

ANNUAL REPORT

2007-2008



SIAM

Society of Indian Automobile Manufacturers

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2007 - 2008



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PRESIDENT'S MESSAGE



I am very happy to present the Annual Report of the Society of Indian Automobile Manufacturers for the year 2007-2008.

The year gone by was extremely exciting and challenging. The automobile industry addressed several issues commendably, putting the Indian automobile industry on the global map. With a view to achieve the targets set out in the Automotive Mission Plan 2006-2016 (AMP), the industry has pledged over \$ 19 billion additional investments. To meet the mobility needs of the people of India in a sustainable manner, the industry is striving to develop new products incorporating new and improved technologies.

However, this year also saw that most segments have not grown as anticipated due to a variety of reasons, mostly external to the industry.

The cumulative growth of the Passenger Vehicles segment during April – March 2008 was 12.17 per cent. Passenger Cars grew by 11.79 per cent, Utility Vehicles by 10.57 per cent and Multi Purpose Vehicles by 21.39 per cent in this period.

The Commercial Vehicles segment grew marginally at 4.07 per cent. While Medium & Heavy Commercial Vehicles declined by 1.66 per cent, Light Commercial Vehicles recorded a growth of 12.29 per cent.

Sales of Three wheelers fell by 9.71 per cent, with sales of Goods Carriers declining drastically by 20.49 per cent and those of Passenger Carriers declining by 2.13 per cent during April- March 2008, compared to the previous year.

Two wheelers registered a negative growth rate of 7.92 per cent during this period, with Motorcycles and Electric Two wheelers declining by 11.90 per cent and 44.93 per cent, respectively. However, Scooters and Mopeds grew by 11.64 per cent and 16.63 per cent respectively.

Automobile Exports registered a growth of 22.30 per cent during the current financial year. The growth was led by the Two wheelers segment, which grew at 32.31 per cent. Exports of Commercial Vehicles and Passenger Vehicles grew by 19.10 per cent and 9.37 per cent, respectively. Exports of Three wheelers declined by 1.85 per cent.

On the domestic front, the main problems were high interest rates and unavailability of consumer finance, especially in rural areas. Coupled with these factors, appreciation in price of fuel significantly affected the industry and the growth of all the segments fell drastically, if not registered negative growth. In some segments like Two wheelers & Three wheelers and Commercial Vehicles, the sales came at a significant cost to the companies by way of discounts, subsidies, interest etc. On the export front, the appreciating rupee had its impact on the industry. The auto industry is passing through very difficult period on account of unprecedented increase in price of input materials, more particularly steel which forms a substantial component of materials. This is putting tremendous pressure on the bottomline of the entire industry.

SIAM took these issues as a challenge and met the Government authorities at the highest level so that these externalities could be addressed. The decline in the industry's performance if not checked would result in reversal of growth trends, impacting revenues and consequent investments which may lead to under achievement of AMP Goals.

We understand that the Government is currently going through a dilemma whether to promote growth or check rising inflation. However, the Union Budget 2008-09's proposals reflected the intentions of the Government to promote the automobile manufacturing in India. Some of the measures like reduction in excise duties and taxes, especially on small cars, two & three wheelers and buses would have positive impact on the industry.

The year also saw several new issues of importance emerging. Discussions on fuel efficiency gained momentum in the backdrop of rising petroleum prices. The draft Bharat Stage IV emission notification, which is extremely important



PRESIDENT'S MESSAGE

for the industry for vehicles post April 2010, was issued by the Government this year. The safety roadmap has also been prepared and it has been decided by the Government that implementation would be linked to the availability of facilities and infrastructure. Also renewed efforts at standardisation and harmonisation kept us engaged during the year. Even trade negotiations, both at the multilateral and bilateral levels, moved significantly during the year. I am pleased to report that SIAM has till now been able to protect its sensitive items and also convince the Government of India that Product Specific Rules of Origin are necessary for the automobile industry.

To streamline activities of SIAM, we had reoriented the entire structure of our Committees and Task Forces and Working Groups and introduced a two-tier structure where each committee – currently called a Group is attached to a Council. Each Council is headed by a Past President or a very senior CEO who is also a member of the SIAM Executive Committee. I am very happy to note that not only the

Groups which existed before but also the new Groups are actively pursuing the agenda chartered out by them.

I would like to take this opportunity to congratulate all the Chairmen and Co-Chairmen of the Groups and Councils for spearheading activities on behalf of SIAM. Also, I congratulate members for participating in SIAM's safety related activities. Your active participation has enabled us to contribute significantly towards safety awareness.

Auto Expo 2008, one of the major events that took place this year, attracted visitors from all over the world. Auto Expo has become a benchmark event in this part of the world and we hope to continuously improve and establish this as a major international automotive event.

Finally, I would like to take this opportunity to thank all the members of SIAM and other stakeholders for their continued support and advice which has been instrumental in ensuring that the desired results are achieved.



Ravi Kant

September 4, 2008



ABOUT SIAM

Society of Indian Automobile Manufacturers (SIAM), a not-for-profit organisation, 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 endeavours to improve the industry's competitiveness, create an environment to promote mobility, internationalise 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 policies, rules and regulations 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 organises 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 overseas.

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

ANNUAL CONVENTION 2007

Implementing Automotive Mission Plan 2006-2016: Ensuring Sustainable Growth

The SIAM Annual Convention was held on September 5, 2007 in New Delhi. It was inaugurated by Mr. Sontosh Mohan Dev, Minister of Heavy Industries and Public Enterprises. Mr. Dev said that the automotive industry has consistently recorded double-digit growth and now has a turnover of US\$ 35 billion. The Automotive Mission Plan 2006-2016 (AMP) aims at making India a global auto hub.

Mr. Vilas Muttemwar, Minister of New and Renewable Energy and Mr. Kamal Nath, Minister of Commerce and Industry were the Guests of Honour. Mr. Brahm Dutt, Secretary, Department of Road Transport and Highways, Mr. M Ramachandran, Secretary, Ministry of Urban Development and Dr. T Ramaswami, Secretary, Department of Science and Technology were also present.

Dr. Surajit Mitra, Additional Secretary, Ministry of Heavy Industries and Public Enterprises spoke on the AMP. Dr. R C Panda, then-Secretary, Ministry of Heavy Industries and Public Enterprises, said that the AMP is the combined effort of all stakeholders and is jointly owned. In his special address Mr. Sunil Bharti Mittal, CII President and Group Managing Director, Bharti Enterprises, said that there is a deep relationship between CII and the automobile industry. The industry has a responsibility to integrate people from rural areas and smaller towns into the mainstream.

Mentor Awards were also presented during the programme to three distinguished personalities – Mr. R R Akarte, who was the chairman of SIAM's technical committee and was instrumental in the preparation of the Emissions Roadmap; Mr. K N Krishnamurthy who gave inputs on policy issues and led the SAFE initiative, focusing on driver training, in-house vehicle management and led the industry initiative on Tsunami rehabilitation; and Mr. S Nagarajan who played a very active role in SIAM's raw materials committee.

Mr. Craig Cather, President & CEO, CSM Worldwide, USA talked about 'Dynamics of the Global Automotive Industry'. Dr. Philipp Radtke, Principal, McKinsey & Company, Tokyo made a presentation on 'Ensuring Harmony with the Environment'.

Mr. Dale Butcher, Group Development Director, Inchcape Plc, UK, presented a keynote address on 'New Market Strategies'. Mr. Dee Kapur, President, Truck

Group, International Truck and Engine Corporation, USA addressed a session on 'The Potential of the Commercial Vehicle Industry'.

Mr. Sarthak Behuria, CMD, Indian Oil Corporation Ltd. also shared his perspective on changing global demand for energy. Mr. Simon Wood, Lotus Engineering, said that the auto industry is using rapidly depleting non-renewable fossil fuels.

Dr. Carles Grasas, CEO, IDIADA, Spain, said that the four centres being set up under NATRIP would be the key factors for AMP. Mr. Madhur Bajaj concluded by saying that the implementation of AMP will be the core focus for the next decade. The industry may need to be flexible to achieve this goal as a lot could change by 2016.



Immediate Past President, SIAM, Mr. Madhur Bajaj with Hon'ble Minister for Heavy Industries & Public Enterprises, Mr. Sontosh Mohan Dev



Inaugural Session of the Annual Convention.

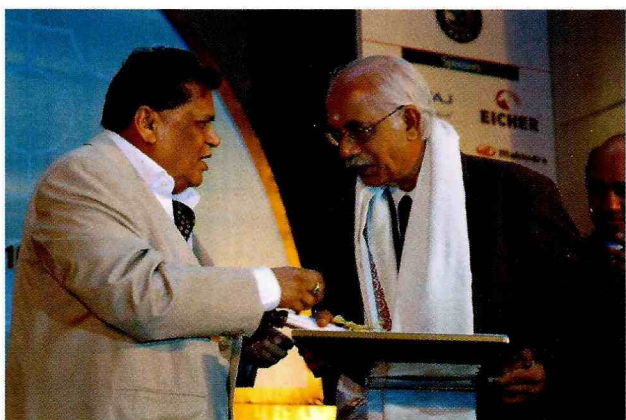
ANNUAL CONVENTION 2007



Mr. Madhur Bajaj addressing the Inaugural Session.



