

Annual Report
2009-2010

AIAM

SIAM

Society of Indian Automobile Manufacturers

50
YEARS

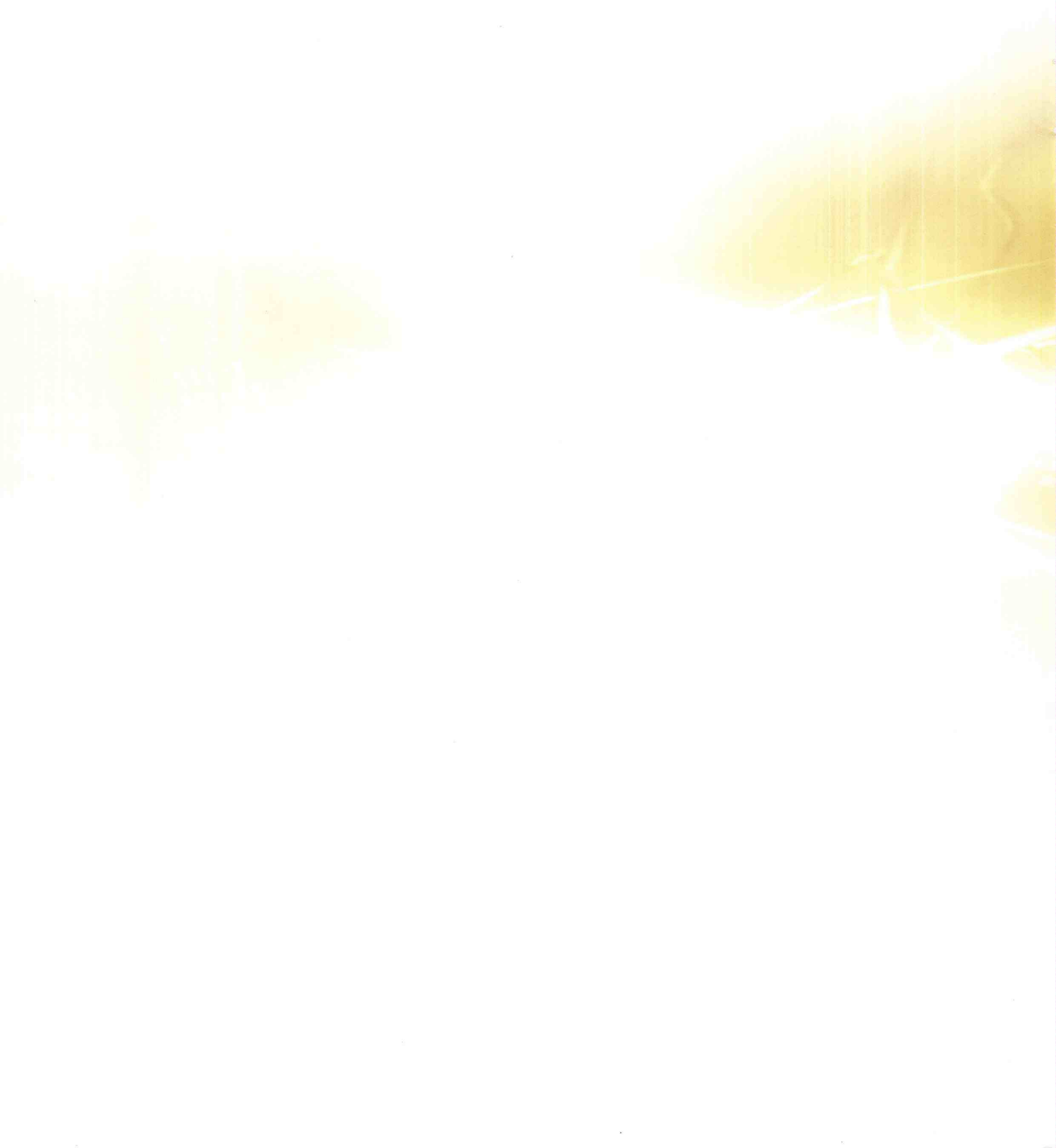
SIAM
CELEBRATING 50
Years

Annual Report 2009-2010

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Society of Indian Automobile Manufacturers





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PRESIDENT'S MESSAGE



Dr Pawan Goenka

I am very happy to present the Annual Report of the Society of Indian Automobile Manufacturers for the year 2009-2010. SIAM is concluding its Golden Jubilee Year and I am happy to inform you that our association has been active as ever; from playing a proactive role in developing policy as well as working with members to manage "Growth with Responsibility".

SIAM has been consciously promoting domestic value addition and employment through manufacturing. In the past, we saw several international automotive manufacturers joining the Indian automotive industry, SIAM is now focusing on opening up international markets and developing relations with various international organizations and participating in a wide array of global initiatives.

The year saw the consolidation of the domestic market with SIAM playing a major role along with the Government to revive demand and ensure the industry can quickly rebound from the downturn. The automobile industry grew showing a production growth of 25.76 percent over the same period last year with the production of Passenger vehicles, Commercial vehicles, Three wheelers and Two wheelers production crossing 2 million, 0.5 million, 0.4 million and 10 million respectively.

The domestic market grew at 26 percent during the year. However, the high growth was reflective of the low base effect and should not be looked at in isolation. The passenger vehicles, commercial vehicles, three wheelers and two wheelers segments registered a growth of 26 percent, 38 percent, 26 percent and 26 percent respectively. Also, the industry exported around 13 percent of its

produce with overall automobile exports registering a growth rate of 18 percent.

SIAM continued its activities through its two-tier structure of Councils and Groups. Several Groups initiated important activities during the year which were beneficial to the industry.

The Council on International Business focused on trade related issues. SIAM joined the Government of India in the negotiating team at WTO and has been participating in small group meetings and other forums which reflect its acquired credibility over the years. Our consistent position in FTA negotiations have paid dividend. Simultaneously, SIAM has consolidated its relationship with countries like Japan (JAMA), South Korea (KAMA), ASEAN (like FOI, TAIA, AFM, etc), etc. SIAM has also established a channel of communication with China's Automobile Industry Association (CAAM).

The Council on Demand Management continued in its endeavour to generate and maintain demand. Auto Expo 2010 saw participation from a record number of organizations and countries. Large number of international journalists also registered for the Show. SIAM has already initiated Regional Shows and the first show was held in Hyderabad. Our interaction with the Indian Railways bore positive results with the launch of policies for Auto Hubs and the Automotive Freight Train Operators. These two together would change the paradigm of automotive logistics in India. The initiatives to work with the State Transport departments have also begun with the first workshop in Maharashtra. SIAM is also working with NIC to develop Vehicles and Licenses National Register.

The Council on Economic Affairs initiated the first SIAM Forecasting Study and came out with forecast numbers. It is yet to be tested and I am sure that in few years it will stabilize and give robust growth projections. Our interaction with the Government on policy is continuing. SIAM has expressed its concerns relating to delay in implementation of Goods & Services Tax (GST) and some of the policy matters that may adversely affect our industry. We expect that our concerns will be addressed. The availability of raw materials and their prices have continued to haunt the industry. SIAM worked with the Government to address these issues.

In the Technical Council, through active participation of its members, SIAM represented the industry position on issues relating to levying additional taxes on diesel vehicles. Awareness about advancements in diesel technology and international practices of supporting diesel as an important technology to address climate change issues was brought to the forefront. A roadmap for developing draft regulations and undertaking a pilot project to recycle vehicles was deliberated in close association with NATRiP and the Ministry of Heavy Industries & Public Enterprises. SIAM undertook an ambitious project with the European Commission to develop ITS solution for effective transport and traffic management.

Under the National & International Regulation Council, several issues and concerns relating to postponement of implementation of Bharat Stage III Emission norms in the rest of the country from 1st April 2010 to 1st October 2010 were deliberated and taken up at the highest level in the Government of India. The new concept of Fuel Economy Consumer Information with comparative provisions was launched. Representations were also made at various groups of WP.29 (world forum on harmonization of vehicle regulations).

As part of our Public Policy activities, the Society for Automotive Fitness & Environment (SAFE) initiated several activities during the year including programmes launched during the Auto Expo 2010 and National Road Safety Week. Also, a major campaign on safety was launched during the year wherein road safety

activities were organized across 28 states covering 384 cities and approximately 2600 automobile dealers. On World Environment Day, Pollution Check Camps were organized at 3,300 locations in 750 cities across the nation. SIAM, SAFE and FADA joined hands to introduce voluntary SAFE service for private vehicles. This initiative will be taken forward with FADA.

I would like to take this opportunity to express our appreciation to the Chairmen and Co-Chairmen of the Councils and the Groups for their leadership role and contribution towards the industry. I also thank the Executive Committee for their support and guidance on matters taken up during the year which enabled us to take the industry back to the path of recovery. Finally, I would also like to mention the stupendous work carried out by the entire SIAM management and staff for making all these initiatives possible.

I take this opportunity to also thank the officials from the various Ministries and Departments without whose support SIAM would not have been able to move so far. Also, the media played a very positive role. We hope that they will continue to support us in our endeavour to play a role of a catalyst for sustainable development of the Automobile Industry in India.



Pawan Goenka
26th August 2010

SIAM

Society of Indian Automobile Manufacturers, SIAM, a not-for-profit organization, is the apex national industry body representing all major vehicle and vehicular engine manufacturers in India. Members include manufacturers of Passenger vehicles, Commercial vehicles, Three wheelers, Two wheelers and Engines.

SIAM aims to promote sustainable development of the Indian automobile industry and enable India to become a global automotive hub. It endeavors to improve industry's competitiveness, create an environment to promote mobility, internationalize the industry and promote India as a global hub for Research & Development.

SIAM provides a window to the automobile industry in India. The Society works closely with all stakeholders in the formulation of the policies, regulations and rules related to the Indian automobile industry. It is a link between the industry and other bodies including the government. It works with various international bodies like OICA, IMMA, UNECE, etc and counterpart associations like VDA, SMMT, JAMA, TAIA, AFM, ANFIA, etc.

SIAM works towards holistic development of the industry with its activities spanning over three broad areas – Economic & International Trade Policy, Technical Policy and activities related to Environment & Safety Awareness. Dissemination of information is an integral part of the Society's activities. It publishes monthly industry statistics, other reports and organizes various informative seminars/ workshops.

Auto Expo, a biennial auto exhibition, is one of the major activities of the Society. It is planning other regional and segment shows across the country and abroad.

SIAM aspires to be a catalyst in the development of the automobile industry in India.

49th SIAM ANNUAL CONVENTION 2009



L to R : Mr S Sandliya, former Treasurer SIAM, Dr Satyanarayana Dash, Secy., MOHI, Dr Pawan Goenka, former VP SIAM & President, M&M Automotive Sector, Mr Vilasrao Deshmukh, Hon'ble Minister of Heavy Industries & Public Enterprises, Mr Ravi Kant, President SIAM & MD, TATA Motors, Mr Dilip Chenoy, DG SIAM

The 49th SIAM Annual Convention at the Taj Palace Hotel, New Delhi on the 28th of August 2009 concluded on an optimistic note with delegates agreeing on the future course of action based on the day's discussions. The day began with Mr Ravi Kant, President, SIAM, laying out the roadmap by elaborating SIAM's contribution to the Indian automobile industry. This was followed by a very positive inaugural talk by Mr Vilasrao Deshmukh, Honorable Minister of Heavy Industries and Public Enterprises appreciating the work and contribution of SIAM. Mr Deshmukh highlighted some of the areas that still required an extra push. He mentioned that the commercial vehicle sector is passing through tough times which need immediate attention in terms of renewed investment and also greater emphasis on R&D. He also expressed the need to focus on developing

more and better skilled manpower to support the future growth in the automobile industry. Prior to Mr Deshmukh's address, Dr Satyanarayana Dash, Secretary, Ministry of Heavy Industries and Public Enterprises released a film on SIAM. The inaugural session was brought to a close by Dr Pawan Goenka who delivered the Vote of Thanks.

The day had a number of intriguing discussions starting with a special plenary on Sustainable Mobility – Connecting India: Making a Paradigm Shift. The three speakers were Mr R C Bhargava Chairman Maruti Suzuki India, Mr Kamal Nath, Honorable Minister of Road Transport & Highways and Mr Siddhartha Lal, Managing Director & CEO VE Commercial Vehicles while Mr R C Bhargava welcomed the panel and the house, mentioning the immense amount of work that is required in

order to get India ready to handle 25 million vehicles on road in a few year's time. He also dwelled on the crying need for better driver training and road safety. Mr Kamal Nath started his speech on a positive note on the need for developing roads by saying "you build the car and I'll build the roads for you". He set out both what is on the anvil in terms of goals as well as the pitfalls on the path to achieving them. He agreed that growth in the auto sector depended on the development of infrastructure, primarily the roads network. Talking about how India had escaped financial toxicity, as he put it, he stressed that roads were both important for wheels as well as human legs. On the need to build 7000 kilometers of roads every year he said it would be a tenfold jump compared to anything envisaged in the past. These mega projects would have various associated requirements of infrastructure involved, and would provide jobs as well. He cautioned that a huge transformation is required in the mindset and approach. Issues like tolls were important as road building costs differ from state to state.

The second session dealt with a far more heavyweight subject, **Restructuring – Build a Viable Industry Model: Challenges Facing the Commercial Vehicle**. Co-chaired by Mr Abhay Firodia, Chairman & Managing Director, Force Motors, and Mr Akash Passey, Managing Director, Volvo Buses India, the panelists included Mr Hakan Samuelsson, Chairman MAN AG, Mr David Bennett, President, Vehicle Group APAC, Eaton Corporation, Mr Takao Suzuki, Chairman of the Board, Mitsubishi Fuso Truck & Bus and Mr Prakash Telang, Managing Director - India Operations, Tata Motors. After Mr Firodia set the stage for the discussion by raising questions on the future of the commercial vehicle industry, noting that confidence had been expressed in other auto sectors, Mr Telang started the discussion by pointing out how a good road network makes a definite difference to industrial growth. Mr Samuelsson was of the opinion that the MCV segment seemed to have



Mr Ravi Kant elaborating SIAM's contribution to the Indian Automobile Industry



L to R: Dr Brijmohan Lall Past President SIAM and Mr Vilasrao Deshmukh Hon'ble Minister of Heavy Industries and Public Enterprises



Vote of thanks by Dr Pawan Goenka



Mr Kamal Nath, Hon'ble Minister of Road Transport & Highways at the Special Plenary



Distinguished speakers at the Restructuring - Build a Viable Industry Model: Facing the Commercial Vehicle Session



Mr R C Bhargava at the Special Plenary



Mr Siddhartha Lal, MD & CEO, VECV addressing the Session: Restructuring - Build a Viable Industry Model: Facing the Commercial Vehicle

shrunk while also observing that roads need to be able to take heavier trucks as higher payload capabilities translate to savings in cost. Replying to a question on the requirement of small trucks, Mr Bennett observed that smaller trucks are usually very successful where the road network is inferior.

The post-lunch session led off with **Sustainability–Role of Collaborative Working**. The keynote address was delivered by Mr Jairam Ramesh, Hon'ble Minister of State for Environment & Forests. The Minister highlighted some of the environmental challenge facing the country. Some of the questions before the speakers related to the changes in dynamics that come with the shift in the epicenter of growth of the auto industry to Asia. Moderated by Mr Markus Doerr, Managing Director, Ricardo Strategic Consulting, and chaired by Mr Siddharth Shriram, Chairman, Honda Siel Cars India, and Mr Jean-Marie Lagey, Managing Director, Skoda Auto India. The panelists for this discussion included Dr Bernd Bohr, Chairman Automotive Group, Robert Bosch GmbH, Ms. Sandra Pupatello, Minister of



Mr Jairam Ramesh Hon'ble Minister of Environment and Forest and distinguished Speakers at the 'Sustainable-Role of Collaborative Working Session'

Economic Development and Trade (Ontario). Mr R Seshasayee, Managing Director, Ashok Leyland, and Mr Arun Maira, Member – Planning Commission, Government of India. The Canadian Minister observed that it was a pleasant change to see Government and industry working together for the common cause of environmental protection as normally in the western world Government and industry are usually at loggerheads.

The penultimate session of the day was on **REVIVAL – The Current and Future State of the Global Automotive Industry & Positioning of**

the Automotive Industry in India. Moderated by Mr Jan Miecznikowski, Head Global Automotive Practice, Booz & Co and co-chaired by Mr Karl Slym, Managing Director, General Motors India, and Mr Hiroshi Nakagawa, Managing Director, Toyota Kirloskar Motor, the panelists in this session included Prof. Dr Jochem Heizmann, Member Manaaement Board, VWAG, Mr H S Lheem, Managing Director, Hyundai Motor India, and Mr John Parker, Executive Vice President – Asia Pacific & Africa, Ford Motor Company. Dr Heizmann expressed the view that Government incentive programs for auto companies go a long way in



Mr Abhay Firodia, Past President SIAM & CMD Force Motors Ltd.



Dr Bernd Bohr, Chairman Automotive Group, Robert Bosch GmbH



Distinguished speakers at the 'Revival' Session

supporting a company in times of difficulty, citing the example of how sales in Germany had bucked the trend by growing thanks to the introduction of old vehicle scrapping programs. Mr Lheem and Mr Parker agreed that infrastructure in India needed a huge upgrade. Mr Parker added that every time he made a trip to India from China, he would get very agitated about the infrastructure. He was also of the view that taxation laws in India could be smoothened out to benefit the industry.

The day concluded with the session on **Leadership in the Two-Wheeler Industry**, Coming on the background of Asia being the epicenter of growth and India being the second-largest two-wheeler manufacturer in the world, the session was moderated by Dr Nick Rogers, Secretary-General International Motorcycle Manufacturers

Association and co-moderated by Mr Sharad Verma, Partner & Director, The Boston Consulting Group. The session was co-chaired by Mr Rajiv Bajaj, Managing Director, Bajaj Auto, and Mr Ravi Chopra, Chairman & Managing Director, Piaggio Vehicles. The panelists were Mr Matt Levatch, President & COO, Harley-Davidson Motor Company, Mr Pawan Munjal, Managing Director & CEO, Hero Honda Motors, Mr Toru Watabiki, Vice Chairman, JAMA & Managing Executive Officer, Yamaha Motor Company, and Mr Bingnan Chen, General Secretary, CCCM (China Chamber of Commerce for Motorcycles).

