



**FACILITATING GROWTH OF MOBILITY  
& CLEANING ENVIRONMENT**

***SIAM***

Society of Indian Automobile Manufacturers

**ANNUAL REPORT  
2010-2011**

# Annual Report 2010-11

***SIAM***

Society of Indian Automobile Manufacturers



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## PRESIDENT'S MESSAGE



Dr Pawan Goenka

Dear Friends,

2010 - 2011 was another exciting year for the Indian automotive industry. With industry growth of 26.2%, multiple new product launches, capacity enhancement and announcement of new investments...we had our fair share of excitement.

We ended the year 2010-11 with the passenger vehicle industry growing by 29.2 % to a level of 2.5 million vehicles, Commercial vehicles by 26.9% to reach a volume of 676,000; two wheelers grew by 25.8% for a volume of 11.8 million and three wheelers grew by 19.4%. Thus the growth was uniformly spread across all segments. On the exports front, while passenger cars exports continued to be adversely affected, commercial vehicle and two-wheeler exports improved significantly. In 2010-11, the industry exported 13% of its production amounting to more than 11% of its turnover.

India's global automotive ranking (7<sup>th</sup> in the world, by production volume for CY 2010), the Auto industry's contribution to India's GDP (6%) and advanced technologies getting introduced through new product launches are clear indicators of how the Indian Auto industry is rapidly maturing.

Today, after two consecutive years of high growth, the automotive industry is showing some signs of slowing down. We knew that the +30% growth is too high to be sustainable in the long term and growth was bound to moderate. But this

de-acceleration is additionally due to the concerns over sustained economic growth and the high vehicle financing rates, caused by the tightening of the monetary policy. The sharp fuel price hike owing to hardening of the global oil prices and increase in commodity prices also had their impact on vehicle sales.

However, the concerns of today's environment are a part of the business cycle and we have every reason to believe that the India growth story is intact. It is on this belief that all OEMs are continuing with their India investment plans and are also designing products specifically suited for India and similar markets.

During the year 2010 - 2011, SIAM continued its focus on the theme of "Growth with Responsibility". SAFE, a SIAM initiative took up a number of activities in respect to environment protection, emission control and road safety. Free PUC check camps were organized at 4,500 locations in the country in which more than 100,000 vehicles went thru a check. SAFE also took up various other activities to promote safety on the road including a first-hand view of the highly successful BRT experience in Gujarat. SAFE also continued its efforts in promoting road safety with school students and drivers across the country.

With the need to contribute towards energy security of the country, SIAM carried out intensive discussions with Ministry of Power and BEE to establish norms for mandatory fuel efficiency and CO2 emissions for the passenger car industry. These discussions are now nearing conclusion and it is expected that the fuel efficiency regulation for the passenger car industry would be implemented by early 2012.

SIAM's thrust on alternative fuels and indigenously developing environment friendly vehicles received a major boost with the announcement of the National Mission on Electric Mobility in the Union Budget 2011. MOHI took up the challenge by setting up the National Council for Electric Mobility and also the National Board on Electric Mobility. Both are high level inter-ministerial bodies involving all the key Ministries responsible for implementing various policy initiatives to promote electric/hybrid mobility. In close partnership with MOHI, SIAM commissioned a study on Electric and Hybrid Mobility. This initiative will result in the evolution of a detailed strategy and plan for introducing electric and hybrid vehicles in the country. SIAM also closely interacted with the MOHI on many other issues like End-Of-Life of vehicles, perspective planning for the industry, trade and economic policies, budget related issues etc., on a regular basis.

On the international trade policy front, SIAM continued its close interaction with Ministry of Commerce to ensure that uniformity is maintained in relation to the automotive industry in all the FTAs being negotiated by Government. SIAM also took up the issue of higher Customs Duty imposed on import of CKD kits and through its efforts achieved a reduction in the proposed duty. Government's proposal to withdrawal of the DEPB Scheme with effect from 30th June 2011 created deep concern amongst the industry as many vehicle exporters depend upon the DEPB Scheme. Timely intervention by SIAM along with the efforts of other industry bodies saw an extension of the DEPB Scheme by another 3 months. SIAM is also in dialogue with the Ministry of Finance to work out viable alternatives to the DEPB Scheme.

SIAM remained vigilant and proactive in regard to the ongoing negotiations at WTO. Issues concerning remanufactured goods, sectorals, trade in environmentally friendly goods, auto TBT proposals were considered and advice was given to Government on the implications of these proposals.

The debate on use of diesel as a fuel for personal transport was once again triggered off by a report on diesel fuels prepared by the Planning Commission. The report suggested that in order to recover the losses incurred by Government due to the use of subsidized diesel by the personal transport sector, a one-time additional excise duty may be charged on diesel cars. SIAM had intensive discussions with all the concerned Ministries to clarify some of the myths surrounding diesel fuels and to explain the facts about diesel.

SIAM continued and further strengthened its close partnership with the Ministry of Roads and Surface Transport (MoRTH) in evolving Safety and Emission standards for the industry. Last year, SIAM was requested by MoRTH to set up a model, fully automated, Inspection and Maintenance Center in Madhya Pradesh for annual mandatory certification of commercial vehicles. During the last one year the Project received formal approval of MoRTH and the foundation stone of the Center was laid on 11<sup>th</sup> March 2011. Construction of the Center has since started and SIAM plans to dedicate this I&M Center to the Nation within the next few months. Furthermore, SIAM, Technical Committee continued its intensive involvement in the various technical meetings for evolving safety and emission standards for the auto industry, including the revision of the Motor Vehicles Act, developing the new Bus Body Code etc. Discussions have also been initiated for the development of the Emission and Fuel Roadmap till 2020. This year also saw the successful implementation of new emission norms across the country.

Perhaps, one of the most significant long term developments that took place was in regard to the Automotive Skills Development Council (ASDC). During the year, ASDC was registered with the Registrar of Societies and this new Society came into formal existence as a joint initiative of ACMA, SIAM, FADA, NSDC and Government of India. The work on the Pilot Project also began in earnest and I would like to acknowledge the invaluable contributions made by the HR Groups of SIAM, ACMA and FADA along with the guidance received from NSDC that made this possible.

A new chapter was added to SIAM's interaction with the component suppliers, with the setting up of a joint working group between SIAM and ACMA. The discussions of this Working Group have been very useful in developing a greater level of mutual understanding between the OEMs and the suppliers, especially in times of high growth of the industry. The cooperation with ACMA extended to a unique initiative that included developing of potential projects for light-weighting of components and automotive systems.

SIAM's international activities included a number of highlights during the year with the organization of the OICA General Assembly in India in October last year, where for the first time, SIAM had the opportunity of hosting the world's key automotive industry associations in New

Delhi. This three day event attracted more than 40 CEOs from the global automotive industry associations to the country and was one of the main highlights of the year. SIAM, as a member of the OICA Board also regularly participated in the various OICA Meetings, including a special 2-Day Conference on Electric Mobility held in China.

SIAM also continued to involve very closely in the activities of the International Motorcycle Manufacturers Association and made contributions as a member of the Board of IMMA. SIAM's close dialogue with JAMA of Japan was further strengthened during the year. Regular meetings were held with JAMA at which many technical as well as economic issues were discussed.

SIAM, jointly with ACMA and VDA in cooperation with the Ministry of Heavy Industry and Public Enterprises organized the India Day at the IAA Show held at Hannover in September last year. Secretary, Ministry of Heavy Industries was the chief guest at this event. The work of the Indo-German Joint Working Group on Automotive Industry was also carried forward with the organization of the JWG meetings in Germany during the IAA in Hannover and subsequently in New Delhi in April this year.

Friends, as I reflect on my tenure as President over the last two years, I can say that this has been a highly rewarding and enriching experience for me. This could not have been possible without the support of all the member CEOs, heads of various departments as well as technical experts who contributed immensely to the vast canvas of activities at SIAM. I would like to put on record my "thank you" to all the Council and Committee Chairmen, for having spent so much quality time during their involvement in the association's work, which has been instrumental in making SIAM a highly credible and effective institution representing the Indian automotive industry within India as well as internationally. I also would like to compliment a very committed Secretariat that has worked tirelessly on all of SIAM's activities.

I take this opportunity to thank The Government of India and various Ministries for their support to SIAM and the Indian Auto Industry. I would also like to thank our affiliates CII, ACMA, IMTMA, etc for their close partnership.

Indian Auto Industry has an exciting future ahead and I am sure SIAM will continue to be an enabler to convert this anticipated excitement into reality.

I wish you all the very best.



Pawan Goenka  
7<sup>th</sup> September 2011



Dr Pawan Goenka, President SIAM, chairing SIAM Executive Committee meeting

# **SIAM**

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

SIAM works towards supporting sustainable development of the Indian Automobile Industry with the mission that India emerges as the destination of choice in the world for design and manufacture of automobiles. It works towards facilitating improvement of the competitiveness of the Indian Automobile Industry, reducing cost of vehicles, increase in productivity and to achieve 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 is providing economic and statistical information as well as technical and public policy services to the Indian automobile industry. It publishes Monthly Industry Statistics, Monthly Raw Material Price Monitor and other reports. It also organizes Seminars & Workshops on subjects of topical relevance and interest to the industry.

It works closely with the Government and with international bodies like UNECE, OICA, IMMA and coordinates with other counterpart international associations like VDA, JAMA, SMMT, TAIA AFM, ANFIA etc.

The Society organizes Auto Expo a widely awaited biennial auto exhibition showcasing the trends in the Auto Industry. Regional as well as segment specific shows are also planned.

SIAM aims to promote safety, address air quality improvement, ensures compliance with standards and promotes growth with responsibility.

## **SIAM MISSION**

To become a growth engine of the Indian economy by propelling the Indian Auto industry to a global USD 145 bn industry by 2016 whilst promoting sustainability by addressing the multiple challenges arising out of emissions, climate change, energy independence and safety.

In order to achieve the mission, SIAM focused on several areas during the last two years 2009-11:

- Improve Indian automotive industry's competitiveness.
- Promote development of a sustainable mobility eco-system.
- Achievement of leadership in innovative technology.
- Enable society at large in India to perceive the automotive industry's contribution to the nation and its people.

# 50<sup>th</sup> SIAM ANNUAL CONVENTION 2010

## Dynamics of Managing Growth : The Next Phase of the Auto Industry

26<sup>th</sup> August 2010, Hotel Taj Palace, New Delhi



L to R: Mr S Sandilya, Mr Jairam Ramesh, Mr Vilasrao Deshmukh, Dr Pawan Goenka, and Mr Vishnu Mathur

The 50<sup>th</sup> Annual Convention of SIAM was inaugurated by Union Environment Minister, Mr Jairam Ramesh and Minister of Heavy Industries & Public Enterprises, Mr Vilasrao Deshmukh, on 26<sup>th</sup> August 2010 at the Taj Palace Hotel in New Delhi. The theme of Annual Convention was "*Dynamics of Managing Growth: The Next Phase of the Auto Industry*".

Dr Pawan Goenka, President, SIAM, and President – Automotive and Farm Equipment, Mahindra & Mahindra, said that the convention was a milestone event as it was the Golden Jubilee year of SIAM. He lauded the auto industry for a robust growth after last year's economic recession.

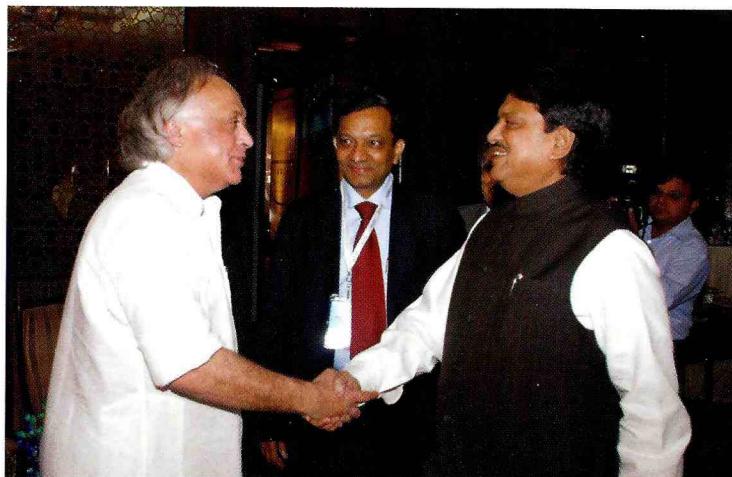
Dr Goenka also thanked the government for its support to the industry and attributed the good showing of the auto industry to the efforts made by component manufacturers, the strong fundamentals of the Indian economy and the

highly calibrated government policy steps in support of the industry.

To address the issue of road safety, he called for safety requirements for vehicles and proper training to drivers. SIAM was working with the transport department in this regard.

Dr Goenka announced SIAM's new initiative of Voluntary Fuel Efficiency Regime which will promote lower fuel consumption. He called upon the government to give incentive for green technology as environment friendly technology was necessary for the future of auto industry.

Environment Minister Mr Jairam Ramesh congratulated the auto industry for its most impressive growth and called upon the industry to go for growth with ecological sustainability. Mr Ramesh welcomed SIAM's initiative on fuel efficiency.



L to R: Mr Jairam Ramesh, Dr Pawan Goenka and Mr Vilasrao Deshmukh



Mr Kamal Nath addressing the gathering

Heavy Industry Minister Mr Vilasrao Deshmukh assured government's help in making Indian auto industry the leading force in the world. He suggested the auto industry to focus on building and augmenting value chain, upgradation of technology, capacity building, human resource management and investment in Research and Development.

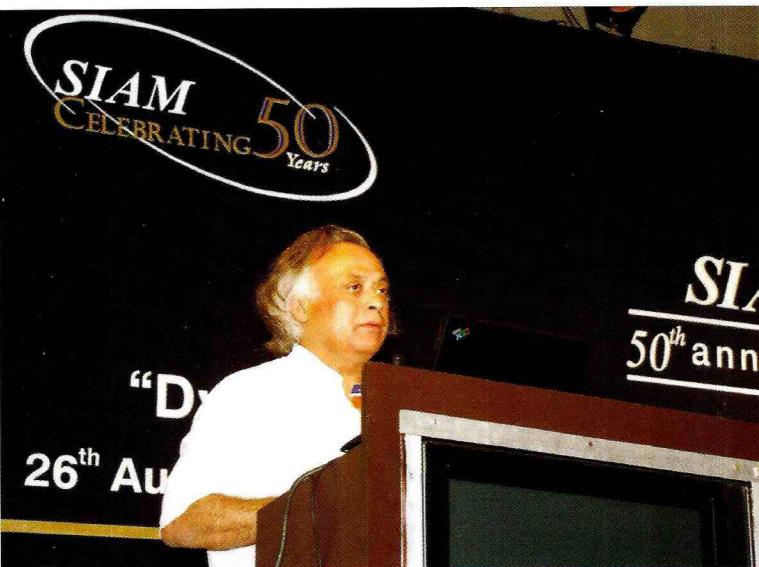
The inaugural session was followed by a special plenary session on **Shifting the Horizon**. The session was chaired by Mr Venu Srinivasan, Chairman and Managing Director, TVS Motor Company Ltd.

The Union Road Transport and Highways Minister, Mr Kamal Nath, in his address, emphasized the government's vision on building roads and how roads were important for the long term growth of the auto industry. He promised that his ministry is working hard to solve the problem of bad roads and infrastructure.

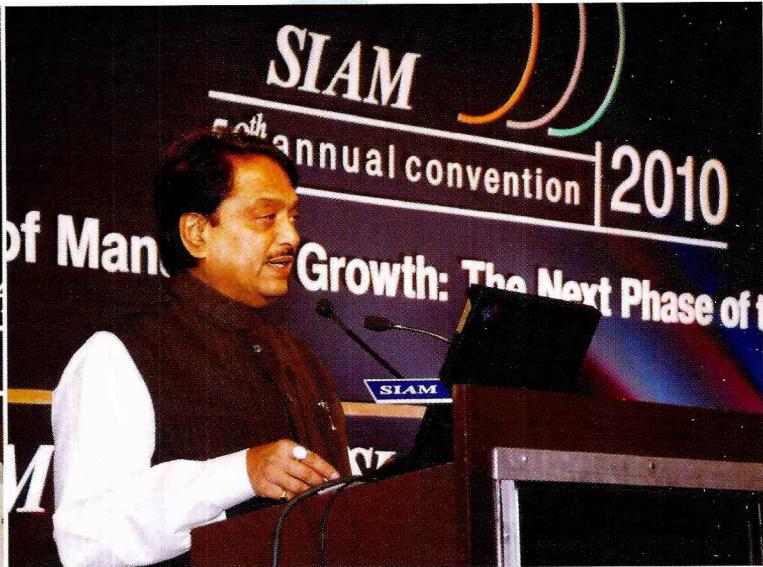
After the inaugural and special plenary session, more technical aspects of the convention followed. Divided broadly into three, the session started with the first plenary **Managing Growth: Value Chain**. The Opening Remarks



L to R: Mr Ravi Chopra, Mr Kamal Nath, Mr Venu Srinivasan, and Mr K K Gandhi



Mr Jairam Ramesh addressing the gathering



Mr Vilasrao Deshmukh addressing the gathering

were provided by Mr Michael Boneham, President and Managing Director, Ford India Limited. He talked about the localization of value chain and how his company was utilizing it for maximum efficiency.

Mr Jan Micznikowski, Vice President, Head Global Auto and Industrial Business, Booz & Co, talked about the challenges in resources i.e. human resources, capital and material and the competition in these areas.

Dr Dazong Wang, President, Beijing Automotive Industry (Holding) Corp (BAIC), talked about the growth projection of India and China.