Hon'ble Minister for Heavy Industries & Public Enterprises, Mr. Sontosh Mohan Dev presenting the Mentor Award to Mr. S Nagarajan, Ashok Leyland



Hon'ble Minister for Heavy Industries & Public Enterprises, Mr. Sontosh Mohan Dev, presenting the Mentor Award to Mr. K N Krishnamurthy, Ashok Leyland



Mr. R R Akarte, Tata Motors receiving the Mentor Award from Hon'ble Minister for Heavy Industries & Public Enterprises, Mr. Sontosh Mohan Dev. Also seen in the picture is Mr. Madhur Bajaj, Immediate Past President, SIAM



(L to R) Mr. Eric Leblanc, MD, Volvo India, Mr. Craig Cather, President & CEO, CSM Worldwide, USA, Mr. H S Lheem, MD, Hyundai Motor India & Dr S M Gupta, Dy Director, SIAM at the Keynote Address on 'Dynamics of Global Automotive Industry'



Participants at the Convention

ANNUAL CONVENTION 2007



(L to R) Mr. Rajiv Bajaj, MD, Bajaj Auto, Dr Philipp Radtke, Principal, McKinsey & Co, Mr. Vilas Muttemwar, Hon'ble Minister of New & Renewable Energy, Mr. Venu Srinivasan, CMD, TVS Motor Co, Mr. K K Gandhi, ED, SIAM & Mr. Simon Wood, Engineering Director, Lotus Engineering at the Plenary Session on 'Ensuring Harmony with Environment'.



(L to R) Mr. Dale Butcher, Group Development Director, Inchcape Plc, Mr. R Seshasayee, MD, Ashok Leyland, Mr. Kamal Nath, Hon'ble Minister of Commerce & Industry, Mr. Pawan Munjal, MD, Hero Honda Motors and Mr. Dilip Chenoy, DG, SIAM at the Plenary Session on 'New Market Strategies'.



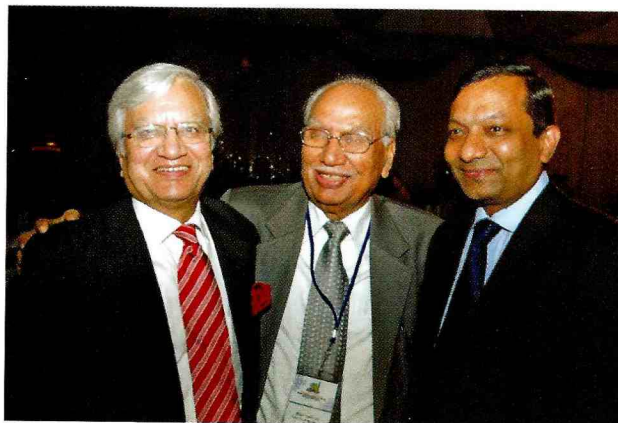
Participants at the Convention



(L to R) Mr. Venu Srinivasan, CMD, TVS Motor Co, Mr. Madhur Bajaj, Immediate Past President, SIAM & Mr. Vilas Muttemwar, Hon'ble Minister of New & Renewable Energy. Also seen in picture is Mr. Rajiv Bajaj, MD, Bajaj Auto.



(L to R) Mr. Dee Kapur, President – Truck Group, International Truck & Engine Corp, Mr. Brahm Dutt, Secretary, DoRT&H, Dr. Pawan Goenka, Vice President, SIAM and Mr. A Ramasubramanian, CEO, Eicher Motors at the Keynote Address on 'Potential of Commercial Vehicle Industry'.



(L to R) Mr. Ravi Kant, President, SIAM, Mr. Brijmohan Lall, Chairman, Hero Honda Motors & Dr. Pawan Goenka, Vice President, SIAM at the Convention.



ANNUAL CONVENTION 2007



Media at the Convention.



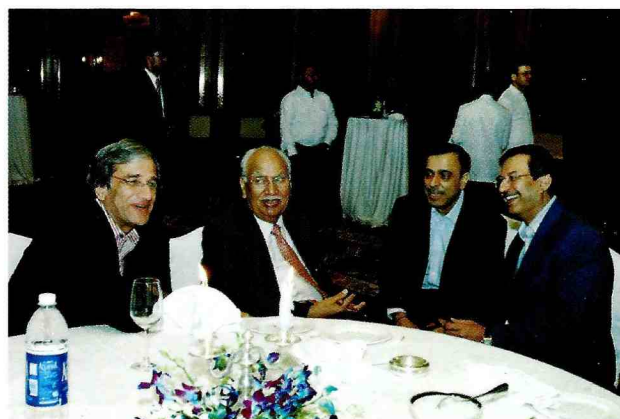
President, SIAM – Mr. Ravi Kant seen with Mr. Karsten Bogun, Managing Director, SkodaAuto India and other delegates from Germany.



Delegates with Mr. Ravi Kant, President, SIAM.



Mr. Bhure Lal, Chairman, EPCA seen with Mr. Ravi Kant, President, SIAM.



(L to R) Mr. A K Taneja, Past President, ACMA & President, Shriram Pistons & Rings Ltd, Mr. Brijmohan Lall, Chairman, Hero Honda Motors, Mr. Arvind Kr Gupta, Dy Director, ACMA-ACT and Mr. Deep Kapuria, MD, Hi Tech Gears.



SIAM Agenda, Initiatives & Events

AUTO EXPO 2008

The 9th Auto Expo was held in New Delhi from January 10 to 17, 2008. Auto Expo 2008, which was jointly organised by Automotive Component Manufacturers Association (ACMA), Confederation of Indian Industry (CII) and SIAM attracted more than 18,00,000 visitors and close to 1,35,000 business visitors. The theme for this year was 'Mobility for All'. Around 25 launches, including four global launches took place at the Expo which had a display area of 1,20,000 sq ft, making it second only to the Shanghai Motor Show.

The show, which is accredited by the International Organisation of Motor Vehicle Manufacturers (OICA) was visited by people from different parts of the globe. Automotive delegations from 25 countries, including Brazil, China, France, Germany, Italy, Japan, Korea, UK, USA, etc. participated in the Expo.

Many distinguished dignitaries were present at the inaugural of Auto Expo – Union Minister of Heavy Industries & Public Enterprises, Mr. Sontosh Mohan Dev; Union Minister of Commerce & Industry, Mr. Kamal Nath; President of OICA, Mr. Carlo Sincerì; Chairman & Managing Director of India Trade Promotion Organisation (ITPO), Dr. (Mrs.) Sheela Bhidé; President of ACMA, Mr. Sanjay Labroo; President of CII, Mr. Sunil Bharti Mittal and President of SIAM, Mr. Ravi Kant.

In his address, Mr. Sontosh Mohan Dev congratulated the Indian automotive industry and wished the industry great success ahead. He said that the Government is committed towards developing the industry in India.

Auto Expo 2008 saw:

- Country Pavilions: Canada, China, France, Germany, Italy, Japan, Malaysia, Spain, Taiwan, UK and USA.
- International Participation: 29 countries – Austria, Bangladesh, Canada, China, Czech Republic, Egypt, France, Germany, Holland, Hong Kong, India, Italy, Japan, Korea, Malaysia, Poland, Russia, South Africa, Singapore, Spain, Sweden, Switzerland, Taiwan, Turkey, Thailand, UAE, UK and USA.
- Overseas Delegations: 84 delegations from 33 countries – Austria, Bangladesh, Belarus, Brazil, Canada, China, France, Germany, Indonesia, Iran, Italy, Japan, Kenya, Korea, Malaysia, Nepal, Pakistan, Philippines, Russia, Singapore, Spain, South Africa, Sri Lanka, Sweden, Tanzania, Taiwan, Thailand, Turkey, UAE, UK, USA, Uzbekistan, Vietnam.

• Focused Pavilions:

- Design Pavilion - Diesel City
- Infotronics
- Garage Equipment
- Accessories/ Car Décor Pavilion
- Alternate Fuel Technologies

• Several Concurrent Shows :

- Auto Enterprise 2008 – The big fair for small enterprises
- Robo Expo 2008 – The first exhibition on robotics & automation
- 'Asli Naqli' – Theme pavilion, creating awareness about original and duplicate products
- Vintage & Classic Car Drive and Display
- Auto Expo – Apollo Tyres Quiz Event – the first event for the exhibitors
- Auto Expo Safe Ride Programme
- Trial Bike Demonstration, Bike Designing Demonstration and Education on Safe Riding for Adults and Children
- Conferences & Seminars: Several conferences and seminars were organised during the Auto Expo.



AUTO EXPO 2008



Mr. Kamal Nath, Hon'ble Minister of Commerce & Industry and Mr. Sontosh Mohan Dev, Hon'ble Minister of Heavy Industries & Public Enterprises at Auto Expo 2008.



Mr. Sontosh Mohan Dev, Hon'ble Minister of Heavy Industries & Public Enterprises and Dr Surajit Mitra, Additional Secretary, Ministry of Heavy Industries & Public Enterprises at Auto Expo 2008.



Mrs. Sheila Dikshit, Hon'ble Chief Minister of Delhi inaugurating the 'Diesel City'.



(L to R) Mr. Rajive Kaul, Chairman, CII Trade Fairs Committee, Dr. Shiela Bhide, ITPO, Mr. Sanjay Labroo, President, ACMA, Mr. Kamal Nath, Hon'ble Minister of Commerce & Industry, Mr. Sunil Bharti Mittal, Group CEO, Bharti Enterprises, Mr. Sontosh Mohan Dev, Hon'ble Minister of Heavy Industries & Public Enterprises and Mr. Ravi Kant, President, SIAM at the Inaugural function of Auto Expo 2008.



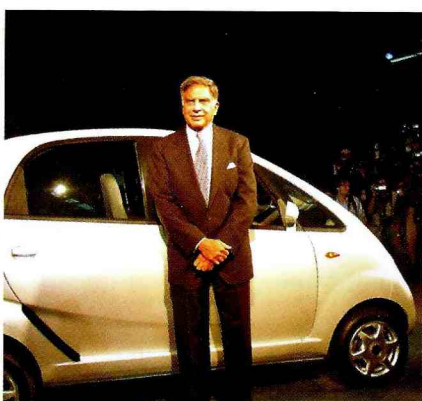
Hon'ble Finance Minister- Mr. P Chidambaram at Auto Expo 2008.