The 4th SIAM Annual Convention concluded with a magnificent awards ceremony in the evening where the Honorable Finance Minister of India, Mr Pranab Mukherjee was present as the Chief Guest.



Mr Hiroshi Nakagawa, MD, Toyota Kirloskar Motor



Mr Pawan Munjal, MD & CEO, Hero Honda Motors



Distinguished Speakers at the Leadership in the Two Wheeler Industry Session

To mark the Golden Jubilee of SIAM, awards were given in four categories: The Mentor Award, instituted in 2003 and given out every alternate year, the President's Award newly instituted in 2009, the Past President Award and the special Golden Jubilee Award.

Mr Tapan Basu of Mahindra & Mahindra received the Mentor Award for his tireless work both at SIAM and in the field of alternative technologies. Four President's Awards were given to illustrious members of the Indian automotive fraternity – Mr R. Seshasayee of Ashok Leyland, Mr S. Sandilya of Eicher Motors, Dr Pawan Goenka of Mahindra & Mahindra and Dr Wilfried Aulbur of Mercedes-Benz India.



L to R (front row): Dr Surajit Mitra Add Secy. MoHI and Mr R Seshasayee, MD, Ashok Leyland also seen in picture are Mr Madhur Bajaj, Past President SIAM and Mr P M Telang, MD, Tata Motors



Mr Rajiv Bajaj, MD, Bajaj Auto



Mr Bingnan Chen, General Secy., CCCM (China Chamber of Commerce for Motorcycles)



L to R: 1. Mr Ravi Kant, former President, SIAM & Vice Chairman, Tata Motors, Mr Pranab Mukherjee, Hon'ble Finance Minister, Dr Pawan Goenka, President SIAM & President Mahindra & Mahindra Automotive Sector At the Awards Ceremony
2. Mr Pranab Mukherjee, Hon'ble Finance Minister, addressing the gathering
3. Mr Tapan Basu Senior General Manager Mahindra & Mahindra receiving the Mentor Award
4. Mr R Seshasayee, Managing Director, Ashok Leyland, receiving the President's Award
5. Mr S Sandilya Chairman Royal Enfield (Unit of Eicher Ltd), receiving the President's Award
6. Dr Pawan Goenka, Vice President SIAM & President Mahindra & Mahindra Automotive Sector, receiving the President's Award





President's Award being presented to Dr Wilfried Aulbur, Managing Director and CEO, Mercedes-Benz India



Former SIAM President Dr V Krishnamurthy received the Past President's Award



Golden Jubilee Award being presented to Mr Brijmohan Lall Munjal, Chairman, Hero Honda



Mr Ravi Kant President, SIAM & Vice Chairman, Tata Motors presenting memento to Mr Pranab Mukherjee, Hon'ble Finance Minister

Former SIAM President Dr V Krishnamurthy received the Past President's Award while the Golden Jubilee Award went to Mr Brijmohan Lall Munjal of Hero Honda.

SIAM, Mr Mukherjee said that the "auto industry has a very important place in India." He went on to assert that India "is one of the fastest growing markets and an attractive market too because of the spending power of young Indians today."

All awardees received their awards from the Honorable Finance Minister. In his speech to



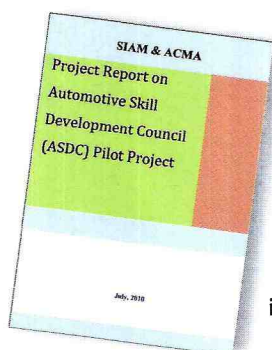
ECONOMIC AGENDA

AUTOMOTIVE SKILL DEVELOPMENT COUNCIL

Based on the current growth in the Indian auto industry, it is expected that an additional 2 ~ 2.5 million employment opportunities per annum will be created in the Indian auto industry over the next decade. The auto industry is expected to face severe shortage in manpower, both in terms of numbers as well as in the quality of the personnel employed, especially in terms of knowledge and skills which is not appropriately matched to the requirements of the automobile industry in India. Further, India suffers from lower productivity in vehicle production vis-à-vis other nations.

Given the developments in the industry, the problem is destined to aggravate going forward, especially from a skill perspective. For example, the electronic and software content of cars is expected to rise considerably and personnel who can work on such areas will be needed by the industry. As the industry progresses along its growth path, in order to provide for comprehensive growth, it will become imperative to track the enablers of market and industry and at the same time capture and react to the changing skill requirements in each of these areas along with the skill requirements of the mainstream industry. Alongside, as workforce in Europe ages, there will be increased demand for Indian and Chinese automotive engineers there.

Keeping this in view, SIAM Human Capital Group mooted the idea of Automotive Skill Development Council. A small Group of members worked on it and got it approved from the Development Council for Automobile Allied Industries under the Ministry of Heavy Industries & Public Enterprises and finally got funds tied up through National Skill Development Corporation. SIAM is now in the process of setting up



separate society on Automotive Skill Development to take forward this initiative.

COMPENSATION STUDY

SIAM has got a compensation study done through Hewitt Associates which was highly appreciated by members. This study compared compensation across various levels amongst the participating member companies. Next year, the study will be repeated and will be submitted in December 2010.

SIAM'S FIRST HR CONCLAVE, "ACCELERATING GROWTH THROUGH PEOPLE"

SIAM organized the first ever conclave on Human Resource issues concerning the automobile industry on 12th February 2010 at Hotel Eros InterContinental in New Delhi.

The conclave involved eminent business leaders such as Mr Anand Mahindra, Vice Chairman and Managing Director, Mahindra & Mahindra; Mr R C Bhargava, Chairman, Maruti Suzuki; Mr Karl Slym, President and Managing Director, General Motors India; Dr Pawan Goenka, President (Automotive sector) Mahindra & Mahindra and President-SIAM, Mr Rajeev Kapoor, President and CEO, Fiat India; Mr Ravi Pisharody, President-CVBU, Tata Motors; Mr Raman Kumar Sharma, Vice President and Director, Honda SIEL Cars, Mr Jayant Davar, MD, Sandhar Technologies Limited & President-ACMA, Mr Nikunj Sanghi, MD, J S Fourwheel Motors Private Limited & Vice President-FADA and other industry stalwarts and Human Resource heads such as Mr S Y Siddiqui, Managing Executive Officer Maruti Suzuki India Ltd., Dr Anadi Pande, VP – Human Resource Management, Hero Honda Motors Limited. The industry leaders shared their vision and thoughts on various aspects of Human Resource function during the day long event.

Organized by the SIAM Human Capital Group, the



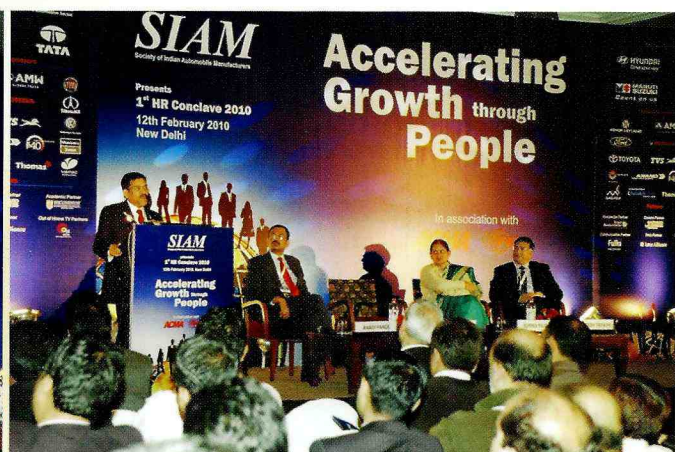
Mr Anand Mahindra, Vice Chairman & MD, Mahindra & Mahindra receiving the Award from Mr Jayant Davar, President ACMA and looking on (center) Dr Pawan Goenka, President SIAM



Launch of SIAM H R Journal



L to R: Panel Discussion on "Connecting Hearts and Minds " Mr P Sudhakar, VP-HR, Fiat India, Mr Shekar Arora, ED-HR, Ashok Leyland, K S Srinivasan, Taj Group of Hotels, Mr Pratik Kumar, EVP-HR, Wipro, Ms Anita Belani, Country Manager, Right Management India



L to R: Panel Discussion on "Innovate or Perish Track A" Mr S Y Siddiqui, MEO (HR, Finance & IT), Maruti Suzuki India, Dr Anadi Pande, VP-HRM, Hero Honda Motors, Ms Surina Rajan, Financial Commissioner & Principal Secretary, Govt of Haryana, Labour & Employment Department and Mr Suresh Tripathi, President, Human Resource, SRF Ltd



Mr Raman Kumar Sharma, Vice President & Director-General Affairs, Honda Sael Cars India at the Valedictory Session



Panel Discussion on "Innovate or Perish Track B" L to R: Mr B Padmanabha, DGM-HR, Toyota Kirloskar Motors, Mr N S Rajan, Partner & Global Leader - HR Advisory, Ernst & Young, Mr S Y Siddiqui, MEO (HR, IT & Finance), Maruti Suzuki India & Ms Bridget Beattie, Regional General Manager, Right Management - Australia & New Zealand



Inaugural of Auto Hub at Shalimar (West Bengal)



Vehicles being offloaded at Auto Hub at Shalimar (West Bengal)



SIAM team at the Inaugural of Auto Hub at Shalimar (West Bengal)

HR Conclave was attended by over 300 industry professionals. These included line and HR managers of the Automobile OEMs and Auto components industry, as well as from the automobile dealer community.

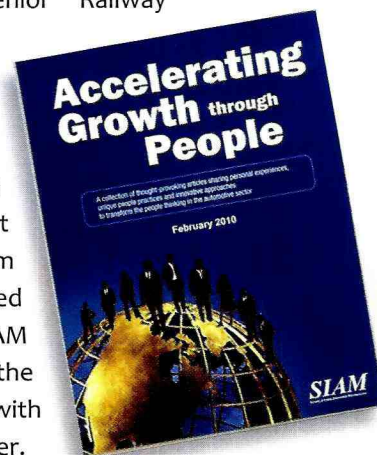
OTHER INITIATIVES

SIAM supported Delhi University and CII initiative of automotive engineering courses by providing necessary equipments and internship opportunity to their students.

INTERACTION WITH RAILWAYS

SIAM Logistics Group spearheaded the initiative of improving logistics operations. SIAM is working with the Railway Board to increase the share of railways in movement of automobiles from around 2% in 2007-08 to 15% in the next 3-4 years and the target is to reach 25% share of railways as early as possible. Already the share of railways has increased to around 5%.

SIAM met with senior Railway Board officials and members of the Expert Committee on Railways and detailed presentations were made on the short term and medium term policy support required from Railways. SIAM also participated in the Interactive session with Hon'ble Railway Minister.



Interactions with Railway Board took a major step forward with announcement of three policies - the Auto Hub Policy, the Automobile Freight Train Operators Policy, and the Private Railway Siding Policy after incorporating improvements suggested by stakeholders including SIAM.

FIRST RAILWAY AUTO HUB

The first Railway Auto Hub was commissioned by The Hon'ble Railway Minister, at Shalimar,

Kolkata in Feb 2010. The function was attended on behalf of SIAM by a team of 10 members lead by the Chairman of the Logistics Group. The Hon'ble Railway Minister announced that ten more Auto Hubs would be set up. Second auto hub is now being contemplated by Railways in the south (near Sriperambudur).

INITIATIVE TOWARDS COLLABORATIVE LOGISTICS

SIAM Logistics Group initiated a Pilot Transportation Project for exploring efficiency gains arising due to Collaborative Logistics. The project had resulted in an improvement of more than 35 % in the turnaround time resulting in faster and more economical transportation and was highly appreciated by the members.

SIAM LOGISTICS GROUP DELEGATION TO SHANGHAI AND HANOI

A Delegation of SIAM Logistics Group lead by Mr M M Singh, Chairman, SIAM Logistics Group went to Shanghai and Hanoi to discuss latest logistics practices and Modified Auto Wagon Designs. The Delegation consisted of 9 members from member companies Mr M M Singh Chairman, & Mr Deepak Sharma from MSIL, Mr Prem Verma and Mr G S Mekan from Tata Motors, Mr A Paliwal from Hyundai India, Mr R Sankaran from TVS Motors, Mr J Chitnis from Mahindra and Mahindra and Mr S Kumar from SIAM Secretariat. The delegation visited the factories of Shanghai Volkswagen, Sangan Ford Mazda Auto in Shanghai and had detailed interaction about the inbound logistics



SIAM Logistics Delegation to China and Vietnam

ie supply of components from vendors as well as out bound logistics involving PDI of Cars and Delivery to Dealers. In Hanoi, the delegation had discussions with N R Green line logistics regarding specially designed Auto Wagons. A visit also took place to the loading area where members saw the Auto wagon designed by Nissin and saw the loading process on both lower and the flexible upper decks. The visit was found beneficial by the members and further follow up action is being taken.

SIAM 4TH LOOKING AHEAD CONCLAVE

SIAM organized the 4th Looking Ahead Conclave on 24th May 2010 in New Delhi. Mr BS Meena, Secretary, Ministry of Heavy Industries & Public Enterprises was the Chief Guest on the occasion. The Chief Guest was Mr B S Meena, Secretary, Ministry of



L to R: Mr Ambuj Sharma, Joint Secretary, Department of Heavy Industry, Mr B S Meena, Secretary, Ministry of Heavy Industries & Public Enterprises, Mr S Sandilya, Vice President, SIAM and Mr Vishnu Mathur, DG, SIAM at the Inaugural Session of the Looking Ahead Conclave



L to R: Mr Rajan Pental, EVP & Business Manager-Auto Loans, HDFC Bank, Mr Arvind Saxena, Director (Sales & Marketing), Hyundai Motor India, Mr Vikram Gulati, Director, Department of Heavy Industry & Mr Mayank Pareek, Executive Officer, Maruti Suzuki India at the Passenger Vehicles Panel in the Looking Ahead Conclave



L to R: Mr Jasjit Sethi, MD, TCI Supply Chain, Mr P Sridharan, President, Shriram Transport Finance Company, Mr Ravi Pisharody, President-CVBU, Tata Motors, Mr Rakesh Jain, Past President, FADA & Mr Raman Aggarwal, Co-Chairman, FIDC at the Commercial Vehicles Panel in the Looking Ahead Conclave



L to R: Mr Ashutosh Khosla, Director -Sales & Marketing, Piaggio Vehicles, Mr R Srirangarajan, Senior VP, IndusInd Bank, Mr C K Rao, GM - Business Development, Bajaj Auto & Mr Balamurugan S, National Product Head- SCV, Shriram Transport Finance Company at the Three Wheelers Panel in the Looking Ahead Conclave

Heavy Industries & Public Enterprises. Industry Experts participated in various Sessions organized during the Conclave. There were Sessions on Macro Economic Overview and Market Forecast and four Panels on each of the vehicle segments – Passenger Vehicles, Commercial Vehicles, Three Wheelers and Two Wheelers.

DEVELOPMENT COUNCIL FOR AUTOMOBILE & ALLIED INDUSTRIES (DCAAI)

The 3rd Meeting of Development Council for Automobile & Allied Industries (DCAAI) was held in February 2010 in New Delhi under the chairmanship of Dr S N Dash, Secretary, Ministry of Heavy Industries & Public Enterprises. SIAM team was led by Mr S Sandilya, Vice President, SIAM and Chairman, Eicher Group. SIAM submitted a detailed

presentation on the industry performance and current issues. Mr Vivek Vishawanath, Member of SIAM Human Capital Group made a presentation on the Automotive Skills Development Council (ASDC).

DEPARTMENT RELATED PARLIAMENTARY STANDING COMMITTEE ON INDUSTRY

SIAM participated in the meeting of the Department-related Parliamentary Standing Committee on Industry. SIAM made a presentation on the key Post-Budget policy issues to the Committee. Apart from this issue, availability of land for Auto Expo was also raised in the meeting to which the Committee members suggested that SIAM should look at facilities that have come up in Noida, Greater Noida, Hyderabad, etc.

INTERACTIVE WORKSHOP WITH MINISTRY OF FINANCE OFFICIALS

An Interactive Session with Ministry of Finance (MoF) was held in July 2010 in North Block, New Delhi. Mr Y G Parande, Member-Budget, CBEC, Ministry of Finance chaired the Session. Mr Vivek Johri, Joint Secretary (TRU), Ministry of Finance, Mr Gautam Bhattacharya, Joint Secretary (TRU), Ministry of Finance and other officials also participated in the programme. The purpose of the Session was to raise Issues/Concerns relating to Goods & Services Tax (GST) and other Procedural Issues and to discuss these issues with Ministry of Finance officials.

Mr S Sandilya, Vice President, SIAM led the SIAM team. SIAM made two presentations:- on Goods & Services Tax and on Procedural Issues. Ministry of Finance officials were positive and assured the industry of their support and said that GST is likely to be introduced from 1st April 2011. They added that

the Ministry is setting up IT system and working to introduce a common portal at least to begin with for Registration and Return Filing and are planning to set up Facilitation Centres for places where IT penetration is still low so as to achieve procedural simplification.

INTER MINISTERIAL GROUP INITIATIVES - TAXATION RELATED

SIAM worked with the Ministry of Heavy Industries & Public Enterprises on its recommendations relating to Taxation Policy and Procedural issues directly and also, through the Inter Ministerial Group (IMG) on Taxation, Fiscal & Investment Policy. SIAM made a detailed presentation to the Inter Ministerial Group highlighting the recent performance of the industry and key suggestions. During the year, meetings were also held to discuss taxation procedural issues impacting the industry.

TAXATION POLICY AND PROCEDURAL SUGGESTIONS

SIAM Taxation Policy & Procedural Groups met several times during the year to finalize suggestions on both Policy & Procedural Issues. The Group finalized the SIAM Post Budget Memorandum on both Policy & Procedural Issues which was presented and submitted to various ministries. Also, SIAM position on the proposed Goods & Services Tax and Direct Taxes Code were finalized.

