March in different states of India
- Road Safety Refresher Training programs for students and drivers across the country
- Health Check-up camps for heavy commercial vehicles drivers
- Full week programme at Delhi Airport
- Provided full support to YES bank for organising Road Safety activities
- Programs organised in collaboration with NGOs in different states

SAFE Annual Convention, in association with MoRTH, Transport Department Government of Rajasthan & Rajasthan Police was held on 25<sup>th</sup> April 2016 at Jaipur, Rajasthan under theme of "Safer & Cleaner Tomorrow: Traffic Planning and Technology". The convention was aimed at addressing the rising concerns of environment related issues due to vehicular emissions and also the need for having proper engineering while constructing roads in India.



(From L to R) Dr N Saravanan, President, SAFE, Mr Pawan Kumar Goyal, Transport Commissioner, Government of Rajasthan, Mr Yunus Khan, Hon'ble Minister of Public Works and Transport, Government of Rajasthan, Mr Abhay Damle, Joint Secretary, Ministry of Road Transport & Highways, and Mr Naveen Soni, Vice President, Toyota Kirloskar Motors at the inaugural function of SAFE Annual Convention on 25 April 2016 at Jaipur.

The convention was inaugurated by Mr. Yunus Khan, Hon'ble Minister of Public Works & Transport, Rajasthan with the kind presence of Mr. Abhay Damle, Joint Secretary, Ministry of Road Transport & Highways, Mr. Pawan Kumar Goyal, IAS, Principal Secretary and Commissioner, Transport Department, Government of Rajasthan, Mr. Manoj Bhat, Director General of Police, Government of Rajasthan, Dr. N Saravanan, President, SAFE. 250 participants from across the country from industry, government and NGOs participated at the convention.

Through the year, SAFE spread environmental awareness by organizing Free Pollution Check Drive at 5500 dealerships across the country on the occasion of World Environment Day on 5<sup>th</sup> June, 2016. Also organised full year road safety awareness activities and programmes with school students at Delhi and spread the message of safety.

SAFE also participated in discussions with Ministry, corporates, NGOs etc. working in the area of road safety and environment and shared views on effective implementation of ideas.



(From L to R) Mr Sandeep Goel, Special Commissioner of Police, Delhi - Traffic, Mr A K Patnaik, Special Commissioner of Police, Delhi, Mr Alok Kumar, Commissioner of Police, Delhi, Mr Sugato Sen, Dy. Director General, SIAM and Mr Y S Guleria, Sr. Vice President, Honda Motorcycle and Scooter India Pvt Ltd at the Inauguration of Road Safety Summer Camp 2016 at New Delhi



Road Safety Rolling Trophy awarded to the ASN Public School, Mayur Vihar for successful implementation of Road Safety activities in their school in the year 2015- 2016.