Dr. Pawan Goenka, Vice President, SIAM & President-Automotive, Mahindra & Mahindra along with other industry representatives addressing the Press Conference at 'Diesel City'.



AUTO EXPO 2008



Some new launches at the Auto Expo 2008

SIAM Agenda, Initiatives & Events

ECONOMIC AGENDA

Changes in Taxation Policy

Union Budget 2008-09

SIAM Taxation Policy & Procedural Groups worked on the preparation of pre-budget and post-budget memorandum throughout the year. Apart from several internal meetings, deliberations involved meetings with the parent ministry, Ministry of Heavy Industries & Public Enterprises and representation to Ministry of Finance. Mr. Ravi Kant, President, SIAM led the team, which presented its suggestions for the Union Budget 2008-09 to the Ministry of Finance in November 2007.



CEOs at the Union Budget Viewing Session.

Some of the auto related announcements in the Union Budget 2008-09 were:

- Excise duty on buses and their chassis reduced to 12 per cent
- Excise duty on small cars reduced to 12 per cent
- Excise duty on hybrid cars reduced to 14 per cent
- Excise duty on Two wheelers & Three wheelers (passenger carriers only) reduced to 12 per cent
- Excise duty on electric cars, Two wheelers and Three wheelers eliminated
- No change in the peak rate of customs duty
- Customs duty on project imports reduced to 5 per cent
- Customs duty eliminated on iron or steel melting scrap and aluminium scrap
- 125 per cent weighted deduction for outsourced R&D allowed (from 2009-10) {Section 35(1)(iia)}

Meeting with the Prime Minister

A SIAM team led by Mr. Ravi Kant, President along with representatives from ACMA made a detailed presentation on issues affecting the automotive industry to Dr. Manmohan Singh, Hon'ble Prime Minister of India on January 29, 2008.



SIAM and ACMA Meeting with Hon'ble Prime Minister of India, Dr. Manmohan Singh.

ECONOMIC AGENDA



Mr. Ravi Kant, President, SIAM in a meeting with Hon'ble Prime Minister of India, Dr. Manmohan Singh.

Post Budget 2008-09

In June 2008, an additional excise duty was imposed on large cars, multi utility vehicles (MUVs) and sports utility vehicles (SUVs), of engine capacity exceeding 1,500cc. Cars and utility vehicles between 1,500cc – 2,000cc attract Rs.15,000 as additional levy and those above 2,000cc attract Rs. 20,000.

SIAM has requested for removal of these additional levies and is of the view that in the current economic environment, it is inappropriate for the Government to increase the excise duty.

Consultations on International Trade Policy

Bilateral Negotiations

SIAM is actively working with the Ministry of Commerce & Industry on negotiations related to various bilateral, free and preferential trade agreements. This year active negotiations took place with countries/ regions like Japan, European Union, Sri Lanka etc. and those with South Korea, ASEAN etc. are in advanced stages. Discussions are also being held on possible trade agreements with Indonesia, New Zealand, Australia, etc.

The negotiators are studying both tariff reduction and Rules of Origin (RoO). SIAM was invited to give a presentation on RoO for the automobile industry to Japan's Ministry of Economy, Trade & Industry in August 2007. Discussions were held on RoO for Sri Lanka and South Korea during the year.

The Government of India recognises the industry's sensitivities and concerns and is supportive of the industry's position.

Multilateral Negotiations

With regard to developments in the World Trade Organisation (WTO), SIAM has continuously apprised the Government of its position. The revised draft modalities texts released by the Chairman of Non-agricultural Market Access (NAMA) in May and July 2008 fail to take into account concerns of the Indian industry. The key issues from the point of view of the Indian automotive industry are:

- **Formula:** In the new proposal, the value of the coefficient is linked to the extent of flexibilities an economy is seeking, which is not in line with the spirit and mandate of the Doha Round
- **Flexibilities:** Developing Members subject to the formula cut shall be granted the flexibility to choose to apply the coefficient and flexibilities, but the flexibilities suggested fail to meet the industry requirements and SIAM does not support any reduction in bound tariff
- **Anticoncentration:** This clause limits the flexibilities available to developing countries by subjecting certain per cent of tariff lines in a chapter to formula cut. SIAM is of the view that this clause should be opposed in every form.
- **Sectorals:** The text re-emphasised the sectoral tariff elimination programme which the industry has opposed from the beginning
- **Remanufactured goods:** A proposal on remanufactured goods is also included. SIAM has always opposed this proposal, i.e. no trade of remanufactured goods under WTO
- **Automotive Non-tariff Barriers (NTBs):** SIAM was one of the first to highlight the need to address NTBs with equal importance of tariff negotiations. SIAM, as part of the Global Automotive Industry Dialogue (GAID) is working on this and aims to pursue redressal of NTBs in the future also

In various interactions with officials of the Ministry of Commerce, SIAM has reiterated its concerns and the Ministry has assured its support. The Government of India has expressed India's reservations on the current text.

Automotive Trade Workshop – Phase VI

SIAM, jointly with Centre for WTO Studies, IIFT and ACMA organised Phase VI of the Automotive Trade Workshop in August 2008. The workshop saw active participation from

ECONOMIC AGENDA



(L to R) Mr. Vishnu Mathur, Executive Director, ACMA, Dr. Biswajit Dhar, Head-Centre for WTO Studies, IIFT, Mr. G K Pillai, Commerce Secretary, Mr. S Sandilya, Chairman, Trade Policy Group & Treasurer, SIAM and Mr. Dilip Chenoy, DG, SIAM at the Phase VI of the Automotive Trade Workshop.



Dr. Rahul Khullar, Additional Secretary, Ministry of Commerce & Industry at the Phase VI of the Automotive Trade Workshop.



Joint Secretaries from the Ministry of Commerce & Industry at the Phase VI of the Automotive Trade Workshop – Mr. Dinesh Sharma, Mr. P K Dash, Mr. Jayant Dasgupta and Mr. Amarendra Khatua.

officials of the Ministry of Commerce including Mr. G K Pillai, Commerce Secretary, Dr. Rahul Khullar, Additional Secretary, Mr. Amarendra Khatua, Joint Secretary, Mr. Dinesh Sharma, Joint Secretary, Mr. Jayant Dasgupta, Joint Secretary and Mr. P K Dash, Joint Secretary.

Foreign Trade Policy Consultation

SIAM was invited by the Director General of Foreign Trade, Ministry of Commerce & Industry for a brainstorming session on its suggestions for Annual Supplement to Foreign Trade Policy/ Procedure on November 2, 2007 in New Delhi. SIAM presented its Memorandum of Suggestions on Foreign Trade Policy and highlighted the adverse impact of current rupee appreciation on the industry.

SIAM also participated in an interactive session with Mr. Kamal Nath, Hon'ble Commerce Minister, Mr. G K Pillai, Commerce Secretary and Mr. R S Gujral, Director General of Foreign Trade.

Department Related Parliamentary Standing Committee on Industry

SIAM made a presentation to the Department related Parliamentary Standing Committee on Industry under the chairmanship of Mr. Santosh Bagrodia on the impact of Union Budget 2008-09 on the automobile sector.

Skill Development Initiatives

SIAM, through its Group on Human Capital has initiated taking over of ITIs in order to focus their activities to suit industry requirements. This initiative is expected to have a long-term implication in ensuring steady availability of manpower. These facilities could also be utilised for promoting development of other skill enhancement activities including scaling up of e-Learning projects by providing practical/ laboratory experience.

Interaction with General Insurance Council

SIAM is working with General Insurance Council and trying to address issues of common interest like identification of stolen vehicles using manufacturer's database, identifying masters in order to help identify fraudulent vehicle transfers, defining composite parts - metal/ plastic etc., preventing illegitimate export of stolen vehicles across the borders etc. A group under the chairmanship of Mr. P Balendran, Vice President - Sales & Marketing, General Motors is spearheading these activities.

ECONOMIC AGENDA

Advertising Standards

SIAM members have adopted the Voluntary Code of Conduct for Automobile Advertising, originally mooted by Advertising Standards Council of India (ASCI). The main feature of the Voluntary Code of Conduct is that advertisements would not depict dangerous driving or any other safety hazards without a rider on safety precaution.

Industry Action Over Rising Raw Material Prices

In the current environment of rising input prices, SIAM is engaged in close dialogue with relevant government bodies to control the situation. To check rising steel prices, several meetings were held with Alloy Steel Producers Association (ASPA), Ministry of Steel and Ministry of Heavy Industries & Public Enterprises during the year. SIAM Sourcing Group, under the chairmanship of Mr. Sudam Maitra, Executive Director, Maruti Suzuki India is actively working in this area. The Group has also initiated a monthly analysis of prices of various raw materials.

Meeting with Finance Minister

Mr. Ravi Kant met Mr. P Chidambaram, Hon'ble Minister of Finance, on April 8, 2008 in a meeting called by the latter with select representatives of the capital goods industry. The Finance Minister was briefed about the current developments affecting the industry. Mr. Kant also met with Mr. P V Bhide, Revenue Secretary, Ministry of Finance.

Exploring Railways for Vehicle Logistics

SIAM is working with the Railways to explore various technological options/ solutions to address the issue of transportation of vehicles by rail. Its interaction with the Railways is now being spearheaded by its newly constituted Logistics Group under the chairmanship of Mr. M M Singh, Executive Director, Maruti Suzuki India.



A newly designed Auto Rail Wagon.

Interaction With Port Authorities

During the year, the Tariff Authority for Major Ports held several consultations with SIAM on areas of concern.

Urban Transport Solutions

SIAM worked in close cooperation with the Ministry of Urban Development to develop public transportation solutions for urban areas. A project on airport connectivity via buses in some selected cities has also been initiated. SIAM is working closely with the Ministry to ensure that adequate and appropriate transport facilities are made available.