USED VEHICLES TREATMENT UNDER GOODS & SERVICES TAX

Under the aegis of SIAM Retail Group, SIAM worked with the Government to spread awareness about



Pre-Meeting of the Taxation Policy & Procedural Groups before the Interactive Session with Ministry of Finance



Members deliberating at the Pre-Meeting



Meeting on GST with Ministry of Finance Officials

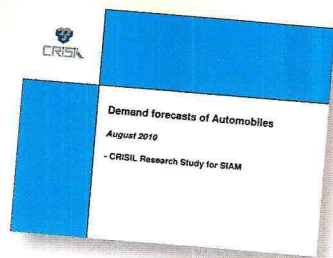
the problems being faced by the Used Vehicle segment. The Used Vehicle segment is affected by lack of uniform tax rates and procedures as these vary across states. It was felt that we need to have a unified approach for dealing with treatment of Used Vehicles. A white paper highlighting the concerns and how the segment could be treated under the Goods & Services Tax (GST) was developed for informing the Government authorities.

IMPLEMENTATION OF JNNURM SCHEME

SIAM worked with the Ministry of Urban Development towards implementation of the purchase of buses under the JNNURM Scheme which was announced as part of last year's Economic Stimulus Package of the Government of India. The Government of India had announced that purchase of buses by State Transport Undertakings would be permitted under the JNNURM Scheme. The scheme was aimed at generating demand for the bus segment which was witnessing slowing down of sales.

FORECASTING STUDY

During the year, several meetings of SIAM Economic Research Group were held to finalize the study proposal. Members worked rigorously with the agency throughout the year to ensure that the models used are robust and the results



President SIAM released results of Forecasting Study

usable. The findings of the study were formally announced in May 2010.

BRAINSTORMING SESSIONS WITH EXPERTS

SIAM Economic Research Group organized several Brainstorming Sessions with various Experts during the year. Mr John Hadley, Executive Director – Transaction Services, Pricewaterhouse Coopers was invited to present on the Global Auto Industry with focus on India's Auto Industry. Also, a presentation was made by Mr Arjun Narsipur, Corporate Treasury Sales-Southern India, Global Markets, HSBC Ltd on the Euro Zone Crisis.

SOURCING OF RAW MATERIAL/COMPONENTS

Many of the raw materials/ components procured by the auto industry were subject to existing investigations / cases related to Safeguard Duty and Antidumping duty and import restrictions. Interactions were held with the officials from Directorate General of Foreign Trade, Department of Industrial Policy & Promotion and Department of Heavy Industry to address these issues.

Tyre had been a major issue of the concern throughout the year. SIAM organized several interactions during the year with ATMA to sort out the problems. SIAM also took up the matter with the Government and could remove the licensing requirement especially for bus and truck tyres. Also, the Government refrained from imposing BIS marking on tyres.

The SIAM Monthly Monitor- Commodity Prices, which started in 2008, have established itself with detailed coverage of prices of various commodities and other issues. SIAM Sourcing Group is now planning to come out with Raw Material index for different kinds of vehicles.

SIAM VEHICLE CLASSIFICATION

SIAM took up the issue of re-classification of Passenger cars. SIAM Vehicle Classification Group approached Passenger Car CEOs' Council to resolve the issue of re-classification. After a few rounds of consultation, the Passenger Car CEOs

Council could come to a consensus on Passenger car classification. Dummy reports based on the new classification are being prepared parallelly every month. Utility Vehicles classifications are also being reviewed by the MUVs CEOs Council and are expected to be ready by April 2011 when SIAM would start publishing reports based on the new classification.

INTERACTION WITH MINISTRY OF COMMERCE & INDUSTRY ON WTO & FTAS/RTAS

Several meetings were held with the Government officials during the year. Discussions were held regarding India-EU FTA, India-Japan CEPA, India-MERCOSUR FTA, India-Chile PTA, GSP, etc. Also, two major FTA negotiations were concluded in 2010:- India-ASEAN CEPA and India-Korea CEPA. SIAM met with several Government officials during the year to sensitize them of the industry position.

Also, meetings were convened by the Ministry of Commerce & Industry to discuss India's position on the issue relating to reduction / elimination of Tariff and Non Tariff Barrier on trade of Environmental Goods under WTO. SIAM reiterated its position and informed the Government officials that the industry is against inclusion of automobiles in any such list.

SIAM Trade Policy Group felt that as of now the industry has been working in a defensive mode. The industry should now look at opportunities abroad and identifying markets – products of interest, which could then be communicated to the Government.

SIAM JOINS GOVERNMENT OF INDIA TEAM IN WTO

SIAM officials were inducted in the Government of India team to participate in discussions in WTO. The team participated in all discussions in Non Agricultural Market Access (NAMA) Technical Barriers to Trade (TBT) and also made presentation to the NAMA Chair on India's view on automotive NTBs discussions highlighting need for harmonization of standards as being discussed in UN ECE WP29.

AUTOMOTIVE TRADE WORKSHOP PHASE VII

Organized by the SIAM Trade Policy Group under the aegis of SIAM together with the Automotive Component Manufacturers Association of India (ACMA) organized Phase VII of the Automotive Trade Workshop on 9th December 2009 in New Delhi. Dr Rahul Khullar, Commerce Secretary and other Joint Secretaries briefed the members about the latest developments in WTO and trade agreements like EU, South-East Asia, Chile, etc. Dr Khullar told the industry that he is aware of the automotive industry's concerns and urged the industry to formulate a medium to long term road map with respect to trade policy.



L to R: Mr Ketan Doshi, Chairman, SIAM Trade Policy Group, Mr Amarendra Khatua, Joint Secretary, Dept of Commerce, Dr Rahul Khullar, Commerce Secretary, Mr A K Taneja, Past President, ACMA & Mr A S Puri, Chairman, SIAM International Relations Group at the Automotive Trade Workshop Phase VII



Participants at the Automotive Trade Workshop Phase VII



Select Industry Leaders at Auto Trade Dialogue

SIAM 4th AUTO TRADE DIALOGUE 2010

SIAM organized the fourth Auto Trade Dialogue on 8th January 2010 in New Delhi. The Dialogue was intended to facilitate better understanding and appreciation of the characteristics, market dynamics and policies of the automotive industries in individual countries and regions. Leaders from Japan, Germany, UK, Indonesia, China, Brazil, Russia and US participated in the Dialogue.

The dignitaries who participated included: Mr Ambuj Sharma, Joint Secretary, Department of Heavy Industry, Mr Vikram Gulati, Director, Department of Heavy Industry, Dr Pawan Goenka, President, SIAM, Mr A K Taneja, Past President, ACMA and Managing Director & CEO, Shriram Pistons & Rings, Mr Yoshiyasu Nao, President & Vice Chairman, Japan Automobile Manufacturers Association (JAMA), Ms Angela Mans, Head of Foreign Trade and International Relations, VDA (German Association of the Automotive Industry), Dr Biswajit Dhar, Director General, Research and Information System for Developing Countries (RIS), Mr David Croxson, Head of International, The Society of Motor Manufacturers and Traders Limited (SMMT), UK, Mr Bambang Trisulo, President, Indonesia Automotive Federation & Chairman of GAIKINDO, Dr Wayne W.J. Xing, Editor/Publisher, China Business Update/China Auto Review, Mr Hugo Pinto Ribeiro, President, RGS, Brazil, Mr Steve Cherynsh, Director-International Relations, Russian Association of Automobile Dealers, Mr A S Puri, Sr General Manager (Govt Affairs & Collaborations), Tata Motors and Mr Edward C Tonkin, Vice Chairman, NADA, United States.

PARTICIPATION IN 12th APEC AUTOMOTIVE DIALOGUE MEETING

SIAM participated in the 12th meeting of the APEC Automotive Dialogue as guest (Mr A S Puri, Chairman, SIAM International Relations Group & Senior General Manager, Tata Motors, and Mr Sugato Sen, Senior Director, SIAM). The 12th meeting of the Automotive Dialogue (AD) was held in Sapporo, Japan from 17th May to 20th May 2010. The meeting was attended by government and industry representatives from Australia, China, Indonesia, Japan, Korea, Malaysia, Philippines, Russia, Chinese Taipei, Thailand, the United States of America and Vietnam.

Each economy made a brief presentation on the relevant policies changes and challenges that have been developed in their respective economies in response to the economic downturn experienced since 2008. The outlook for economies was positive with the broad expectation that the consumer demand is recovering in most economies.

SIAM presented an overview of the development of standards harmonization work in WTO. SIAM representatives discussed the features of WP29 including the comparative features of the 1958 and 1998 agreements. Indian industry recommended that while the WTO should not be a standard setting body, the WTO should recognize the UN/ECE Working Party 29 as the main body to work out globally accepted solutions to technical barriers to trade.

Also, a one half day session was devoted to presentations, member economy comments and

discussion of current and projected developments in advanced and/or green technologies in motor vehicles.

EXPORTS RELATED INITIATIVES

During the year, several constraints affecting exports were identified by the SIAM Exports Group –infrastructure constraints like facilities at ports, customs/ export documentation, exchange rate volatility, etc. While the Government of India has expanded the coverage of Market-Linked Focus Product Scheme to cover certain types of automobiles, it was felt that there is a need for specific initiatives which could help boost auto exports. Interactions were held with officials from Directorate General of Foreign Trade (DGFT) to address these issues.

WORKSHOPS ON STRATEGIES TO INCREASE EXPORTS OF AUTO & AUTO COMPONENTS THROUGH SEZs

SIAM along with ACMA partnered with EEPC India (Engineering Export Promotion Council) who organized series of Workshops on Strategies to increase exports of Auto and Auto Components through SEZs was organized by in partnership with CII, SIAM and ACMA. This was an initiative taken on advice by the Ministry of Commerce & Industry. The Workshops briefed the participants about the policy relating to Special Economic Zones and the SEZs benefits arising from fiscal packages and ease of business.

PARTICIPATION IN THE 5th INDONESIA INTERNATIONAL AUTOMOTIVE CONFERENCE

SIAM was invited by FOI and GAIKINDO to participate in the 5th Indonesia International Automotive Conference and Indonesia Auto Show 2010 from 22nd – 23rd July 2010 in Jakarta. SIAM made a presentation on the “Indian Automobile Industry: Performance & Future Policy” in the Indonesia International Automotive Conference held on 22nd July 2010.

Indonesia Auto Show 2010 which was scheduled from 23rd July 2010 – 1st August 2010 in Jakarta saw participation of many companies. The Show was inaugurated by the Vice President of Indonesia in a formal ceremony which began with a cultural



SIAM's participation in 5th Indonesia International Automotive Conference



Mr A S Puri, Chairman, SIAM International Relations Group at the 5th Indonesia International Automotive Conference

dance, speech by the Vice President and ended with prayer. The Inaugural was attended by dignitaries from Indonesian Government, international leaders and other dignitaries.

Mr AS Puri, Chairman, SIAM International Relations Group and Sr General Manager (Govt Affairs & Collaborations) led the SIAM delegation. The other participants included Mr Ajit Venkatraman, CEO, Tata Motors-Thailand Operations and Ms Rinki Verma, Manager, SIAM.

INTERACTION WITH VDA, THE GERMAN AUTOMOTIVE INDUSTRY ASSOCIATION



Dr Pawan Goenka addressing the participants at IAA India Day during the Frankfurt Motor Show



A meeting of the Indo-German Working Group in progress

Group on Automotive Sector which were held from 21st to 22nd September 2009 in Frankfurt, Germany. SIAM led by Dr Pawan Goenka, President, SIAM also participated in the IAA - India Day "Indo-German Cooperation: Way Out of Global Crisis" on 22nd September 2009. Dr Pawan Goenka made a presentation on the recent industry performance and the challenges ahead.

Also, SIAM along with ACMA, Indian Oil Corp, NATRIP and officials of the Ministry of Heavy Industries & Public Enterprises participated in the meetings of the Indo-German Working Group on

Automotive Sector and the Working Sub-Groups, which were held on 21st & 22nd September 2009 in Frankfurt, Germany. The Working Sub-Groups are on (i) Technology, (ii) Commercialization & Framework Development and (iii) Institutional Co-operation, Training and Skill Development.

SIAM team included the following – Dr Pawan Goenka, President, SIAM and President-Automotive, Mahindra & Mahindra, Mr Ketan Doshi, Head – New Business Development, Mahindra & Mahindra and Member of Working Sub Group on Commercialization & Framework Development, Mr A S Puri, Senior General Manager (Government Affairs & Collaborations), Tata Motors and Member of Working Sub Group on Institutional Co-operation, Training and Skill Development, Mr Sugato Sen, Senior Director, SIAM and Ms. Rinki Verma, Manager, SIAM.

MEETING WITH JAPAN AUTOMOBILE MANUFACTURERS ASSOCIATION (JAMA)

Continuing the past relations, the second High-level Secretariat Meeting between SIAM and Japan Automobile Manufacturers Association (JAMA) was held on 23rd October 2009 in Tokyo. JAMA team was led by Mr Yoshiyasu Nao, President, JAMA and Mr Dilip Chenoy, Director General, SIAM led the SIAM team. Both sides exchanged information about the current market situation, government support programme and current status of FTA negotiations. Discussions were also held on specific issues relating to automobile taxation in India.



Representatives from SIAM, ACMA and NATRIP at the Indo-German Working Group Meeting

SIAM PARTICIPATION IN GLOBAL AUTOMOTIVE SYMPOSIUM 2010

SIAM participated in the Global Automotive Symposium 2010 organized by China Business Update (CBU) in Beijing from 21st to 24th April 2010. The Theme of the symposium was “China & World Auto Market in the Next Decade: Innovation, Green Vehicles and Global Competition”. Mr A S Puri, Chairman, SIAM International Relation Group & Senior General Manager, Tata Motors, made a presentation on the recent developments in the Indian Automotive Industry. The programme saw participation from representatives from Chinese automotive industries, ACEA, and JAMA besides others.

INTERNATIONAL CONGRESS OF THE AUTOMOTIVE INDUSTRY, CIIAM 2010

SIAM was invited to participate in the 8th Edition of the International Congress of the Automotive Industry in Mexico (CIIAM 2010). Mr Sugato Sen, Senior Director, SIAM participated as a guest speaker in the programme. The event was organized jointly by the Mexican Government Officials, Mexico's automotive supplier industry, and the Mexican Ministry of Economy (SE). The event saw participation from senior Mexican government officials and automotive industry leaders including international vehicle manufacturers, supplier industry CEOs and aftermarket leaders. The Congress aimed at gathering, communicating and integrating key actors for the automotive value chain development, such as top executives and governmental officials at every level of the automotive industry as well as governmental

entities established in Mexico and in other countries, in order to help them make timely and informed decisions critical for their business, based on the knowledge regarding changes and trends.

SIAM 4TH STYLING & DESIGN CONCLAVE

At the sidelines of Auto Expo 2010, the 4th Styling and Design Conclave 2010 was organized on 7th January by SIAM's Styling and Design Group – the body that looks after issues covering vehicle styling aspects and its changing status in India. The event was divided in three sessions; the speakers sharing their views on the direction and pace of the automotive design in India and the direct and indirect factors influencing the developments. The chief guest for the event, Dr Satyanarayan Dash, Secretary, Ministry of Heavy Industries, congratulated SIAM and Styling and Design Group for establishing Styling and Design Conclave as one of the most important events and laid emphasis on the importance of design in as equal a measure as is on fuel efficiency, ergonomics and other vehicular elements. He recognized the fact that design capability in India is rather limited but assured that the government will act to the best of its capability in bringing up the design competence.

The dignitaries presented included - Dr Pawan Goenka, President SIAM & President Mahindra & Mahindra, Automotive & Farm Equipments, Mr Gerry McGovern, Design Director, Land Rover, Mr Siddhartha Lal, Managing Director, VE Commercial Vehicles, Mr K Saito, Chief Designer, Motorcycle Division, Honda R&D India (P) Ltd., Mr B Bhaumik, Sr. Vice President, Mahindra & Mahindra, Mr Anil Saini, Design Director, General Motors, Mr Craig Cather, President and CEO, CSM Worldwide, Mr Andreas Wolfgruber, Chief Designer, Magna Steyr, Mr Manoj Kothari, Onio Design, Mr Amitoj Singh, IIT Delhi, Mr Pradyumna Vyas, Director, National School of Design and Mr Xavier Melkonian, Dassault Systemes France.

SIAM AUTOMOTIVE DESIGN CHALLENGE

The 2nd SIAM Automotive Design Challenge was initiated in 2009. It attracted more than



SIAM'S Participation in CIIAM



Dr Pawan Goenka addressing the participants at Styling & Design Conclave



Dr Satyanarayan Dash, then Secretary, MOHI&PE being shown display of shortlisted entries of Automotive Design Challenge



Inaugural Session of Styling & Design Conclave

100 entries. The results of the Challenge were announced in the Styling & Design Conclave and awards were presented by Mr Ambuj Sharma, Joint Secretary, Ministry of Heavy Industries and Public Enterprises and Mr Justyn Norek, Chief Designer, Trilix. All the short listed models were displayed in Auto Expo 2010. The first prize was bagged by Mr Neeraj Pathak of NID Ahemadabad for his design called 'Flux'. The second prize was won by

Mr Chacko Ebrahim of IIT Delhi who created 'Vayu' as his design effort. Occupying the third place was the team of Mr Shantanu S. Joshi and Mr Ketan M. Chaturmutha of IIT Guwahati who gave their creation brand name of Figo. Mr Gaurav Jain and Mr Saurabh Patwardhan of MIT Pune received special mention by bagging the Jury award for their model – Zygote.

TECHNICAL AGENDA

TECHNICAL COUNCIL

The Technical Council was chaired by Dr Wilfried Aulbur, Managing Director & CEO, Mercedes Benz India and Co-chaired by Mr Anant S Talaulicar, Chairman & Managing Director, Cummins India. The Council reviewed the activities of the Group on Frontier Technology, Recycling, Diesel Image, Automotive Infotronics and CMVR & Safety. The issues are discussed in a holistic manner and way forward is planned. The major issues are put to the Executive Committee by the Chairman.