# COUNCILS & GROUPS: 2015-16

## A. COUNCIL ON INTERNATIONAL BUSINESS



**Chairman: Dr Pawan Goenka**  
Executive Director & Group President – Auto & Farm Sector Mahindra & Mahindra Ltd.

### 1. INTERNATIONAL RELATIONS & TRADE POLICY GROUP



**Chairman: Mr Ketan Doshi**  
Vice President – New Business Development, Mahindra & Mahindra Ltd



**Co-Chairman: Mr Rahul Bharti**  
Vice President – Corporate Affairs, Maruti Suzuki India Ltd

### 2. EXPORTS GROUP



**Chairman: Mr Rakesh Sharma**  
President, International Business Bajaj Auto Ltd



**Co-Chairman: Mr Rakesh Srivastava**  
Senior Vice President (Sales & Marketing) Hyundai Motor India Ltd.

## B. COUNCIL ON MARKET



**Chairman: Mr P N Shah**  
President & Chief Executive (Automotive), Mahindra & Mahindra Ltd.

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



**Chairman: Mr Jnaneswar Sen**  
Senior Vice President (Sales & Marketing) Honda Cars India Ltd



**Co-Chairman: Mr R Ramakrishnan**  
Senior Vice President, CVBU, Tata Motors

### 2. TRADE FAIRS GROUP



**Co-Chairman: Mr Sanjeev Handa**  
General Manager (Marketing) Maruti Suzuki India Ltd

### 3. LOGISTICS GROUP



**Chairman: Mr Prem Verma**  
Chief Executive Officer, TML Distribution Company Ltd



### 3. LOGISTICS GROUP



**Co-Chairman: Mr V Anand**  
Senior General Manager-Sales  
Logistics, Hyundai Motors India

### 6. IT GROUP



**Co-Chairman: Mr Bishwanath Ghosh**  
Chief Information Officer  
Mahindra & Mahindra Ltd

### 4. CSR & COMMUNITY SERVICES



**Chairman: Mr Naveen Soni**  
Vice President (Govt. Affairs & CSR),  
Toyota Kirloskar Motor Pvt. Ltd.



**Co-Chairman: Mr Sushant Naik**  
National Head,  
Government Affairs, Tata Motors

## C. COUNCIL ON ECONOMIC AFFAIRS



**Chairman: Dr Abhay Firodia**  
Chairman  
Force Motors Ltd

### 5. SERVICE HEADS GROUP



**Chairman: Mr Pankaj Narula**  
Executive Director (Service),  
Maruti Suzuki India Ltd



**Co-Chairman: Mr Gopal Mahadevan**  
CFO & President-Finance,  
Ashok Leyland

### 6. IT GROUP



**Chairman: Mr Vijay Sethi**  
Vice President  
(Information Systems)  
Hero MotoCorp Ltd



**Chairman: Mr B B Parekh**  
Chief Purchase Officer,  
Tata Motors Ltd.



**Co-Chairman: Mr Hemant Sikka**  
Chief Purchase Officer - Auto &  
Farm Sector,  
Mahindra & Mahindra Ltd

## 2. ECONOMIC RESEARCH GROUP



**Chairman: Mr Mayank Pareek**  
President, PCBU  
Tata Motors

## 5. DIRECT TAX



**Co-Chairman: Mr B C Datta**  
Assistant Vice President (Taxation)  
Hyundai Motor India Ltd.



**Co-Chairman: Mr. N. Raja,**  
Senior Vice President and Director  
Toyota Kirloskar Motor

## 6. FINANCE, LEASING & INSURANCE GROUP



**Chairman: Mr Ajay K Seth**  
Chief Financial Officer, Maruti  
Suzuki India Ltd

## 3. TAXATION POLICY GROUP



**Chairman: Mr Shekar Viswanathan**  
Vice Chairman  
Toyota Kirloskar Motor Pvt Ltd.



**Co-Chairman: Mr K Ramkumar**  
Vice President-Finance  
Ashok Leyland

## 4. TAXATION PROCEDURAL GROUP



**Chairman: Mr D D Goyal**  
Sr. Vice President (Finance),  
Maruti Suzuki India Ltd.



**Chairman: Mr Balachandar N V**  
Sr. Vice President &  
Group Head - HR & CSR  
Ashok Leyland



**Co-Chairman: Mr Mohan Raghavan**  
Vice President (Excise)  
Mahindra & Mahindra Ltd.



**Co-Chairman: Mr C S Raju**  
Executive Director (HR)  
Maruti Suzuki India Ltd.

## 5. DIRECT TAX



**Chairman: Mr Anantharaman T**  
General Manager  