IT Initiatives

The SIAM Task Force on IT initiatives, under the chairmanship of Mr. Rajesh Uppal, Chief General Manager, Maruti Suzuki India is working on promoting the use of Information Technology among member companies by creating a regular forum for



CIO Meeting at Mumbai.

ECONOMIC AGENDA

discussions, exchange of information, sharing of best practices and creating awareness of new trends and developments of interest to the automotive sector.

Auto Trade Dialogue 2008

SIAM organised the 3rd Auto Trade Dialogue on January 11, 2008 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.

There were three focused sessions in the programme – Trade Agreements, Trade & IPR and Market Characteristics,



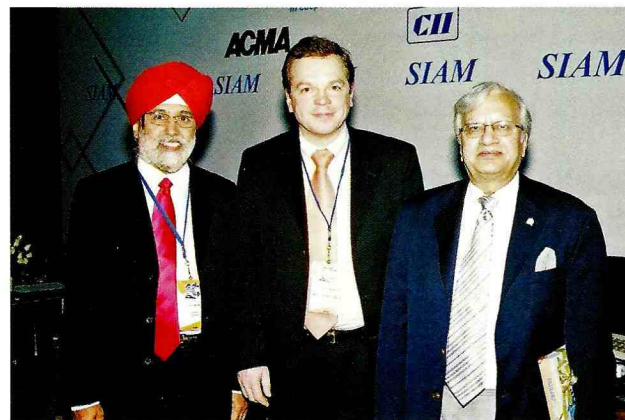
(L to R) Mr. Rajive Kaul, Chairman, CII Trade Fairs Committee, Mr. Ashok K Taneja, Managing Director, Shriram Pistons & Rings, Dr Surajit Mitra, Additional Secretary, Ministry of Heavy Industries & Public Enterprises, Mr. Abhay Firodia, CMD, Force Motors and Mr. G K Pillai, Commerce Secretary, Ministry of Commerce & Industry at the Inaugural Session of the Auto Trade Dialogue 2008.



(L to R) Mr. Toshihiro Iwatake, Vice President, JAMA, Mr. A K Taneja, Past President, ACMA & President, Shriram Pistons & Rings Ltd, Mr. Amarendra Khatua, Joint Secretary, Ministry of Commerce & Industry, Mr. Ivan Hodac, Secretary General, ACEA and Mr. Liam Benham, Vice-President, Asia-Pacific & Africa Governmental Affairs, Ford Motor Company at the Session on 'Trade Agreements' of the Auto Trade Dialogue 2008.



(L to R) Dr. Hans Georg Raber, Chairman, Customs Working Group, VDA, Dr. Yilong Chen, General Director of Asia Pacific Affairs & Chief Representative of AIAG, Mr. Suren Abeyagoonasekera, Past Chairman, CMTA and Dr. Biswajit Dhar, Head – Centre for WTO Studies, IIFT at the 'Session on IPR' in the Auto Trade Dialogue 2008.



(L to R) Mr. A S Puri, Sr General Manager, Tata Motors, Dr. Hans Georg Raber, Chairman, Customs Working Group, The Association of the German Automotive Industry (VDA), and Mr. Ravi Kant, President – SIAM & MD, Tata Motors at Auto Trade Dialogue 2008.



(L to R) Mr. Roger Pitot, Executive Director, NAACAM, Mr. A S Puri, Chairman, International Relations Group, SIAM and Sr General Manager, Tata Motors, Mr. David Croxson, Head of International, SMMT, Mr. P K Dash, Joint Secretary, Ministry of Commerce & Industry, Ms. Aishah Ahmad, President, AFM, Mr. Suparat Sirisuwanangkura, President, TAIA & Mr. Bernard Swiecki, Director, Asian Automotive Programmes, CAR at 'Session on Market Characteristics, Trade Flows & Auto Polices IPR' in the Auto Trade Dialogue 2008.

ECONOMIC AGENDA

Trade Flows & Auto Policies. The Dialogue saw participation of international associations, Indian government, academia and industry.

Leaders from China, Europe, Germany, Japan, Malaysia, Thailand, Sri Lanka, South Africa, UK and US participated in the Dialogue.

Mr. G K Pillai, in his address highlighted the Indian government's continued commitment to promote trade, globalisation and growth of the Indian industry. Dr. Surajit Mitra who was also present at the occasion laid emphasis on the continued commitment to encourage manufacturing and exports. Mr. Amarendra Khatua and Mr. P K Dash, Joint Secretaries from Ministry of Commerce & Industry were also present.

'Looking Ahead' Conclave

SIAM organised the 2nd 'Looking Ahead' Conclave from



Mr. Anil Dua, Senior Vice President-Marketing & Sales, Hero Honda Motors chaired the Session on Two Wheelers.



Mr. S Sandilya, Treasurer, SIAM & Chairman, Eicher Group at the Session on Commercial Vehicles.



Mr. Ravi Chopra, MD, Piaggio Vehicles chaired the Session on Three Wheelers.

April 1 to 2, 2008 in New Delhi. The Conclave, which was held in the backdrop of the recent performance of the industry, had exclusive sessions on various segments of the industry like Two wheelers, three -wheelers, commercial



(L to R) Ms. Rinki Verma, SIAM, Mr. Jnaneswar Sen, Senior Vice President – Marketing, Honda Siel Car, Mr. Rajeev Kapoor, Managing Director, Fiat India Automobiles, Mr. Rajiv Dube, President – PCBU, Tata Motors, Mr. Arvind K Saxena, Vice President – Sales & Marketing, Hyundai Motor India, Mr. Dilip Chenoy, SIAM and Mr. Sugato Sen, SIAM at the Session on Passenger Vehicles.

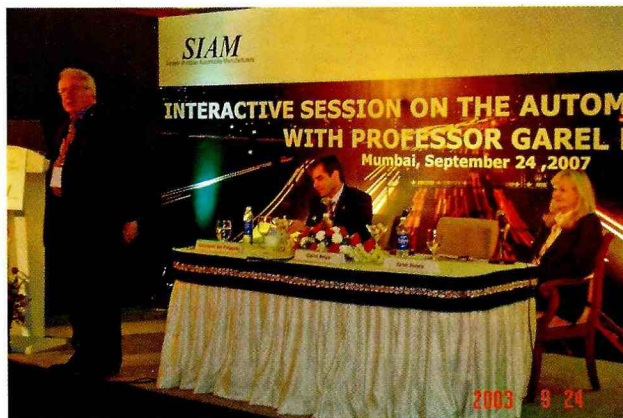
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vehicles and passenger vehicles. The Economic Conclave saw active participation from various stakeholders including the industry, dealerships, banks, non-banking financial institutions, economists, consultants and other opinion makers.

Knowledge Building Programmes

Interactive Session with Professor Garel Rhys, Cardiff University, Wales

SIAM, in partnership with International Business Wales, organised an interactive session with one of Europe's most recognised thought leaders on the automotive industry- Professor Garel Rhys, CBE, Cardiff University Business School and Chair, Welsh Automotive Forum on September 24, 2007 in Mumbai. Mr. Giovanni De Filippis, Managing Director, Fiat India Automobiles, delivered the welcome address on behalf of SIAM.



Interactive Session with Professor Garel Rhys, CBE, Cardiff University Business School, Chair, Welsh Automotive Forum organised jointly by SIAM and International Business Wales.

Prof. Garel Rhys spoke on the trends in the automotive sector in Europe, developments in the global automotive world and opportunities for companies in India.

Session on Toyota Product Development System

SIAM organised a session on the understanding of Toyota Product Development System where Booz Allen Hamilton's (BAH) international team made a presentation on April 2, 2008 in New Delhi.

Mr. Kazutoshi Tominaga, Global Director & Principal (Product Development System), BAH and Mr. John Loehr, Global Director & Principal (Innovation), BAH made a



Mr. John Loehr, Global Director & Principal (Innovation), Booz Allen Hamilton at the Session on Toyota Product Development System.



Mr. Kazutoshi Tominaga, Global Director & Principal (Product Development System), Booz Allen Hamilton at the Session on Toyota Product Development System.

presentation. The presentation covered a range of topics explaining the system in the Indian context including value of product creation, excellence across the value chain, identifying the drivers of value, foundation elements of an effective product creation etc.

Indian Foreign Service Training Programme

SIAM was invited to give a presentation on the current automobile industry scenario with focus on International Trade Policy to the Probationer Officers' batch of Indian Foreign Service (IFS) on August 16, 2007 in New Delhi.

Kaizen Training Programme

SIAM, jointly with the Association for Overseas Technical Scholarship (AOTS) organised two Kaizen training programmes during September and October of 2007,



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one in New Delhi and the other at Chennai. The training programme was conducted by Mr. Takashi Kotabe, Chief Instructor, Technical Assistance Group, Overseas Project Department, Isuzu Techno Co. Ltd., Japan. Participants included personnel from OEMs like Mahindra & Mahindra, Tata Motors, Hindustan Motors and component manufacturers. The Kaizen course helped participants to acquire the knowledge and abilities required for the promotion of cost reduction and productivity/ quality improvement through group activities.