1 FRONTIER TECHNOLOGY GROUP

The meetings of the Group were organized under the Chairmanship of Mr I V Rao, Managing Executive Officer, Maruti Suzuki India and Co-Chairmanship of Mr Rao Chalasani, General Motors India. Sub-Group on Electric Vehicles (EVs) and Hybrid Electric Vehicles (HEVs) was chaired by Mr A Srinivas, Senior General Manager - R&D, Mahindra & Mahindra and Co Chaired by Mr Girish M. Rakhe, President - India Operations, Reva India. The Group's mission is to develop India as a global leader of low cost alternate propulsion technologies by 2015 and production hub by 2020. Also, the Group aims to produce 1 million EV/HEV/Fuel Cell/HCNG Vehicles by year 2020. The ultimate goal is to create viable and indigenous technologies for achieving energy security and energy independence for the country. The Group focus is also on issues related to the policy changes and awareness campaign. Presently, SIAM, including Ashok Leyland Limited, Bajaj Auto Limited, Mahindra & Mahindra, Tata Motors Limited and Volvo-Eicher Commercial Vehicle, is working in partnership with IOCL for development of Hydrogen blended CNG vehicles. The project is being carried out under the aegis of Ministry of New & Renewable Energy (MNRE), where, the Ministry has funded around 50% of the project cost.

2 RECYCLING GROUP

Meetings were held under the Chairmanship of

Capt. N. S. Mohan Ram, Advisor, TVS Motors and Co-Chairmanship of Mr Prakash Vemali, General Manager, Product Homologation, Mercedes Benz India. Group is working on formulation of Regulation on End-of-Life of Vehicles (ELV) in India. Vehicle under the Group aiming towards CO₂ reduction and energy savings. SIAM is in the process of submitting old Vehicle to the demonstration recycling unit being setup by NATRIP at Chennai. This recycling unit is to be commission by March, 2011.

3 DIESEL IMAGE GROUP

SIAM Diesel Image Group was led under the Chairmanship of Mr Anant Talaulicar, Chairman & Managing Director, Cummins India and Co-Chairmanship of Mr K K Swamy, Vice President & Managing Director, Volkswagen India.

Encouraged by success of first edition of Diesel Pavilion during the 9th Auto Expo 2008, SIAM organized rechristened 2010 edition as "Diesel Planet" during 5th to 11th January 2010 Auto Expo inaugurated by Mr Ambuj Sharma, Joint Secretary, Ministry of Heavy Industries & Public Enterprises. Combined effort of automobile and component manufacturers helped in showcasing the latest advancements in diesel and associated



Mr Ambuj Sharma, Joint Secretary, Ministry of Heavy Industries & Public Enterprises inaugurating the Diesel Planet. L to R: Mr K K Gandhi, ED (Tech), SIAM, Mr J S Chopra, President, Delphi Automotive, Mr Rajeev Kapoor, MD & CEO, Fiat India, Mr Anant J Talaulicar, CMD, Cummins India, Mr P K Banerjee, DGM, Tata Motors

technologies. The Planet created special events for reaching out to the masses.

Mr P M Telang, Managing Director, Tata Motors, led a SIAM team for representing on the issue of additional tax on Diesel cars, in lieu of diesel fuel being used by these cars which is taxed lower than petrol, in an Inter-Ministerial Group meeting Chaired by Joint Secretary, MoRTH. Dr Kirit Parikh, former Member, Planning Commission was also invited for the meeting and SIAM point of view was presented in detail.

The Diesel Image Group also organized a Round Table on Diesel Vehicles and technologies wherein experts from USA, Germany, Japan and India spoke about the current and future trends in diesel. The experts in the roundtable proposed that there is a need for a holistic approach for diesel vehicle image make up by also addressing other mode of diesel consuming vehicles such as off-road equipments, tractors, power generation and old vehicles.



L to R: Mr A K Taneja, President, Shriram Piston & Rings, Mr Anant J Talaulicar, CMD, Cummins India, Mr Ambuj Sharma, JS, MoHI&PE and Mr Vishnu Mathur, DG, SIAM and Mr Craig Barnes, CTO, Cummins India at the Diesel Round Table

On the issue of importing of AUS 32 for replenishing BS IV emission norms complaint vehicles fitted with Selective Catalytic Reduction (SCR) technology, SIAM has made representation to Director General of Foreign Trade (DGFT) and Ministry of Fertilizers for free import of AUS 32 as it does not conform to the composition of Urea (46%N), used for agricultural purposes. In the interim, DGFT has started granting advance license to companies importing AUS 32.

4 AUTOMOTIVE INFOTRONICS AND INTELLIGENT TRANSPORT SYSTEM (ITS) GROUP

The Group meetings were held under the Chairmanship of Dr Aravind Bharadwaj Chief Executive Officer - AIPL and Co- Chairmanship of Mr C S Venkatraman General Manager, ERC, Tata Motors. The Group deals with the very niche and upcoming subject of Intelligent Transport System using vehicle electronics, wireless communication and information technology to achieve sustainable multi-model transportation system for India.

SIAM organized a Roundtable on Automotive Infotronics and ITS on 7th January during the Auto Expo 2010 in New Delhi. The Roundtable brought together representatives from government institutions, academia, as well as industry experts from IT, Electronics, Semi Conductors and Automotive, providing a platform to exchange ideas and to discuss strategies and implementation plans.



L to R: Mr A Srinivas, Senior General Manager, Mahindra & Mahindra; Mr Ashwini Vaishnav, Advisor, DIMTS; Mr Ambuj Sharma, Joint Secretary, MoHI (Chief Guest); Dr Aravind Bharadwaj, Chairman, SIAM Automotive Infotronics Group & CEO, Automotive Infotronics Pvt Ltd; and Mr Rohit Gupta, General Motors during the Roundtable on Automotive Infotronics and Intelligent Transport Systems held on 7th January 2010 during Auto Expo 2010 in New Delhi

SIAM is either carrying out or part of various ongoing demonstration programs to build confidence amongst all stake-holders including Government, Policy Makers, NGOs etc. about the use of Information Technology to achieve 'Intelligent' Transportation System. Mr K K Gandhi Executive Director (Tech) and Mr Saurabh Rohilla Associate Director (Tech) from SIAM participated in the SIMBA-2 final workshop held at Brussels on 25th & 26th March 2010. SIMBA-2 project is an EU



SIMBA-2 Final workshop, Brussels, March 2010



Mr K K Gandhi, Executive Director, SIAM making a presentation on ITS Priorities during the SIMBA-2 final workshop, Brussels, March 2010

funded program to identify national priorities by respective countries. A presentation was made by Mr K K Gandhi on the key priority research areas identified for India in ITS.

SIAM, as consortium partners, is currently carrying out the European Union Framework Program funded demonstration project called Smart Transport Application Designed for large events with Impact on Urban Mobility (STADIUM). The project highlights the application of ITS during large events to provide better services to public through information sharing platform related to traffic conditions. The India demonstration shall take place during the CWG 2010 to be held from 3rd-14th October 2010 in New Delhi. As part of deliverable, SIAM with other consortium partners shall hold a one day workshop on 24th September 2010 to demonstrate the application capabilities. SIAM intends to invite all stakeholders like



Mr Paolo Squillante, STADIUM India Demonstration Coordinator, making a presentation during SAFE Annual Convention, May 2010

Government Bodies, State Transport Departments, Academia and NGOs for this workshop.

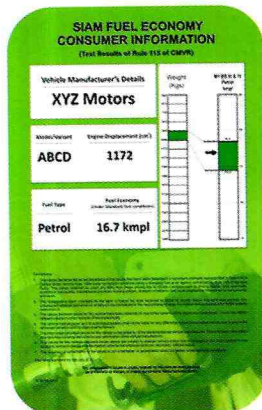
NATIONAL & INTERNATIONAL REGULATIONS COUNCIL

The National and International Regulations Council was chaired by Mr P M Telang, Managing Director, Tata Motors and co-chaired by Mr A Ramasubramanian, President, AMW Motors. The Council reviewed the activities of the Emission and Conservation Group, CMVR, Safety & Regulations Group, International Harmonisation Group and of Two and Three-Wheeler Sub-Groups from the point of view of macro implications on the positions taken by the SIAM Groups and sub-Groups and also provided direction for future actions.

1 EMISSIONS & CONSERVATION GROUP

Activities of SIAM Emissions & Conservation Group were held under the Chairmanship of Mr Jayant K Deb, Vice President, Fiat India and Co-Chairmanship of Dr Mathew Abraham, General Manager, Mahindra & Mahindra, on various issues primarily through the meetings of Standing Committee of Emission (SCOE) under Ministry of Road Transport & Highways. Postponement of BS III Emission norms in the rest of the country from 1st April 2010 to 1st October 2010 at the very last stage by Government of India, due to non-availability of BS III Fuel resulted in problems of vehicle registration and concerns of planning & scheduling of supply of vehicles in the country. The Group also launched the updated Fuel Economy label which has a provision of comparison of Fuel Efficiency

of vehicles in similar weight range. Fuel Economy data of all passenger cars and two-wheelers of SIAM members is also available on www.siam.in.

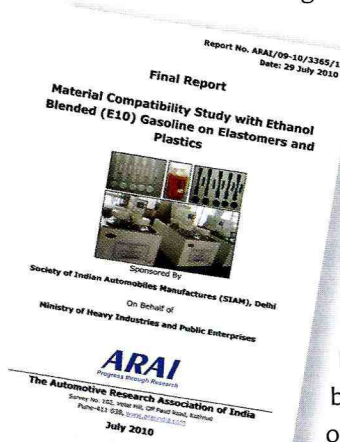


The Group has had elaborate discussions on the likely roadmap for next stage of emission norms in view of the ongoing discussions in Auto Fuel Policy Review Committee under Mr M B Lal and the Indian Clean Air Programme (ICAP) study undertaken by Ministry of Environment & Forests. SIAM position on new Idle Emission Norms for BS IV four wheelers, including Lambda measurement was finalized by the Group. The Group also finalized the Type Approval Procedure (TAP) for mass emission testing of BS IV four wheelers and BS III Two and Three-wheelers.

• Study on impact of E10 blended gasoline fuel on vehicles

SIAM, Indian Oil Corporation R&D and The Automotive Research Association of India (ARAI) have completed the interim project to evaluate the performance of vehicles with 10% blended Ethanol fuel with Gasoline. The report has shown slight deterioration in Fuel

Efficiency, increase in NOx emissions and increase in evaporative emissions with E10 Fuel. Compatibility of materials with E10 fuel also revealed decomposition of Neoprene rubber and blistering on black paints of Fuel tanks.



• Study on estimating the travel demand in Delhi and associated pollution loads

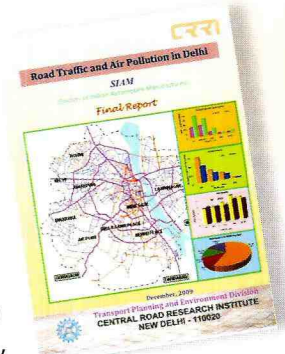
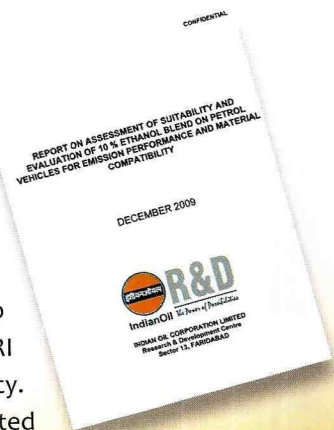
SIAM along with Central Road Research Institute (CRRI) conceived a study to estimate travel demand and associated pollution loads in the city of Delhi. The study results show that the Vehicle Kilometer Traveled (VKT) has increased almost two times as compared to the CRRI study in 2002 for Auto Fuel Policy. On the contrary, the associated pollution loads have significantly reduced as compared to 2002 CRRI study and the reduction is of the order of 37%, 31%, 25% and 23% in CO, HC, NOx and PM respectively. This reduction in pollution loads can be attributed to the age profile of the vehicles operating with improved technologies such as BS-I, BS-II and BS-III, full scale implementation of CNG (as a fuel) in Autos, Taxis and Buses, increased proportion of CNG run private cars and other factors such as four stroke engines in two wheelers, improvements in fuel quality etc.

SIAM has also initiated a study along with Indian Institute of Petroleum (IIP), Dehradun to estimate the possible quantum of improvement in Fuel Efficiency of vehicles due to various interventions, other than vehicle technology, such as driving habits, tyre pressure, etc.

Other issues related to SIAM submission on uniform in-use vehicle pollution checking system across India and deliberation for a project on framing rules for Replacement of Catalytic Converters along with International Centre for Automotive Technology (ICAT) and Emission Control Manufacturers Association (ECMA) were also discussed by the Group.

2 CMVR AND SAFETY REGULATION GROUP

The Group meetings were held under the chairmanship of Mr S Ravishankar, Vice President,



SIAM CRRI 2009 Study report on Road Traffic and Pollution in Delhi



CMVR and Safety Group Meeting, 4th July 2010, New Delhi. L to R: Mr K K Gandhi, Exe. Director-Tech, SIAM, Mr S Ravishankar, VP, Tata Motors & Chairman, CMVR and Safety Regulation Group, Mr Z Mujawar, GM, M&M & Co-Chairman, CMVR and Safety Regulation Group

Tata Motors and Mr Z A Mujawar, GM, Mahindra & Mahindra respectively. The Group discussed issues related to safety regulations. Group members share and report the progress of Automotive Indian Standards formulation, revision and alignment with Global Technical Regulations (GTRs) and ECE Regulations. Activities on Driver field of vision, Truck Code, Bus Body Code, Axle Combination, School Bus Code, Technical specification of vehicles, Gradeability, Wheelbase definition, Type Approval & Conformity of Production etc. were being discussed in the Group meetings.

3 TWO-WHEELER GROUP

SIAM Two-Wheeler Group worked actively under the Chairmanship of Mr Harjeet Singh, Associate Vice President, Hero Honda on various issues. Announcement of postponement of implementation of BS III Emission norms for Two-wheelers in other than 13 cities from 1st April 2010 till 1st October 2010 by Government of India,



SIAM Two-Wheeler Group meeting in progress under the Chairmanship of Mr Harjeet Singh, (sitting 2nd from left) Associate Vice President, Hero Honda.

created serious planning and scheduling issues for delivering vehicles in appropriate parts of the country. The committee members also represented SIAM in the Hon'ble Supreme Court on issues related to Helmets and Rule 123 of CMVR. SIAM positions on various Automotive Standards for two-wheelers were also finalised and represented at the Automotive Industry Standards Committee. SIAM two-wheeler members have raised serious concerns on Government of India's plan for across the board blending of 10% Ethanol in Gasoline. SIAM also articulated its position on implementation of evaporative emission regulation for two-wheelers to be aligned with next level of emission norms in India.

SIAM participated in International Motorcycle Manufacturers Association (IMMA) Technical Committee meetings and sub-committee meetings on Harmonization, Safety and Environment. SIAM is also actively working as a member of the Road Safety Task Force for publishing the IMMA Road Safety position paper to be launched by IMMA shortly.



The IMMA Motorcycle safety action plan from 2011 to 2020

4 THREE-WHEELER GROUP

The Three-wheeler sub-Group led by Mr S Sane, Sr. Vice President, Piaggio Vehicles at Pune along with members listed the developments that have taken place in Three-wheeler technologies for lower emissions and improvement in safety. The Group also undertook preliminary discussions for developing the industry position for next stage of emission norms. The new Global Technical Regulation (GTR) being discussed for tell-tale symbols is also being reviewed along with other issues such as Retro-fitment of safety devices in the Indian context.

5 INTERNATIONAL HARMONIZATION GROUP

Activities of International Harmonisation Group were led by Group Chairman, Mr T M Balaraman, GM Bajaj Auto and Co-Chairman Mr P K Banerjee, DGM, Tata Motors. One of the key discussion points for

the committee was SIAM's position regarding the possibility of India signing 1958 Agreement in view of the existing infrastructure and administrative system prevalent in India regarding Type Approval of vehicles. Members were also given updates on the activities of the various GR Groups. Other administrative subjects were discussed such as format for reporting of GR Groups, appropriate communication to members for India GR meetings and briefing / de-briefing for WP.29 meetings.



L to R : Mr T Gopalan, Chairman, TMA Technical Committee, SIAM, Mr Ambuj Sharma, JS, MoHI & PE, Mr S R Marathe, Director, ARAI and Mr Dilip Chenoy, the then DG, SIAM at the 150th Session of WP.29 at United Nations, Geneva

SIAM INITIATIVES

Revision of Motor Vehicles Act 1988

MoRT&H has set up a committee under the Chairmanship of Mr S Sunder, Distinguished fellow TERI and former Secretary, MoRT&H to review the Motor Vehicle Act and propose the necessary changes. The Committee has held number of meetings on the subject and accepted various suggestions and recommendations given by various Government and Non-Government agencies. The final amendment would be submitted to the MoRT&H by first week of September 2010.

SEMINARS ON "RECYCLING OF VEHICLE"

SIAM organized two seminars on recycling of vehicles. The first was organized on 7th January 2010 and the other very recently on 5th August 2010 at New Delhi. During the first seminar, the understanding of ELV regulations and practices in Europe, Japan and China were deliberated



SIAM Seminar on Recycling of Vehicles, 5th August 2010, New Delhi
L to R: Capt N S Mohanram, Advisor, TVS Motors & Chairman, SIAM Recycling Group, Mr Ambuj Sharma, Joint Secretary, Ministry of Heavy Industry and Public Enterprises, Mr Prakash Vemali, GM, Mercedes Benz India Ltd & Co-Chairman of SIAM Recycling Group

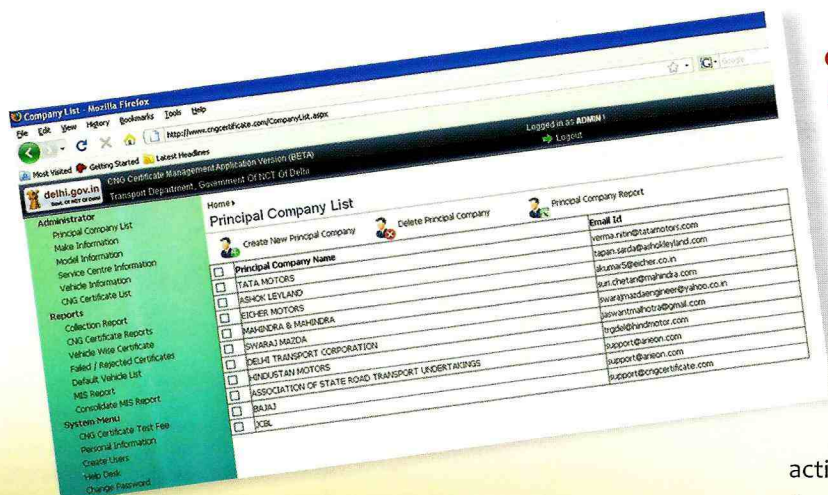
upon and it was felt that suitable approaches for implementing such a regulation in India is necessary. During the second seminar, India got the opportunities to learn and share the experiences of overseas participants' expert in recycling. The work on formulation of ELV regulation in India is started and the same would be expected to be completed by 2011. The Government of India ensured necessary funding and support for Fleet modernization.