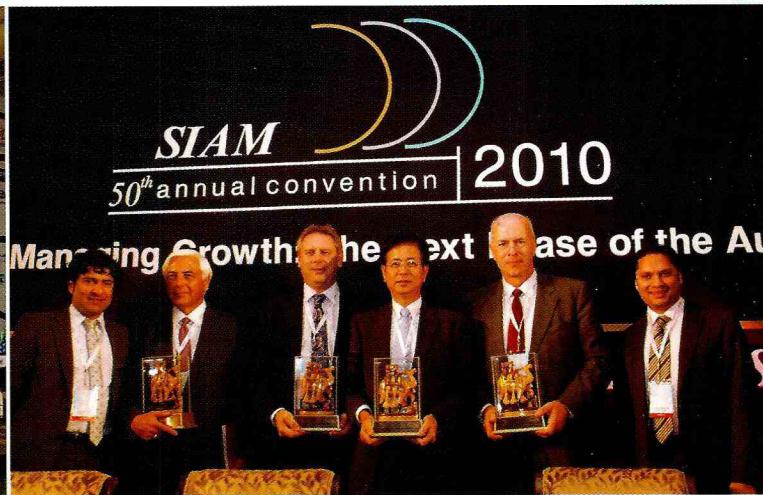
Mr Tim Bowes, Vice President and President,



L to R: Mr Cuneyt L Oge, Dr George Gillespie, Mr Siddhartha Lal, Mr Mitsuhiro Sonoda, Mr Carl-Peter Forster, Mr Anirudh Bhuwalka, and Mr Atanu Ganguli



L to R: Mr Michael Boneham, Mr Jan Miecznikowski, Dr Dazong Wang, Mr Tim Bowes, Mr P S Rajamani, and Mr Sugato Sen



L to R: Mr Siddhartha Lal, Mr Cuneyt L Oge, Dr George Gillespie, Mr Mitsuhiro Sonoda, Mr Carl-Peter Forster, and Mr Anirudh Bhuwalka



L to R: Mr Dieter Becker, Mr Helmut Matschi, Mr Akash Passey, Mr Joe Hinrichs, Dr Chanyong Yoo, and Mr Saurabh Rohilla

Industrial, Arvin Meritor, counted the initiative taken by his company to meet future challenges of human resources and capital.

The second plenary, **Managing Growth: Sustainable Mobility**, focused on another very important aspect of the auto industry. Mr Siddhartha Lal, Managing Director, VE Commercial Vehicles, opening the session, emphasized the need to have more efficiency so that mobility becomes accessible to all sections of the society.

Mr Mitsuhiro Sonoda, CEO, Toyota Motor Asia Pacific emphasized the innovation in technology for sustainability and also highlighted his company's efforts in this regard. He narrated Toyota's technological innovation in bringing about fuel efficiency.

Mr Carl-Peter Forster, Group CEO, Tata Motors Ltd, said, "India is different." He warned against copy pasting solutions from other parts of the world to India."

Dr George Gillespie, CEO MIRA, said personal mobility is growing rapidly in India and China and it has to be sustainable both at the global and local level.

The third plenary focused on **Evolving Market Dynamics** in the automobile industry. Mr Akash

Passey, Managing Director, Volvo Buses India Pvt Ltd, opened the session.

Mr Joe Hinrichs, President, Asia Pacific & Africa, Ford Motor Pvt Ltd, said India's growth is envy of the world. He said, "India is key to Ford's global plans".

After the captains of auto industry shared their views on the Indian auto industry, it was time for the government and policy makers to grace the occasion. The **Policy Makers Panel** was opened by Mr Prakash M Telang, Managing Director (India Operations), Tata Motors Ltd.

Dr Thirumalachari Ramasami, Secretary to the Government of India, Department of Science and Technology, said that Research and Development has to be taken up on a priority basis. He said the government provided fiscal incentive for the same but he warned that fiscal incentives are important but not necessary.

Speaking on the occasion, Mr Vivek Sahai, Chairman, Railway Board and ex-officio Principal Secretary to the Government of India, Ministry of Railways, said Railways can be a good means of transport of finished automobiles. He said the Railway has always been there for the help of industry. Mr Sahai added that railway has announced the idea of auto hub policy as well as the automobile

freight train operators (AFTO) policy. For that, he said, Railways needed a huge investment and the government is looking for a Public Private Partnership (PPP) model to go for the huge infrastructure development.

Mr B S Meena, Secretary to the Government of India, Ministry of Heavy Industries & Public Enterprises, assured all at the convention that the government will always act as a facilitator for the auto industry. Mr Meena said, 'The government was committed to setting up state of the art facility for automotive testing Research and Development'.

The concluding session, the Special Industry Panel, was entitled **Crystal Ball Gazing: Indian Automotive Industry** and the biggest names from India's automobile industry participated in a lively and insightful panel discussion. Chaired by Tata Motors' Vice President Mr Ravi Kant, the session saw one of the most astute and enlightening discussions engaged in by Mr Anand Mahindra, Vice Chairman, Mahindra & Mahindra Ltd, Dr Abhay Firodia, Chairman, Force Motors Ltd and Mr Venu Srinivasan, Chairman & Managing Director, TVS Motor Company Ltd. Mr Ravi Kant said that alternate fuels like hydrogen would become popular in the future. He added that India is entering into a new technology phase and society will pressurize industry into change.

Starting the discussion, Mr Anand Mahindra emphasized the need to visualize about the future trends in the industry. He said that India and China will determine the kind of vehicles to be made in bulk. Mr Mahindra said, the future trend is that there will be huge volume growth for small and cost efficient cars. While Dr Abhay Firodia talked about need for a paradigm shift the way Japan did in the past. Mr Venu Srinivasan forecast a soaring growth for India's auto industry. He also reminded that India should not follow the American model. He said 'India needs to go for radical solutions for its problems and issues. We have to keep thinking and evolving to be able to be relevant'.

SIAM President Dr Pawan Goenka made the concluding remarks. He thanked the speakers and the audience for being present at the convention throughout the day. He was all praise for the insightful and informative discussions which had taken place and acknowledged the government's supportive role to the auto industry.

The 50<sup>th</sup> SIAM Annual Convention concluded with a magnificent awards ceremony in the evening where past presidents of Association of Indian Automobile Manufacturers (AIAM) and the Society of Indian Automobile Manufacturers (SIAM) were honoured for their contributions

*L to R: Dr Thirumalachari Ramasami, Mr Prakash M Telang, Mr B S Meena, and Mr Vivek Sahai*



**"Dynamics of Managing Growth: The Next Phase of the Auto Industry"**  
August 2010

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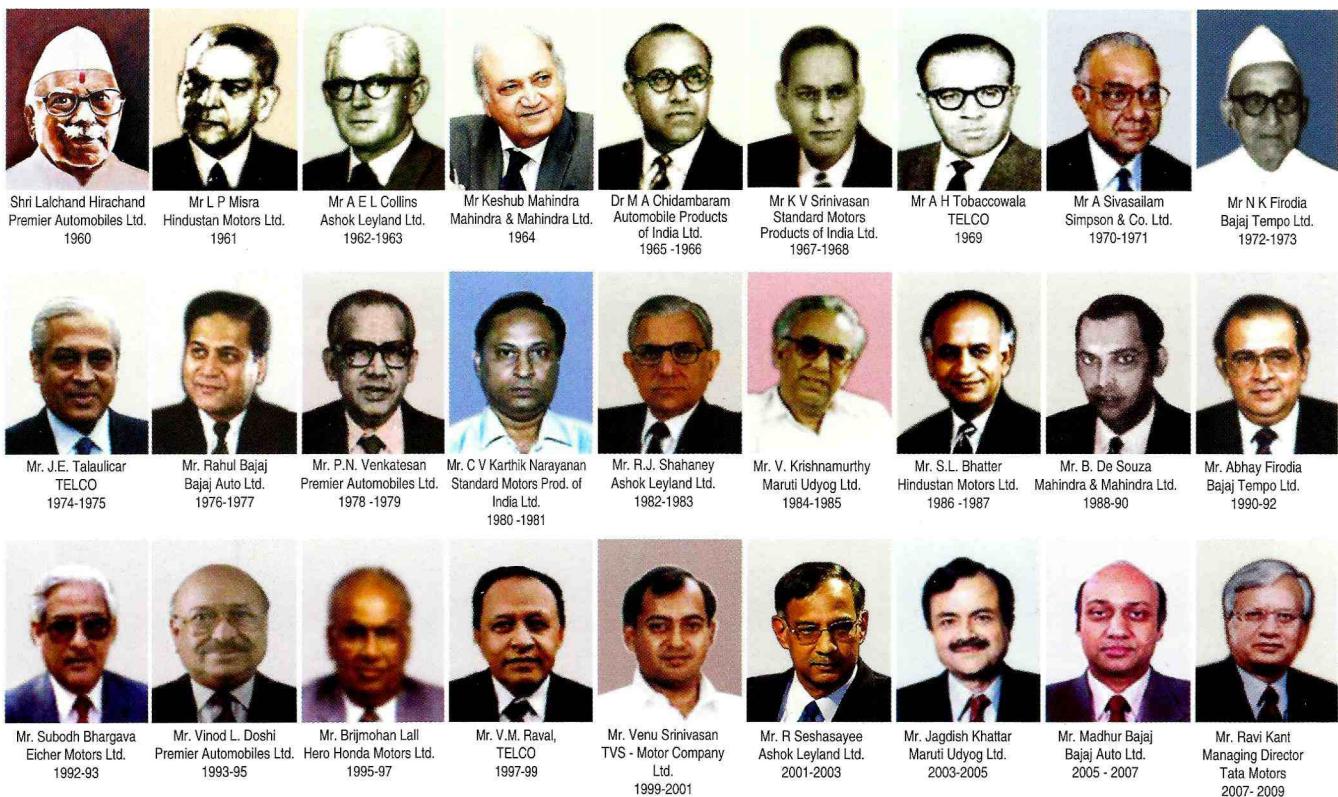


L to R: Dr Pawan Goenka, Mr Venu Srinivasan, Dr Abhay Firodia, Mr Ravi Kant, Mr Anand G Mahindra, and Mr Vishnu Mathur

to the development of the association. On the occasion of its 50<sup>th</sup> Year, it was time for SIAM to pay tribute to all the past Presidents of the Association who selflessly guided the institution

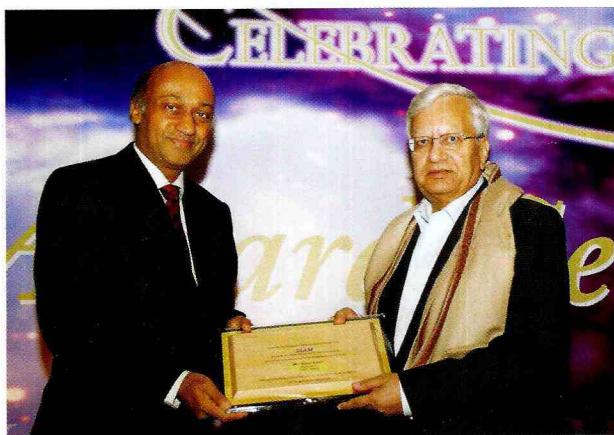
and nurtured it from a fledgling organization into a dynamic industry body which is, today, recognized globally as the premier voice of the Indian automobile industry.

**LEADERSHIP OVER THE YEARS**  
Past presidents of AIAM/SIAM



50 years of Leadership

## RECIPIENTS OF AIAM/SIAM PAST PRESIDENTS' AWARD



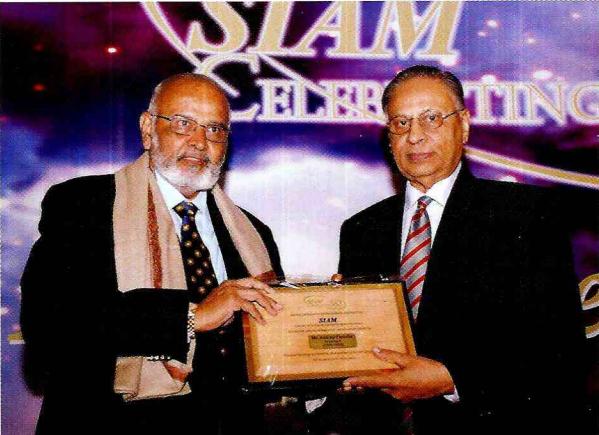
Mr Ravi Kant being felicitated by Mr Madhur Bajaj



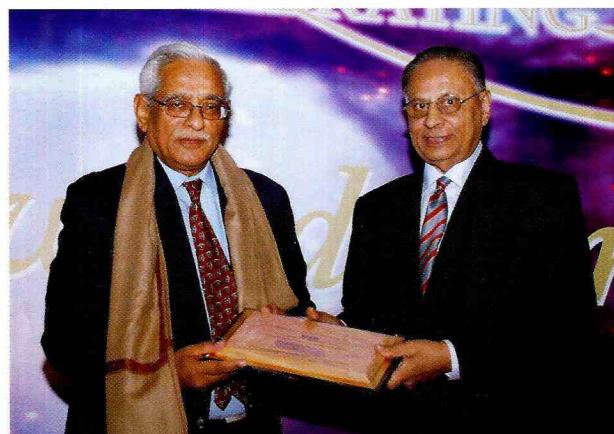
Mr Madhur Bajaj receiving the award on behalf of Mr Rahul Bajaj from Mr B S Meena, and Dr Pawan Goenka



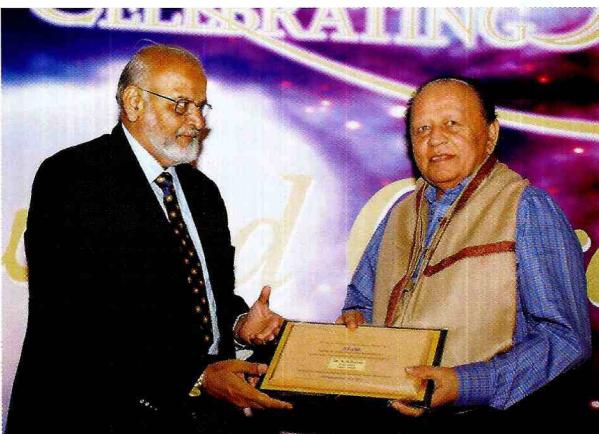
Mr C V Karthik Narayanan being felicitated by Mr B S Meena and Dr Pawan Goenka



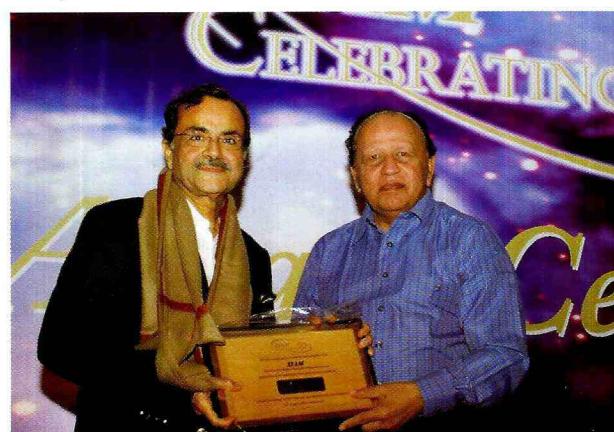
Dr Abhay Firodia being felicitated by Mr C V Karthik Narayanan



Mr Subodh Bhargava being felicitated by Mr C V Karthik Narayanan



Mr V M Raval being felicitated by Dr Abhay Firodia



Mr Jagdish Khattar being felicitated by Mr V M Raval



Mr Madhur Bajaj being felicitated by Mr Jagdish Khattar

# ECONOMIC AGENDA

## ECONOMIC & COMMERCIAL AFFAIRS

### SIAM SUGGESTIONS FOR UNION BUDGET 2011-2012

A joint meeting of SIAM Taxation Policy & Procedural Groups was held in October 2010 to discuss and finalize SIAM Pre-Budget Memorandums for this year. Both Mr Sudhir Mehta, Director, Force Motors & Chairman, SIAM Taxation Policy Group and Mr D D Goyal, Chairman SIAM Taxation Procedural Group were present.

SIAM secretariat presented the draft Memorandums. Extensive discussions were held on the draft Memorandums. This was followed by discussions on the suggestions/inputs by various member companies. The Group finalized the recommendations that should be incorporated in SIAM Pre-Budget Policy Memorandum and SIAM Pre-Budget Procedural Memorandum.

The documents created by SIAM were presented and submitted to various ministries. The Department of Heavy Industry convened meetings of the Inter-Ministerial Group on Taxation, Fiscal and Investment Policies to discuss the suggestions for Union Budget 2011-12. Ministry of Finance invited SIAM to present its Pre-Budget suggestions, which was made by a team of CEOs led by President, SIAM.

Hon'ble Finance Minister of India announced the Union Budget 2011-12 in February 2011. Announcing several reform initiatives including roadmap for Direct Taxes Code, Constitutional Amendment Bill for Goods & Services Tax (GST) to be tabled and also, pilot project across 11 states for implementation of IT towards GST introduction etc. President SIAM termed the Union Budget 2011-12 as a "Reform Oriented Budget" The key announcements relating to the



Mr D D Goyal, Chairman Taxation Procedure Group and CGM, Maruti Suzuki chairing Taxation meeting



Taxation Group meeting in progress

auto sector were:

- Central CENVAT rate was kept unchanged at 10%.
- Announcement of setting up of National Mission for Hybrid & Electric Vehicles.
- Concessional excise duty of 10% on vehicles based on Fuel cell/Hydrogen cell technology.
- Concession for specified components of Hybrid vehicles:
- Basic Customs Duty and special Countervailing Duty exempted.
- Concessional Excise duty of 5%.

- Excise duty on kits developed indigenously for the conversion of fossil fuel vehicles into Hybrid vehicles and their parts reduced from 10% to 5%.
- Concession to factory-built ambulances in place of the existing refund-based concession from excise duty.
- Refund-based concession (@ 20% of excise) available to taxis having a seating capacity not exceeding 13 persons including the driver.
- Full exemption from basic customs duty and Central Excise duty of 5% to specified parts of electrical vehicles in the last Budget on actual-user basis extended to batteries imported by such manufacturers for the replacement market.

The budget also defined "hybrid motor vehicles" and "CKD".

The two Taxation Groups again met in March this year to review implications of the Union Budget recommendations for the industry and finalize SIAM Post Budget Memorandums after the announcement of Union Budget 2011-12. The Group finalized the recommendations that were submitted to the Government.

One of the most contentious issues in the years'



The Second Taxation Workshop held offsite in May 2011 in Mussoorie



Members in Second Taxation Workshop held offsite in May 2011 in Mussoorie

budget recommendation was the new definition of CKD kits on which 60% duty was originally recommended in place of 10%. SIAM took up the matter with Ministry of Finance and as per SIAM's request, Government reduced the rate of duty from 60% to 30% for kits containing pre-



Members in Second Taxation Workshop held offsite in May 2011 in Mussoorie

assembled engines, gearbox and transmission.

## SIAM WORKSHOPS ON TAXATION PROCEDURAL ISSUES

SIAM organized a Workshop on Taxation Procedural Issues in January 2011 in Mumbai, for SIAM Taxation Procedural Group and SIAM Taxation Policy Group. The workshop was spread over two days and involved brainstorming discussions among the members. Three sessions were held during the workshop:

- Service Tax Related Issues
- Excise Related Issues

- VAT & Sales Tax Related Issues

The second Taxation Workshop was held in May 2011 in Mussoorie. The Workshop had three sessions stretching over two days.