(Corp. Taxation & Govt. Affairs),  
Mercedes-Benz India Pvt. Ltd.



**Chairman: Mr Yashpal Sachar**  
General Manager - Parts  
Honda Motor India

## 8. ANTI COUNTERFEITING GROUP

## 8. ANTI COUNTERFEITING GROUP



**Co-Chairman: Mr P S Bhumak**  
Sr GM and Group Head - Marketing & Sales  
Hyundai MOBIS

## 2. RECYCLING GROUP



**Chairman: Capt. N S Mohanram**  
Consultant,  
TVS Motor Company Ltd.

## D. TECHNICAL COUNCIL



**Chairman: Mr K N Radhakrishnan**  
President & CEO,  
TVS Motor Company



**Co-Chairman: Mr Sanjeev Mandpe**  
General Manager  
(Product Homologation)  
Mercedes-Benz India Pvt Ltd

## 3. DIESEL IMAGE GROUP



**Chairman: Mr Anant J Talaulicar**  
Chairman & MD  
Cummins India Ltd



**Co-Chairman: Mr Sumit Sawhney**  
Managing Director,  
Renault India Pvt Ltd

## 4. AUTO INFOTRONICS GROUP



**Chairman: Mr S Gopalakrishnan**  
Head – Vehicle Electronics & Product Development,  
Ashok Leyland Ltd.

## 1. FRONTIER TECHNOLOGY GROUP, EV & HEV



**Chairman: Dr Tapan Sahoo**  
Vice President (Engineering and R&D),  
Maruti Suzuki India Ltd



**Co-Chairman: Mr. Kartik Gopal**  
Head – Strategy and Business Planning  
Mahindra Reva Electric Vehicles Ltd



**Co-Chairman: Dr. S J Dhinagar**  
Vice President (Advanced Engg)  
TVS Motor Company Ltd.

## 5. STYLING & DESIGN GROUP



**Chairman: Mr Anil Saini**  
Director – Design,  
General Motor India Pvt. Ltd

## 5. STYLING & DESIGN GROUP



**Co-Chairman: Mr Saurabh Singh**  
Head, Design Studio,  
Maruti Suzuki India Ltd

## 2. CMVR & SAFETY REGULATIONS GROUP



**Chairman: Mr S Ravishankar**  
Executive Advisor  
(Product Development),  
Ashok Leyland Ltd

## E. NATIONAL & INTERNATIONAL REGULATIONS COUNCIL



**Chairman: Mr Deepak Sawkar**  
Vice President,  
Maruti Suzuki India Ltd



**Chairman: Mr Rajan Wadhera**  
President &  
Chief Executive - Technology  
Mahindra & Mahindra Ltd

## 1. EMISSIONS & CONSERVATION GROUP



**Chairman: Mr C V Raman**  
Executive Director (ERD)  
Maruti Suzuki India Ltd.



**Co-Chairman: Dr Mathew Abraham**  
Senior General Manager  
Mahindra & Mahindra Ltd

## 3. TWO WHEELERS GROUP



**Chairman: Mr Harjeet Singh**  
Vice President (GRT),  
Hero MotoCorp Ltd



**Co-Chairman: Mr R Narasimhan**  
Vice President (R&D),  
Bajaj Auto Ltd

## 4. THREE WHEELERS GROUP



**Chairman: Mr S Sane**  
Senior Vice President  
(Engg and R&D)  
Piaggio Vehicles Pvt Ltd

## 5. INTERNATIONAL HARMONIZATION GROUP



**Co-Chairman: Mr D Balakrishnan**  
Head - Homologation  
Ashok Leyland Ltd

## F. COMMERCIAL VEHICLES CEO'S COUNCIL



**Chairman: Mr Ravi Pisharody**  
Executive Director  
(Commercial Vehicles),  
Tata Motors Ltd

## G. THREE WHEELERS CEO'S COUNCIL



**Chairman: Mr Ravi Chopra**  
Chairman and Managing Director,  
Piaggio Vehicles Pvt. Ltd.

## H. TWO WHEELERS CEO'S COUNCIL



**Chairman: Mr K N Radhakrishnan**  
President & CEO  
TVS Motor Company Ltd

## I. PASSENGER CAR CEO'S COUNCIL



**Chairman: Mr Nigel Harris**  
President  
Ford India Pvt. Ltd.

## J. MUVS CEO'S COUNCIL



**Chairman: Mr P N Shah**  
President & Chief Executive  
(Automotive),  
Mahindra & Mahindra Ltd

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



**President, SAFE: Dr. N Saravanan**  
Head Engineering  
Ashok Leyland Ltd



**Vice President, SAFE: Mr Naveen Soni**  
Vice President (Govt. Affairs & CSR),  