VEHICLE FITNESS CENTRE IN CHHINDWARA

SIAM is working with MoRTH to setup a vehicle inspection and certification centre for Commercial vehicles in Chhindwara, Madhya Pradesh. The Centre is likely to have two Heavy Duty Inspection lanes and two light duty inspection lanes. State of art Brake Testing equipment, Head Light Tester, Emission Check systems and other infrastructure is proposed to be created for checking the fitness and roadworthiness of commercial in this region. SIAM has also identified a suitable land in Pandhurna Tehsil for the upcoming Centre.

AUGMENTATION OF CNG LEAKAGE TESTING SYSTEM FOR BUSES

It was felt from the audits that were carried out jointly by the team comprising of EPCA, Transport Department (Government of NCT of Delhi), ASRTU (Burari) and SIAM at various CNG leakage test centres in Delhi to develop a software application.



Website image of online CNG Leakage Test Software launched by SIAM in partnership with Transport Department, Govt of NCT of Delhi

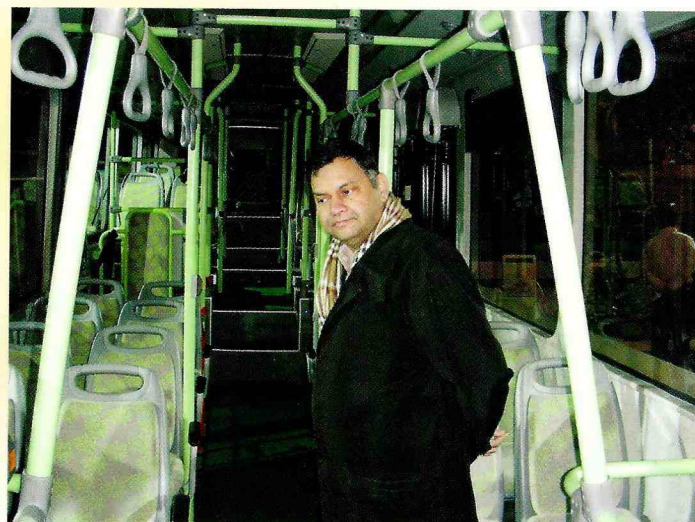
It was also felt that this application shall support online certification, test procedure harmonization, reliable online test data collection and last but not the least minimization of malpractices observed during the audits. SIAM in partnership with Transport Department, Government of NCT of Delhi, has launched a website under the URL www.cngcertificate.com for carrying out CNG leakage test for CNG bus-fleet in Delhi. The website was launched in the month of June this year. It is being used by all authorized CNG Leakage Test Centres including around 06 Delhi Transport Corporation (DTC) Centres.

CMVR-TECHNICAL STANDING COMMITTEE (CMVR-TSC)

Meetings were held under the chairmanship of Joint Secretary, Ministry of Road Transport and Highway. Automotive Industry Standing Committee (AISC) is the secretariat and report to CMVR-TSC. AISC works on formulation, finalization and revision of standards. AISC meetings were held under the chairmanship of Mr S R Marathe, Director, Automotive Research Association of India (ARAI). ARAI reports the progress on various activities of the CMVR-TSC meetings. The activities include briefing of action taken report, revision of standards, formulation of new standards, alignment of National Standards with GTRs, approval and release of notifications, etc. Other issues related to retro-fitment of safety devices at state level, implementation of safety standards, enforcement etc. are also discussed in the meeting.

CORE GROUP ON BUS BODY ACCREDITATION SYSTEM

Meetings were organized under the chairmanship of Joint Secretary, Ministry of Road Transport and Highways. Mr D P Saste, Central Institute of Road Transport (CIRT) is the convener and secretariat to report the progress on accreditation systems for bus body builders. ARAI and iCAT are supporting the action plan of the core Group. The activities involve designing of logo for National Accreditation Board, nomination of bus body builders from North, East, South and West Zone, conducting workshop for awareness creation, interviews for the post of technical assessors and lead technical assessors, release of advertisement, organizing of Zonal and National Accreditation Board meetings, hosting of information on various website etc.

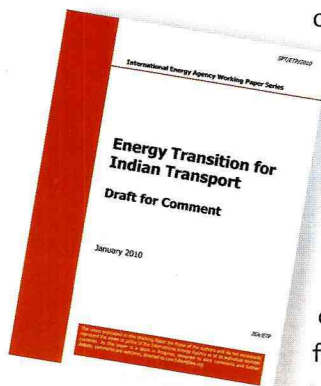


Mr Anand Prakash, Director, MoRT&H looking at the internal body design of a prototype low floor bus at Auto Expo 2010

ENERGY TECHNOLOGY PERSPECTIVE 2010

A sub-Group on transport sector was formed under the Chairmanship of then Director General, Mr Dilip Chenoy to study and review the draft report prepared by International Energy Agency (IEA) to estimate the energy requirement from various sectors in India, including transport, up to the year 2050. From India Central Electricity Authority (CEA) was the coordinating agency for reviewing the study. Initially a one day Workshop was organized by International Energy Agency (IEA) along with Central Electricity Authority

(CEA) on 29th January 2010 at New Delhi. SIAM secretariat studied the document and commented on some of the assumptions made in the document which would possibly skew the projections for 2050. During the final meeting of the Indian stakeholders, all members of each of the Sectors from India expressed strong reservations on the assumptions made by IEA for the study. It was decided that on behalf of Government of India comprehensive comments would be sent by CEA to IEA.



Draft IEA Report on Energy Transition for Indian Transport for comments

INTERACTION WITH SAE PRESIDENT

SAE President, Dr James E. Smith met SIAM and ACMA members on 8th December 2009, New Delhi and shared his insights for looking at improving the capabilities of Engineers to address the challenges that are coming in future for Automotive sector. He also spoke about the need for innovation which has to be radically different from the present situation. Path breaking innovation would result in putting several companies in discomfort for overall improvement of the society



L to R : Mr K K Gandhi, ED (Tech), SIAM, Mr James Smith, President, SAE International, Mr Ramesh Suri, Past President ACMA and Mr Murli Iyer, SAE International USA

4TH ENVIRONMENTALLY FRIENDLY VEHICLE CONFERENCE

SIAM & ACMA organized the 4th EFVC under the coordination of Ministry of Heavy Industry & Public Enterprises along with NATRiP held on 23rd-24th November 2009, New Delhi. There were



4th International Environmentally Friendly Conference, 23-24 November 2009, New Delhi. L to R: Dr Donald Hillebrand, Director, Argonne's Centre for Transportation Research, US, Dr Surajit Mitra, Additional Chief Secretary, Govt of Assam & former Additional Secretary, MoHI&PE, Mr Robert Evans, CEO, Centre of Excellence for Low Carbon and Fuel Cell Technologies (CENEX), Dr Pawan Goenka, President SIAM & President Automotive Sector, M&M Ltd, Mr Philippe Jean, Head of Automotive Industry, European Commission

six technical sessions and a panel discussion on industry and government collaboration for EFVs. Speakers made presentations during the session on Mobility and Environment – Role of EFVs, EFV – future scenario, Alternative fuels and drives, Gaseous Fuel Technology – Technology of the future, Future of Electric Vehicles and Regulatory and Legislative Framework for EFVs. The 5th EFV conference will be hosted by USA in year 2011.

REVIEW OF AUTO FUEL POLICY

Meeting were held under the chairmanship of Mr M B Lal to Review of Auto Fuel Policy and prepare position paper on "Rationale and economics of conversions of vehicles to CNG" for submission to MoP&NG. A working Group comprising of GAIL, SIAM and HPCL was formed to draft the report to be submitted

LOW CARBON DEVELOPMENT STRATEGY

Under the Chairmanship of Dr Kirit Parikh, Planning Commission has undertaken a study to recommend interventions for Low Carbon Development which would also go into the 12th Plan process of Government of India. The objective of the study was to look at Carbon mitigation methods in all sectors upto the year 2020 and also beyond.

President SIAM, Dr Pawan Goenka is a member of the Transport Sub-Group and participated in detail

meetings and made representations on behalf of the Automobile Industry on SIAM approach for Carbon mitigation. Other member of the Group included Dr J J Irani, Director, Tata Sons, Ministry of Railways and convened by Dr Girish Sant of Prayas Group. Expert opinion of IIT Chennai, Delhi and Mumbai were also taken into consideration for preparing the report of the Transport Sub-Group.

WORKSHOP ON SCR TECHNOLOGY FOR CLEANER DIESEL EMISSIONS

A workshop on Selective Catalytic Reduction (SCR) Technology for cleaner diesel emissions was organized by SIAM along with Ministry of Heavy Industries & Public Enterprises on 18th November 2009 at New Delhi. The objective of the workshop was to have a clear understanding of all issues and concerns with regard to availability, usage and effectiveness of SCR Technology, which have been raised from time to time. The main outcome that emerged during the discussions was the concerns of import of AUS 32 and dispensation of the same, which the oil companies were unable to commit at this point of time. However, the Oil companies supported introduction of SCR technology if at the initial stages the vehicle manufacturers themselves address the issue of supply of AUS 32 to the vehicle operators through their dealers and other networks. It was noted that the vehicle manufacturers were already in the process of seeking license directly from DGFT, after necessary clearance from Ministry of Fertilizers for importing AUS 32. Mr Ambuj Sharma, Joint Secretary and Mr Vikram Gulati, Director, Department of Heavy Industries participated in the workshop apart



Mr Ambuj Sharma, JS, MoHI&PE, (4th from left) Mr Jayant K Deb (5th from left), Vice President, Fiat India and Mr Vikram Gulati (6th from left) at the workshop on SCR Technology

from oil industry, Ministry of Environment and Forests, ECMA, TIFAC and automobile industry representatives. Mr Craig Barnes, Chief Technical Officer, Cummins India made a detailed presentation on the SCR technology and its advantages.

WORKSHOP ON ADOPTION OF ENERGY EFFICIENT PROCESSES

SIAM along with BEE organized series of three workshops on Life Long Learning (3L) Programme for the Automobile Sector at Chennai, Pune and Delhi in the year 2010. The objective of the workshop was to share best practices amongst the industries for adoption of Energy Efficient Process Technologies and Practices in the manufacturing units of the automobile Industry. Through participation of various automobile companies



Mr Vishnu Mathur, DG, SIAM addressing the delegates at the Inaugural Session of the Life Long Learning Programme of BEE & SIAM. Seated: Mr Ashok Kumar, BEE and Mr Jens Burgtorf, Director – IGEN, GTZ.

viz. Ashok Leyland, Tata Motors, Fiat India, Maruti Suzuki and Hero Honda the workshop highlighted various energy efficient methods and equipments that are being used in the manufacturing of automobiles which results in substantial energy saving. Case studies and presentations from other than automobile manufacturing units were also presented including use of energy efficient motors, lighting equipments, etc.

INDIA - UK LOW-CARBON VEHICLE SEMINARS

India - UK Low-Carbon Vehicle strategy seminars were organized jointly by the SIAM and UK Trade & Investment (UKTI) on 25th November 2009 and with Society of Motor Manufacturers & Traders, UK on 6th January 2010 in New Delhi. Sir Andrew

Fuel Efficiency Regulations. The next meeting was agreed to be scheduled in the later part of 2010 in India.

RACE MEETING

The 14th Asian Regulation & Certification Experts (RACE) Meeting was held on 24th November 2009 in Hanoi, Vietnam. Presentations made by the industry/industry representatives from each country centred on National Regulations adoption to ECE Regulations and the status of WP.29 1958 and 1998 agreement. JAMA made a presentation on International Whole Vehicle Type Approval.



SIAM participated in RACE meeting at Hanoi, Vietnam

JASIC ASIA GOVERNMENT-INDUSTRY MEETING

The 2nd meeting of the 5th Series on the series theme – “Developing infrastructure in each country to realize mutual recognition of Whole Vehicle Type Approvals under UNECE framework with the regulations annexed to the 1958 Agreement” – was held in Hanoi, Vietnam, from 25th to 27th November 2009. The Participating countries reported their



JASIC Asia Government-Industry Meeting, 25th to 27th November 2009, Hanoi, Vietnam

respective activities towards harmonization of regulations and discussed how they should establish the vehicle certification system under the United Nations 1958 Agreement in each country.

41ST TOKYO MOTOR SHOW

SIAM team participated in the inaugural ceremony of the 41st Tokyo Motor Show held on 23rd October



L to R: Mr T M Balaraman, General Manager, Bajaj Auto and Mr S Sen, Senior Director, SIAM at the 41st Tokyo Motor Show, Tokyo, October 2009

2009 which was followed by the visit to the Recycling Plant, covering both two-wheeler and four-wheelers, besides white goods.

CII CLIMATE CHANGE COUNCIL

CII has set up a National Council on Climate Change to develop Indian Industry position on Climate Change. Mr Jamshyd N Godrej, Chairman and Managing Director, Godrej & Boyce Mfg. Co. Ltd. is the Chairman of the CII Council. The first meeting of the Council was held on 29th August 2009, wherein it was shared that CII is presently focusing on two out of the eight missions outlined in National Action Plan for Climate Change (NAPCC) viz. Solar Mission and Enhanced Energy Efficiency Mission. The second meeting of the Council was held in Delhi on 21st October 2009 followed by the 3rd meeting 11th November 2009 in Mumbai. Presently the CII Council on Climate Change is exploring various ideas and looking at areas which could be taken up on priority for addressing in near future.

AUTO EXPO 2010

10th AUTO EXPO
2010

The Complete Automotive Show
5-11 January, 2010 • New Delhi, India

Silver Jubilee Year

January 2010



L to R: Dr Pawan Goenka President SIAM & President (Automotive) Mahindra & Mahindra Ltd, Mr Kamal Nath, Hon'ble Minister of Road Transport & Highways, GOI, Mr Venu Srinivasan, President CII, Mr Vilasrao Deshmukh, Hon'ble Minister of Heavy Industries & Public Enterprises, GOI

The 10th Auto Expo was held in New Delhi from January 5 to 11, 2010. Auto Expo 2010, which was jointly organized by Automotive Component Manufacturers Association (ACMA), Confederation of Indian Industry (CII) and SIAM attracted more than 12,00,000 visitors and close to 2,00,000 Business visitors. The theme for this year was 'Mobility for All, Special Focus: Green Environment'. With more than 25 launches, including Five global launches took place at the Expo which had a display area of 1,25,500 sqmts.

The show, which is accredited by the International Organization of Motor Vehicle Manufacturers (OICA) was visited by people from different parts of the globe. Automotive delegations from large number of countries, including Brazil, Canada, China, Columbia, Czech Republic, Egypt, Finland, France, Germany, UK, USA etc. participated in the Expo.

Many distinguished dignitaries were present at the inaugural of Auto Expo-Minister of Road Transport & Highways, GOI Mr Kamal Nath, & Minister of Heavy Industries and Public Enterprises; GOI, Mr Vilasrao Deshmukh.

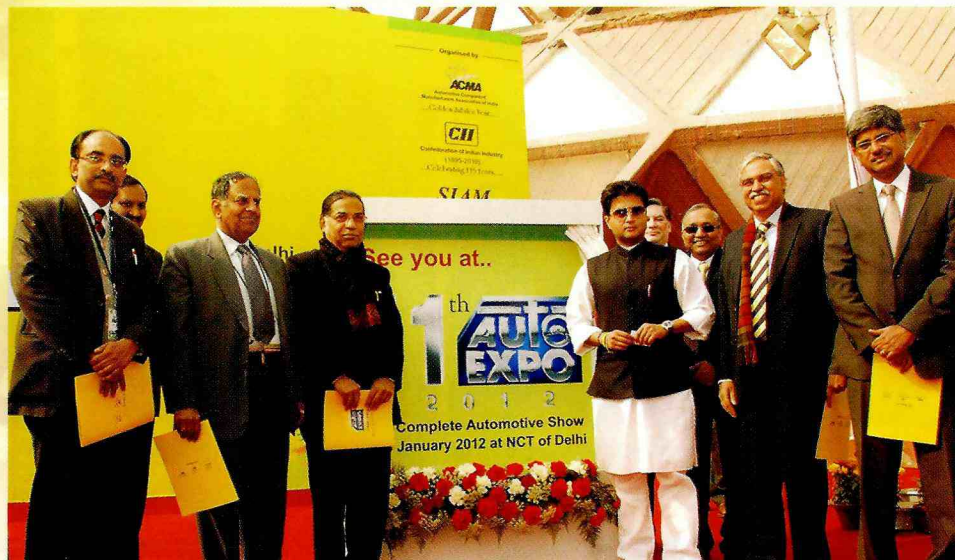
Valedictory function done by Minister of State for Commerce and Industry, GOI, Mr Jyotiraditya Scindia.