Apart from the Workshops, during the year, SIAM Taxation Procedural Group had discussions with several Government officials in order to resolve various procedural issues affecting the industry.

## ECONOMIC RESEARCH

Four working areas have been identified by the SIAM Economic Research Group to work namely (i) Demography & Lifestyle, (ii) Rural



Meeting of SIAM Economic Research Group



Brainstorming during SIAM Economic Research Group meeting



Mr R Anandakrishnan, Chairman Economic Research Group Chairing a group meeting

Economy, (iii) Infrastructure and (iv) Alternative Fuel. These Groups are expected to come out with their suggestions in the next 10 months.

Regular interactions were held with experts who shared their insights. The Group is actively working with SIAM Frontier Technology Group on the EV/ HEV Mobility study.

## LOOKING AHEAD CONCLAVE

SIAM organized the 5<sup>th</sup> Looking Ahead Conclave in January 2011 in New Delhi. The programme involved participation from various stakeholders like Industry, Financiers, Dealers, Economists, Analysts, Government officials, etc. The day's programme comprised of the following informative Sessions:



L to R: Mr Sachin Mathur, Head of Research, CRISIL, Mr P Sridharan, President, Shriram Transport Finance Co, Mr Rajan Pental, EVP & Business Manager-Auto Loans, HDFC Bank, Mr B K Mahindroo, Head - Retail Banking, Punjab National Bank, Mr Sushil Kumar, Advisor, SIAM

- Panel Discussions on
  - Macro-Economic Trends & Impact on Demographics
  - Consumer Psychographics – Hierarchy of Purchase
  - Retail Financing
- Presentation on the Vehicle Market Forecast
- Industry Panels on Personal Vehicles and Commercial Vehicles
- The industry panels saw participation of several industry leaders as well as reputed speakers from government banking & financial sectors.



L to R: Mr Sachin Mathur, Head of Research, CRISIL, Dr Shubhada Rao, Chief Economist, Yes Bank, Mr R Anandakrishnan, Chairman SIAM Economic Research group & Vice President (Business Planning & TQM), TVS Motor Company Ltd, Dr Rajesh Shukla, Director, NCAER, Mr Sugato Sen, Sr Director, SIAM



L to R: Mr Sachin Mathur, Head of Research, CRISIL, Mr Ganesh Relekar, Director - Consumer Research, The Nielsen Company, Mr Pradeep Saxena, Senior Vice President, TNS India, Mr Mohit Arora, Director APAC, JD Power, Mr Sugato Sen, Sr Director, SIAM

The external speakers Mr R Anandakrishnan, Chairman, SIAM Economic Research Group chaired the Conclave.

The panels were conducted by Mr Sachin Mathur, Head of Research, CRISIL

## PARTICIPATION IN THE TWELFTH FIVE YEAR PLAN (2012-17) CONSULTATION PROCESS

The Planning Commission of India has various Working Groups as part of the Twelfth Five Year Plan (2012-17) consultation process. Several Sub-Groups have been constituted to work in specific areas and SIAM is working with the Government in various Sub-Groups and looking at development of the industry in the next five year plan period. Some of the Working Groups/

Sub-Groups where SIAM is working are on:

- MOHI&PE Working Group on the Automobile Sector
- MOS Sub-Group on Demand & Supply of Iron & Steel
- MNRE Sub-Group on Alternative Fuels for Surface Transportation, BOV, HEV, PHEV
- MOC&I Sub-Group on Engineering Exports
- MORT&H Sub-Group on Policy Issues
- MORT&H Sub-Group on Strengthening of road transport division
- MORT&H Sub-Group on Passenger and freight traffic assessment and adequacy of fleet and data collection and use of it in transport Sector
- MORT&H Sub-Group on Road safety and human resource development
- Planning Commission Sub-Group on Promoting Environmental Sustainability
- NSDC Sub-Group on Skill Development in Manufacturing(including Unorganized sector)

## FINANCE, LEASING AND INSURANCE

SIAM Finance, Leasing & Insurance Group, under the chairmanship of Mr. Ajay K. Seth, CFO, Maruti Suzuki India, organized in November 2010, Informative Session on



SIAM Finance, Leasing and Insurance group meeting on International Financial Reporting Standards (IFRS) in November 2010



SIAM Finance, Leasing and Insurance group meeting held on International Financial Reporting Standards (IFRS) in November 2010

International Financial Reporting Standards (IFRS) these are increasingly being recognized as the global financial reporting standards. Convergence with IASB has gained worldwide momentum. More than 120 countries have already converged with IFRS. The Ministry of Corporate Affairs has committed convergence of Indian Accounting Standards with IFRS from 1<sup>st</sup> April 2011.

SIAM invited experts from Ernst & Young to update and address members on the changes that are being introduced under IFRS.

The Group also met in May in New Delhi for an update on IFRS and discussions with Finance Industry Development Council (FIDC) on NBFC matters. Mr. Raman Aggarwal, Co-Chairman, FIDC briefed members on classification of Asset Financing NBFCs - recent changes in RBI's stance.

## **BILATERAL TRADE POLICY RELATED DEVELOPMENTS**

During the year, SIAM had several rounds of discussions with the Government of India and other stakeholders about the trade agreements currently being negotiated, as well as on expansion of scope of existing trade agreements.

With respect to India's PTAs with Chile and MERCOSUR, SIAM has submitted request for seeking market access for certain items. In addition, the Government of India has started discussions with New Zealand and Australia.

The year saw a lot of negotiations taking place for taking forward the India-EU FTA. There were pressures from the European Union side to open up the auto sector to trade. SIAM is of the view that manufacturing should be encouraged instead of trade and hence, CBU import tariffs should not be lowered for India-EU FTA.

Also, the lists under India-Korea CEPA were reviewed by both countries this year. Discussions were held on India-Thailand CECA aimed at broadening the scope of agreement by including services and investment apart from goods. India also negotiated FTA with Indonesia wherein market access was given for export of two wheelers and dumpers from India.

Also, Government of India started FTA discussions with Australia, New Zealand and Canada during the year and it is expected that we will see more such discussions in the coming years.

## **PARTICIPATION IN WTO-NAMA MEETINGS**

SIAM participated with the Government of India in the WTO Non-Agricultural Market Access (NAMA) discussions in NAMA week in Geneva throughout the year.

Discussions were held mainly on the Remanufactured Goods proposal and Automotive NTBs paper. India expressed

serious reservations on trade in remanufactured products stating that the practice may hurt local manufacturing industries very significantly.

Other automotive issues discussed during the year in WTO included review of NTBs. The Indian team also highlighted their opinion on the automotive paper. India stated that they were apprehensive of the EU trying to designate the 1958 UNECE Agreement as the relevant international standard setting body.

In Delhi, a meeting of EU Delegation was held with SIAM along with other industries on Non-Agricultural Market Access (NAMA) negotiations in November 2010. The objective of the interaction was to highlight the major areas of concerns of Indian industry vis-à-vis EU position on Non-Agricultural Market Access issues in the context of the ongoing WTO negotiations. SIAM reiterated the position of the Auto Industry in India on issues such as those relating to Technical Barriers to Trade (TBT), remanufactured goods, etc.

## **INTERNATIONAL ENGAGEMENTS**

### **OICA GENERAL ASSEMBLY IN INDIA**

For the first time in the history, SIAM hosted the OICA General Assembly in New Delhi on 21-22 October 2010. Apart from official meetings, two Round Tables were held – one on Global Market and the other on CO2.

As a part of the OICA General Assembly Meeting a Global Market Round Table was held in New Delhi. Several countries like China, France, Germany, India, Japan, Russia, S. Korea, etc., made presentations on their market situation.

SIAM and JAMA (Japan Automobile Manufacturers Association) officials met in January 2011 in Pune to exchange information on the Indian and Japanese Auto industry. This was the 3<sup>rd</sup> annual High Level Staff meeting between SIAM and JAMA officials. SIAM and JAMA exchanged information on Market Trends,



L to R: Mr Yoshihiro Yano, Director General - International, JAMA, Mr Yoshiyasu Nao, President, JAMA, Mr S Sasaki, Director General - Technical, JAMA



SIAM & JAMA Officials after the meeting



Panel at the OICA Round Table on "Global Market Situation"



OICA General Assembly held in New Delhi on 21-22 October 2010



Mr Dong Yang, President, CAAM

Mr Yoshihiro Yano, Director General - International, JAMA



EPA/FTA developments and Environmental issues relating to their industry.

## ***PARTICIPATION IN IAA-INDIA DAY IN SEPTEMBER 2010, GERMANY***

SIAM participated in the 'IAA - India Day' which was organized during the 63<sup>rd</sup> IAA Commercial Vehicles show in Hannover in September 2010. The "IAA India Day," was organized by the German Association of the Automotive Industry (VDA) in cooperation with ACMA, SIAM, the Ministry of Heavy Industries and Public Enterprises and the Indo-German Chamber of Commerce (IGCC). This was the fifth time that this programme was organized.

Mr B S Meena, Secretary, Ministry of Heavy Industries & Public Enterprises also addressed the audience at the programme. Dr Pawan Goenka, President, SIAM made a presentation on the recent industry performance of the Indian auto industry with focus on the commercial vehicles segment.

SIAM along with the Indian Delegation visited an End of Life Vehicle Scrap-yard facility located at Salzgitter, outside Hanover in Germany. This Scrap-yard has a capacity of metal shredding of over 500,000 tons. The visit was organized for the Government of India delegation in the IAA-India Day programme held during the 63<sup>rd</sup> IAA Commercial Vehicles show in Hannover.

## **THIRD MEETING OF INDO-GERMAN JOINT AUTOMOTIVE WORKING GROUP**

In April 2011, third meeting of the Indo-German Joint Working Group on Automotive Sector was organized. Mr Praful Patel, Hon'ble Minister of Heavy Industries & Public Enterprises along with his German counterpart lead the meeting. SIAM and ACMA represented the Indian industry in the meeting. Interactions were held to identify future areas of cooperation and knowledge sharing between the two countries in the automotive sector.



IAA India Day Programme



Indo-German Joint Automotive Working Group meeting

## **PARTICIPATION IN THIRD KUALA LUMPUR INTERNATIONAL AUTOMOTIVE CONFERENCE**

SIAM was invited to participate in the 3<sup>rd</sup> Kuala Lumpur International Automotive Conference 2010 which was held in December 2010 at Kuala Lumpur in Malaysia. Mr Sugato Sen made a presentation in the Session on "Emerging Auto Giants – China & India: How Will They Impact the Global Automotive Industry."



*L to R: Mr Sugato Sen, Sr Director, SIAM, Mr A S Puri, Chairman SIAM International Relations group & Vice President (Govt. Affairs & Collaborations), Tata Motors Ltd*

## **VISIT BY INTERNATIONAL COMPANIES**

During the year, several internal companies like Proton, FOURIN, Hitachi Research Institute, etc visited SIAM to understand the current state of the industry and recent policy. SIAM has been working with various stakeholders and spreading awareness about the current developments relating to the Automobile Industry in India.

## **INFORMATION SHARING IN APEC AUTOMOTIVE DIALOGUE**

SIAM participated in the 13<sup>th</sup> & 14<sup>th</sup> APEC Automotive Dialogue in November 2010

(Singapore) and March 2011 (Washington, D.C.) respectively. SIAM team was led by Mr A S Puri, Chairman, SIAM International Relations Group and Vice President, Tata Motors. These meetings were attended by government and industry representatives from Australia, Canada, China, Indonesia, Japan, Korea, Malaysia, Mexico, Philippines, Russia, Chinese Taipei, Thailand, the United States of America, and Vietnam. In the 13<sup>th</sup> APEC AD, SIAM made presentations about initiatives in advanced technology vehicles in India and on development in WP.29 and its linkages with WTO. This was followed by presentations by SIAM on Harmonization of Regulations and Road Safety WG and Government Innovation

SIAM's participation in the APEC Automotive Dialogue held in November 2010 (Singapore)





Meeting on DEPB discontinuation



Meeting on DEPB discontinuation

and Green Technologies Policies in the 14<sup>th</sup> APEC AD.

#### **SIAM SUGGESTIONS ON INCREASING EXPORTS**

SIAM submitted its inputs for revision in the India's Foreign Trade Policy & Procedure. The recommendations were submitted to the Directorate General of Foreign Trade (DGFT). These suggestions aimed at improving India's automobile exports were prepared by the SIAM Exports Group.

During the year, the Government of India announced that Duty Entitlement Passbook Scheme (DEPB) scheme, one of the schemes extensively utilized by two wheelers and commercial vehicle exporters, would be discontinued post March 2011. SIAM worked with the Government urging for continuation of the scheme till an alternative scheme is put in place. The Government of India announced that it would work on development of a new scheme that could replace the existing DEPB

scheme and extension of the current scheme till 30th September 2011.

The Government is understood to be exploring the possibility of enhancing the existing Drawback scheme to make it attractive so that it is utilized by exporters in place of the DEPB scheme. SIAM has been working with the authorities to develop an alternative scheme so that our exports do not suffer. Earlier, SIAM team led by the President had met with Commerce Minister and Revenue Secretary requesting for extension of DEPB Scheme. SIAM team led by Chairman, SIAM Exports Group met with the Drawback Committee also.

#### **INFRASTRUCTURE CONSTRAINTS AT JNPT**

SIAM submitted a detailed note on the constraints being faced by companies at Jawaharlal Nehru Port Trust (JNPT) to the Ministry of Shipping and Customs Department, Central Board of Excise & Customs, Ministry of Finance. The officials appreciated the issues and assured that the Government is working towards resolving these issues.

#### **SOURCING GROUP**

The SIAM sourcing Group is engaged in matters concerning the input requirements for vehicles. SIAM is compiling and circulating every month a monthly price monitor for various raw materials giving the trend of price movement of important raw materials. The Secretariat is now developing a vehicle price index to correlate the impact of increase in prices of input materials on the cost of cars. The index is in the final stages of development.

Sourcing group has remained engaged with various stakeholders including the Government on tyre issue. The Group is also engaged with ACMA discussing matters of mutual concern including capacity creation in the component sector to meet the increasing production requirements of the OEMs, support from OEMs to components manufacturers on skill

development through training of personnel, light-weighting of identified components to help in material conservation as well as vehicle weight reduction, etc.

Discussions have also been held with the Automotive Tyre Manufacturers Association (ATMA), to resolve issues of mutual concern - pricing as well as delivery issues. Discussions were also held with the Association of Indian Foundry men, (Casting industry Association) for creation of additional capacity in the foundry sector for the increasing demand of tyres and tubes. ATMA informed that around Rs 12000 crores investment is being planned by the tyre companies for expansion of capacities

The Group also got engaged with SAIL to apprise them of the demand of the industry with regard to various sizes of steel material to facilitate their planning of additional capacity.

A SIAM Sourcing Group delegation, consisting of nine members, visited the China International Auto Parts Expo 2010 at Beijing from 24<sup>th</sup> to 27<sup>th</sup> September 2010. Besides Auto Parts the exhibitor categories included Materials and Components, Repairing Equipment Accessories, etc. The delegation held discussions with a number of suppliers of Auto Parts from different parts of China. One to one discussions were

SIAM Sourcing group meeting held in Volkswagen India plant, Pune



(3<sup>rd</sup> from left) Mr Sudam Maitra, Chairman SIAM Sourcing group & Managing Executive Officer (Supply Chain), Maruti Suzuki India Ltd and Mr B B Parekh, Co-Chair SIAM Sourcing Group & Chief (Strategic Sourcing), Tata Motors Ltd (2<sup>nd</sup> from left) along with ACMA Members



Members at the Auto Part development summit conference



Members at the inauguration of the China International Auto Parts Expo - 2011

also held by members with chosen potential suppliers.

### BIS MARKING OF TYRES & TUBES

As per an order issued by the Department of Industrial Policy and Promotion BIS Marking has been made mandatory for Automotive tyres & tubes. SIAM participated in the related meetings in DIPP & DGFT to present the industry view point and to deliberate on the list of tyres to be exempted for imports by OEM's for replacement purposes. Tyres & tubes imported by OEM'S for original fitments, for domestic production and exports are exempted under the order.

### LOGISTICS GROUP

SIAM Logistics group was engaged in developing strategies for improvements in the logistics -both inbound as well as out bound for the industry covering Road, Rail as well as coastal shipping routes for out bound delivery of finished vehicles and coordination for inbound logistics through reusable packaging crates.

SIAM had held discussions with RDSO for development of a new design for auto wagons for carrying a higher payload in terms of a larger number of vehicles to be transported per rake. They had been provided the dimensions of various models and makes of vehicles to help in developing an optimal design. Inputs were also provided to them based on the visit of a SIAM delegation to see some wagon designs



Mr Prem Verma and Mr M M Singh, Chairman SIAM Logistics group & Managing Executive Officer (Production), Maruti Suzuki India Ltd with Railway board officials discussing about Auto Hubs & AFTO policies at SIAM Logistics group meeting



SIAM Logistics group meeting



Member of the delegation in discussion with selected component supplier at the expo meet



SIAM Logistics group inspecting a possible location for Auto Hub near Cochi



L to R: Mr Sushil Kumar, Advisor, SIAM, Mr Sugato Sen, Sr Director, SIAM, Mr Prem Verma, Co-Chair SIAM Logistics group & Chief Executive Officer, TML Distribution Co. Ltd, Mr Deepak Sharma, General Manager, Maruti Suzuki India Ltd at SIAM Logistics Group meet

from Vietnam. A new auto wagon design has since been developed by RDSO.

Senior Railway officers from the Railway Board, Ministry of Railways visited SIAM for an interaction with members. Inputs of members to the Railways' AFTO and Auto Hub policies and the draft AFTO license agreement were discussed. Suggestions of the members on the AFTO Policy as well as on the AFTO License agreement were communicated to the Railway Board and these are now under active consideration of the Railways for suitably modifying them to make them more user-friendly and beneficial for all concerned. Similar inputs were provided on the Automobile Hub Policy and the draft Auto Hub License agreement.

Members had visited Chennai and Cochin to see some locations suggested by Railways for creation of Auto Hubs. SIAM suggested location near Chennai has been notified as a proposed hub and railways is in the process of selecting the licensee for the same.