Toyota Kirloskar Motor Pvt. Ltd.

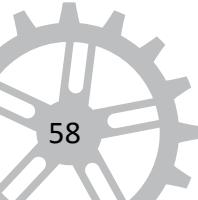
As on 31<sup>st</sup> March 2016

# SIAM OFFICE BEARERS

## SIAM Executive Committee 2015-2016

<b>COMPANY</b>	<b>MEMBER</b>	<b>ALTERNATE MEMBER</b>
Ashok Leyland Ltd	Mr Vinod K Dasari	Mr Anuj Kathuria
Bajaj Auto Ltd	Mr Rajiv Bajaj	Mr R C Maheshwari
Cummins India Ltd	Mr Anant J Talaulicar	Mr Sandeep Sinha
Fiat India Automobiles Private Limited	Mr Gurpratap Boparai	Mr Kevin Flynn
Force Motors Ltd	Mr Prasan Firodia	Mr Prashant V Inamdar
Ford India Pvt Ltd	Mr Anurag Mehrotra	Dr Shripad Bhat
General Motors India Pvt Ltd	Mr Kaher Kazem	
Hero MotoCorp Ltd	Mr Pawan Munjal	Mr Harjeet Singh
Hindustan Motor Finance Corporation Ltd	Mr Uttam Bose (Co-opted)	Mr P Vijayan
Honda Cars India Ltd	Mr Yoichiro Ueno	Mr Raman Kumar Sharma
Honda Motorcycle and Scooter India P Ltd	Mr Keita Muramatsu	Mr V Sridhar
Hyundai Motor India Ltd	Mr Y K Koo	Mr B C Datta
Mahindra & Mahindra Ltd	Mr P N Shah	Mr Ketan Doshi
Mahindra & Mahindra Ltd	Dr Pawan Goenka (Co-opted)	Mr Rajan Wadhera
Maruti Suzuki India Ltd	Mr Kenichi Ayukawa	Mr I V Rao
Mercedes-Benz India Pvt Ltd	Mr Roland Folger	Mr S M Kadlaskar
Piaggio Vehicles Private Limited	Mr Ravi Chopra	Mr Stefano Pelle
Renault India Pvt Ltd	Mr Sumit Sawhney (Co-opted)	Mr Jatin Aggarwal
Royal Enfield <i>A Unit of Eicher Motors Ltd</i>	Mr Siddhartha Lal	Mr G Sekar
Royal Enfield <i>A Unit of Eicher Motors Ltd</i>	Mr S Sandilya (Co-opted)	Mr Rudratej Singh
Tata Motors Ltd	Mr Ravi Pisharody	Mr Guenter Butschek
Toyota Kirloskar Motor Pvt Ltd	Mr Vikram Kirloskar	Mr Akito Tachibana
TVS Motor Company Ltd	Mr K N Radhakrishnan	Mr M N Muralikrishna
VE Commercial Vehicles Limited	Mr Vinod Aggarwal	Mr B Srinivas
Volkswagen India Pvt Ltd	Dr Andreas Lauermann (Co-opted)	Mr Pankaj Gupta
Volvo Buses India Pvt Ltd	Mr V R V Sripasad	Mr Suresh Chettiar

As on 31st March 2016



# AIAM/SIAM 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 of India Ltd
1969	Mr A H Tobaccowala*	Tata Engineering & Locomotive Co Ltd
1970 & 1971	Mr A Sivasailam*	Simpson & Co. Ltd
1972 & 1973	Mr N K Firodia*	Bajaj Tempo Ltd
1974 & 1975	Mr J E Talaulicar*	Tata Engineering & Locomotive Co 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 Products of 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	Mr Brijmohan Lall*	Hero Honda Motors Ltd
1997/98 & 1998/99	Mr V M Raval	Tata Engineering & Locomotive Co 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 Ltd
2009/10 & 2010/11	Dr Pawan Goenka	Mahindra & Mahindra Ltd
2011/12 & 2012/13	Mr S Sandilya	Royal Enfield (Unit of Eicher Motors)
2013/14 & 2014/15	Mr Vikram Kirloskar	Toyota Kirloskar Motors Pvt Ltd
2015/16 - Current	Mr Vinod K Dasari	Ashok Leyland Ltd

\* Since deceased

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

# SIAM MEMBERS



AMW Motors Ltd



Force Motors Ltd



Honda Cars India Ltd



Ashok Leyland Ltd



Ford India Pvt Ltd



Honda Motorcycle and Scooter India Pvt Ltd



Atul Auto Ltd



Foton Motors  
Manufacturing India Pvt Ltd



Hyundai Motor India Ltd



Bajaj Auto Ltd



CHEVROLET  
General Motors India  
Pvt Ltd



India Kawasaki Motors  
Pvt Ltd\*



BMW India Pvt Ltd



GREAVES  
SINCE 1859



India Yamaha Motor  
Pvt Ltd



Cummins India Ltd



H-D Motor Company India  
Pvt Ltd\*



Isuzu Motors India  
Pvt Ltd\*



Daimler India Commercial Vehicles Pvt. Ltd.