Auto Expo 2010 saw:

- Canada, China, France, Germany, Italy, Japan, Luxembourg, Spain, Taiwan, & UK.
- International Participation: **30 countries** - Austria, Bangladesh, Canada, China, Columbia, Czech Republic, Egypt, Finland, France, Germany, Hong Kong, India, Italy, Japan, Luxembourg, Malaysia, Mexico, Netherlands,



L to R: Mr Gurudas Kamat, Hon'ble Minister of State for Information Technology and Communication, GOI, Mr Kamal Nath, Hon'ble Minister of Road Transport & Highways, GOI & Mr Vilasrao Deshmukh, Hon'ble Minister of Heavy Industries & Public Enterprises, GOI, inaugurating the Auto Expo 2010



L to R: Mr Vishnu Mathur, the then Executive Director ACMA, Mr S Sandilya, Vice President SIAM & Chairman, Royal Enfield, Dr Subhash Pani, Vice Chairman and Managing Director, India Trade Promotion Organisation, Mr Jyotiraditya Scindia, Hon'ble Minister of State for Commerce & Industry, GOI, Mr Sunil Kant Munjal, Chairman Hero Corporate Service Ltd, Mr Jayant Davar, President ACMA

Russia, Singapore, South Korea, Srilanka, Spain, Sweden, Switzerland, Taiwan, Thailand, UAE, United Kingdom, United States of America etc.

- Overseas Delegations: 98 delegations from 33 countries - Austria, Algeria, Bahrain, Bangladesh, Belgium, Brazil, Canada, China, Colombia, Czechoslovakia, France, Germany, Ghana, Indonesia, Iran, Italy, Israel, Japan, Kenya, Korea, Kuwait, Luxembourg, Myanmar, Malaysia, Mexico, Nepal, Nigeria, Pakistan, Philippines, Poland, Russia, Saudi Arabia,

Singapore, Spain, South Africa, Sri Lanka, Sweden, Tanzania, Taiwan, Thailand, Turkey, United Arab Emirates, United Kingdom, United States of America.

- Focused Pavilions: Accessories Pavilion, Alternate Fuel Technologies, Ash Naqli Pavilion, Design Pavilion, Diesel Planet, Engine Pavilion, Garage Equipment, Students Corner.
- Several Concurrent Show: Auto Enterprise 2010 The Big Fair for the Small Enterprises.



Mr Jyotiraditya Scindia, Hon'ble Minister of State for Commerce and Industry, GOI



Mr Ratan Tata, (centre) Chairman Tata Motors Ltd, at the Auto Expo 2010 fair ground



Extreme right: Mr Arun Jaitley, former Hon'ble Minister of Commerce, at the Auto Expo 2010



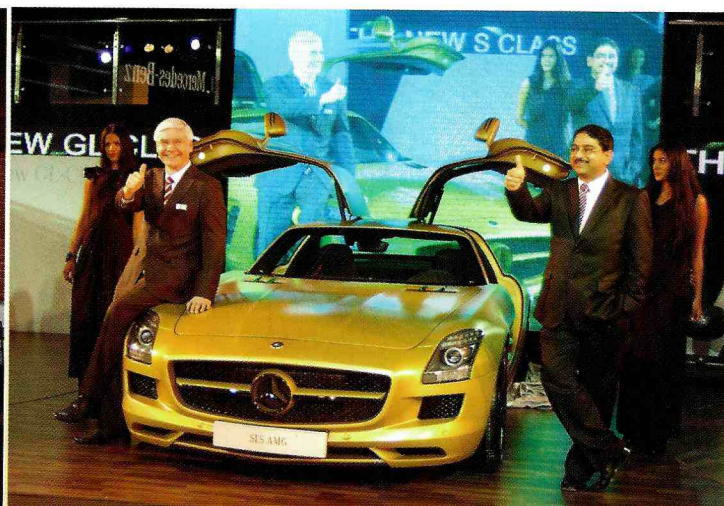
L to R: Dr Pawan Goenka, (2nd from left) President SIAM and Mr R Seshasayee, Managing Director, Ashok Leyland with Ashok Leyland's new Hybus



Mr R Seshasayee, Managing Director, Ashok Leyland with Ashok Leyland's new Hybus



Left: Mr Siddhartha Lal, Managing Director, VE Commercial Vehicles

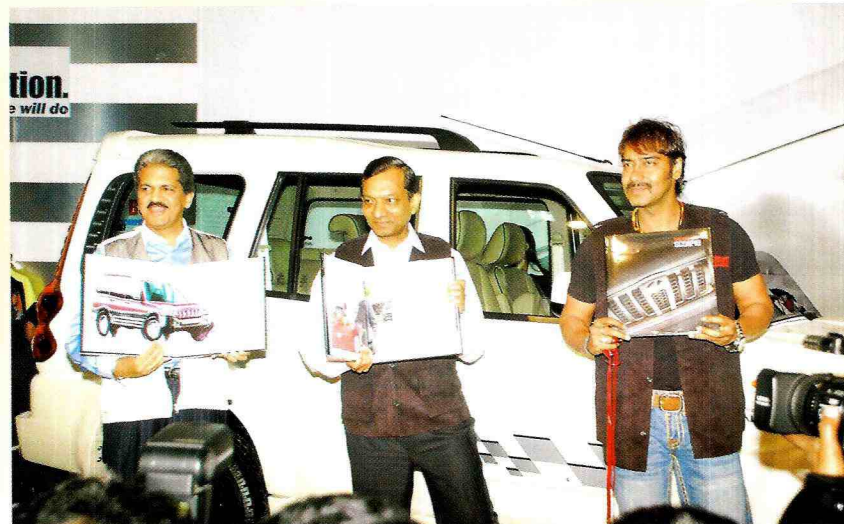


Dr Wilfried Aulbur (left), Managing Director & CEO, Mercedes Benz India at the launch of Mercedes SLS AMG

- 210 exhibitors; 8000 sqmts of area in an Exclusive Pavilion.
- Overwhelming response.
- Concurrent Events: Introduction of Goodwill Day - a Special facilitation of visit by physically challenged people.
- “Ash Nagli” - Theme Pavilion, organized by ACMA, creating awareness about Original and Duplicate products.
- “Vintage & Classic Car Display”, organized in cooperation with HMSI (Heritage Motoring Club of India)
- “Auto Expo - Design the Bookmark Contest the first (offline) event for the School children.
- Introduction of Traffic Marshals inside Pragati Maidan and at main entry points for Traffic Management in association with JK Tyre.
- Road Safety Rallies by School Children.
- No-Honking Campaign in association with Save Earth NGO.
- Free Health Check Up Campaign for Drivers organized by SIAM-SAFE in association with Delhi Traffic Police, DTC and TCI Foundation.
- Nukad Natak on HIV Aids awareness for Drivers, Road Safety Nukad Natak
- Safety Ride Zone for Children By Hyundai Motor (I) Limited.
- Automotive Style Design Contest for Engineering Students.
- Three Wheelers Training Programme organized by SIAM.
- National Road Safety Week - Valedictory function in association with Ministry of Heavy Industries.
- Special Award Ceremony on the occasion of 10th edition and 25 years of Auto Expo for continuous participation in all 10 events and largest participation in categories of Vehicles, Component, SME Sector and Overseas Pavilion.
- IP Round table discussion by SIAM.
- ACMA Golf Day.
- Celebrity Visits.
- Conferences & Seminars: Several Conferences and seminars were organized during the Auto Expo.
- Seminar on “Recycling of Vehicles” by SIAM.
- Seminar on IP Management Through Brand Protection by ACMA.
- Indian Semiconductor Association Conference
- FADA Summit organized by Federation of Automobile Dealers Association.
- 4th Styling & Design Conclave, organized by SIAM.



Mr Shahrukh Khan during the launch of Hyundai i10 Electric



L to R: Mr Anand Mahindra, Vice Chairman & MD, Mahindra & Mahindra, Dr Pawan Goenka, President SIAM & Mr Ajay Devgan



Mr John Abraham (centre) at the Auto Show

- Investment Promotion Seminar - the Road Ahead by ACMA.
- Seminar on Low Carbon Vehicle Technology organized by SIAM in association with Society of Motor Manufacturers & Traders, UK (SMMT).
- Conference on Transport- Transport Solutions for a World-Class City organized by CII.
- One-to-One Meeting with Delegation from All India Motor Transport Officials by SIAM.
- 4th Auto Trade Dialogue 2010, organized by SIAM.
- Export conference by ACMA, Interactive Session with ACMA Office Bearers, Senior Members and Dr Polter, Fraunhofer, Germany
- International Conference on Automotive Infotronics, organized by SIAM.
- Interaction with Young Presidents' Organization delegation by ACMA.
- Visit of Minister of Krecke, Ministry of the Economy & Foreign Trade, Luxembourg.

AUTO SHOW SOUTH



Dr K Rosaiah, Hon'ble Chief Minister of Andhra Pradesh Inaugurating the Auto Show South 2010

The 1st Auto Show South 2010, organized by jointly by Confederation of Indian Industry (CII) and Society of Indian Automobile Manufacturers (SIAM) was successfully concluded on 16th May 2010 at Hitex Exhibition Centre, Hyderabad, Andhra Pradesh, India.

Auto Show South 2010-Hyderabad- the first Regional Auto Show received encouraging response from the industry with the presence of major automobile manufacturers along with accessories showcasing the new gadgets and technologies. Auto Show South 2010 spread across 15,000 sqmtrs was the first such event in the country organized by organizers of Auto Expo series of shows in India.

Around 75 physically challenged people visited the show in a conducted tour and witnessed the latest car display at Goodwill Day, organised after the Media meet on the first day of the show.

The show was inaugurated by Dr K Rosaiah, Chief Minister, Andhra Pradesh, Government of India;

and Mr Akash Passey, Member, Executive Council, Society of Indian Automobile Manufacturers (SIAM) represented SIAM.

Some of the major participants at Auto Show South 2010 included Toyota Kirloskar Motors, TATA Motors, Honda Cars, General Motors, Mahindra & Mahindra, Skoda Automobiles, Hyundai Cars, FIAT Automobiles, Honda Scooters & Motorcycles, TVS Motors, Yamaha India along with companies in Accessories and Tyres.

Some of the special activities conducted for attracted large number of visitors and provided a first hand experience to the visitors Go-Karting by JK Tyres, 4X4 Track by Mahindra & Mahindra, Painting Competition by General Motors, Test Drive by TVS Motors. As a special CSR initiative; and Safety Rides campaign for children and adults organized by Honda Motorcycles & Scooters.

Auto Show South 2010 recorded attendance of over 42,000 visitors. In addition; the event generated over 22000 enquiries number of



Dr K Rosaiah, Hon'ble Chief Minister of Andhra Pradesh addressing the Inaugural programme



Interactive session with select industry representative during Auto Show South 2010



Dr K Rosaiah, Hon'ble Chief Minister of Andhra Pradesh at the Auto Show South



Dr K Rosaiah, Hon'ble Chief Minister of Andhra Pradesh releasing the Catalogue of Auto Show South

instant orders were also booked by dealers. The maiden show also witnessed the visits by Celebrities, Consulates, Government Departments,

Corporates, Auto Enthusiasts besides the visitors looking for upgrading or purchasing new vehicles/ technologies.



SOCIETY & SIAM - SAFE

Society for Automotive Fitness & Environment, SAFE, a SIAM initiative, took several initiatives during the year 2009-2010. SAFE continued to organize programs throughout the year to raise awareness in the area of road safety and better environment with extensive support from Automobile Manufacturers, Traffic Police, Transport and Environment Departments of the respective states.

While SAFE has sought to extend its reach to larger parts of India, it has also remained active at international forums. SAFE participated in the First Ministerial Conference on Road Safety in Moscow on 19th & 20th November 2009 where Ministers from more than 70 countries responsible for road safety as well as leaders from international, regional, governmental and non-governmental organizations from more than 140 countries were present. The high level of representation was conditioned by an intention to work out a joint document – The Moscow Declaration – which gave a start to concerted actions in the field of global road safety and will be introduced for adoption at the UN General Assembly Session.

In keeping with its mission to make the roads safer, particularly for children who constitute the most vulnerable users and who can also work as highly effective change agents to amend the rash road behaviors of their parents, SAFE continued

to undertake initiatives directed towards that end. With the support of automobile manufacturing companies and traffic police, schools, and NGOs, SAFE organized various programs with this target audience in mind throughout the year. These included general awareness campaigns, spearheaded through such events as painting competitions, road safety rallies, and student traffic warden undertakings, the launching of Safety Clubs in select schools from New Delhi, and the beginnings of a self sustainable road safety project on Two Wheeler Safety for senior students attending schools in Delhi and Gurgaon. SAFE also sponsored awards for other road safety initiatives, such as the Annual Road Safety Trophy to the Bal Bhavan Public School, Mayur Vihar, New Delhi given by the Delhi Traffic Police during the inauguration of their Pavilion cum Road Safety Traffic Park on 16th November 2009 at the India International Trade Fair (IITF) 2009 at Pragati Maidan, New Delhi.

SAFE actively pursued its mission of providing quality driver education and training programs to fleets across various segments, from drivers of Delhi Transport Corporation to drivers of Terminal Ballistics Research Laboratory (TBRL), Chandigarh, Instrument Research & Development Establishment (IRDE), Dehradun, and Integrated Test Range (ITR), Balasore, of Defense Research and Development Organization (DRDO) as well as Bus Rapid Transit (BRT) drivers at Ahmedabad.



Mr S K Dash, Joint Secretary (2nd from right), Ministry of Road Transport & Highways and SIAM official at the Moscow Conference



Road Safety Rolling Trophy and cash award to Bal Bhavan Public School, Mayur Vihar, New Delhi



Mr Naresh Kumar, MD, DTC, addressing the drivers and trainers at the training programme



DTC Trainers after completing the training programme



BRT Drivers and officials at Ahmedabad



No Honking Campaign at Auto Expo 2010



Road Safety Awareness activities during National Road Safety Week 2010



SIAM - Maruti Suzuki organized Road Safety Rallies with the support from school children at Auto Expo 2010



Refresher Driver Training Workshop during National Road Safety Week in 2010



Drive for Life Training programme for Delhi Traffic officials, initiative of Ford in association with SIAM & Delhi Traffic Police at New Delhi

SAFE also organized a refresher workshop for Guwahati Traffic Police officers, while interacting frequently with Delhi and other state transport corporations in a bid to facilitate the adoption of transparent driver licensing systems all over India.

Another significant step was taken by SAFE prior to the National Road Safety Week in January 2010. A "Don't Drink & Drive" program organized with support from Delhi Traffic Police, in December 2009 was specifically aimed at curbing irresponsible driving and yielded very positive results. A "Don't Honk" program was similarly organized during

the 10th Auto Expo in January 2010, in partnership with The Earth Saviours Foundation, to create awareness about the growing menace of noise pollution.

Road Safety activities were organized in over 28 States and 3 Union Territories covering 384 cities at 2600 automobiles dealers. Approximately 150 refresher driver training workshops and awareness activities were organized in major states of India and SAFE reached out to and touched approximately 1,00,000 people during the National Road Safety Week in January 2010.



Road Safety Conclave for New Delhi Schools



Road Safety awareness programme with the help of two wheeler simulator



Road Safety Workshop for Traffic Volunteer with Delhi Traffic Police



Road Safety Training programme for Divers during National Road Safety Week 2010



Mr Kamal Nath (2nd from right), Hon'ble Minister of Road Transport & Highways presenting a Recognition Certificate to SIAM



L to R: Mr M S Khandela, Hon'ble State Minister for Road Transport & Highways, Mr Kamal Nath, Hon'ble Minister of Road Transport & Highways, Mr Ajay Chadha, Spl. Commissioner-Traffic, Delhi and Mr S. K. Dash, Jt. Sec. Road Transport & Highways at the valedictory function of National Road Safety Week, 2010 at New Delhi

During the year, SAFE continued Road Safety Awareness Campaigns for three wheeler drivers, wherein the best drivers were awarded cash prizes as well as certificates in recognition of their accident and challan-free driving records. The focus of the Safety Awareness Camps remained the inculcation of soft skills, along with other driving tips and general advice on fuel efficiency and vehicle maintenance. On the sidelines, general health check-up camps were also conducted.



Mr A. Nandkumar (Centre), Eicher Motors giving Participation Certificate to driver



Mr Arvinder Singh Lovely (Centre), Hon'ble Minister for Transport, Govt. of NCT, Delhi handing over cash prize to three wheeler drivers



SIAM-SAFE World Environment Drive 2010



Dealers planting saplings on the occasion of World Environment Day 2010



Free PUC Check Campaign on the day of World Environment Day at dealers network on 5th June 2010



parts of the country to make vehicle owners aware about the importance of safe vehicles and clean environment.

SAFE organized its Annual Convention 2010 at Chandigarh on 5th May 2010 with the theme 'Growth with Responsibility: Ensuring Safety on Roads'. It was organized in association with Ministry of Road Transport & Highways, Transport Department, Government of Haryana, and Chandigarh Traffic Police and received support from All India Federation of Motor Vehicles Department, and Confederation of Indian Industries. The annual convention was inaugurated by Guest of Honor, Mr R R Jowel, Transport Commissioner, Government of Haryana, along with other dignitaries and bureaucrats from the ministry. Dr Pawan Goenka, President, SIAM, Mr M P Shah, President, FADA, and Mr Harjeet Singh, President, SAFE, launched the Voluntary SAFE Service Certification concept to be introduced at service centers very soon.

Officials from different automotive companies shared their knowledge, experiences and practices followed to make roads safer for the people. There were also officials from transport and police departments from Delhi, Haryana, Punjab, Karnataka, Andhra Pradesh, Himanchal Pradesh, Rajasthan, Tamil Nadu, Kerala and Orissa.

This event registered a significant footfall from representatives of the Ministries, Transport, Police, Environment, Auto Components and Automobile Manufacturers, Academicians, Students, NGOs and others working for improvement of Environment and Road Safety.



Mr R R Jowel, Transport Commissioner, Government of Haryana, addressing at the SAFE Annual Convention 2010 at Chandigarh



Launch of SAFE Service Certificate at SAFE Annual Convention 2010



Mr S Garg, Joint Transport Commissioner- Traffic, Delhi Traffic Police addressing at the session on Best Practices adopted by Enforcement Departments in improving Road Safety



Prof. Dinesh Mohan, Coordinator, TRIPP, IIT Delhi, making a presentation during the session on Accident Analysis: Preventing Road Fatalities



Panelist at the Panel Discussion on steps to be taken to reduce fatalities on our roads.

OVERVIEW OF AUTOMOBILE INDUSTRY

INDUSTRY PERFORMANCE IN 2009-2010

The cumulative production data for April-March 2010 shows production growth of 25.76 percent over same period last year. Passenger vehicles production crossed 2 million and two wheelers production crossed 10 million.