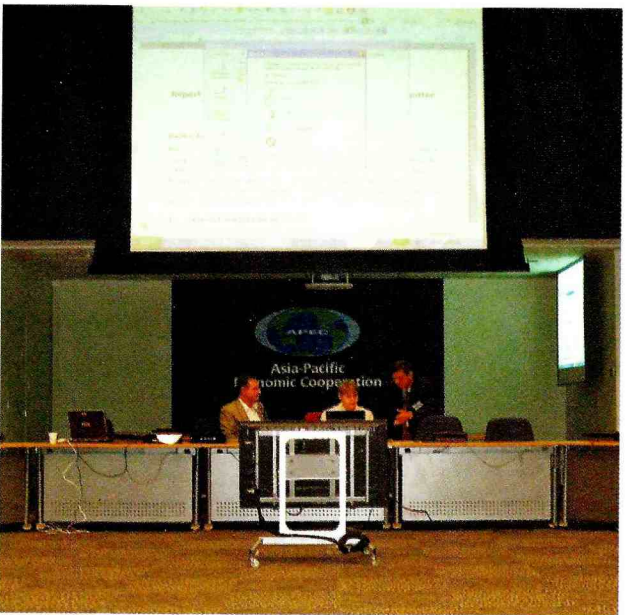
Interaction with International Organisations

Participation In International Events

APEC Automotive Dialogue

SIAM participated in the APEC Automotive Dialogue Steering Committee meeting held at the APEC headquarters in Singapore from November 14 to 16, 2007. The members of the Dialogue decided to establish closer linkages with the activities and priorities of the APEC Committee on Trade & Investment (CTI). It was agreed that an important goal would be to seek renewed participation from China. Various

working groups apprised the participants of the status of their activities. Mr. A S Puri, Senior General Manager, Tata Motors and Mr. Sugato Sen, Senior Director represented SIAM.



APEC Automotive Dialogue.

Seminar on Intellectual Property Rights

SIAM participated in the first IPR Seminar held in Thailand from November 12 to 13, 2007 as part of the APEC Automotive Dialogue initiative. The seminar involved presentations from USA, Thailand, Korea, Australia, Indonesia and Japan and it was decided that similar workshops would be organised in different countries of the region to create awareness about IPR violations.

International Energy Agency's Workshop

A workshop within the framework of the G8 dialogue on



SIAM at the APEC Automotive Dialogue.



SIAM participated in a Workshop organised by the International Energy Agency (IEA) in collaboration with the International Transport Forum (ITF).



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climate change, clean energy and sustainable development was organised by the International Energy Agency (IEA) in collaboration with the International Transport Forum (ITF) from January 28 to 29, 2008 in Paris.

The workshop was intended to understand transport energy use. Deliberations were held to develop more detailed indicators to understand and analyse trends and the impact of policies. The workshop saw participation from international experts from several regions like Europe, Australia, Brazil, Canada, Japan etc. Ms. Rinki Verma from SIAM gave a presentation on the kind of data available in India.

Visit to Proton

SIAM visited Proton Holdings Berhad in Malaysia in February 2008. Automotive Federation of Malaysia (AFM) hosted a dinner for the delegation.

International Delegations

During the year, several delegations visited SIAM in order to gain insight into various aspects of the Indian automobile industry. Some of the delegations were:

Normandien Delegation visited SIAM on November 23, 2007 for understanding the industry, government policy etc.

PSA Peugeot Citroen Delegation visited SIAM on November 30, 2007. It was part of a study being undertaken for evaluating the prospects of entering the Indian market.

General Motors Delegation from US visited SIAM on September 25, 2007.

GAZ Group (Russia), which is looking at setting up a vehicle manufacturing facility in India, met SIAM on February 12, 2008. The Group aims to establish joint ventures with Indian companies to work both in India and Russia.

Columbia University's Mr. Daniel H. Rosen, Principal, China Strategic Advisory; Visiting Fellow, Peterson Institute for International Economics and Adjunct Associate Professor shared his perspective on China's development, when he visited SIAM on February 26, 2008.

South African Delegation – Mr. Nepo William Kekana, CEO, Economic Planning Unit, Gauteng Tooling Initiative, Government of Gauteng invited Indian companies to establish manufacturing facilities in South Africa when he met SIAM on February 28, 2008.

Dutch Automotive Trade Mission visited SIAM on April 11, 2008. The Mission visited several OEMs and component manufacturers in India.

Wolfsburg AG Group team visited SIAM on May 22, 2008 and has invited SIAM to participate in the International Suppliers Fair organised from October 29 to 31, 2008 in Wolfsburg.

MIRA, UK met SIAM on September 27, 2007 in New Delhi to explore possibilities of mutual cooperation and coordination between the two organisations.

Association For Manufacturing Technology, USA's delegation, led by Mr. John B. Byrd III, President, AMT visited SIAM on October 23, 2007.

Centre For Automotive Research (Car), US, met SIAM on January 8, 2008 to understand the Indian industry's dynamics.

Several international associations visited SIAM during Auto Expo 2008:

- OICA, International Organisation of Motor Vehicle Manufacturers
- KAMA, Korea Automobile Manufacturers Association
- JAMA, Japan Automobile Manufacturers Association
- VDA, The Association of German Automotive Industry
- SMMT, The Society of Motor Manufacturers and Traders



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Meetings of some of the Economic Councils/ Groups in progress.

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Fuel Efficiency

Ministry of Shipping, Road Transport & Highways has formed a SCoE (Standing Committee on Emissions) sub-committee for formulating fuel efficiency regulations for automobiles. Bureau of Energy Efficiency has also initiated labelling for the vehicles. An expert panel under the Prime Minister's Office is working out strategies for reducing CO₂ emissions in the country, including the transport sector. The Planning Commission has also proposed fuel economy reduction targets for the sector. Reference is also made to the fuel consumption in the Auto Fuel Policy made by the Ministry of Petroleum & Natural Gas and Automotive Mission Plan 2006-2016 by the Ministry of Heavy Industries & Public Enterprises.

The Indian auto industry is conscious of the fact that more than 70 per cent of the country's oil requirement is met through imports. The fleet average of the country is one of the lowest in the world as small cars constitute a major proportion of the fleet. SIAM supports the initiative of the Government for energy security. The industry produces the most fuel efficient two wheelers in the world, which form about 75 per cent of the vehicle population. SIAM has asked the Government for:

- One single agency to interact with SIAM
- Approach for a long term roadmap beyond 2010/11

Emission Regulation

Draft BS IV Emission notification has been issued by the Government, mandating BS IV emission regulations, which are equivalent to Euro IV in 11 metro cities and BS III in rest of the country from April 1, 2010 for all four wheelers. For two & Three wheelers BS III norms are mandated across the country from April 1, 2010.

Urea Requirements for Diesel Vehicles

SIAM has submitted the consolidated requirements to the Ministry of Shipping, Road Transport & Highways (MoSRT&H). MoSRT&H would convene a meeting with the Ministry of Fertilisers to explore the possibility of urea being made available to the automotive sector for use.

Emission Roadmap

A presentation was made to the Executive Committee on 'Future Emission Roadmap' on July 17, 2007 at Chennai regarding BS V and BS VI.

The members agreed that availability of fuel is an important issue and needs to be emphasised. The availability of fuel should be ensured at least one year before mandating of the regulation.

Auto Fuel Policy Review

A committee under Mr. M B Lal has been constituted by the Ministry of Petroleum & Natural Gas to review the Auto Fuel Policy and look into the preparedness of the oil and the auto industries for meeting the next stage of emission regulations. The committee also reviewed the implementation status of the various recommendations.

It was observed that out of the 42 recommendations, only those pertaining to the emission regulations for vehicles have been implemented. SIAM prepared a report on future technology options and alternative fuels for the committee.

Alternative Fuels

Ethanol

5 per cent ethanol gasoline blends have been mandated across the country subject to availability at the rates fixed by the Ministry of Petroleum & Natural Gas. It is understood that the blending is happening off and on.

The Government has decided to increase the quantity to 10 per cent from October 2008. The SIAM proposal for separate labelling of retail outlets has been accepted. BIS has also published the specifications of E10. Studies have been planned along with the oil industry on the effect of the blend on vehicles that are in use, but have not been designed for E10.

Hydrogen

SIAM and Indian Oil Corporation are conducting a study on optimum blend of hydrogen and CNG, which can be used in existing CNG vehicles with minimum modification. In this project, which is being partly supported by the Ministry of New & Renewable Energy, companies such as Ashok Leyland, Bajaj Auto, Eicher Motors, Mahindra & Mahindra and Tata Motors are also participating.

National Hydrogen Energy and Fuel Cell Centre

The Secretary of the Ministry of New and Renewable Energy (MNRE) held a meeting to stimulate views and suggestions

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for setting up the National Hydrogen Energy and Fuel Cell Centre in Gurgaon. This centre is proposed to be set up with an initial investment of Rs. 200 crore from MNRE along with a commitment of 10 years' support for operation from the Government. The Centre is also proposed to integrate all the work that is being done at a national level on Fuel Cell and Hydrogen and integrate the same so that such research can be easily used for application purposes by the industry

National Hybrid Propulsion Platform

Under the Chairmanship of Dr. Arun Jaura, Group CTO, Mahindra & Mahindra, a panel including SIAM and ACMA members and select government officials has been continuously working for the development of National Hybrid Propulsion Platform. Three teams on Commercial Vehicles, Passenger Vehicles and Three wheelers have been formed to prepare a detailed project report for a three-phased execution covering technology demonstration, R&D and economical viability. This year two workshops were organised in Chennai and Pune to deliberate on the philosophy of the groups, architectural definitions, IPR issues, testing and validation, time plan for demonstration of vehicles, estimated costs and making it a successful programme etc.



Participants at NHPP Implementation Plan Meeting in Chennai.

Support is also being sought from various Ministries of the Government of India to work on this subject and address all pre-competitive issues for introduction of Hybrid Platform in India.

ICAP Studies for Emission

Factor & Source Apportionment

The final report has been submitted by ARAI on proposed emission factors. It was observed that the number of vehicles tested to propose emission factors was not sufficient. Source apportionment studies are being carried out for the cities of Delhi, Mumbai, Kanpur, Chennai, Bangalore and Pune by NEERI, IIT Kanpur, IIT Chennai, TERI and ARAI, respectively. The preliminary studies have indicated that re-suspended dust is one of the major contributors to suspended particulate matter. The final report is expected by the end of September 2008.