An interactive session with Industry was held by the Ministry of Railways for direct feedback to the Hon' Minister of Railways Ms Mamata Banerjee on various policies announced by the Railways in the recent past for the industry. It was mentioned by SIAM that in taking forward the policy initiatives, SIAM had some concerns and that these needed to be addressed by the Railways. Some of the aspects highlighted were expeditious design approvals for new wagon designs, details of Concession Agreement outlining the actual costs that the 3 PL would need to bear under the Auto Hub and AFTO Policies and a stable and transparent freight policy so that there are no sporadic changes in the freight charges.

SIAM has started exploring the coastal sea route for transportation of finished vehicles. Other innovative concepts are being evaluated including the concept of a Road-Railer.

## **DEVELOPMENT COUNCIL FOR AUTOMOBILE & ALLIED INDUSTRIES (DCAAI) MEETINGS**

The Development Council for Automobile & Allied Industries (DCAAI) met last year under the chairmanship of Secretary, Ministry of Heavy Industries & Public Enterprises. SIAM along with ACMA briefed DCAAI on Industry Performance. NATRIP project's progress updates were also provided in DCAAI meeting. Also, SIAM made a presentation on the action taken/review of Automotive Mission Plan 2006-2016.

## **SIAM FLASH REPORT – NEW VEHICLE CLASSIFICATION INTRODUCED**

After years of effort, SIAM has come out with a new vehicle classification format approved by the Executive Committee during the year, for the SIAM statistical report. The reports as per the new format have been introduced from April, 2011. This has been a result of the continuous effort put in by various committees/ groups in SIAM.

The new classification has been introduced for the Passenger Vehicles and Commercial Vehicles segments.

- Passenger Vehicles are vehicles having up to 10 seats and classified into 1. Passenger Cars, 2. Utility Vehicles/ Sports Utility Vehicles and 3. Vans. Each of these segments is further sub-segmented/classified. For instance, in case of Passenger Cars, 10 sub-segments have been introduced based on seating & length as the primary criteria and body style & engine displacement as the secondary criteria. Each of these sub-segments is further classified as 'Regular' or 'Specialty' except the 'Exotic' sub-segment. 'Regular' vehicles are those vehicles which normally fit as per most of the criteria of the segment. The vehicles which though fit as per the primary criteria of the segment, but are not typical of that segment are termed as 'Specialty' vehicles; it could be in terms of body style, fuel type/drive energy, price, etc.

The new classification of Passenger Vehicles is given herewith:

**PASSENGER VEHICLES : UP TO <=10 SEATS**

**A. PASSENGER CARS - UPTO 5 SEATS**

Micro	Seats upto-4, Length Normally <3200 mm, Body Style-Hatchback, Engine Displacement Normally up to 0.8 Litre
Mini	Seats upto-5, Length Normally <3600 mm, Body Style-Hatchback, Engine Displacement Normally up to 1.0 Litre
Compact	Seats upto-5, Length Normally between 3600 - 4000 mm, Body Style-Sedan/Estate/Hatch/Notchback, Engine Displacement Normally up to 1.4 Litre
Super Compact	Seats upto-5, Length Normally between 4000 - 4250 mm, Body Style-Sedan/Estate Hatch/Notchback, Engine Displacement Normally up to 1.6 Litre
Mid-Size	Seats upto-5, Length Normally between 4250 - 4500 mm, Body Style-Sedan/Estate/Hatch/Notchback, Engine Displacement Normally up to 1.6 Litre
Executive	Seats upto-5, Length Normally between 4500 - 4700 mm, Body Style-Sedan/Estate/Notchback, Engine Displacement Normally up to 2 Litre
Premium	Seats upto-5, Length Normally between 4700 - 5000 mm, Body Style-Sedan/Estate, Engine Displacement Normally up to 3 Litre
Luxury	Seats upto-5, Length Normally Over 5000 mm, Body Style-Sedan/Estate, Engine Displacement Normally up to 5 Litre
Coupe	Roadster- 2 Doors; 2/4 Seater, retractable/firm roof
Exotics	Upto 5 Seats, Price >Rs. 1 Crore

**B. UTILITY VEHICLES/ SPORTS UTILITY VEHICLES; 4X2 OR 4X4 OFFROAD CAPABILITY; GENERALLY LADDER ON FRAME ; 2 BOX ; 5 SEATS OR MORE BUT UP TO 10 SEATS**

UV1	Length <4400 mm, Price up to Rs. 15 Lakh
UV2	Length between 4400 - 4700 mm, Price up to Rs. 15 Lakh
UV3	Length >4700 mm, Price up to Rs. 15 Lakh
UV4	Price between Rs. 15 to 25 Lakh
UV5	Price >Rs. 25 Lakh

**C. VANS; GENERALLY 1 OR 1.5 BOX; SEATS UP TO 5 TO 10**

V1	Hard tops mainly used for personal transport, Price up to Rs. 10 Lakh
V2	Soft tops mainly used as Maxi Cabs, Price up to Rs. 10 Lakh
V3	Price >Rs.10 Lakh

- In the new classification of Commercial Vehicles, Goods Carriers are further segmented based on tonnage. The new classification of Goods Carrier Commercial Vehicles is given below:

**COMMERCIAL VEHICLES : GOODS CARRIER**

N1	Max. mass up to 3.5 tonnes (Goods Carrier)
A1	Mini Truck- Max. mass not exceeding 2 tonnes
A2	Pick Ups-Max. mass exceeding 2 but not exceeding 3.5 tonnes
N2	Max Mass exceeding 3.5 tonnes but not exceeding 12 tonnes (Goods Carrier)
A1	LCV-Max. Mass exceeding 3.5 tonnes but not exceeding 6.0 tonnes
A2	LCV- Max. Mass exceeding 6.0 tonnes but not exceeding 7.5 tonnes
A3	ICV-Max. Mass exceeding 7.5 tonnes but not exceeding 10.0 tonnes
A4	ICV-Max. Mass exceeding 10.0 tonnes but not exceeding 12.0 tonnes
N3	Max Mass exceeding 12 tonnes (Goods Carrier)
A	Max. Mass not exceeding 16.2 tonnes

- B Max. Mass exceeding 12 tonnes but not exceeding 16.2 tonnes
- Max Mass exceeding 16.2 tonnes
- B1 Rigid Vehicles
  - a. Max Mass exceeding 16.2 tonnes but not exceeding 25 tonnes
  - b. Max. Mass exceeding 25 tonnes
- B2 Haulage Tractor (Tractor – Semi Trailer/ Trailer)
  - a. Max. Mass exceeding 16.2 tonnes but not exceeding 26.4 tonnes
  - b. Max. Mass exceeding 26.4 tonnes but not exceeding 35.2 tonnes
  - c. Max. Mass exceeding 35.2 but not exceeding 40.0 tonnes
  - d. Max. Mass exceeding 40 but not exceeding 49.0 tonnes
  - e. Max. Mass exceeding 49 Tonnes & above

## TRADE FAIRS GROUP

SIAM Trade Fairs Group met several times during the year under the Chairmanship of Mr Arvind Saxena, Director, Hyundai Motor India Ltd to discuss about the Regional Shows, Bus & Special Vehicles Shows and Auto Expo 2012 and beyond. The Group decided that apart from Auto Expo, SIAM will organize other shows in the interim period and Chairman urged members to participate in the regional and special shows to make them successful. While members were told about the Regional Show in Kolkata, members would be provided a calendar for the complete year which would help members plan their participation.

The Group also deliberated on the issues faced by the members during the Auto Expo 2010 – how to rectify them in the next Auto Expo and felt that in view of enhanced demand, it was no longer possible to have Auto Expo in Pragati Maidan as a single venue and asked the three

organizing secretariats – ACMA, CII and SIAM to explore possibilities to look for a solution. It was decided that some alternative venues for the Auto Expo shall be explored by this Group.

Accordingly a suggestion was made that the component show be held concurrently as part of Auto Expo in a second location to enable expansion of the show. However, the Auto Expo Steering Committee decided that 2012 Auto Expo will be held in Pragati Maidan as an



SIAM Trade Fairs group meeting being held under the Chairmanship of Mr Arvind Saxena, Chairman SIAM Trade Fairs group & Director, Hyundai Motor India Ltd



SIAM Trade Fairs group meeting being held under the Chairmanship of Mr Arvind Saxena, Chairman SIAM Trade Fairs group & Director, Hyundai Motors India Ltd

integrated show. Thus the Auto Expo 2012 will be held in Pragati Maidan, New Delhi, during 5<sup>th</sup> – 11<sup>th</sup> January 2012 (5<sup>th</sup> and 6<sup>th</sup> January 2012 will be for media and VIPs and the show will be open for public from 7<sup>th</sup> to 11<sup>th</sup> January 2012) with ACMA members participating. In an Auto Expo Steering Committee meeting, it was decided that SIAM Members will get 47000 Sq Meter gross space in Pragati Maidan for Auto Expo 2012, ACMA and CII members will get 27000 & 4000 Sq Meter gross space, respectively. Pragati Maidan in total has built up space of around 63000 sq meters gross space.

Under the circumstances, it has been decided that based on participation of SIAM members in Regional Shows, consistent participation in Auto Expo and Bus and Special Vehicle Shows, SIAM will ration the original space requirement received by various OEMs to fit all members in available space for Auto Expo 2012 with significantly less number of Hanger Structures to be used.

It has also been decided by the SIAM Executive Committee that since space is a major constraint in the growth of Auto Expo and since there is no other suitable venue in India other than Pragati Maidan, the show will be split in 2 categories:

1. Car and Bike Show
2. CV and Component Show.

Splitting Auto Expo in 2 parts will enable members to display more products and hence will grow the show.

#### IT GROUP

The meetings of the Group were held under the Chairmanship of Mr N Chandershekhar, Ashok Leyland and Co-Chairmanship of Mr Vijay Sethi, Hero MotoCorp Ltd. The group activities were focused on the use of IT in the automotive industry.

SIAM and ACMA jointly commissioned a study project on standardization of data interchange

between the automobile and component manufacturers. The specific objective of the study is to establish a uniform standard for Industry-wide EDI in the interest of building efficiencies in OEM-supplier operations. Also, standardization of the EDI will help build a common and integrated response to changes in technology, security threats, regulatory requirements etc.

#### SERVICE HEADS FORUM

The Group met during the year under the Chairmanship of Mr Pankaj Narula, Maruti Suzuki India Ltd. and Co-Chairmanship of Mr Rajesh Makhija, Hero MotoCorp Ltd. The group activities were focused on the benefit of information sharing of the best practices of the industry.

It has been proposed that the industry requirement of skilled service area manpower may be channelized under Automotive Skills Development Council (ASDC). Service Heads Group would be providing inputs to define appropriate terms of reference for the same.



R to L: Mr K K Gandhi, ED (Tech) SIAM, Mr Pankaj Narula, Chairman SIAM Service Heads group & ED- Service, Maruti Suzuki India Ltd, Mr Sanjay Yadav, ASM Delhi, TVS Motor Co., Mr Dimple Mehta, AGM - CCS Hyundai Motor India Ltd, Mr E Jayagopu, General Manager Ashok Leyland Ltd and Mr Pradeep Chakravarty, General Manager Honda Siel Cars India Ltd

#### ANTI-COUNTERFEITING GROUP

The meetings of the Group were held under the Chairmanship of Mr Sanjoy Gupta, Mahindra & Mahindra Ltd. The group deliberated on the work plan under each of

the broad areas viz. Awareness, Education, Prevention and Elimination to combat the menace of counterfeiting which is rampant in the automotive sector. The group planned to create synergy for sustaining this initiative with various stakeholders like Government, Police Departments, Media/Press, Associations like ACMA, CII and FADA, Consumer Forum etc.

### **SIAM HUMAN CAPITAL GROUP INITIATIVES**

During the year, SIAM worked consistently to help the industry develop improved human resource through its Human Capital Group activities. Under the chairmanship of Mr Prince

Augustin, SIAM has started regular interaction with ACMA for sharing of HR practices to improve HR practices at component manufacturers' end. Experts including Hewitt Associates, Price Waterhouse Cooper, etc. shared thoughts with the Group.

Thought sharing presentations were made by member companies. The 2<sup>nd</sup> edition of HR Conclave is being planned to be held in New Delhi in the first quarter of 2012.

SIAM got the second compensation survey done through Hewitt Associates. The scope and coverage of the survey was enhanced to



SIAM Human Capital group meeting under the Chairmanship of Mr Prince Augustin, Chairman SIAM Human Capital group & Chairman (Human Capital), Mahindra & Mahindra Ltd



Mr Shekhar Arora, member SIAM Human Capital group & ED-HR, Ashok Leyland Ltd giving a presentation to the group



SIAM Human Capital group meeting being held under the Chairmanship of Mr Prince Augustin, Chairman SIAM Human Capital group & Chairman (Human Capital), Mahindra & Mahindra Ltd

cover various functions and different levels. The new broad-based survey is serving as a useful benchmark and helping the participating members to determine appropriate compensation packages for their staff.

### **AUTOMOTIVE SKILLS DEVELOPMENT COUNCIL (ASDC)**

SIAM along with the Ministry of Heavy Industries & Public Enterprises, ACMA and FADA, has set up the Automotive Skills Development Council (ASDC). ASDC being initially funded by NSDC was formally registered as a Society in February 2011. It has become the first Sector Skills Council to be set up in India and is already being looked upon as a path breaking historic development for the country.

Towards achieving these objectives, the first pilot project is underway. In this pilot, ASDC is targeting 3 skills / occupations:

- Machinist
- Service Technician
- Drivers

Separate expert committees comprising of experts from member companies of ACMA, SIAM and FADA have been set up for Course Development, Promotion and Delivery, Evaluation and Certification and Employment to ensure success of ASDC.



Governing Council Meeting of ASDC

The development of the courses for these 3 occupations is in progress and the first batch of ASDC certified personnel is expected to come out shortly. These certified persons, comprising of the trainees who will have undergone these bridge courses, will be given preference for employment by the industry members of ACMA, SIAM and FADA.

Also, ASDC is working closely with NSDC, Ministry of Human Resource & Development and Ministry of Labour & Employment to ensure alignment of curriculum and policies with other vocational and educational agencies. This will enable ease of mobility for skilled people and provide industry with a larger pool of skilled workforce.

### **NATIONAL VOCATIONAL EDUCATION QUALIFICATION FRAMEWORK**

SIAM participated in a Roundtable to discuss the National Vocational Education Qualification Framework with emphasis on the Automobile Industry, organized by the All India Council for Technical Education (AICTE), in December 2010. The meeting was addressed by Mr Kapil Sibal, Hon'ble Union Minister Human Resource Development, and was attended by Dr D Purandeshwari, Hon'ble Minister of State Human Resource Development, Ms Vibha Puri Das, Secretary Human Resource Development, and Professor S S Mantha, Chairman, All India Council for Technical Education. SIAM team included representatives from Ashok Leyland Ltd, Asia Motor Works, BMW India Pvt Ltd,



*L to R: Mr Raman Kumar Sharma, Co-Chair SIAM Human Capital group & Vice President & Director (General Affairs) Honda Siel Cars India exchanging the signed ASDC MoU with Mr Dilip Chenoy, Managing Director & CEO, National Skill Development Corporation*

Maruti Suzuki India, Scooters India, Skoda Auto India Ltd, Tata Motors Ltd and others who participated in the discussions.

The purpose of the meeting was to evolve a framework for linking various vocational qualifications and setting common principles and guidelines for a nationally recognized qualification system and standards. SIAM informed the Hon'ble Minister about the formation by SIAM, ACMA, and FADA of the Automotive skills Development Council (ASDC) and the pivotal role it can play in setting up the NVQF for the automotive industry and in rating the public and private automotive training institutes.

A Core Group, comprising SIAM and related government bodies, was constituted under the chairmanship of Mr R Seshasayee, Past President, SIAM and Vice Chairman, Ashok Leyland Ltd. The committee would be submitting its recommendations to MHRD.

#### **DEMAND MANAGEMENT COUNCIL MEETING : OCTOBER 2010**

SIAM Demand Management Council met during the year under the chairmanship of Mr Joerg Mueller, then, President & Managing Director, Volkswagen India Pvt Ltd. The Groups under this Council made presentations on their activities carried out during the year. Council discussions have provided directions for future activities of the Groups.



(2<sup>nd</sup> from Left) Mr Joerg Mueller Chairman SIAM Council on Demand Management & President and Managing Director, Volkswagen India Pvt Ltd chairing the Demand Management Council meeting

#### **MEETING OF SIAM COUNCIL ON ECONOMIC AFFAIRS: JANUARY 2011**

A meeting of SIAM Council on Economic Affairs under the Chairmanship of Dr Abhay Firodia, Chairman, Force Motors was held in Mumbai. Co-Chairmen, Mr Rajeev Kapoor, President & CEO, Fiat India Automobiles, also participated in the meeting.

The objective of the meeting was to take stock of the activities of the Groups under the Council on Economic Affairs and develop future action plan. Presentations were made by the Chairmen/Co-Chairmen of the various Groups under this Council to apprise the council about the initiatives undertaken by each.

#### **BUS CEO'S COUNCIL MEETING: MAY 2011**

SIAM Bus CEOs' Council met under the chairmanship of Mr Ravi Pisharody, President – CVBU, Tata Motors Ltd. The main agenda during the year included the problems being faced by bus manufacturers who supplied buses under the JNNURM stimulus scheme. SIAM met Mr Kamal Nath, Hon'ble Minister of Urban Development as well senior officials of the ministry and raised the issues affecting the manufacturers who have supplied buses to STUs/ STCs under the JNNURM scheme. The ministry is trying to help in resolving the problems being faced by the bus industry.



Mr Sugato Sen, Sr Director, SIAM with Mr Ravi Pisharody, Chairman SIAM Bus CEO's Council & President (CVBU), Tata Motors Ltd

# TECHNICAL AGENDA

## TECHNICAL COUNCIL

The Technical Council was Chaired by Mr Anant J Talaulicar, Chairman & Managing Director, Cummins India and Co-chaired by Dr John Chacko, President & Managing Director, Volkswagen India Pvt Ltd. The activities of the Group on Frontier Technology, Recycling, Diesel Image, Automotive Infotronics and Styling & Design were reviewed by the council.