DOMESTIC SALES

Passenger Vehicles segment during April-March 2010 grew at 25.57 percent over same period last year. Passenger Cars grew by 25.10 percent, Utility Vehicles grew by 20.88 percent and Multi Purpose Vehicles grew by 40.94 percent in this period.

The overall Commercial Vehicles segment registered positive growth at 38.31 percent during April-March 2010 as compared to the same period last year. Medium & Heavy Commercial Vehicles (M&HCVs) registered growth at 33.55 percent and; Light Commercial Vehicles grew at 42.67 percent. However, Medium & Heavy Commercial Vehicle sales during the period is still lower than 2006-07.

Three Wheelers sales recorded a growth rate of 25.92 percent in April-March 2010. While Passenger Carriers grew by 30.25 percent during April-March 2010, Goods Carriers grew at 11.62 percent.

Two Wheelers registered a growth of 26.00 percent during April-March 2010. Mopeds, Scooters and Motorcycles grew by 30.93 percent, 27.40 percent and 25.88 percent respectively.

EXPORTS

During April-March 2010, overall automobile exports registered a growth rate of 17.90 percent.

Passenger Vehicles, Commercial Vehicles, Three wheelers and two wheelers segment, grew by 32.89 percent, 5.59 percent, 17.03 and 13.54 percent respectively in this period.

INDUSTRY PERFORMANCE: FIRST QUARTER OF 2010-2011

The overall production data for April-June 2010 shows production growth of 33.27 percent over same period last year with industry producing 4,091,485 vehicles.

DOMESTIC SALES

Passenger Vehicles segment in April-June 2010 grew at 32.70 percent over same period last year. Passenger Cars grew by 33.43 percent, Utility Vehicles grew by 25.36 percent and Multi Purpose Vehicles grew by 39.19 percent in April-June 2010 over same period last year.

The overall domestic sale of Commercial Vehicles segment registered growth at 54.72 percent in April-June 2010 as compared to the same period last year. Medium & Heavy Commercial Vehicles (M&HCVs) registered growth at 83.12 percent and Light Commercial Vehicles grew at 35.68 percent.

During April-June 2010, Three Wheelers sales recorded a growth rate of 15.17 percent. While Passenger Carriers grew by 16.53 percent and Goods Carriers grew at 9.98 percent in this period.

Two Wheelers registered a growth rate of 27.60 percent in April-June 2010. Scooters, Mopeds and Motorcycles grew by 48.18 percent, 24.39 percent and 24.13 percent respectively.

EXPORTS

In April-June 2010, overall automobile exports registered a growth rate of 59.30 percent.

Passenger Vehicles, Two Wheelers, Commercial Vehicles and Three Wheelers segments grew by 11.20 percent, 67.50 percent, 103.37 percent and 150.33 respectively in April-June 2010 over April-June 2009.

AUTOMOBILE PRODUCTION TRENDS

CATEGORY	NUMBER OF VEHICLES				
	2005-06	2006-07	2007-08	2008-09	2009-10
Passenger Cars	1,046,133	1,238,021	1,426,212	1,516,967	1,926,484
Utility Vehicles	196,506	222,495	246,038	219,498	272,848
MPVs	66,661	84,707	105,333	102,128	151,908
TOTAL PASSENGER VEHICLES	1,309,300	1,545,223	1,777,583	1,838,593	2,351,240
M&HCVs	219,295	294,258	294,957	192,283	250,171
LCVs	171,788	225,724	254,049	224,587	316,437
TOTAL COMMERCIAL VEHICLES	391,083	519,982	549,006	416,870	566,608
Three Wheelers	434,423	556,126	500,660	497,020	619,093
Scooters	1,021,013	943,944	1,074,933	1,161,276	1,494,409
Motorcycles	6,207,690	7,112,281	6,503,532	6,798,118	8,444,852
Mopeds	379,994	379,987	430,827	436,219	571,070
Electric Two Wheelers	-	30,454	17,389	24,179	2,558
TOTAL TWO WHEELERS	7,608,697	8,466,666	8,026,681	8,419,792	10,512,889
Grand Total	9,743,503	11,087,997	10,853,930	11,172,275	14,049,830

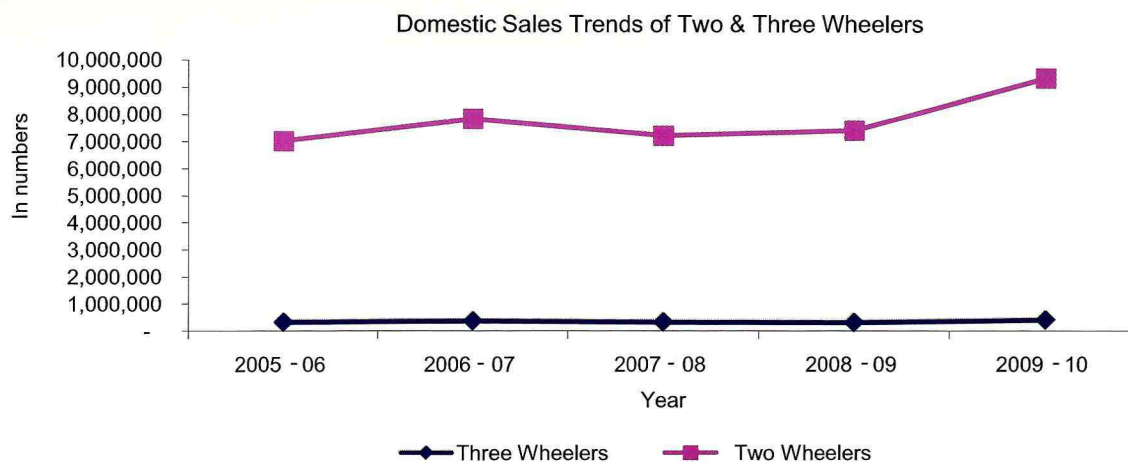
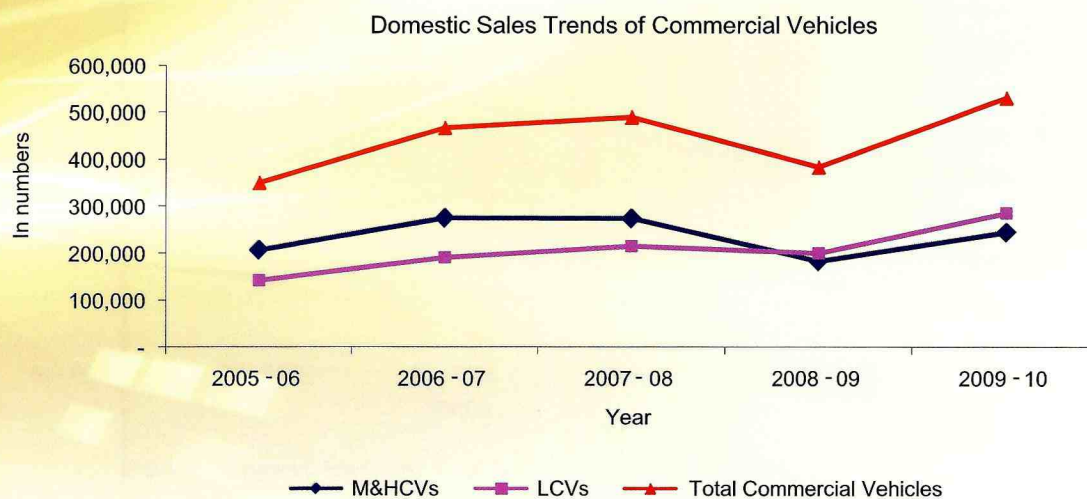
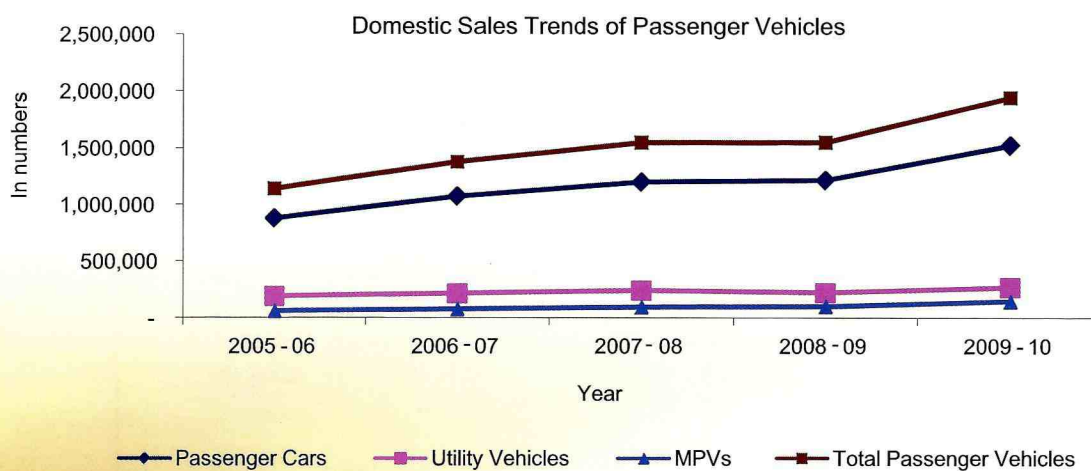
AUTOMOBILE DOMESTIC SALES TRENDS

CATEGORY	NUMBER OF VEHICLES				
	2005-06	2006-07	2007-08	2008-09	2009-10
Passenger Cars	882,208	1,076,582	1,203,733	1,220,475	1,526,787
Utility Vehicles	194,502	220,306	245,284	225,621	272,733
MPVs	66,366	83,091	100,865	106,607	150,256
TOTAL PASSENGER VEHICLES	1,143,076	1,379,979	1,549,882	1,552,703	1,949,776
M&HCVs	207,472	275,556	274,582	183,495	245,058
LCVs	143,569	192,209	215,912	200,699	286,337
TOTAL COMMERCIAL VEHICLES	351,041	467,765	490,494	384,194	531,395
Three Wheelers	359,920	403,910	364,781	349,727	440,368
Scooters	909,051	940,617	1,050,109	1,148,007	1,462,507
Motorcycles	5,810,599	6,547,195	5,768,342	5,831,953	7,341,139
Mopeds	332,741	354,760	413,759	431,214	564,584
Electric Two Wheelers	-	29,762	17,068	26,445	3,001
TOTAL TWO WHEELERS	7,052,391	7,872,334	7,249,278	7,437,619	9,371,231
Grand Total	8,906,428	10,123,988	9,654,435	9,724,243	12,292,770

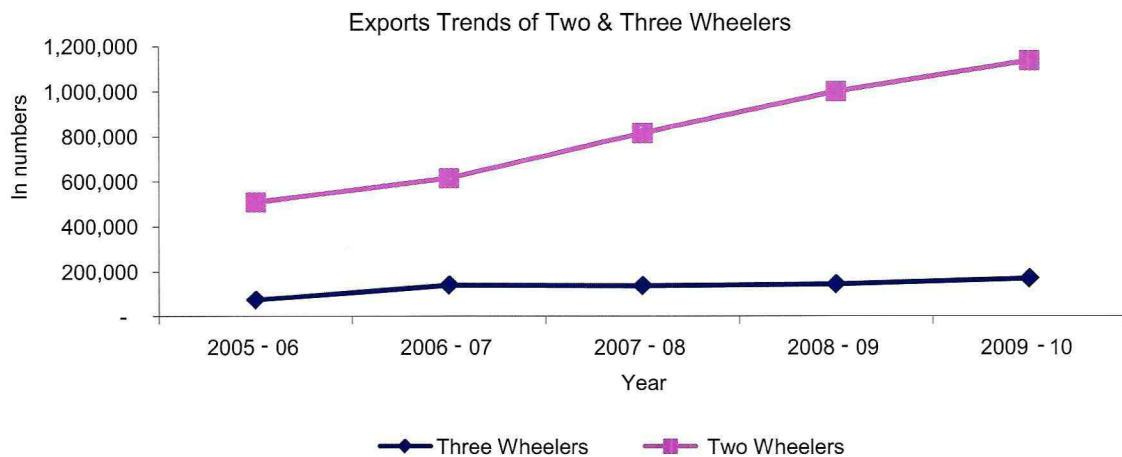
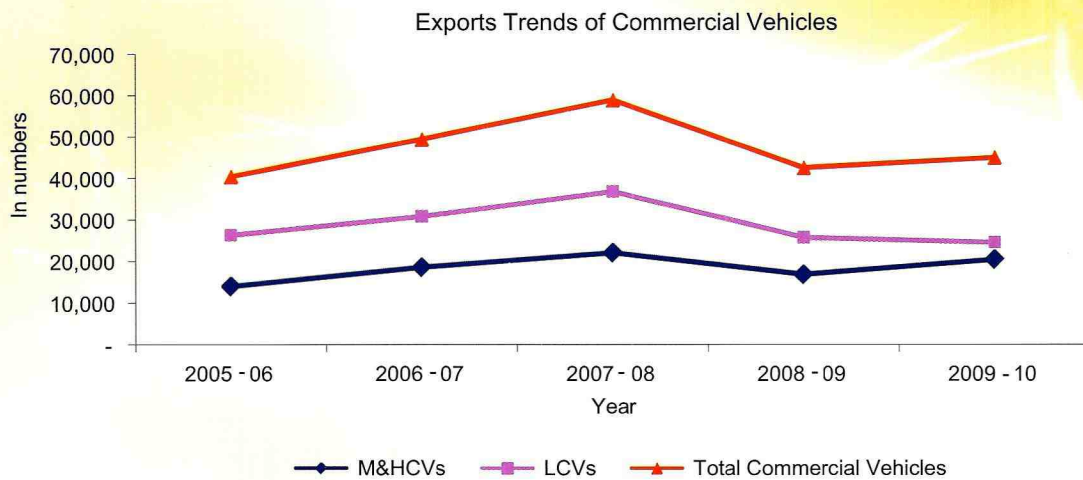
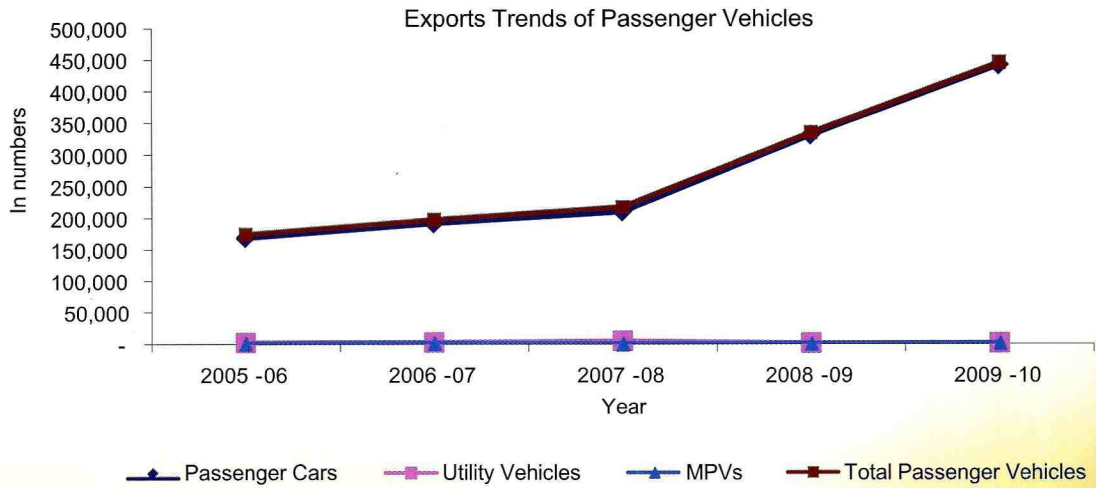
AUTOMOBILE EXPORTS TRENDS

CATEGORY	NUMBER OF VEHICLES				
	2005-06	2006-07	2007-08	2008-09	2009-10
Passenger Cars	169,990	192,723	211,112	331,535	441,710
Utility Vehicles	4,489	4,399	6,283	3,034	2,823
MPVs	1,093	1,330	1,006	1,160	1,613
TOTAL PASSENGER VEHICLES	175,572	198,452	218,401	335,729	446,146
M&HCVs	14,078	18,610	22,093	16,819	20,423
LCVs	26,522	30,927	36,901	25,806	24,584
TOTAL COMMERCIAL VEHICLES	40,600	49,537	58,994	42,625	45,007
Three Wheelers	76,881	143,896	141,225	148,066	173,282
Scooters	83,934	35,397	25,482	25,816	30,125
Motorcycles	386,054	545,592	776,007	971,018	1,103,104
Mopeds	43,181	38,655	18,224	7,300	6,905
Electric Two Wheelers	-	-	-	40	50
TOTAL TWO WHEELERS	513,169	619,644	819,713	1,004,174	1,140,184
Grand Total	806,222	1,011,529	1,238,333	1,530,594	1,804,619

Automobile Domestic Trends



Automobile Export Trends



SIAM OFFICE BEARERS

SIAM Executive Committee 2009-2010

COMPANY	MEMBERS	ALTERNATE MEMBERS
Mahindra & Mahindra Ltd	Dr Pawan Goenka President	Mr Ketan Doshi
Eicher Motors Ltd	Mr S Sandilya Vice President	
Ashok Leyland Ltd	Mr R Seshasayee	Mr Vinod K Dasari
Bajaj Auto Ltd	Mr Rajiv Bajaj	Mr Pradeep Srivastava
Cummins India Ltd	Mr Anant J Talaulicar	Mr Arun Ramachandran
Ford India Pvt Ltd	Mr Michael Boneham	Mr Kuljit Rana
General Motors India Pvt Ltd	Mr Karl Slym	Mr P Balendran
Hero Honda Motors Ltd	Mr Pawan Munjal	
Hyundai Motor India Ltd	Mr H S Lheem	Mr Arvind Kumar Saxena
Maruti Suzuki India Ltd	Mr S Nakanishi	Mr I V Rao
Mercedes-Benz India	Dr Wilfried Aulbur	Mr S M Kadlaskar
Piaggio Vehicles Pvt Ltd	Mr Ravi Chopra	
Royal Enfield	Mr R L Ravichandran	Mr Ventakesh Padmanabhan
Toyota Kirloskar Motor Pvt Ltd	Mr Hiroshi Nakagawa	Mr Shekar Viswanathan
TVS Motor Company Ltd	Mr Venu Srinivasan	
TVS Motor Company Ltd	Mr K N Radhakrishnan	
Volkswagen India Pvt Ltd	Mr Joerg Mueller	Mr K K Swamy
TATA Motors Ltd	Mr Ravi Kant	
TATA Motors Ltd	Mr Prakash M Telang	

COUNCILS & GROUPS

A. COUNCIL ON INTERNATIONAL BUSINESS



Chairman: (Left) **Mr R Seshasayee**, Managing Director, Ashok Leyland Ltd

Co-Chairman: **Mr R Santhanam**, Managing Director, Hindustan Motors Ltd

The Council on International Business has been constituted to enable SIAM achieve the aim of 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: **Mr Ketan Doshi**, Head-New Business Development, Mahindra & Mahindra Ltd

SIAM Trade Policy Group deliberated and provided inputs on trade related issues, pertaining to WTO and India's Free Preferential Trade Agreements. SIAM gave suggestions to the Ministry of Commerce & Industry and Ministry of Heavy Industries and Public Enterprises on the items relating to Automotive sector and other related issues like TBT Agreement, etc.