Diesel Image

A public interest litigation was filed before the Hon'ble High Court of Delhi regarding banning of diesel cars, but withdrawn as a similar petition is pending before the Hon'ble Supreme Court.

SIAM has filed an affidavit before the court on the EPCA report no. 32 pending before the Court. A SIAM group with representatives from Tata Motors, Toyota Kirloskar Motors, General Motors and Mercedes Benz India has prepared an aide-memoire on Diesel Emissions with special emphasis on responding to the suggestions of banning diesel passenger cars in Delhi. The main submission in the report is with regard to whether vehicles using diesel fuel with 50 ppm sulphur fuel can be considered clean. The Court still has to reach a decision on the same.

The Group has decided that the highly successful 'Diesel City' concept, showcased during the 9th Auto Expo at Pragati Maidan in New Delhi, will be organised at the regional auto shows and SIAM AGM scheduled to be held in September 2008 in Delhi.

Emission Management of In-use Vehicles

SIAM organised a Service Heads Meet in Pune on June 3, 2008. The objective of the meeting was to share the best practices implemented by vehicle manufacturers to enhance customer loyalty and after sales service. SIAM is also working along with the Delhi Government on Inspection & Certification System for private vehicles.

CMVR & Safety Regulations

SIAM CMVR Group under the Chairmanship of Mr. S Ravishankar, Tata Motors reviewed the status of the pending



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safety notification and various AIS standards. Other issues under discussion included the Safety Roadmap, mandating ABS in all vehicles, GVW testing of diesel three wheelers, definition of wheelbase, definition of battery-operated vehicles and an update on OICA Technical Committee's meeting. Additional safety measures for two wheelers as per Maharashtra Government's suggestion were also discussed.

Safety Roadmap

The Safety Roadmap has been prepared taking into consideration the development time, availability of testing facilities, finalisation of the standard and time required for the notification subject to implementation from April or October.

Finalisation of Standards for Various Safety Components/ Parts

It has been decided by the Ministry of Shipping, Road Transport & Highways that sufficient time should be available for implementation of AIS 037 and the reference to BIS be deleted from the draft notification. Crash related test would be linked to the availability of testing facilities, which is an important criterion for deciding the implementation schedule.

Bus Body Code

CMVR committee chaired by Mr. S K Dash, Joint Secretary, Ministry of Shipping, Road Transport & Highways has approved the AIS 052 Rev I. The draft notification is expected to be issued by the end of 2008 for implementation of the code from October 2010 for existing models and October 2009 for new models. The truck code would be implemented one year after the implementation of bus body code. The accreditation system is also expected to come on line by that time. ARAI, ASRTU, CIRT and SIAM agreed to prepare the action plan including designing of the logo, certification form, interview process of applicants, feedback form, advertisements, developing of the board website and links connectivity with respect to the Zonal and National Boards for Accreditation of Bus Body Builders.

Marking of Tyres

BIS had prepared a draft gazette notification for mandatory certification of tyres to be issued under Section 14 of

the BIS Act, which required mandatory certification and embossing of the ISI mark on tyres.

In view of practical difficulties, the automobile industry objected to this mandatory certification. SIAM had pointed out that all tyres fitted by OEMs already meet the requirements and quality requirements of OEMs are much more stringent than existing standards. SIAM has asked to exempt mandatory marking on tyres used by vehicle manufacturers.

Dimensions of Vehicle Carriers

In order to promote efficient transportation of new vehicles from production facilities to dealers across the country, SIAM members are discussing the need to classify vehicle carriers in the Motor Vehicles Act. AISC was constituted in December 2008 to study and finalise the dimensions of vehicle carriers under the chairmanship of Mr. Rajesh Uppal, Chief General Manager, Maruti Suzuki India Ltd.

The panel is preparing a report to establish the criteria for standardisation of body design and code of construction. The proposed roadmap would also include short-term actions and a mid-term plan for rationalising the various aspects and aligning them to the approval procedure for trailers including technical and safety requirements.

International Harmonisation

The SIAM International Harmonisation Group is chaired by Mr. T M Balaraman, Bajaj Auto and the Co-chairman is Mr. Z A Mujawar, Mahindra & Mahindra. SIAM is deliberating on finalising the recommendation to join the 1958 Agreement, methodology for deciding SIAM position for voting in GTRS, guidelines for coordination of SIAM members attending WP.29 meetings, short listing of ECEs and GTRS electronic vehicle stability regulations and methodology to be followed for regulations for hydrogen fuelled two and three wheeled vehicles. SIAM has put in place a system for debriefing and has representatives in GRs who take active part in the deliberations.

India is a member of ECE WP.29 1998 agreement and SIAM is a part of the Govt. of India's team, which is led by the Ministry of Shipping, Road Transport & Highways.

Conclave on WP.29 1958 Agreement

A two-day Conclave on the 1958 Agreement (UNECE WP.29) was organised by the Ministry of Shipping, Road Transport

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& Highways, Government of India in New Delhi from September 27 to 28, 2007 in association with ACMA, ARAI, ICAT, NATRIP and SIAM with an objective to understand the perspective of JASIC and UNECE Secretariat on WP.29 1958 Agreement. It was felt that many preparations would be required in India, especially from the administrative point of view, before acceding to the 1958 Agreement.

12th Asian Regulation & Certification Experts (RACE)

The RACE meeting was attended by industry representatives from South East Asia to share the status of the national, UNECE adoption plan and accession to 1958/ 1998 agreement.

JAMA representatives made a presentation on vehicle type approval system under WP.29 and need for establishment of vehicle type approval systems. Discussions were held on what each country considers as obstacles in establishing vehicle type approval system.

12th JASIC Asia Government - Industry Meeting

The 12th JASIC Asia Government - Industry Meeting, co-organised by the Department of Transportation and Communications and Land Transportation Office of the Philippines, was held from November 27 to 29, 2007. It was attended by as many as 150 government officials and industry representatives from a total of 14 countries.

This meeting was the final meeting of the fourth series on the subject of 'Accession to the 1958 Agreements and improved Asian presence in WP.29'.



(L to R) Mr. Brahm Dutt, Secretary, Ministry of Shipping, Road Transport & Highways, Mr. Tadaomi Akiba, Executive Director, JASIC, Mr. S K Dash, Joint Secretary, Ministry of Shipping, Road Transport & Highways, Mr. Juan Ramos - Garcia, UNECE, Chief - Technology Section and Dr. Ajay Sehgal, Director, Ministry of Shipping, Road Transport & Highways at the Conclave on 1958 Agreement.

Each country made a report on the activities concerning the accession to the 1958 Agreement, participation in the WP.29 and harmonisation of the vehicle regulations with the ECE regulations. The participants were engaged in serious and active discussions for the resolution of the problems that each country faces in such activities and on the direction of each country's activities after the accession to the Agreement.

SIAM Participation in IMMA

SIAM participated in several Committees of the International Motorcycle Manufacturers Association (IMMA), which discussed a range of issues impacting the



Siam participation in IMMA Meeting at Geneva.



New IMMA President, Mr. Hendrik von Kuenheim, Managing Director, BMW Motorcycles addressing the General Assembly Meeting.

industry, namely, safety, including brakes & light, road safety, environment etc. SIAM recommendations on brakes and noise were considered by IMMA for representation at WP.29.

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SIAM attended the IMMA 2008 General Assembly in Toronto from May 6-9, 2008. The meetings were hosted by Motorcycle and Moped Industry Council (MMIC) of Canada. Mr. Hendrik von Kuenheim, Managing Director, BMW Motorcycles was elected the President of IMMA from 2008 to 2010. A special IMMA SCE meeting was held in July 2008 to arrive at a consensus on WMTC limit values.

One of the most important discussions in IMMA was the finalisation of limit values for the newly developed Worldwide Motorcycle Testing Cycle Procedure (WMTC). SIAM members submitted their position and the same is now being finalised with due consideration, in WP.29.

SIAM Participation in OICA

After becoming a member of International Organisation of Motor Vehicle Manufacturers (OICA) in 2007, SIAM members started attending the OICA Technical Committee's meetings on a regular basis. SIAM has been actively participating in the



An OICA Meeting in progress in Paris.

discussions for finalisation of regulation for electronic stability control system. SIAM also participated in the OICA General Assembly meeting in September 2007 at Washington DC, including the meetings of the Exhibition Committees.

SIAM Participation in WP.29

SIAM has been a part of all the Government of India delegations in the main WP.29 meetings held in November 2007, March 2008 and June 2008. During these meetings, several key decisions regarding finalisation of new Global Technical Regulations (GTRs) and amendments to ECE regulations were ratified. India being a signatory to the 1958 Agreement of WP.29, SIAM has been closely studying



A WP.29 Meeting in progress in Geneva.

the development of these regulations and recommending proposals through the Government of India.

SIAM members also participated in the subsidiary meetings of WP.29, especially in the GRRF for Brakes, GRE for Lighting and GRPE for Emissions.

EVENTS & CONFERENCES

Round Table with The World Bank

A team from World Bank (Mr. John Rogers, Mr. Charles Cormier, Ms Kseniya Lvovsky and Mr. N V Iyer) met SIAM Technical Heads on 25th September 2007 to study on strategies for Low Carbon Growth across all sectors at the behest of the Planning Commission. The objective of this exercise was to develop a strategy for further lowering the carbon intensity and to undertake an assessment of potential for energy savings & GHG reductions in key energy intensive sectors.

2nd SIAM-JAMA Meeting

The 2nd SIAM-JAMA meeting was held on 26th September 2007 at New Delhi to discuss some of the key issues of mutual interest. SIAM made presentations on vehicular safety and emission regulations for all categories of vehicles, harmonisation and the 1958 Agreement. JAMA made presentations on Fuel Efficiency regulations for Heavy Duty Vehicles and OBD systems.