## FRONTIER TECHNOLOGY GROUP

The meetings of the Group were held under the Chairmanship of Dr Rao Chalasani, of General Motors India Pvt Ltd and Co-Chairmanship of Mr A Sriniwas, of Mahindra & Mahindra Ltd. The group activities were focused on making Indian Automotive Industry a global leader of low cost alternate propulsion technologies. The focus activities undertaken were Hybrid/Electric Mobility, Lightweighting and Demonstration Project on HCNG (H<sub>2</sub>+CNG) fuel under the aegis of Ministry of New and Renewable Energy

SIAM commissioned a study on National Hybrid/Electric Mobility with support from the Ministry of Heavy Industries and Public Enterprises. The findings of the study would provide vital inputs for formulating National Mission for Electric Mobility through recently constituted National

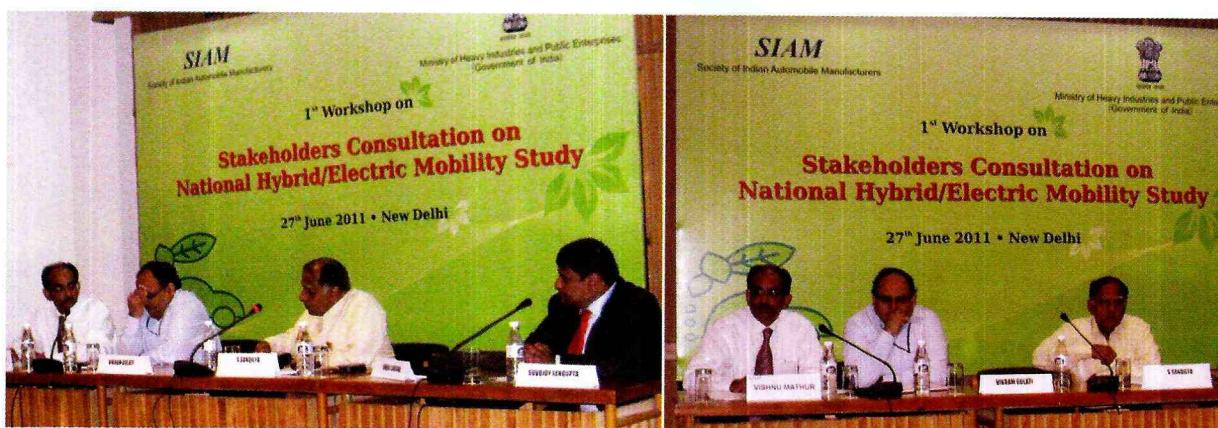
Council on Electric Mobility and National Board on Electric Mobility.

## RECYCLING GROUP

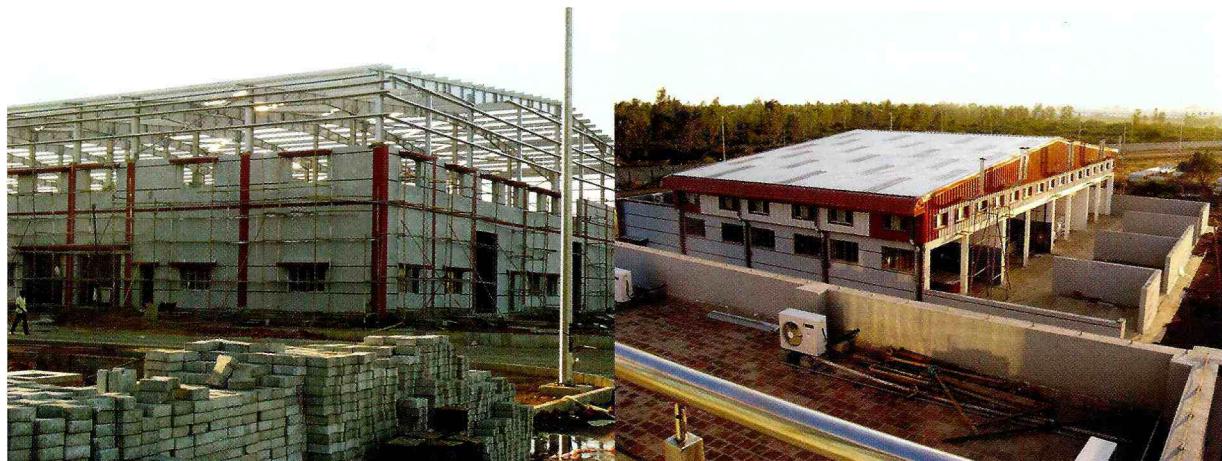
The group is Chaired by Capt N S Mohan Ram, Advisor TVS Motor Company and Co-Chaired by Mr Prakash Vemali, General Manager, Product Homologation, Mercedes-Benz India. The group is supporting the Ministry of Heavy Industry in setting up the Recycling Demo Centre at Global Automotive Research Centre-NATRIP, Chennai by providing old vehicles for dismantling and preparing the necessary documentation for taking the process forward. The Group held a series of meetings with the Ministry for addressing the issues in a holistic manner.

The first phase of the draft ELV Regulation for India is being worked upon by the Recycling Group Task Force Members under the guidance of Mr Prakash Vemali, General Manager, Product Homologation, Mercedes-Benz India.

SIAM Secretariat and Member Companies visited the recycling demo centre where the NATRIP team showed the status of the demo unit. The construction of the unit is complete and dismantling of the vehicles has been commissioned. A Memorandum of



Stakeholders consultation on Hybrid/Electric Mobility Study

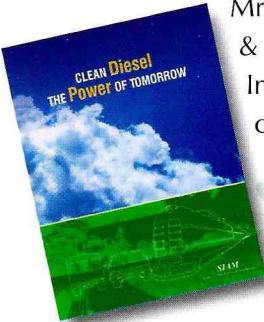


Global Automotive Research Centre, Chennai

Understanding has been signed between SIAM and NATRIP for this project.

### DIESEL IMAGE GROUP

The SIAM Diesel Image Group chaired by Mr Anant J Talaulicar, Chairman & Managing Director, Cummins India organized the first conference on "Advancement in Diesel Technologies" along with Automotive Research Association of India (ARAI) to create a positive image of the diesel vehicles at Pune in 2011.



The prime objective of the conference was to make the audience aware about the development in diesel engines and new age diesel technology at the domestic but as well as at the international level. Ms Supriya Sule, Hon'ble MP, underlined



Hon'ble MP Supriya Sule alongwith ARAI Director Shrikant Marathe (right) and ARAI President and Chairman SIAM Diesel Group, Anant Talaulicar at the conference organised by SIAM and ARAI

the need of making diesel a clean and efficient fuel in comparison with other fuels used for vehicles. The second conference in the series would be organized in Delhi followed by similar conferences in Chennai/Bangalore. The subject of proposed increase in Road tax of Diesel cars by Government of NCT of Delhi was also discussed and members expressed concerns that such measures would set a wrong precedent.

### AUTOMOTIVE INFOTRONICS AND INTELLIGENT TRANSPORT SYSTEM (ITS) GROUP

The meetings of the Group were held under the Chairmanship of Dr Arvind Bhardwaj, Ashok Leyland Ltd and Co-Chairmanship of Mr C S Venkatraman, Tata Motors Ltd. The group aimed



L to R: Mr K K Gandhi Exe. Director SIAM, Mr Vikram Gulati Director Deptt., Heavy Industry, Mr Anant J Talaulicar, Chairman Diesel Image Group SIAM, Ms Supriya Sule Hon'ble MP, Mayor of Pune Mr Mohan Singh Rajpal & Mr S R Marathe Director ARAI



STADIUM Project Workshop & Demo Taj Palace, New Delhi

to enable the association to be a nodal institution for intelligent transport systems and automotive infotonics in India by working along with the Government and other stake holders.

SIAM partnered with European Union for the Project namely STADIUM (Smart Transport Applications Designed for large events with Impacts on Urban Mobility) headed by EU Directorate General for Research and Development to demonstrate benefits of

Intelligent Transport Systems (ITS) through a pilot project during CWG 2010 in Delhi. The project was aimed at demonstrating ITS applications like transport planning, real time fleet management, live travel information through web or mobile etc.

SIAM organized a Demonstration Workshop under the STADIUM Project from 23<sup>rd</sup> - 29<sup>th</sup> September 2010 at New Delhi.

Mr Ken Parkinson, Vice President, Design GM International Operations (GMIO) addressing the session. (L to R) Mr B Bhumick, Mahindra & Mahindra Ltd, Mr Ambuj Sharma, Ministry of Heavy Industries & PE, Mr C V Raman, Maruti Suzuki India Ltd





Mr Oliver Stefani, Head of Design, Volkswagen Group Design    Mr Wayne J Burgess, Chief Designer, Jaguar Design    Mr C V Raman Chairman SIAM Styling and Design Group and CGM Engg., Maruti Suzuki India Ltd

### **SIAM 5<sup>th</sup> STYLING & DESIGN CONCLAVE, 11<sup>th</sup> FEBRUARY 2011, PUNE**

SIAM's 5<sup>th</sup> Styling & Design Conclave was organized at Hotel Westin, Koregaon Park, Pune, and saw participation of more than 150 delegates and designers from all over the world. These included Mr Ken Parkinson, Vice President, Design GM International Operations (GMIO), General Motors, Mr Yoshinori Noritake, Chief Engineer, Toyota Motor Corporation, Mr Wayne J Burgess, Chief Designer, Jaguar Design, UK, Mr Oliver Stefani, Head of Design, Volkswagen Group Design, Germany, Mr M Hattori, Chief Designer, Suzuki Motor Corporation, Mr Luca Borgogno, Senior

Designer, Pininfarina, Italy etc. Additionally, experts from SIAM membership were present.

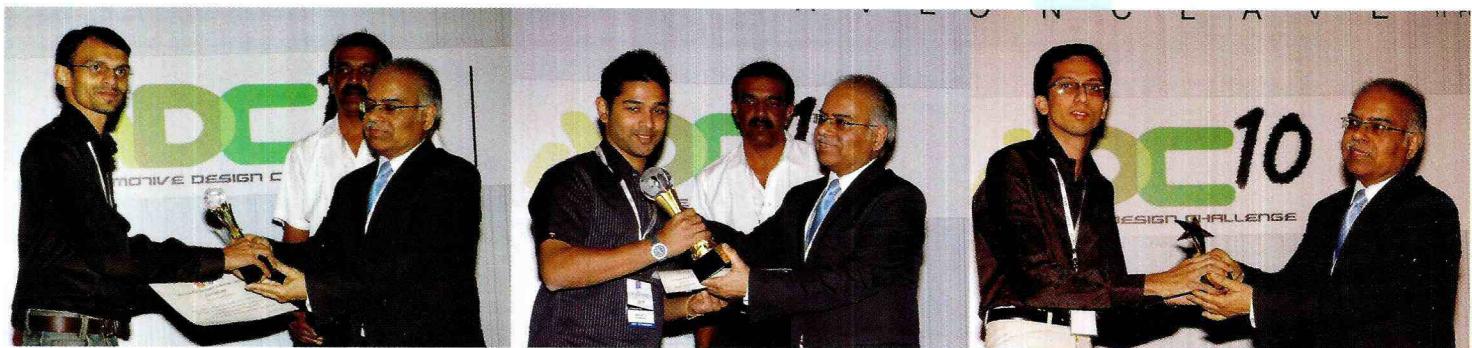
Mr Ambuj Sharma, Joint Secretary, Ministry of Heavy Industries & Public Enterprises inaugurated the 5<sup>th</sup> Styling & Design Conclave and the 1<sup>st</sup> Session of the conclave "Urbanization & Mobility" was chaired by Mr Vikram Gulati, Director, Department of Heavy Industry.

### **SIAM 3<sup>rd</sup> AUTOMOTIVE 'DESIGN' CHALLENGE (ADC), 11<sup>th</sup> FEBRUARY 2011, PUNE**

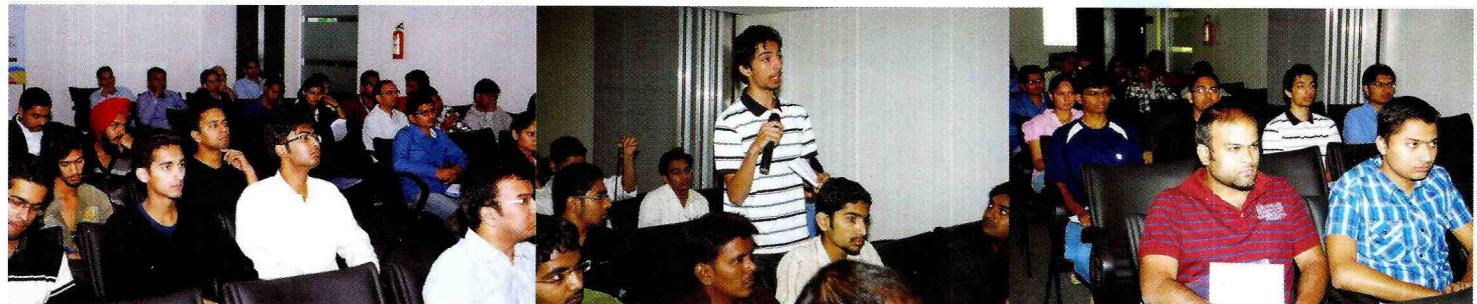
SIAM's 3<sup>rd</sup> Automotive Design Challenge (ADC) was held parallelly with the 5<sup>th</sup> SIAM Styling &

Mr Ambuj Sharma, Jt Sec., MOHI giving the trophy to the winner of the Automotive Design Challenge 2010





Images from 3<sup>rd</sup> Automotive Design Challenge, Pune



Industry Academia interaction

Design Conclave at Hotel Westin, Koregaon Park, Pune. The theme of this year's ADC was Personal Mobility for Urban India – 2016. The result of the contest was announced during the SIAM Styling & Design Conclave 2011 on 11<sup>th</sup> February 2011. The selected designs were showcased at the Pune Design Festival, MCCIA, ICC Towers, Pune on 12<sup>th</sup> February 2011.

SIAM Automotive Design Challenge (ADC) is aimed to encourage young students to opt for automobile design as a career and to offer to the

Indian automobile manufacturers the talented Indian designers. The jury was from some of the senior most designers from Indian Automobile manufacturers plus some International speakers of the SIAM Styling & Design conclave.

With more than 100 entries received from Engineering/Design students across the country. 10 best models were shortlisted for Phase - II and top 3 designs including a special Jury Award (including cash prizes plus certificates) were presented to the winning students by Mr

Industry Academia interaction



Ambuj Sharma, Jt. Secy., MoH& PE, Govt. of India at the end of SIAM S&D Conclave.

### **SIAM 1<sup>st</sup> AUTO INDUSTRY ACADEMIA – INTERACTION, 12<sup>th</sup> FEBRUARY 2011, PUNE**

SIAM Styling & Design Group for the very first time organized the Auto Industry Academia – Interaction on 12<sup>th</sup> February 2011 at Pune. It was a platform where the design/engineering students got a chance to meet the Indian Automobile designers face to face; also the winners of SIAM Automotive Design Challenge were given a platform to showcase their respective prototype projects to be open for general public, engineering/design students and faculties from various institutes.

### **STUDY ON IMPACT OF USE Of ETHANOL BLENDED FUEL IN AUTOMOBILE INDUSTRY**

SIAM instituted a study through ICRIER to examine the rationale for implementation of the 'Ethanol Blending Programme' in India and to further analyse its cross-sectoral implications on the various stakeholders including supplier industry and the industries using ethanol as feedstock.

### **NATIONAL & INTERNATIONAL REGULATION COUNCIL**

The National & International Regulation Council was Chaired by Mr P M Telang, Managing Director, Tata Motors Ltd and Co-Chaired by Mr I V Rao, Managing Executive Officer, Maruti Suzuki India Ltd. The Council reviewed the activities of the Emission and Conservation Group, CMVR & Safety Regulation Group, Two Wheeler Group, Three Wheeler Group and International Harmonization Group. The Council reviewed the activities from a wider perspective and provided policy directions for future action.

### **EMISSIONS & CONSERVATION GROUP**

The Group is Chaired by Mr J K Deb, Vice

President, Fiat India Automobiles Pvt Ltd and Co-Chaired by Dr Mathew Abraham, General Manager, Mahindra & Mahindra Ltd on issues related to emissions from the vehicles and its regulations, Group held discussions on various issues relating to future emission roadmap, Idle Emission regulations, Indian Clean Air Programme, Project on Catalytic Converters and Draft notification on Hydrogen-CNG Blend vehicles, etc., primarily through active participation in the meetings of Standing Committee of Emission Legislation (SCOEL) under Ministry of Road Transport & Highways. Detailed discussions were held to evolve a SIAM position on long term emission roadmap with the first step being implementation of BS IV Emission Norms all over the country.

Discussions are underway on various issues related to implementation of Fuel Efficiency Regulations and labeling programme for four wheelers with Ministry of Road Transport and Highways and Bureau of Energy Efficiency, Ministry of Power. Automobile Industry is continuing with the voluntary display of the fuel consumption value of each model of passenger vehicles and two-wheelers at the point of sale since the year 2009.

SIAM has made representations on Emission issues to various Parliamentary Standing Committees of Government of India such as Petroleum & Natural Gas, Environment & Forests and Science & Technology.

### **CMVR AND SAFETY REGULATION GROUP**

Group meetings were held under the Chairmanship of Mr S Ravishankar, Vice President, Tata Motors Ltd. The group is Co-Chaired by Dr N Sarvanan, Ashok Leyland Ltd. The group discussed various technical issues such as revision of various Automotive Industry Standards (AIS), formulation of new regulations, alignment of existing standards with ECER, notification and implementation of the standards, etc. The group also deliberated on issues raised by State Transport Department

from time to time. SIAM Safety Regulation Roadmap is under finalization.

- The Group works on the subjects taken up under the CMVR Technical Standing Committee (CMVR-TSC) and Automotive Industry Standards Committee (AISC).

### **BUS BODY ACCREDITATION SYSTEM**

Meetings were organized under the Chairmanship of Joint Secretary, Ministry of Road Transport & Highways. National Seminar were organized in South and West region. Logo for National Accreditation Board designed by SIAM was approved.

### **TWO-WHEELER GROUP**

SIAM Two-Wheeler Group under the Chairmanship of Mr Harjeet Singh, Vice President, Hero Motocorp Ltd discussed several issues on implementation of upcoming regulations relating to Electromagnetic Interference, Lighting standards, tell-tales etc. The Two-Wheeler Group actively participated in various committees of International Motorcycle Manufacturers Association (IMMA) for discussion of subjects at Global forum, such as CO<sub>2</sub> Regulation, upcoming emission regulations roadmap in Europe, Brakes and Noise testing procedures, etc.

The group is presently discussing the various options for fuel efficiency regulations in India. The group has also supported Government of India's proposal to make WMTC as an alternative test cycle for emission regulations, a draft notification for the same has already been issued by the Ministry of Road Transport and Highways.