2. INTERNATIONAL RELATIONS GROUP

Chairman: **Mr A S Puri**, Sr. General Manager (Govt Affairs & Collaborations), Tata Motors Ltd

SIAM International Relations Group worked towards establishing relations with other international associations and embassies of several countries. Its activities are geared to establish positive image of Indian automobile industry. The Group also spearheads SIAM initiatives on various international platforms like APEC Automotive Dialogue, etc. SIAM also entered into a MoU with Indonesia's Automotive Association.



3. EXPORTS GROUP

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

The Group aims to facilitate members get market access by helping members get export support from government. It provides inputs to the Government for the preparation of 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**, Managing Director, Ford India Pvt Ltd

The Demand Management Council was constituted keeping in view the growing ambition and targets of the industry. While the Council comprises of Groups focusing on each of the vehicle segments, it also covers areas that acquire importance with the growing size of the industry like finance availability, logistics & insurance facility, used vehicle business, participation in domestic trade fairs and vehicle categorization.





1. VEHICLE CLASSIFICATION, SALES REPORTING AND ANALYSIS GROUP

Chairman: (Left) **Mr Rajiv Dube**, President (PCBU), Tata Motors Ltd
Co-Chairman: **Mr Jnaneshwar Sen**, Sr. Vice President (Sales & Marketing), Honda Sael Cars India Ltd

The Group approached the Passenger Car CEOs Council and the MUV CEOs council to resolve outstanding issues of the Group. The new vehicle classification is now ready and now will be implemented from next financial year.



2. TRADE FAIRS GROUP

Chairman: **Mr Sudhir Mehta**, Managing Director, Force Motors Ltd

Apart from organizing the AutoExpo 2010, the Group for the very first time organized a Regional show "Auto Show South" in Hyderabad in May 2010 with huge success, and plans to do a similar show in Kolkata in November 2010 called the "Auto Show East". The Group is acting as the Organizing Committee for the 11th AutoExpo and other shows.



3. LOGISTICS GROUP

Chairman: **Mr M M Singh**, Managing Executive Officer, Maruti Suzuki India Ltd

The Group works on Inbound & Outbound logistics covering Railways, Roadways and Ports. As a result of the Logistics Group interactions with Railway Board, one auto hub was inaugurated at Shalimar and a specific Auto Hub Policy was announced. A dedicated Automobile Freight Train Operator's policy was also announced. This Group is also interacting with international experts to derive optimum benefits of the policy. It is now interacting with possible 3rd party logistics providers to take benefit of the above policies for outbound as well as inbound logistics. Collaboration amongst members for road transports is also taking place.



4. RETAIL GROUP

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

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

The Group is working towards making Pre-owned/Used vehicle business attractive for players and is interacting with State Government at all levels to ensure that hurdles in retail business are minimized.



5. SERVICE HEAD GROUP

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

Co-Chairman: **Mr Rajesh Mukhija**, Deputy General Manager, Hero Honda Motors 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 Chandershekar**, Special Director & CIO, Ashok Leyland Ltd

Co-Chairman: **Mr Vijay Sethi**, Vice President (Information Systems) & CIO, Hero Honda Motors 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: **Mr Abhay Firodia**, Chairman & Managing Director, Force Motors 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: **Mr Sudam Maitra**, Managing Executive Officer (Supply Chain), Maruti Suzuki India Ltd

SIAM Sourcing Group has created a platform for bringing together the Sourcing Heads of various companies. The Group has initiated a monthly analysis of prices of various raw materials and is working with ACMA to develop appropriate course for imparting training to the suppliers. In the current environment, when the Safeguard Duty/ Antidumping duty imposition is being considered on various raw materials and components, the Group is engaged in close dialogue with relevant government bodies to preempt any such duty imposition.



2. ECONOMIC RESEARCH GROUP

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

SIAM Economic Research Group has been constituted to spearhead industry research and provide inputs to the members. The Group is working on developing a forecasting report for the members. It also invites various experts for brainstorming sessions. The Group provides valuable inputs in organizing the annual SIAM 'Looking Ahead' Conclave.



3. TAXATION POLICY GROUP

Chairman: (Left) **Mr Rajiv Kapoor**, President & CEO Fiat India Automobiles Pvt 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. Inputs were provided to the Government to on a regular basis throughout the year on various issues like Direct Taxes Code, Goods & Services Tax, etc.





4. TAXATION PROCEDURAL GROUP

Chairman: **Mr D D Goyal**, Chief General Manager, Maruti Suzuki India Ltd

SIAM Taxation Procedural Group, apart from preparation of Pre-Budget & Post-Budget Memorandum on Procedural issues, organized various knowledge sharing and mutual problem solving sessions. Several Group members made presentations. An interactive session was organized with Ministry of Finance Officials.

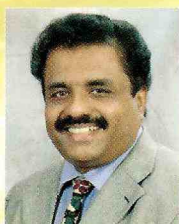


5. FINANCE, LEASING & INSURANCE GROUP

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

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

The Group is working on establishing and enhancing relationship with the Finance Industry, Leasing Industry and the Insurance Industry. This Group initiated a dialogue with Finance Companies to ensure greater transparency and risk grading in the credit delivery system, the Group worked with stakeholders to prepare guidelines on repossession. The Group also aims to work on all the issues affecting the industry and is in the process of preparing reports on issues faced by different vehicle segments. It also interacts with the General Insurance Council (GIC).

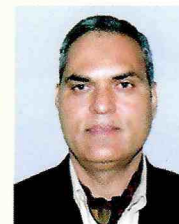


6. HUMAN CAPITAL GROUP

Chairman: (Left) **Mr Prince Augustin**, Executive Vice President, Mahindra & Mahindra Ltd

Co-Chairman: **Mr Yash Yadav**, Vice President-Human Resources, General Motors India Pvt Ltd

The Group worked in the following areas - Learning & Development, Workforce Development/ITI, Compensation & Industrial Relations. The Group organized the 1st SIAM HR Conclave in February 2010 in New Delhi, attended by HR Heads of not only Automobile Sector but also by various other industries and was a huge success. The Group is working on a Pilot project - Automotive Skill Development Council (ASDC) which is funded by National Skill Development Corporation (NSDC).



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. Actions taken under the umbrella of SIAM would have better impact leading to increase in profits of Automobile Industry and the Government.

D. TECHNICAL COUNCIL



Chairman: (Left) **Dr Wilfried Aulbur**, MD & Chief Executive Officer, Mercedes Benz India Pvt Ltd

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

The objective of forming a new apex Technical Council was to seek report from all the SIAM Technical Groups and seek guidance for 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

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

Co-Chairman: **Mr Rao Chalasani**, Director (Future Programmes), General Motors India Pvt. Ltd

The Group aims to develop alternate propulsion technologies. The Group is working towards establishing of Indian Hydrogen Association.



2. RECYCLING GROUP

Chairman: (Left) **Capt Mohan Ram**, Advisor, TVS Motor 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 interacts with international experts and recently represented the country in International Automobile Recycling Congress in Munich.



3. DIESEL IMAGE GROUP

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

Co-Chairman: **Mr K K Swamy**, Vice President & Managing Director, Volkswagen India Pvt Ltd

The Group works towards improvisation of Diesel image/ amongst consumers, Government and Non Government agencies etc through various media such as Seminars, Conferences and Exhibitions etc.



4. AUTO INFOTRONICS GROUP

Chairman: (Left) **Mr Aravind Bharadwaj**, Chief Executive Officer-Automotive Infotronics Pvt Ltd

Co-Chairman: **Mr CS Venkatraman**, General Manager (Electric & Electronics), Tata Motors Ltd

The Group aims to promote the use of Infotronics in India and facilitate public private partnership between different Government departments and private enterprises. The Group has developed a high level operational blue print to establish a common roadmap for Automotive Infotronics in India.



5. EV & HEV GROUP

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

Co-Chairman: **Mr Girish M Rakhe**, President (Indian Operations), Reva Electric Car Company Pvt Ltd

The Group aims to develop India as a global leader of low cost electric/ hybrid electric propulsion technologies through development of viable and indigenous technologies.





6. STYLING & DESIGN GROUP

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

Co-Chairman: **Mr Elias Abraham**, Vice President (Styling & Design) TVS Motors Company Ltd

The Styling and Design Group was set up to give greater exposure and enabling atmosphere to the designer's community. The Group initiated industry academia dialogue by meeting all the major engineering & design institutes in India. The Group plans to organize 3rd Automotive Design Challenge (ADC) and 5th Styling & Design Conclave in January 2011.



E. NATIONAL & INTERNATIONAL REGULATION COUNCIL



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

Co-Chairman: **Mr A Ramasubramaniam**, President, Asia Motor Works 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. Issues related to emission regulations, fuel efficiency and vehicle safety fall in the purview of the Council.



1. EMISSIONS & CONSERVATION GROUP

Chairman: (Left) **Mr J K Deb**, Vice President-Engineering & Development, Fiat India Automobile Pvt Ltd

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

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



2. CMVR & SAFETY REGULATIONS GROUP

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

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

The Group focuses on vehicle safety regulations. It provides inputs on drafts standards, alignment of existing AIS and IS to advanced levels of ECE Regulations and EEC Directives.



3. TWO WHEELERS GROUP

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

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



4. THREE WHEELERS GROUP

Chairman: **Mr S Sane**, Head (Engineering), Piaggio Vehicles Pvt Ltd

The Group takes up technical issues related to Three wheelers viz, emission regulations and safety regulations as per the principal guidelines laid under National and International Regulations Council.



5. INTERNATIONAL HARMONIZATION GROUP

Chairman: (Left) **Mr T M Balaraman**, General Manager(ES), Bajaj Auto Ltd

Co-Chairman: **Mr P K Banerjee**, Deputy General Manager, ERC, Tata Motors Ltd

This Group reviews the new requirements of the harmonization process and submits SIAM comments to international bodies from time to time. SIAM participates in W9.29, IMMA and OICA meetings held on regular basis.



F. COMMERCIAL VEHICLES CEO'S COUNCIL



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

The Council aims to ensure sustainable growth of the segment and also works with Government/Stakeholders on segment-specific issues. Some of the issues that the Council has identified relates to 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 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 Rajiv Bajaj**, Managing Director, Bajaj Auto Ltd

The Two Wheelers CEOs Council is constituted to address issues and concerns specific to the Two Wheelers segment. It aims to work in the following areas - reclassification of Two Wheelers in SIAM classification, introduction of Model-wise data like Passenger Vehicles, identifying demand generation measures, etc.

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. It finalized the new vehicle classification for Passenger Cars.

J. MUVS CEO'S COUNCIL



Chairman: **Mr Shekhar Viswanathan**, *Director, Toyota Kirloskar Motors Pvt Ltd*

The MUVs CEOs Council is constituted to address issues and concerns specific to the MUVs segment. Some of the issues that the Council had identified are: Extension of tax refund benefit to MUV vehicles up to 13 seats registered as taxi, Excise duty implication on introduction of GST, reclassifying the segment, etc.

K. BUS CEO'S COUNCIL



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

The Bus CEOs Council aims to work in the following areas - development of a Multimodal 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). The Council during the year had several discussions with various Government Departments, especially Ministry of Urban Development, Ministry of Road Transport & Highways and Ministry of Heavy Industries & Public Enterprises regarding the JNNURM Scheme implementation.

SAFE - SOCIETY FOR AUTOMOTIVE FITNESS & ENVIRONMENT



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

Vice President SAFE: **Mr S V Suderson**, *Deputy General Manager, Daimler India Commercial Vehicles Pvt Ltd*

SAFE works to generate awareness among stakeholders on issues of cleaner and safer environment and aims to be a catalyst in the automobile industry's endeavor to fulfill its commitment. It supports and enhances the industry's role as a responsible corporate citizen in the country. SAFE organizes seminars with State Governments & other stakeholders and also organizes Road Safety awareness campaign for students, drivers and public at large.



SIAM PAST PRESIDENTS

Year	Name	Company
1960	Mr Lalchand Hirachand*	Premier Automobiles Ltd
1961	Sir L P Misra*	Hindustan Motors Ltd
1962 & 1963	Mr A E L Collins*	Ashok Leyland Ltd
1964	Mr Keshub Mahindra	Mahindra & Mahindra Ltd
1965 & 1966	Dr M A Chidambaram*	Automobile Products of India Ltd
1967 & 1968	Mr K V Srinivasan*	Standard Motor Products of India Ltd
1969	Mr A H Tobaccowala	Tata Engineering. & Locomotive Co Ltd
1970 & 1971	Mr A Sivasailam	Simpson & Co Ltd
1972 & 1973	Mr N K Firodia*	Bajaj Tempo Ltd
1974 & 1975	Mr J E Talaulicar	Tata Engineering. & Locomotive Co Ltd
1976 & 1977	Mr Rahul Bajaj	Bajaj Auto Ltd
1978 & 1979	Mr P N Vencatesan	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 Bhatler	Hindustan Motors Ltd
1988/89 & 1989/90	Mr B De Souza*	Mahindra & Mahindra Ltd
1990/91 & 1991/92	Mr Abhay Firodia	Bajaj Tempo Ltd
1992-1993	Mr Subodh Bhargava	Eicher Motors Ltd
1993/94 & 1994/95	Mr Vinod L Doshi*	Premier Automobiles Ltd
1995/96 & 1996/97	Mr Brijmohan Lall	Hero Honda Motors Ltd
1997/98 & 1998/99	Mr V M Raval	Tata Engineering & Locomotive Co Ltd
1999/00 & 2000/01	Mr Venu Srinivasan	TVS Motor Company Ltd
2001/02 & 2002/03	Mr R Seshasayee	Ashok Leyland Ltd
2003/04 & 2004/05	Mr Jagdish Khattar	Maruti Udyog Ltd
2005/06 & 2006/07	Mr Madhur Bajaj	Bajaj Auto Ltd
2007/08 & 2008/09	Mr Ravi Kant	Tata Motors Ltd

* Since deceased

SIAM MEMBERS

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

AFFILIATION WITH OTHER INSTITUTIONS

INDIA

All India Motor Transport Congress
Alloy Steel Producers Association
Aluminum Association of India
Association of Indian Forging Industry
Association of State Road Transport Undertakings
Asian Development Bank
Automotive Component Manufacturers Association of India
Automotive Tyre Manufacturers Association
Automotive Services Equipments Association
Bureau of Indian Standards
Centre for High Technology
Central Institute of Road Transport
Central Road Research Institute
Confederation of Indian Industry
Delhi Transport Corporation
Federation of Automobile Dealers Association
Indian Auto LPG Coalition
Indian Diesel Engine Manufacturers Association
Indian Institute of Petroleum
Indian Machine Tool Manufacturers Association
Indian Institute of Metals
Indian Institute of Technology
Indian Rubber Institute
Indian Institute of Foreign Trade
Insurance Regulatory and Development Authority
International Centre for Automotive Technology
Institute of Road Traffic Education
National Institute of Design
National Automotive Testing and R&D Infrastructure Project
Petroleum Federation of India
Research & Information Systems for Non-aligned and Other Developing Countries
Technology Information Forecasting and Assessment Council

Tractor Manufacturers Association

The Automotive Research Association of India

The Energy and Resources Institute

United States Agency for International Development

Vehicle Research & Development Establishment

World Bank

Western India Automobile Association

SAFE

AFFILIATION WITH OTHER INSTITUTIONS

OVERSEAS

ASEAN Automotive Federation (AAF)
 Asia Pacific Economic Cooperation Automotive Dialogue (APEC AD)
 Asian Motorcycle Union (UAM)
 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
 Comité des Constructeurs Français d'Automobiles (CCFA), France
 China Association of Automobile Manufacturers (CAAM), P R China
 Clean Air Initiatives of Asian Cities (CAI-Asia)
 European Automobile Manufacturers Association (ACEA), Europe
 Federal Chamber of Automotive Industry (FAI), Australia
 Federation of Asia Motorcycle Industries (FAMI), Singapore
 Federation of Nepal Chamber of Commerce & Industry, Nepal
 Fuels and Lubes Asia (F&L Asia)
 Global Automotive Industry Dialogue (GAID)
 Indonesian Automotive Industry Association (GAIKINDO), Indonesia
 Indonesian Motorcycle Industry Association, Indonesia
 International Motorcycle Manufacturers Association (IMMA)
 International Organization of Motor Vehicle Manufacturers/Organisation/ Internationale des Constructeurs d'Automobiles (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
 Motorcycle Development Program Participants Association, Philippines
 National Alternative Fuel Training Consortium, USA
 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 Ceylon Motor Traders' Association (CMTA), Sri Lanka
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
US Department of Commerce, USA
US Department of Energy, USA
US Environment Protection Agency, USA
Vietnam Register, Vietnam
Verband der Automobilindustrie e.v. (VDA), Germany
World Wide Fuel Charter
The Indonesia Automotive Federation (FOI)
FEMA – Federation of European Motorcycles Association

CONTACT US

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