Daimler India Commercial  
Vehicles Ltd



Hero MotoCorp Ltd



J C B L Ltd



Fiat India Automobiles Pvt Ltd



Hindustan Motors Ltd /  
Hindustan Motor Finance  
Corp. Ltd



JBM Auto Ltd\*

In alphabetical order

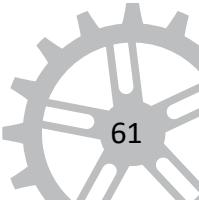
\*Associate Member

As on 31<sup>st</sup> March, 2016



# SIAM MEMBERS

 <p><b>KINETIC</b></p> <p>Kinetic Motor Company Ltd</p>	 <p><b>PREMIER</b></p> <p>Premier Ltd</p>	 <p><b>SUZUKI</b></p> <p>Suzuki Motorcycle India Pvt Ltd</p>
 <p><b>LML</b> MOTORCYCLES &amp; SCOOTERS Think LML. Think innovation.<sup>TM</sup></p> <p>LML Ltd</p>	 <p><b>RENAULT</b> Passion for life</p> <p>Renault India Pvt Ltd</p>	 <p><b>TATA MOTORS</b></p> <p>Tata Motors Ltd</p>
 <p><b>Mahindra</b> Rise.</p> <p>Mahindra &amp; Mahindra Ltd</p>	 <p><b>ROYAL ENFIELD</b></p> <p>Royal Enfield (A Unit of Eicher Motors Ltd)</p>	 <p><b>TOYOTA</b> Quality Revolution</p> <p>Toyota Kirloskar Motor Pvt Ltd</p>
 <p><b>MAHINDRA TWO WHEELERS</b></p> <p>Mahindra Two Wheelers Ltd</p>	 <p><b>SCANIA</b></p> <p>Scania Commercial Vehicles India Pvt Ltd*</p>	 <p><b>TRIUMPH</b> FOR THE RIDE</p> <p>Triumph Motorcycles India Pvt Ltd*</p>
 <p><b>MARUTI SUZUKI</b> Way of Life!</p> <p>Maruti Suzuki India Ltd</p>	 <p><b>Scooters India Limited</b></p> <p>Scooters India Ltd</p>	 <p><b>TVS</b> </p> <p>TVS Motor Company Ltd</p>
 <p>Mercedes-Benz The best or nothing.</p> <p>Mercedes-Benz India Pvt Ltd</p>	 <p><b>Simpson &amp; Co. Ltd</b></p> <p>Simpson &amp; Co. Ltd</p>	 <p><b>VE COMMERCIAL VEHICLES</b> A VOLVO GROUP AND EICHER MOTORS JOINT VENTURE</p> <p>VE Commercial Vehicles Ltd</p>
 <p><b>NISSAN</b></p> <p>Nissan Motor India Pvt Ltd</p>	 <p><b>SKODA</b></p> <p>SkodaAuto India Pvt Ltd</p>	 <p><b>VOLKSWAGEN</b></p> <p>Volkswagen India Pvt Ltd</p>
 <p><b>PIAGGIO</b></p> <p>Piaggio Vehicles Pvt Ltd</p>	 <p><b>SML ISUZU</b></p> <p>SML Isuzu Ltd</p>	 <p><b>VOLVO</b></p> <p>Volvo Buses India Pvt Ltd</p>



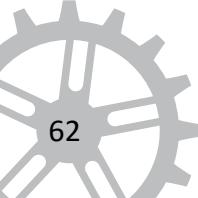
# SIAM SECRETARIAT



Mr Amit Kumar  
Mr Arindom Ghatak  
Mr Arnab Chakraborti  
Mr Atanu Ganguli  
Mr B K Dutta  
Mr Bhisham Prasad Rai  
Mr Debasish Majumder  
Mr Dhiraj V Chatap  
Mr Dikshant Negi  
Mr Dinesh Patnaik  
Mr Diwit Prajapati  
Mr Hardik Makhija  
Ms Jasleen Kaur  
Mr J S Cheema  
Mr Jitendra Rai  
Mr K K Gandhi  
Mr Kartike Karwal  
Ms Manju Dhamija  
Mr Manoj Mohapatra