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Participants at the 2nd SIAM – JAMA Meeting in New Delhi.

14th World Congress on Intelligent Transport Systems

The 14th World Congress on ITS, under the theme "ITS for a Better Life," took place in Beijing, China, from October 9 to 13, 2007. The Congress brought together the representatives of governments and related organizations as well as industry experts from many countries around the world providing a platform to exchange ideas on ITS and discuss strategies and initiatives. The congress which included more than 200 sessions presented a glimpse of China's achievements in transport technology which will promote international communications and cooperation on



SIAM participation at 14th World Congress on ITS in Beijing, China, October 2007.

ITS, including the ITS projects underway in preparation for the 2008 Beijing Olympics, 2010 Shanghai Expo, and the Guangzhou Asia Games.

SIAM made a presentation in one of the special sessions on Free Flow Road User Charging, Supporting the Policy Requirements of Asia organised by Satellic. The Session presented the two potential administrative and technical solutions, the first being based on license plate recognitions and the second based on satellite navigation systems combined with mobile phone technology.

PCRA Seminar on Vehicle Technology & Fuel Efficiency

PCRA organised a seminar on Vehicle Technology & Fuel Efficiency to kick-off the discussions on Fuel Efficiency regulations for automobiles in India. SIAM, Tata Motors and Maruti Suzuki India made presentation on the vehicle technology and gave an overview of the Indian auto industry highlighting that Indian vehicles are as fuel efficient as any other vehicles in other parts of the world.

3rd International Environmentally Friendly Vehicles Conference

A delegation led by Dr. Surajit Mitra, Additional Secretary, Ministry of Heavy Industry & Public Enterprises participated in 3rd International Environmentally Friendly Vehicle (EFV) Conference from 19 to 20 November 2007 at Dresden, Germany. The Indian delegation included representatives from MoHI&PE, MoEF, MoPNG, MoSRT&H, ACMA and SIAM.

Following up on the two previous EFV conferences held in Tokyo and Birmingham, this year's conference, which included an exhibition, aimed at continuing and sustaining the process of understanding environmentally



Dr. Surajit Mitra, Additional Secretary, Ministry of Heavy Industries & Public Enterprises at the 3rd International Environmentally Friendly Vehicles Conference.



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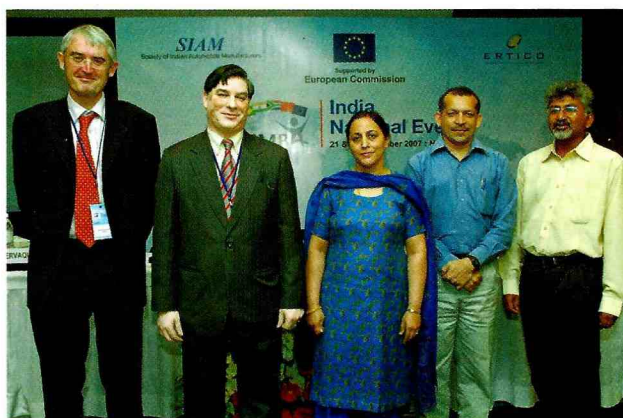


Indian Delegation at the 3rd International Environmentally Friendly Vehicles Conference.

friendly vehicles in the future with innovative technologies and alternative energy sources. The next environmentally friendly vehicle conference would be held in India hosted by Ministry of Heavy Industry & Public Enterprises.

India-EU Cooperation in ITS, Infrastructure & Automotive

As a follow up of last year's SIMBA India Priority Workshop, the SIMBA India National Event was organised by SIAM on November 21 to 22, 2007 in New Delhi. SIAM coordinated this National Event under the EU Programme for Strengthening road transport research cooperation between Europe and emerging international markets (SIMBA). SIMBA aims to increase cooperation between the EU and the emerging markets of China, India, Brazil and South Africa in Intelligent Transport Systems (ITS), Infrastructure and Automotive. The



(L to R) Mr. Vincent Blervaque, ERTICO, Mr. Dilip Chenoy, DG, SIAM, Mrs Sadhna Relia, Department of Science & Technology, Mr. Sajid Mubashir, Director, TIFAC and Mr. Indraneel Ghose, European Commission at the Concluding Session of SIMBA India National Event.



(L to R) Mr. Vincent Blervaque, ERTICO, Mr. S Sandilya, Treasurer, SIAM, Mr. S K Dash, Joint Secretary, Ministry of Shipping Road Transport & Highways, Dr Aravind Bharadwaj, Executive Director (Advanced Engineering), Ashok Leyland and Mr. K K Gandhi, Executive Director, SIAM at the Inaugural Session of SIMBA India National Event.

event saw participation of Senior Government Officials, Academic Institutions, IT Industry, Auto Component Manufacturers and OEM's.

Concrete, short and medium-term actions were deliberated and working groups were formed to further the discussion on the priorities and possible future activities in the areas of Automotive (like use of Bio Diesel, Hybrid, Hydrogen Production, Storage, Distribution & Use, etc), ITS (like Road User Charging, Advanced Traffic Management, Electronic Toll Collection, etc) and Infrastructure (like Driving patterns on Four lane roads, Long Term Infrastructure Projects, etc).

Baja SAE India 2007

The first ever Baja SAE India was organised by SAE India from December 21 to 23, 2007 at Pithampur, in the vicinity of Indore city. The Baja SAE India was organised under aegis of NATRIP and on the land at Pithampur for establishing



BAJA SAE India 2007

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Dignitaries at BAJA SAE India 2007.

their future testing facility for the automotive industry. Twenty seven teams from different engineering colleges participated in the competitions which were short listed out of 52 teams who competed rigorously for 3 days. SIAM is part of the Organising Committee.

Styling & Design Conclave

As a step towards encouraging Styling & Design in the automobile industry, SIAM, jointly with the National Institute of Design (NID), organised the second Styling & Design Conclave on 9th January 2008 in New Delhi. The programme focused on three themes - Creating Values, Winning Styles, and Indian Imperatives.

Mr. Ajay Shankar, Secretary, Dept of Industrial Policy & Promotion, Ministry of Commerce & Industry in his



(L to R) Dr. Surajit Mitra, Additional Secretary, Ministry of Heavy Industries & Public Enterprises, Dr. Darlie O' Koshi, Director, NID, Mr. Ajay Shankar, Secretary, DIPP, Ministry of Commerce & Industry, Mr. Rajive Kaul, Chairman, CII Trade Fairs Committee, Mr. Dilip Chenoy, DG, SIAM and Mr. Patrick Le Quement, Head, Global Design, Renault Design at the Inaugural of Styling & Design Conclave.

address pointed out the importance of designing today and identified Styling & Design as the key enabler to compete in the today's globalized world. He hoped that India will soon emerge as the Centre of Design for the world.

Dr. Surajit Mitra, Additional Secretary, Ministry of Heavy Industries & Public Enterprises highlighted two key points



(L to R) Mr. Pradyumna Vyas, Professor, NID, Mr. Pratap Bose, Tata Motors European Technical Centre, Mr. C V Raman, Chairman, SIAM Styling & Design Group and Chief General Manager, Maruti Suzuki India, Mr. Vaibhav Desai, Designer, Auto Car India and Mr. Rajesh Mirajker, Mirajker Design at the Plenary Session on 'Indian Imperatives' of Styling & Design Conclave.

for the Indian automotive industry – global competitiveness and value creation. He announced that a dedicated design institute for the auto sector would be set up with the help of his Ministry in cooperation with NID.



Participants at the Styling & Design Conclave.

National Automotive Styling Challenge

National Automotive Styling Challenge (NASC), organised by Society of Indian Automobile Manufacturers (SIAM) and Auto Monitor culminated on 16th January 2008 at Pragati Maidan, New Delhi.

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The first prize in the Industry Segment was won by two final year students of Masters in Design, IIT Delhi. A student from the Coventry University, UK won the Popular Choice Award.



Winners of the National Automotive Styling Challenge receiving prize from Dr. Surajit Mitra, Additional Secretary, Ministry of Heavy Industries & Public Enterprises. Also seen in the picture - Mr. C V Raman, Chairman, SIAM Styling & Design Group and Mr. Dilip Chenoy, DG, SIAM.

The initial screening for the 1st NASC was held on October 5, 2007 in New Delhi. Four eminent experts from the field of automotive design and product development sat together to shortlist nine from over 60 entries received from enthusiastic participants from engineering and design institutes across the country.

International Conference on Automotive Infotronics

SIAM organised the International Conference on Automotive Infotronics on 11th January 2008 in New Delhi during the



(L to R) Dr. Pawan Goenka, Vice President, SIAM, Dr. Aravind Bharadwaj, ED (Advanced Engineering), Ashok Leyland, Dr. R C Panda, Ex-Secretary, Ministry of Heavy Industries & Public Enterprises, Mr. Ramesh Krishnan, Vice President, Continental & Mr. Atanu Ganguli, Dy Director, SIAM at the Inaugural Session of International Conference on Automotive Infotronics during Auto Expo 2008.



(L to R) Dr. Aravind Bharadwaj, ED (Advanced Engineering), Ashok Leyland, Dr. Surajit Mitra, Additional Secretary, Ministry of Heavy Industries & Public Enterprises, Mr. V G Gujrathi, SGM, Tata Motors, Mr. Ramesh Krishnan, VP, Continental and Prof. Anand Patwardhan, ED, TIFAC at the Concluding Session of International Conference on Automotive Infotronics.

Auto Expo 2008. The Conference brought together the representatives of governments and related organizations, academia, as well as industry experts from many countries around the world, providing a platform to exchange ideas on Automotive Infotronics and discuss strategies and implementation plan.

Seminar on Future Vehicle Technologies

SIAM in partnership with MIRA, UK, organised a seminar on Future Vehicle Technologies on January 14, 2008 in New Delhi. The programme was attended by a delegation of technocrats from UK and Automotive experts from India.