### **THREE-WHEELER GROUP**

The Three-wheeler Group actively worked under the chairmanship of Mr S Sane, Senior Vice President, Piaggio Vehicles. The group is

looking at various options for the Next Stage of emission norms for Three-wheelers. Various options include aligning the Three-wheeler emission norms with vehicles of N category tightening of the existing norms by a certain percentage, etc. The members also discussed the concerns of the State Government to make the Three-wheelers safer for passengers including issues such as mandating of Speed Governors in the State of Haryana.

### **INTERNATIONAL HARMONIZATION GROUP**

Activities of International Harmonization Group were led under the Chairmanship of Mr Z A Mujawar, Senior General Manager, Mahindra & Mahindra Ltd and Co-Chaired by Mr P K Banerjee, Head (Homologation & Product Evaluation) Tata Motors Ltd. The Group reviewed the activities under the different GRs under the WP 29 and form SIAM view point on various issues under discussion in the international forum. Members were also updated on the activities of the GR Groups.

### **INDO-US WORKSHOP ON TRANSPORT & GREENHOUSE GAS EMISSION**

SIAM made a presentation on the industry prospective at the Indo-US Workshop on Transport and Greenhouse Gas Emissions on 10<sup>th</sup> & 11<sup>th</sup> February 2011 at CRRI, New Delhi. During the discussions several issues related to traffic management, infrastructure requirement and shifting to Public transport mode from private transport mode were discussed along with experts from California Air Resource Board, Oak Ridge National Lab, Texas Institute, etc.

### **IMMA GENERAL ASSEMBLY**

SIAM participated in the International Motorcycle Manufacturers Association's General Assembly at Penang on 10<sup>th</sup> and 11<sup>th</sup> May 2011. IMMA has now appointed a new Secretary General, Mr Edwin Bastiaensen after



IMMA General Assembly

Dr Nick Rogers left IMMA last year. Chinese Motorcycle Manufacturers participated in the General Assembly as an observer. IMMA's Steering Committee meeting, Road Safety Task Force meeting and Technical Committee meeting were held prior to the General Assembly. IMMA noted the importance of Asia in Motorcycle markets and emphasized that Asian countries need to play a more active role in the International arena as the bulk of motorcycle manufacturing is done in these countries.

#### 5<sup>th</sup> WORLD RECYCLING FORUM WRF 2010

SIAM attended the 5<sup>th</sup> World Recycling Forum WRF 2010, International Conference

& Exhibition on Electronics, Battery & Car Recycling organized by International Congress & Marketing (ICM AG) from 15<sup>th</sup> to 18<sup>th</sup> November 2010 in Hong Kong. The Indian delegation was led by Capt N S Mohan Ram, Chairman, SIAM Recycling Group and Advisor, TVS Motor Company Ltd.

#### AUGMENTATION OF CNG LEAKAGE TESTING SYSTEM FOR BUSES

SIAM in partnership with Transport Department, Government of NCT of Delhi, had launched a website under the URL [www.cngcertificate.com](http://www.cngcertificate.com) for carrying out CNG leakage test for CNG bus-fleet in Delhi. SIAM is responsible for supporting the Operation and maintenance of CNG certificate software through its members.



L to R: Capt N S Mohan Ram, Advisor, TVS Motors Ltd & Chairman SIAM Recycling Group, Mr Prakash Vemali, General Manager, Mercedes-Benz India Pvt Ltd & Co-Chairman, SIAM Recycling Group and Mr Noel Alexander Peters, SIAM



L to R: Mr M V Ramachandran, GARC, Mr V P Singh NATRIP, Mr S Sundareshan, Secretary, MoHIL, Mr Ambuj Sharma, Joint Secretary MoHIL, Capt N S Mohan Ram, Chairman SIAM Recycling Group, Mr K K Gandhi, Executive Director (Tech), SIAM



Japanese and Indian delegates at the 5<sup>th</sup> SIAM-JAMA meeting at New Delhi

### **SIAM/ACMA & FRAUNHOFER INTERACTION MEETING ON LIGHT WEIGHTING FOR AUTOMOBILES**

SIAM & ACMA organized the Fraunhofer Interaction meeting on 22<sup>nd</sup> January 2011 at New Delhi to determine common objectives in order to engage the services of the Fraunhofer Institute in the area of Light Weighting in the automotive domain. Based on the deliberation, SIAM and ACMA jointly formulated a broad framework in order to create guidelines for carrying out projects with Fraunhofer Institute on light weighting.

### **REVIEW OF AUTO FUEL POLICY**

The Parliamentary Standing Committee on Petroleum & Natural Gas has invited views of SIAM on the National Auto Fuel Policy, covering all issues related to emission norms, fuel efficiency and alternative fuels. SIAM has submitted its position on these issues. SIAM is to appear before the Parliamentary committee for elaborating on its representation.

### **5<sup>th</sup> SIAM JAMA TECHNICAL MEETING**

The 5<sup>th</sup> JAMA SIAM meeting was held on 22<sup>nd</sup> October 2010 at Hotel Lalit, New Delhi to discuss some of the key issues of mutual interest. Such as: preparedness of the test facilities in India, trends in environmental regulations, emissions, fuel regulations and fuel efficiency, trends in alternative fuel, procedural matters covering auto industry standards in India, Harmonization activities and the 1958 & 1998 Agreements, including whole vehicle type approval and changes proposed under the UNECE 1958 Agreement. It was also agreed that JAMA and SIAM should continue the bilateral discussions and identify the areas in which both organizations could work together.

# BUS & SPECIAL VEHICLES EXPO 2011

9-12 MARCH, 2011: HITEX CENTRE, HYDERABAD

The 2<sup>nd</sup> Bus & Special Vehicles Expo (BSVE) 2011, was organized in March 2011 at Hitex Exhibition Centre, Hyderabad, Andhra Pradesh, India.

The second edition of BSVE spread across 8,000 sq mtrs received encouraging response from the industry with the presence of major automobile manufacturers along with components manufacturers and overseas participation. The event was also supported by Ministry of Heavy Industries and Public Enterprises, Government of India, Association of State Road Transport Undertaking (ASRTU) and Department of Transport, Andhra Pradesh.

The show was inaugurated by Dr J Geetha Reddy, Minister for Major Industries, Andhra Pradesh, Government of India.

Some of the major participants at Bus & Special Vehicle Expo 2011 included Tata Motors Ltd,

Volvo Buses India Pvt Ltd, SML Isuzu Ltd, Force Motors Ltd, Eicher Motors Ltd, Allission Transmission, FAW Group China etc.

As part of BSVE 2011 a series of Special Meetings were also held including Roundtable on bus transportation: Future challenges in India by ASRTU, Workshop on Bus Body Builders Accreditation System by Central Institute of Road Transport (CIRT), Bus driver's Training camp by Hubert Ebner (P) Ltd & Transport Department, Hyderabad. Bus & Special Vehicle Expo also proved to be a successful launching pad with Volvo Buses launching Intelligent Technology Transmission and Tata Motors organizing the special showcase of its Mobile Classroom Bus and India's first Hybrid bus.

The event concluded on a promising note with nearly 90% of the participants confirming their interest to participate at the next edition of BSVE.



Vehicles displayed at BSVE 2011, Hyderabad



Mr D P Saste, CIRT, addressing participants during the workshop on Bus Body Builders Accreditation System by Central Institute of Road Transport (CIRT)



Mr Sudhakararao Uppada, Executive Director, Association of State Road Transport Undertakings, chairing the Roundtable on bus transportation: Future challenges in India by ASRTU

SIAM

Society of Indian  
Automobile Manufacturers

**BUS AND  
SPECIAL VEHICLES EXPO '11**

CI  
Confederation of Indian Industry  
Since 1885

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Automobile Manufacturers

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## AUTO SHOW EAST

The 1<sup>st</sup> Auto Show East 2010, was organized successfully on 22<sup>nd</sup> November 2010 at Salt Lake Stadium Grounds, Kolkata, West Bengal, India.

Auto Show East 2010 - Kolkata - the first Auto Show East and the second regional show received encouraging response from the industry with the presence of major automobile manufacturers Auto Show East 2010 spread across 15,000 sq mtrs was the first such event in the eastern part of the country organized by organizers of Auto Expo series of shows in India.

After the successful conclusion of the first edition of the Regional Auto Show in Hyderabad this was the second in a row and the first initiative in Kolkata. The event proved to be a successful platform for networking and interaction with the stakeholders of the Automotive Industry at Regional level.

Some of the major participants at Auto Show East 2010 included Toyota Kirloskar Motor Pvt Ltd, Tata Motors Ltd, Honda Siel Cars India Ltd, General Motors India Pvt Ltd, Mahindra & Mahindra Ltd, Maruti Suzuki India Ltd, Hindustan Motors Ltd, Hyundai Motor India Ltd, FIAT India Automobiles Pvt Ltd, Honda Motorcycles & Scooters India Pvt Ltd, TVS Motor Company Ltd, India Yamaha Motor Pvt Ltd along with companies in Accessories. The newly launched Aria by Tata Motors Ltd and the Suzuki Hayabusa, the world's fastest bike were the star attractions of the show and was again one of the first such displays in a show in the region.

The event concluded on a promising note with nearly 95% of the participants confirming their presence at the next edition of the Regional Show series.



# PUBLIC POLICY

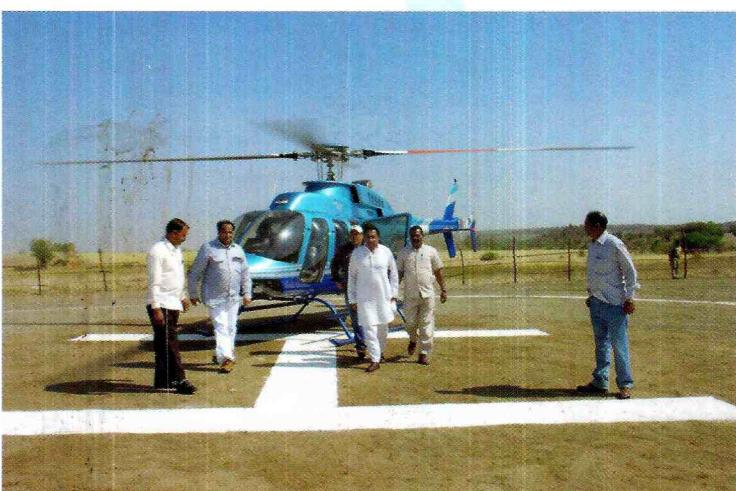
## VEHICLE FITNESS CENTRE IN CHHINDWARA

SIAM is executing a project of Ministry of Road Transport & Highways for setting up of a model vehicle Inspection & Certification Centre in Chhindwara district in Madhya Pradesh. The project is expected to set up two inspection lanes each for heavy-duty vehicles and light duty vehicles. This centre is expected to be one of the first model centres being set-up for periodic inspection of Transport vehicles by MoRTH, which would be later replicated in other parts of the country. The Foundation Stone for the

centre was laid by Shri Kamal Nath, Hon'ble Minister of Urban Development, Government of India in the presence of Dr Pawan Goenka, President SIAM and Mr Vishnu Mathur, DG SIAM on 11<sup>th</sup> March 2011. Construction of the Vehicle Inspection Centre is already underway at a site of about 2.85 acres in Aanjangaon village located at about a distance of about 60 kms from the city of Nagpur. MoRTH is proposes to set-up nine more centres in other States, as model vehicle inspection Centres. SIAM is working with all Stakeholders for finalizing the equipment specification for the Centres.



Mr I J Khalkho, Sub-Division Magistrate, Pandhurna, Mr Vishnu Mathur, DG, SIAM, Shri Kamal Nath, Hon'ble Minister of Urban Development and Dr Pawan Goenka, President, SIAM during unveiling of the foundation stone



Hon'ble Minister of Urban Development Shri Kamal Nath arriving at the foundation stone laying site



Hon'ble Minister of Urban Development Shri Kamal Nath and Dr Pawan Goenka, President, SIAM lighting lamp during the foundation stone laying ceremony



Dr Pawan Goenka, President, SIAM presenting a memento to Shri Kamal Nath, Hon'ble Minister of Urban Development



Construction of boundary wall completed in June 2011



Model of the Vehicle Inspection Centre

## SAFE

Society of Automotive Fitness & Environment (SAFE), a SIAM initiative, has just completed its 12 years. It has the objective of improving Environment Awareness and Road Safety and has taken up an institutional role in bringing all stakeholders – public policy makers and private individuals/ corporates together to have a symbiotic effort towards road safety and ecology needs of the country.

Year after year, SAFE has set up higher standards to spread its reach. As part of various events, seminars, conferences, refresher workshops for drivers, programs for school children and pollution under control camps are organized to raise the sensitization towards road safety amongst different sections of society.

India figures in the unwelcome distinction of being world's no.1 in road fatalities.

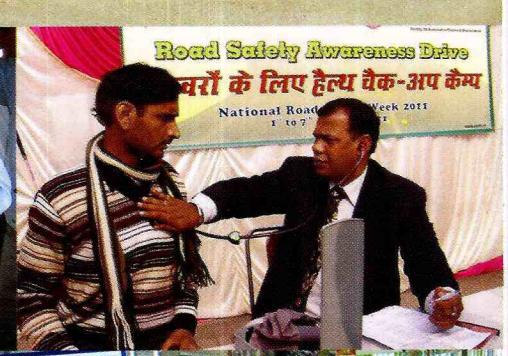
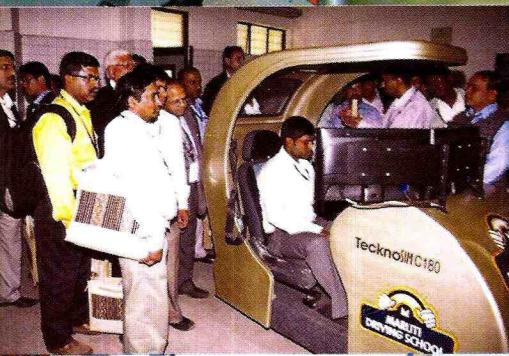
Alarmed by the increasing number of deaths due to road accidents world over, the Commission for Global Road Safety issued a call for a Decade of Action for Road Safety. We in India need similar action and policy at the topmost level also incorporating.

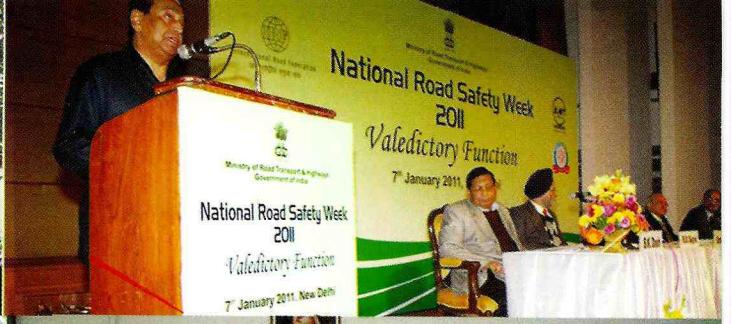
SAFE has been working relentlessly towards objective of reducing & preventing road injuries. With support & close cooperation of transport and traffic personnel at the state/district level with guidance from the central government and untiring commitment of SIAM members, there certainly has been a movement. Few of the key

initiatives wherein SAFE played an energizing role in 2010-2011 were:

- SIAM and MSIL joined hands with Delhi Traffic Police in providing uniforms for Traffic Volunteers-1500 Delhiites who assisted Traffic Officials in managing the traffic during Commonwealth Games 2010 at New Delhi.
- Various training and skill up programs for corporate drivers, DTC, BRT drivers, Commercial vehicles drivers and school bus drivers
- Various Road Safety Awareness Drivse for Schools
- Setting up of Automated Centre for Testing & Inspection of Vehicles (ACTIV) at Pandurna, Madhya Pradesh
- National Road Safety Week at the start of the year 2011
- Workshops/ seminars on driver training and road safety
- SAFE Annual Convention 2011 on Road Safety of Awareness, Enforcement & Technology
- On the occasion of World Environment Day, SIAM along with its members, organised 4500 free PUC Check up camps across the nation wherein more than 1,00,000 vehicles were checked on 5<sup>th</sup> June 2011.

Safer roads can become a reality only, if there is unanimity amongst all road users and they believe to stand in unison for the noble cause for making India a SAFER country.





# OVERVIEW OF AUTO INDUSTRY

## INDUSTRY PERFORMANCE IN 2010-11

### PRODUCTION

The cumulative production data for April-March 2011 shows production growth of 27.45 percent over same period last year. In March 2011 as compared to March 2010, production grew at 20.62 percent. The industry produced 17,916,035 million vehicles of which share of two wheelers, passenger vehicles, three wheelers and commercial vehicles were 75 percent, 17 percent, 4 percent and 4 percent respectively.

### DOMESTIC SALES

The growth rate recorded for Domestic Sales for 2010-11 was 26.17 percent amounting to 15,513,156 vehicles. However, the month of March 2011 registered a lower growth rate of 19.42 percent as compared to the cumulative data of 2010-11.

Passenger Vehicles segment grew at 29.16 percent during April-March 2011 over same period last year. Passenger Cars grew by 29.73 percent, Utility Vehicles grew by 18.87 percent and Multi-Purpose Vehicles grew by 42.10 percent in this period. In March 2011 figures for domestic sales of Passenger Cars show a growth of 24.37 percent over the same month last year which is lower than 2010-11 growth. Also, sales of total passenger vehicle in the month of March 2011 at 23.13 percent (as compared to March 2010) were lower than growth rate of 2010-11.

The overall Commercial Vehicles segment registered growth of 26.97 percent during April-March 2011 as compared to the same period last year. While Medium & Heavy Commercial Vehicles (M&HCVs) registered growth of 31.78 percent, Light Commercial Vehicles grew at 22.88 percent. However, the sales in the month of March 2011 over March 2010 was

substantially lower with growth of only 15 percent.

Three Wheelers sales recorded a growth rate of 19.44 percent in April-March 2011. While Passenger Carriers grew by 22.03 percent during April-March 2011, Goods Carriers registered growth of 9.45 percent.

Two Wheelers registered a growth of 25.82 percent during April-March 2011. Mopeds, Motorcycles and Scooters grew by 23.53 percent, 22.86 percent and 41.79 percent respectively.

If we compare March 2011 to March 2010, the growth figures for three and two wheelers are also lower at 14.36 percent and 19.14 percent respectively.