Ms Meenakshi Kukreja  
Ms Novika Sood  
Mr Prashant K Banerjee  
Mr Philip Skaria  
Mr R N Chakravarty  
Ms Ragmani Shukla  
Mr Raju Kamat  
Mr Ramesh P Iyer  
Ms Ritika Changia  
Ms Ruby Ganguly  
Mr Saurabh Rohilla  
Mr Sugato Sen  
Mr Sundeep Sundli  
Ms Supriya Sinha  
Mr Sushil Kumar  
Mr Tribhuvan Rai  
Mr V K Pandey  
Mr Vishnu Mathur

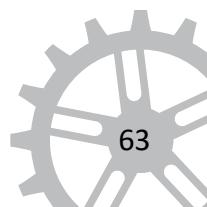
*In alphabetical order*



## LINKAGE WITH OTHER INSTITUTIONS IN INDIA

All India Motor Transport Congress  
Alloy Steel Producers Association  
Aluminium Association of India  
Asian Development Bank  
Association of Indian Forging Industry  
Association of State Road Transport Undertakings  
Automotive Component Manufacturers Association of India  
Automotive Services Equipments Association  
Automotive Skills Development Council (ASDC)  
Automotive Tyre Manufacturers Association  
Bureau of Indian Standards  
Center for High Technology  
Central Institute of Road Transport  
Central Road Research Institute  
Confederation of Indian Industry  
Delhi Transport Corporation  
Federation of Automobile Dealers Association  
Indian Auto LPG Coalition  
Indian Diesel Engine Manufacturers Association  
Indian Institute of Foreign Trade  
Indian Institute of Metals  
Indian Institute of Petroleum  
Indian Institute of Technology  
Indian Machine Tool Manufacturers Association  
Indian Rubber Institute  
Institute of Road Traffic Education  
Insurance Regulatory and Development Authority  
International Centre for Automotive Technology  
National Automotive Testing and R&D Infrastructure Project  
National Council of Applied Economic Research, (NCAER)  
National Institute of Design  
National Skill Development Corporation (NSDC)  
Petroleum Federation of India  
Research & Information Systems for Developing Countries (RIS)  
Society for Automotive Fitness & Environment (SAFE)  
Technology Information Forecasting and Assessment Council  
The Automotive Research Association of India  
The Energy and Resources Institute  
Tractor Manufacturers Association  
United States Agency for International Development  
Vehicle Research & Development Establishment  
Western India Automobile Association

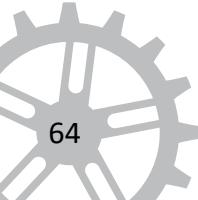
*In alphabetical order*



## OVERSEAS LINKAGE

ASEAN Automotive Federation (AAF)  
Asia Pacific Economic Cooperation Automotive Dialogue (APEC AD)  
Aus Trade Commission, Australia  
Auto Alliance, USA  
American Auto Policy Council (AAPC), USA  
Automotive Federation of Malaysia (AFM), Malaysia  
Automotive Policy Planning, METI, Japan  
Bangladesh Automobiles Assemblers and Manufacturers Association,  
Ceylon Motor Traders' Association (CMTA), Sri Lanka  
China Association of Automobile Manufacturers (CAAM), P R China  
Clean Air Initiatives of Asian Cities (CAI-Asia)  
Comité des Constructeurs Français d'Automobiles (CCFA), France  
European Automobile Manufacturers Association (ACEA), Europe  
Federal Chamber of Automotive Industry (FCAI), Australia  
Federation of Asia Motorcycle Industries (FAMI), Singapore  
Federation of Nepal Chamber of Commerce & Industry, Nepal  
Indonesian Automotive Industry Association (GAIKINDO), Indonesia  
Indonesian Motorcycle Industry Association (AISI), 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  
Motor Vehicle Manufacturers Association, Italy  
Motorcycle and Scooter Assemblers and Distributors Association of Malaysia  
National Association of Automobile Manufacturers of South Africa (NAAMSA)  
National Association of Vehicle Manufacturers (ANFAVEA), Brazil  
National Highway Traffic & Safety Authority, USA  
Nepal Auto Dealers Association, Nepal  
Philippine Automotive Federation, Philippines  
SAE International, USA  
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  
Transport Research Laboratory, UK  
UK Trade & Investment (UKTI)  
US Department of Commerce, USA  
US Department of Energy, USA  
US Environment Protection Agency, USA  
Verband der Automobilindustrie e.v. (VDA), Germany

*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)