### EXPORTS

During April-March 2011, overall automobile exports registered a growth rate of 29.64 percent. Passenger Vehicles registered marginal growth at 1.64 percent in this period. Commercial Vehicles, Three Wheelers and Two Wheelers segments recorded growth of 69.51 percent, 55.86 percent and 35.04 percent respectively during April-March 2011.

In March 2011 compared to March 2010, overall automobile exports registered a lower growth of 19.64 percent.

### SEGMENT WISE OUTLOOK FOR 2011-16

Passenger Vehicles	:	14-16%
Commercial Vehicles	:	15-17%
Three Wheelers	:	8-10%
Two Wheelers	:	11-13%

## AUTOMOBILE PRODUCTION TRENDS

CATEGORY	NUMBER OF VEHICLES				
	2006-07	2007-08	2008-09	2009-10	2010-11
Passenger Cars	1,238,021	1,426,212	1,516,967	1,932,620	2,453,113
Utility Vehicles	222,495	246,038	219,498	272,883	318,576
MPVs	84,707	105,333	102,128	151,908	215,607
<b>Total Passenger Vehicles</b>	<b>1,545,223</b>	<b>1,777,583</b>	<b>1,838,593</b>	<b>2,357,411</b>	<b>2,987,296</b>
M&HCVs	294,258	294,957	192,283	250,133	344,542
LCVs	225,724	254,049	224,587	317,423	408,193
<b>Total Commercial Vehicles</b>	<b>519,982</b>	<b>549,006</b>	<b>416,870</b>	<b>567,556</b>	<b>752,735</b>
<b>Three Wheelers</b>	<b>556,126</b>	<b>500,660</b>	<b>497,020</b>	<b>619,194</b>	<b>799,553</b>
Scooters	943,944	1,074,933	1,161,276	1,494,409	2,144,765
Motorcycles	7,112,281	6,503,532	6,798,118	8,444,857	10,527,111
Mopeds	379,987	430,827	436,219	571,070	704,575
Electric Two Wheelers	30,454	17,389	24,179	2,567	0
<b>Total Two Wheelers</b>	<b>8,466,666</b>	<b>8,026,681</b>	<b>8,419,792</b>	<b>10,512,903</b>	<b>13,376,451</b>
<b>Grand Total</b>	<b>11,087,997</b>	<b>10,853,930</b>	<b>11,172,275</b>	<b>14,057,064</b>	<b>17,916,035</b>

## AUTOMOBILE DOMESTIC SALES TRENDS

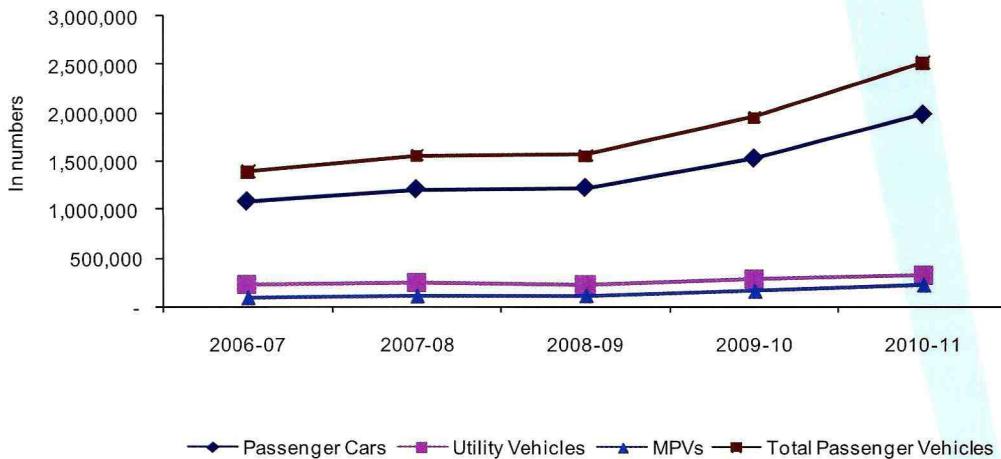
CATEGORY	NUMBER OF VEHICLES				
	2006-07	2007-08	2008-09	2009-10	2010-11
Passenger Cars	1,076,582	1,203,733	1,220,475	1,528,337	1,982,702
Utility Vehicles	220,306	245,284	225,621	272,740	324,212
MPVs	83,091	100,865	106,607	150,256	213,507
<b>Total Passenger Vehicles</b>	<b>1,379,979</b>	<b>1,549,882</b>	<b>1,552,703</b>	<b>1,951,333</b>	<b>2,520,421</b>
M&HCVs	275,556	274,582	183,495	244,944	322,788
LCVs	192,209	215,912	200,699	287,777	353,620
<b>Total Commercial Vehicles</b>	<b>467,765</b>	<b>490,494</b>	<b>384,194</b>	<b>532,721</b>	<b>676,408</b>
Three Wheelers	403,910	364,781	349,727	440,392	526,022
Scooters	940,617	1,050,109	1,148,007	1,462,534	2,073,797
Motorcycles	6,547,195	5,768,342	5,831,953	7,341,122	9,019,090
Mopeds	354,760	413,759	431,214	564,584	697,418
Electric Two Wheelers	29,762	17,068	26,445	2,711	0
<b>Total Two Wheelers</b>	<b>7,872,334</b>	<b>7,249,278</b>	<b>7,437,619</b>	<b>9,370,951</b>	<b>11,790,305</b>
<b>Grand Total</b>	<b>10,123,988</b>	<b>9,654,435</b>	<b>9,724,243</b>	<b>12,295,397</b>	<b>15,513,156</b>

## AUTOMOBILE EXPORTS TRENDS

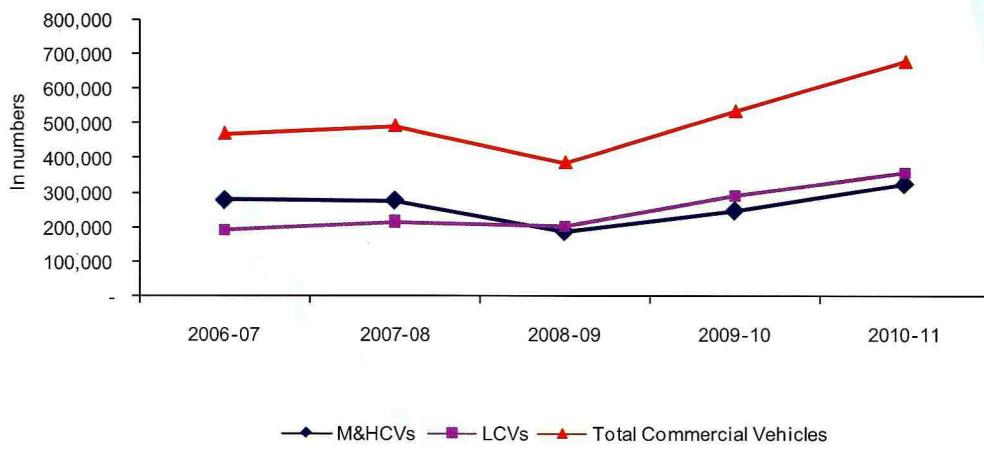
CATEGORY	NUMBER OF VEHICLES				
	2006-07	2007-08	2008-09	2009-10	2010-11
Passenger Cars	192,723	211,112	331,535	441,709	447,403
Utility Vehicles	4,399	6,283	3,034	2,823	3,789
MPVs	1,330	1,006	1,160	1,613	2,287
<b>Total Passenger Vehicles</b>	<b>198,452</b>	<b>218,401</b>	<b>335,729</b>	<b>446,145</b>	<b>453,479</b>
M&HCVs	18,610	22,093	16,819	20,425	29,272
LCVs	30,927	36,901	25,806	24,584	47,025
<b>Total Commercial Vehicles</b>	<b>49,537</b>	<b>58,994</b>	<b>42,625</b>	<b>45,009</b>	<b>76,297</b>
Three Wheelers	143,896	141,225	148,066	173,214	269,967
Scooters	35,397	25,482	25,816	30,125	52,312
Motorcycles	545,592	776,007	971,018	1,102,978	1,480,983
Mopeds	38,655	18,224	7,300	6,905	6,295
Electric Two Wheelers	-	-	40	50	0
<b>Total Two Wheelers</b>	<b>619,644</b>	<b>819,713</b>	<b>1,004,174</b>	<b>1,140,058</b>	<b>1,539,590</b>
<b>Grand Total</b>	<b>1,011,529</b>	<b>1,238,333</b>	<b>1,530,594</b>	<b>1,804,426</b>	<b>2,339,333</b>

## AUTOMOBILE DOMESTIC TRENDS

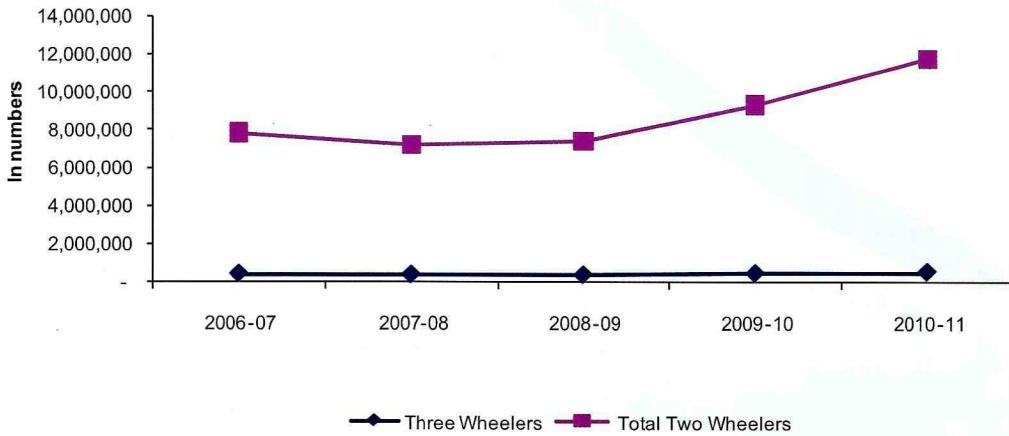
### Domestic Sales Trends of Passenger Vehicles



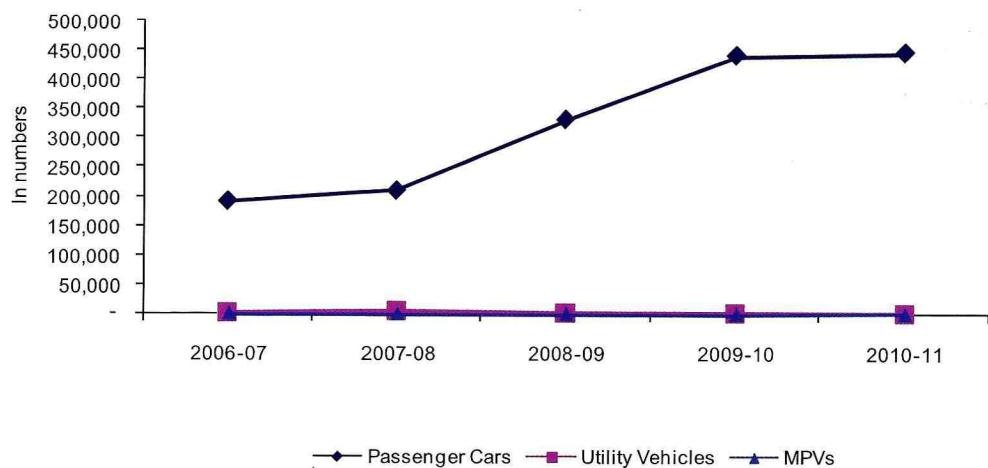
### Domestic Sales Trends of Commercial Vehicles



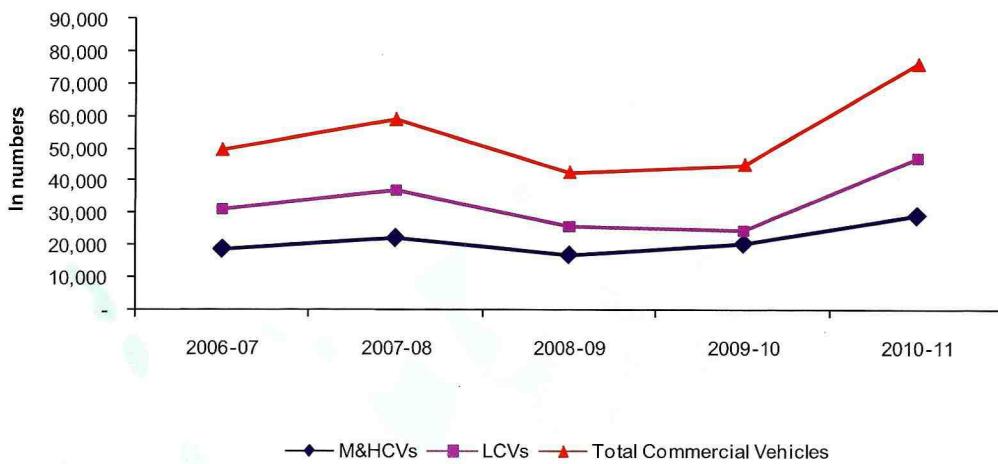
### Domestic Sales Trends of Two & Three Wheelers



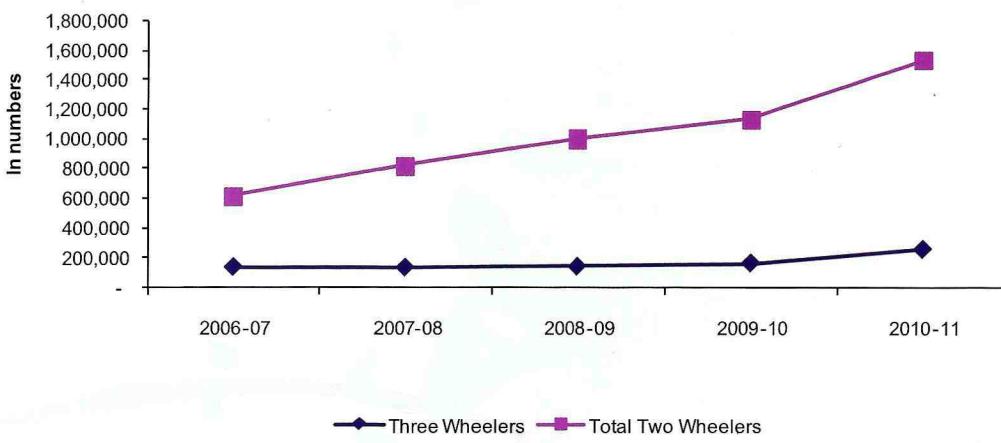
### Exports Trends of Passenger Vehicles



### Exports Trends of Commercial Vehicles



### Exports Trends of Two & Three Wheelers



## SIAM OFFICE BEARERS

### SIAM Executive Committee 2010-2011

COMPANY	MEMBERS	ALTERNATE MEMBERS
Mahindra & Mahindra Ltd	Dr Pawan Goenka <i>President</i>	Mr Rajesh Jejurikar
Royal Enfield (Unit of Eicher Motors Ltd)	Mr S Sandilya <i>Vice President</i>	Mr Vinod Aggarwal
Ashok Leyland Ltd	Mr Vinod K Dasari	Mr Rajive Saharia
Bajaj Auto Ltd	Mr Rajiv Bajaj	Mr Pradeep Shrivastava
Cumminis India Ltd	Mr Anant J Talaulicar	Mr Raj Menon
Ford India Pvt Ltd	Mr Michael Boneham	Mr Kuljit Rana
General Motors India Pvt Ltd	Mr Karl Slym	Mr P Balendran
Hero MotoCorp Ltd	Mr Pawan Munjal	
Hyundai Motor India Ltd	Mr H W Park	Mr Arvind Kumar Saxena
Maruti Suzuki India Ltd	Mr S Nakanishi	Mr I V Rao
Mercedes-Benz India Pvt Ltd	Mr Peter Honegg	Mr S M Kadlaskar
Piaggio Vehicles Pvt Ltd	Mr Ravi Chopra	
Tata Motors Ltd	Mr Ravi Kant	
Tata Motors Ltd	Mr Prakash M Telang	Mr Ravi Pisharody
TVS Motor Company Ltd	Mr Venu Srinivasan	
TVS Motor Company Ltd	Mr K N Radhakrishnan	
Toyota Kirloskar Motor Pvt Ltd	Mr Hiroshi Nakagawa	Mr Shekar Viswanathan
Volkswagen India Pvt Ltd	Mr John Chacko	
VE Commercial Vehicles	Mr Siddhartha Lal	Mr R L Ravichandran

# COUNCILS & GROUPS

## A. COUNCIL ON INTERNATIONAL BUSINESS



Chairman: **Mr R Seshasayee, Executive Vice Chairman, Ashok Leyland Ltd**

The Council on International Business handles activities related to internationalization of the Indian automobile industry. The Council's activities are divided into three focused areas – Policy formulation, Relation building and Export promotion.



### 1. TRADE POLICY GROUP

Chairman: (Left) **Mr Ketan Doshi, Head, New Business Development, Mahindra & Mahindra Ltd**

Co-Chairman: **Mr S Ravikumar, Vice President (Business Development), Bajaj Auto Ltd**

SIAM Trade Policy Group deliberates and provides inputs on trade related issues, pertaining to WTO and India's Free Preferential Trade Agreements.



### 2. INTERNATIONAL RELATIONS GROUP

Chairman: **Mr A S Puri, Vice President (Govt. Affairs & Collaborations), Tata Motors Ltd**

SIAM International Relations Group works towards establishing positive image of Indian automobile industry. Internationally the Group also co-ordinates SIAM initiatives on various international platforms like APEC Automotive Dialogue, OICA and interacts with counterpart associations of other countries.



### 3. EXPORTS GROUP

Chairman: (Left) **Mr P N Shah, Chief Executive (International Operations) Mahindra & Mahindra Ltd**

Co-Chairman: **Mr H S Goindi, President (Marketing) TVS Motor Company Ltd**

The Group aims to facilitate members get international market access through export support from government. It provides inputs to the Government on Foreign Trade Policy & Procedure.



## B. COUNCIL ON DEMAND MANAGEMENT



Chairman: (Left) **Mr Joerg Mueller, President & Managing Director, Volkswagen India Pvt Ltd**

Co-Chairman: **Mr Michael Boneham, President & Managing Director, Ford India Pvt Ltd**

The Demand Management Council comprises of Groups focusing on each of the vehicle segments, and covers areas like finance, logistics and insurance facility, used vehicle business, participation in domestic trade fairs and vehicle categorization.





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

Chairman: (Left) **Mr Akash Passey, Managing Director, Volvo Buses India Pvt Ltd**

Co-Chairman: **Mr Jnaneshwar Sen, Senior Vice President (Sales & Marketing), Honda Siel Cars India Ltd**



The objective of this Group is to align the segmentation according to the market and make the data globally comparable.



## 2. TRADE FAIRS GROUP

Chairman: **Mr Arvind Saxena, Director, Hyundai Motor India Ltd**

The group overseas organizing of AutoExpos, including the Regional show in Kolkata in November 2010 called the Auto Show East, Bus & Special Vehicle Show in March 2011 at Hyderabad as well as other regional and International auto shows.



## 3. LOGISTICS GROUP

Chairman: (Left) **Mr M M Singh, Managing Executive Officer (Production), Maruti Suzuki India Ltd**

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



The Group works on Inbound & Outbound logistics covering Railways, Roadways and Ports. This Group is also interacting with international experts



## 4. RETAIL GROUP

Chairman: (Left) **Mr Anil Dua, Sr. Vice President (Sales & Marketing), Hero Motocorp Ltd**

Co-Chairman: **Mr Rajive Saharia, Executive Director (Marketing), Ashok Leyland Ltd**



The Group deals with all issues related to vehicle, including Pre-owned/Used vehicle retail.



## 5. SERVICE HEADS GROUP

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

Co-Chairman: **Mr Rajesh Mukhija, Deputy General Manager, Hero MotoCorp Ltd**



The Group aims sharing amongst member companies of the best practices and measures adopted by the service department of member companies to enhance customer loyalty and satisfaction.



## 6. IT GROUP

Chairman: (Left) **Mr N Chandrashekhar, Special Director & CIO, Ashok Leyland Ltd**

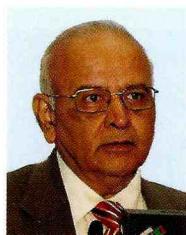
Co-Chairman: **Mr Vijay Sethi, Vice President (Information Systems) & CIO, Hero MotoCorp Ltd**



The Group aims to promote the use of Information Technology within member companies towards their endeavor to increase organizations'

operational efficiency. The Group helps in sharing of best practices and creating awareness on new trends and developments in the field of Information Technology.

## C. COUNCIL ON ECONOMIC AFFAIRS



Chairman: (Left) **Dr Abhay Firodia, Chairman & Managing Director, Force Motors Ltd**

Co-Chairman: **Mr Rajeev Kapoor, President & CEO, Fiat India Automobiles Pvt Ltd**

The Council on Economic Affairs has been constituted to enable the industry achieve competitiveness. Council's activities cover areas related to taxation, sourcing, human resource development, use of IT, etc. and to carry out research in issues related to the industry.



### 1. SOURCING GROUP

Chairman: (Left) **Mr Sudam Maitra, Managing Executive Officer (Supply Chain), Maruti Suzuki India Ltd**

Co-Chairman: **Mr B B Parekh, Chief (Strategic Sourcing), Tata Motors Ltd**

SIAM Sourcing Group has created a platform for bringing together the Sourcing Heads of various companies. It considers matters related to input requirements of the industry including price monitoring.



### 2. ECONOMIC RESEARCH GROUP

Chairman: **Mr R Anandakrishnan, Vice President (Business Planning & TQM), TVS Motor Company Ltd**

SIAM Economic Research Group deals with issues pertaining to industry related research and provide inputs to the members. The Group has started coming out with industry forecast. It also invites various experts for brainstorming sessions and provides valuable inputs in organizing the annual SIAM 'Looking Ahead' Conclave; Infrastructure and Alternative Fuel.



### 3. TAXATION POLICY GROUP

Chairman: (Left) **Mr Sudhir Mehta, Director, Force Motors Ltd**

Co-Chairman: **Mr R Sethuraman, Vice President (Finance), Hyundai Motor India Ltd**

The Group worked on budget issues and other policy issues with the Government and provides inputs to the Government on a regular basis throughout the year on various issues like Direct Taxes Code, Goods & Services Tax, etc.



### 4. TAXATION PROCEDURAL GROUP

Chairman: (Left) **Mr D D Goyal, Chief General Manager (Finance), Maruti Suzuki India Ltd**

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

SIAM Taxation Procedural Group, apart from preparation of pre-budget & post-budget memorandum on procedural issues, organizes knowledge sharing and mutual problem solving sessions.





## 5. FINANCE, LEASING & INSURANCE GROUP

Chairman: (Left) **Mr A K Seth, Chief Financial Officer, Maruti Suzuki India Ltd**

Co-Chairman: **Mr Ramesh Iyer, Managing Director (Finance), Mahindra & Mahindra Financial Services Ltd**

The Group is working on establishing and enhancing relationship with the finance industry, leasing industry and the insurance industry. It also interacts with the General Insurance Council (GIC).



## 6. HUMAN CAPITAL GROUP

Chairman: (Left) **Mr Prince Augustin, Executive Vice President (Human Capital), Mahindra & Mahindra Automotive & Farm Equipment Sector**

Co-Chairman: **Mr Raman Kumar Sharma, Vice President & Director (General Affairs) Honda Siel Cars India Ltd**



The Group works in the following areas - Learning & Development, Workforce Development/ITI, Compensation & Industrial Relations including activities related to the Automotive Skills Development Council.



## 7. ANTI COUNTERFEITING GROUP

Chairman: **Mr Sanjoy Gupta, Vice President (Customer Care), Mahindra & Mahindra Ltd**

The Group objective is to reduce the size of counterfeit market and spread awareness.

## D. TECHNICAL COUNCIL



Chairman: (Left) **Mr Anant Talaulicar, Chairman & Managing Director, Cummins India Ltd**

Co-Chairman: **Dr John Chacko, President & MD, Volkswagen India Pvt Ltd**



The apex Technical Council co-ordinates report from all the SIAM Technical Groups and form a cohesive approach of SIAM Groups. The Technical Council ensures that the objectives and activities of each of the Groups complement each other and are towards the overall development of the Indian automobile industry.



## 1. FRONTIER TECHNOLOGY GROUP, EV & HEV

Chairman: (Left) **Dr Rao Chalasani, Director (AVDC), General Motors India Pvt Ltd**

Co-Chairman: **Mr A Srinivas, Senior General Manager (R&D), Mahindra & Mahindra Ltd**



The Group aims to develop alternate propulsion technologies and develop initiatives in light weighting and E-mobility.



## 2. RECYCLING GROUP

Chairman: (Left) **Capt. N S Mohan Ram, Adviser, TVS Motors Company Ltd**

Co-Chairman: **Mr Prakash Vemali, General Manager (Product Homologation), Mercedes - Benz India Pvt Ltd**

This Group works in the area of Recycling and End-of-Life of Vehicles (ELV) taking cognizance of existing regulations and the experience worldwide. The Group is working on developing appropriate regulation for recycling in the Indian context.



## 3. DIESEL IMAGE GROUP

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

The Group works towards creating a positive image of Diesel amongst consumers, Government and Non Government agencies etc through interaction with media policy makers.



## 4. AUTO INFOTRONICS GROUP

Chairman: (Left) **Mr Arvind Bharadwaj, Chief Operating Officer (Automotive Infotronics), Ashok Leyland Ltd**

Co-Chairman: **Mr. Jayendra Parikh, Executive Director & Head (Advanced Engineering), Ashok Leyland Ltd**

The Group aims to promote the use of Infotronics in India and facilitate public private partnership between different Government departments and private enterprises.

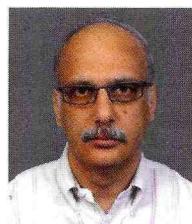


## 5. STYLING & DESIGN GROUP

Chairman: (Left) **Mr C V Raman, Chief General Manager (Engg), Maruti Suzuki India Ltd**

Co-Chairman: **Mr Pankaj Jhunja, General Manager (Design), Tata Motors Ltd**

The Styling and Design Group aims to give greater exposure and enabling atmosphere to the designer's community. Apart from organizing Automotive Design Challenge (ADC) and Styling & Design Conclave the Group is taking up industry academia dialogue by meeting major engineering & design institutes in India.



## E. NATIONAL & INTERNATIONAL REGULATION COUNCIL



Chairman: (Left) **Mr P M Telang, Managing Director, Tata Motors Ltd**

Co-Chairman: **Mr I V Rao, Managing Executive Officer (Engg), Maruti Suzuki India Ltd**

The Council takes up issues before the Groups under the Council for review in a holistic manner and briefs the SIAM Executive Committee (EC) on important issues, related to emission regulations, fuel efficiency and vehicle safety.





#### **1. EMISSIONS & CONSERVATION GROUP**

Chairman: (Left) **Mr J K Deb, Vice President (Engineering and Development), Fiat India Automobiles Pvt Ltd**

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

The Group deliberates and develops SIAM consensus on issues related to emission regulations and fuel economy of vehicles and future roadmap.



#### **2. CMVR & SAFETY REGULATIONS GROUP**

Chairman: (Left) **Mr S Ravishankar, Vice President (ERC), Tata Motors Ltd**

Co-Chairman: **Mr N Sarvanan, Special Director (Product Development), Ashok Leyland Ltd**

The Group focuses on vehicle safety regulations. It provides inputs on drafts standards, alignment of existing AIS, IS, ECE Regulations and EEC Directives. The group actively participates in OICA activities.



#### **3. TWO WHEELERS GROUP**

Chairman: **Mr Harjeet Singh, Associate Vice President, Hero Motocorp Ltd**

The Group on Two Wheelers represents SIAM position on various issues on regulation for Two Wheeler related to safety and emission. It also actively participates in IMMA deliberations.



#### **4. THREE WHEELERS GROUP**

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

The Group takes up technical issues related to Three wheelers viz, emission regulations and safety regulations.

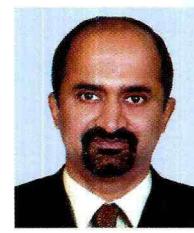


#### **5. INTERNATIONAL HARMONIZATION GROUP**

Chairman: (Left) **Mr Z A Mujawar, Senior General Manager (CMVR & Homologation), Mahindra & Mahindra Ltd**

Co-Chairman: **Mr P K Banerjee, Head (Homologation & Product Evaluation), Tata Motors Ltd**

This Group reviews the new requirements of the harmonization process and submits SIAM comments to international bodies from time to time, and participates in WP.29, IMMA and OICA meetings held on a regular basis.



#### **F. COMMERCIAL VEHICLES CEO'S COUNCIL**



Chairman: **Mr Siddhartha Lal, Managing Director, VE Commercial Vehicles Ltd**

The Council aims to ensure sustainable growth of the segment and also works with Government/Stakeholders on segment-specific issues like Emission Norms, Scrappage Norms, Overloading, Cabin Crash Norms, and standardization for car carriers, etc.

## G. THREE WHEELERS CEO'S COUNCIL



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

The Three Wheelers CEOs Council is constituted to address issues and concerns specific to the Three Wheelers segment including both passenger and cargo three wheelers. It aims to identify the issues affecting this segment.

## H. TWO WHEELERS CEO'S COUNCIL



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

The Two Wheelers CEOs Council is constituted to address issues and concerns specific to the Two Wheelers segment.

## I. PASSENGER CAR CEO'S COUNCIL



Chairman: **Mr Karl Slym, President & Managing Director, General Motors India Pvt Ltd**

The Passenger Car CEOs Council is constituted to address issues and concerns specific to the segment.

## J. MUVS CEO'S COUNCIL



Chairman: **Mr Shekhar Viswanathan, Deputy Managing Director, Toyota Kirloskar Motor Pvt Ltd**

The MUVS CEOs Council is constituted to address issues and concerns specific to the MUVS segment.

## K. BUS CEO'S COUNCIL



Chairman: **Mr Ravi Pisharody, President (CVBU), Tata Motors Ltd**

The Bus CEOs Council aims to work in the areas of development of a Public Transportation Plan including fair business model for Indian cities, achieving standardization of specifications for city buses and suggesting demand stimulating measures (like fiscal incentives, environmental incentives, scrappage scheme, etc).

## SAFE - SOCIETY FOR AUTOMOTIVE FITNESS & ENVIRONMENT



President SAFE: (Left) **Mr I V Rao, Managing Executive Officer (Engg), Maruti Suzuki India Ltd**

Vice President SAFE: **Mr S V Suderson, DGM - Bench Mark Centre & Technical Governance, Daimler India Commercial Vehicles Ltd**

SAFE is a catalyst in the automobile industry's endeavor to fulfill its commitment towards a cleaner and a safer environment. SAFE organizes inspection clinics for in-use vehicles and training workshops for pollution checking technicians in various parts of the country. SAFE also undertake several initiatives on Road Safety education of students, drivers and the public at large.



## AIAM/SIAM PAST PRESIDENTS

<b>Year</b>	<b>Name</b>	<b>Company</b>
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 V Venkatesan	Premier Automobiles Ltd
1980 & 1981	Mr C V Karthik Narayanan	Standard Motor Product of India Ltd
1982 & 1983	Mr R J Shahaney	Ashok Leyland Ltd
1984 & 1985	Mr V Krishnamurthy	Maruti Udyog Ltd
1986 & 1987	Mr S L Bhatter	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 Lal	Hero Motocorp 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 Limited

\* Since deceased

## SIAM MEMBERS

- 1 Ashok Leyland Ltd
- 2 Asia Motor Works Ltd
- 3 Atul Auto Ltd
- 4 Bajaj Auto Ltd
- 5 BMW India Pvt Ltd
- 6 Cummins India Ltd
- 7 Daimler India Commercial Vehicles Ltd
- 8 Fiat India Automobiles Pvt Ltd
- 9 Force Motors Ltd
- 10 Ford India Pvt Ltd
- 11 General Motors India Pvt Ltd
- 12 Greaves Cotton Ltd
- 13 HD Motor Company India Pvt Ltd
- 14 Hero MotoCorp Ltd
- 15 Hindustan Motors Ltd
- 16 Honda Motorcycle & Scooter India Pvt Ltd
- 17 Honda Siel Cars India Ltd
- 18 Hyundai Motor India Ltd
- 19 India Yamaha Motor Pvt Ltd
- 20 International Cars & Motors Ltd
- 21 JCBL Ltd
- 22 Kamaz Vectra Motors Ltd
- 23 Kinetic Motor Company Ltd
- 24 LML Ltd
- 25 Mahindra & Mahindra Ltd
- 26 Mahindra Two Wheelers Ltd
- 27 Mahindra Navistar Automotives Ltd
- 28 Mahindra Reva Electric Vehicles Ltd
- 29 Maruti Suzuki India Ltd
- 30 Mercedes-Benz India Pvt Ltd
- 31 Nissan Motor India Pvt Ltd
- 32 Piaggio Vehicles Pvt Ltd
- 33 Premier Ltd
- 34 Renault India Pvt Ltd
- 35 Royal Enfield (Unit of Eicher Motors Ltd)
- 36 Scooters India Ltd
- 37 Simpson & Co. Ltd
- 38 SkodaAuto India Pvt Ltd
- 39 SML Isuzu Ltd
- 40 Suzuki Motorcycle India Pvt Ltd
- 41 Tata Motors Ltd
- 42 Toyota Kirloskar Motor Pvt Ltd
- 43 TVS Motor Company Ltd
- 44 VE Commercial Vehicles Ltd
- 45 Volkswagen India Pvt Ltd
- 46 Volvo Buses India Pvt Ltd

## SIAM SECRETARIAT

Mr Vishnu Mathur  
Mr K K Gandhi  
Mr Sugato Sen  
Mr Atanu Ganguli  
Mr Sushil Kumar  
Mr Biplab Kumar Dutta  
Ms Meenakshi Kukreja  
Mr Saurabh Rohilla  
Ms Manju Dhamija  
Mr Ramesh P. Iyer  
Mr Arindom Ghatak  
Mr Arnab Chakraborti  
Mr Dinesh Patnaik  
Ms Rinki Verma  
Mr Bhisham Pd. Rai  
Mr Amit Kumar  
Mr Pankaj Kumar Karn  
Mr Dikshant Negi  
Mr V K Pandey  
Ms Ruby Ganguly  
Ms Supriya Sinha  
Mr Philip Skaria  
Ms Ragmani Shukla  
Mr Noel Alexander Peters  
Ms Ravneet Kaur  
Mr Dhiraj V Chatap  
Mr Jitendra Rai  
Mr Raju Kamat  
Mr Tribhuvan Ray

\* as on 31<sup>st</sup> August 2011

## AFFILIATION WITH OTHER INSTITUTIONS

### INDIA

All India Motor Transport Congress  
Alloy Steel Producers Association  
Aluminum 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  
Central Institute of Road Transport  
Central Road Research Institute  
Centre for High Technology  
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 Skills Development Corporation (NSDC)  
Petroleum Federation of India  
Research & Information Systems for Non-aligned and Other Developing Countries  
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

## OVERSEAS

ASEAN Automotive Federation (AAF)  
Asia Pacific Economic Cooperation Automotive Dialogue (APEC AD)  
Aus Trade Commission, Australia  
Auto Alliance, USA  
Auto Trade Policy Council (ATPC), USA  
Automotive Federation of Malaysia (AFM), Malaysia  
Automotive Policy Planning, METI, Japan  
Automotive Research & Testing Centre, Taiwan  
Bangladesh Automobiles Assemblers and Manufacturers Association, Bangladesh  
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  
From Concept to Car  
Fuels and Lubes Asia (F&L Asia)  
Global Automotive Industry Dialogue (GAID)  
Indonesia Automotive Federation  
Indonesian Automotive Industry Association (GAIKINDO), Indonesia  
Indonesian Motorcycle Industry Association, Indonesia  
International Motorcycle Manufacturers Association (IMMA)  
International Organization of Motor Vehicle Manufacturers (OICA)  
Japan Automobile Manufacturer Association (JAMA), Japan  
Japan Automobile Standards Internationalisation Centre, Japan  
Korean Automobile Manufacturers Association (KAMA), South Korea  
Motor Vehicle Manufacturers Association, Italy  
Motorcycle and Scooter Assemblers and Distributors Association of Malaysia  
National Alternative Fuel Training Consortium, USA  
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  
Singapore Motorcycle Trade Association, Singapore  
Taiwan Transportation Vehicle Manufacturers Association, Taiwan  
Thailand Automotive Institution, Thailand  
The Indonesia Automotive Federation (FOI)  
The Indonesian Motorbike Assemblers' Association (PASMI), Indonesia  
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  
Vietnam Register, Vietnam

**SIAM**

Society of Indian Automobile Manufacturers

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