During the inaugural programme, Dr. Surajit Mitra, Additional Secretary, Ministry of Heavy Industries &



(L to R) Mr. John Wood, MD, MIRA, Mr. A Ramasubramanian, CEO, Eicher Motors, Dr. Surajit Mitra, Addl Secretary, MoHI&PE, Mr. P K Banerjee, AGM, Tata Motors and Mr. Sugato Sen, Sr Director, SIAM at the Seminar on 'Future Vehicle Technologies.'

TECHNICAL AGENDA

Public Enterprises, Government of India, said that future vehicles have to be much more intelligent with increased man-machine interface. He identified five challenges for the automobile industry viz., Development of intelligent vehicles, increase in safety requirements, energy efficiency, alternative fuels and drive systems and emissions as the key driving factors for enhanced R&D programmes. He also added that there has been a relocation of production of automobiles worldwide and now it is the time that R&D would also be relocated to countries like India.

Seminar on "National Consultation on Urban Bus-based Transportation Solutions: Standards And Operations"

SIAM, in partnership with Ministry of Urban Development and Urban Mass Transit Company (UMTC), organised a seminar on "National Consultation on Urban Bus-Based Transportation Solutions" on January 16, 2008 in New Delhi wherein it was announced that the Government had taken up Bus Rapid Transit System (BRTS) under the Jawaharlal Nehru National Urban Renewal Mission (JNNURM) as a cost effective solution for providing high quality public transport service in urban areas. At present, BRTS is being taken up in eight cities, namely, Pune, Ahmedabad, Indore, Bhopal, Vijayawada, Vishakhapatnam, Jaipur and Rajkot involving a length of 310 kms at a total cost of Rs. 2740 crore. Delhi is also implementing BRTS as a State Government funded project.



(L to R) Mr. Howard Potter, ED, Transportation Planning (International) Ltd, London, Mr. R Devarajan, Special Director, Ashok Leyland, Mr. M Ramachandran, Secretary, Ministry of Urban Development, Mr. I V Rao, Managing Executive Officer-Engineering, Maruti Suzuki India & Mr. Dilip Chenoy, DG, SIAM at the Inaugural Session of "National Consultation On Urban Bus-based Transportation Solutions: Standards And Operations"

Diesel City - A SIAM Presentation

'Diesel City' as a concept came into reality, this year at the 9th Auto Expo from January 10 to 17, 2008 in New Delhi. Located next to Hall 7 and christened Hall 7(I), 'Diesel City' was one of the few concept pavilions at the Auto Expo. The concept of the Diesel city was planned two years back, under the guidance of Dr. Pawan Goenka, then Chairman of SIAM Diesel Image Committee. The aim of this pavilion was to educate the general masses about realities of Diesel and its technology as an efficient and clean fuel. The idea was to dispense myths in regards to Diesel as a dirty, smoky and polluting fuel. The concept of 'Diesel City' was a strong message communicated from the Auto Industry by showcasing its modern and latest technology in the Indian market. Auto Majors like Cummins India, Eicher Motors, Ford Motors, Mahindra & Mahindra, SkodaAuto, Fiat India and Tata Motors agreed to promote the industry's common message to general masses and other misled segments of society. The 'Diesel City' initiative was also supported by Delphi-TVS and MICO-Bosch, injection system manufacturing giants and Indian Oil Corporation, country's largest energy provider.

The Diesel City had many elements for general public to understand the journey of Diesel fuel from well to the tank of a car. Some of the capturing features of the city were interactive kiosks with Diesel process, a Museum showcasing its journey from early years to modern times and a prominent common area with facts and figures about the Diesel as fuel.

The Diesel City was visited by Mrs. Sheila Dikshit, Hon'ble Chief Minister of Delhi, on its inaugural day. She took the opportunity to visit infotainment areas as well as interact with participants and the large numbers of mediapersons.

Final SIMBA European Event

The SIMBA project's Final European Event brought together over 50 Chinese, Brazilian, South African, Indian and European infrastructure operators, vehicle makers, technology providers and ITS stakeholders in Brussels on February 25, 2008. Furthering the discussions held at the SIMBA National Events in emerging markets in 2007 and the initial Priority Workshops in 2006, the event defined possible future activities to be done in cooperation between the EU and emerging markets in the field of road transport research.



TECHNICAL AGENDA

SIMBA aims to increase road transport research cooperation between Europe and the emerging markets of Brazil, China, India, and South Africa by establishing a collaboration network that will bring together the key stakeholders in the fields of Intelligent Transport Systems (ITS), infrastructure and automotive development. Dr Aravind Bharadwaj represented SIAM and presented the latest perspective of India priorities and concrete expert working groups composed by Europeans and Indians in common areas of interest were established. The work of SIMBA will continue through the SIMBA II project.



SIAM at the SIMBA European Event in Brussels.

8th International Automobile Recycling Congress

The 8th International Automobile Recycling Congress was organised by International Congress & Marketing (ICM) from March 12 to 14, 2008 at Munich, Germany. The conference witnessed participation of 250 delegates from 28 countries including eminent speakers from all around the world.

A paper was presented on behalf of SIAM by Captain Mohan Ram from TVS Motors and Mr. Alok Jaitley from Maruti Suzuki. The SIAM presentation gave situation of the automobile recycling in India, which was primarily handled by the unorganised sector with low technology, poor yield and in an environmentally unsound manner. The delegation from Indian Automotive Industry targeted dismantling or shredding companies from Europe for assistance in setting up a demonstration unit in India. But the companies asked for ELV regulations followed in India. It was clarified that India has currently no regulations or set of laws for automotive recycling but would have very soon.

The other speakers spoke about ELV regulations in their respective countries and associated experiences. They also

commented on the targets set for the automobile recycling in their countries and their possibilities to achieve them. Visits to plants were also organised on the last day of the conference. The Indian delegation visited three different plants i.e. BMW & RDC, Schindelar car dismantling plant and Waste Utilization Plant of Augsburg.

SAE International Trade Show

SIAM participated at the SAE International Trade Show held in Detroit from April 14 to 17, 2008. Participation at the trade show was not very good, although there was a sizable Indian pavilion there. Dr. Surajit Mitra made a presentation on the Indian automotive industry on 'India Day'.

SIAM-JAMA Workshop on CO₂ Regulations

SIAM in partnership with Japanese Automobile Manufacturers Association, Inc. (JAMA) organised a workshop on "Japanese Approach for CO₂ Abatement from Transport Sector" on April 28, 2008 at New Delhi.

During this workshop, presentations were made by experts from Japan including Director, Ministry of Economy, Trade and Industry, (METI) Japan and Director, Global Environment Policy Office, Ministry of Land, Infrastructure & Transport, (MLIT) Japan and automobile experts from JAMA. The objective of this workshop was to understand the process followed in Japan for mitigating CO₂ from transport sector and also share the Indian perspective on this issue.

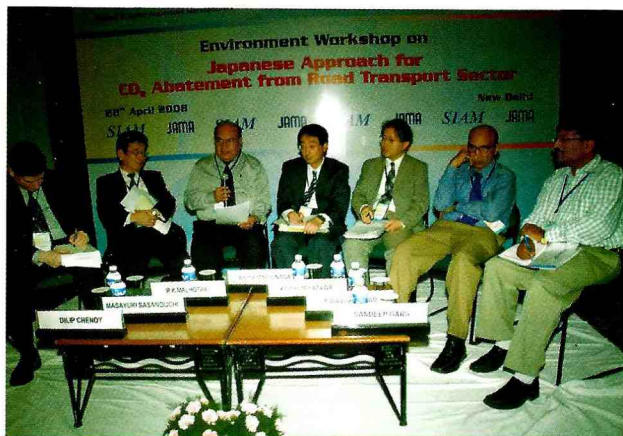
This workshop was held following the presentation made by JAMA President to SIAM Executive Committee on



(L to R) Dr. G K Sharma, Chairman, SCOE Sub-Committee on CO₂ Regulations, Govt. of India and Director, NATRIP, Mr. I V Rao, Co-Chairman, SIAM Group on CMVR and Managing Executive Officer, Maruti Suzuki India, Mr. Yoshiyasu Nao, Vice Chairman & President, JAMA and Mr. Dilip Chenoy, DG, SIAM at the Inaugural of SIAM-JAMA Environment Workshop.

TECHNICAL AGENDA

January 16, 2008 and it was suggested that SIAM and JAMA should closely work together on the CO₂ regulations.



(L to R) Mr. Dilip Chenoy, DG, SIAM, Mr. Masayaki Sasanouchi, JAMA, Mr. R K Malhotra, ED, IOC R&D, Mr. Akira Matsunaga, Director, Automobile Division, Manufacturing Industry Bureau, METI, Japan, Mr. Koichi Miyazawa, Director, Global Environment Policy Office, Environmental Policy Division, Policy Bureau, MLIT, Japan, Mr. S Ravishankar, Chairman, SIAM Group on CMVR and Senior GM, Tata Motors & Mr. Sandeep Garg, Energy Economist, PCRA at the SIAM-JAMA Environment Workshop on "Japanese Approach for CO₂ Abatement from Road Transport Sector".

Towards a Global Approach for Fuel Economy

FIA Foundation organised a symposium on Global Approach for Fuel Economy on May 15 to 16, 2008 at Paris. This symposium brought together key opinion makers from International Energy Agency (IEA), United Nations Environmental Partnership (UNEP), European Commission, German EPA, ACEA, International Transport Forum and ICCT. The objective of the discussion was to understand and share the different approaches on Fuel Economy being pursued by different countries / economies.

Transport and Energy: The Challenge of Climate Change"

International Transport Forum (ITF) organised a conference to stimulate discussions on Energy by increased use of Transport (Road, Rail, Air and Shipping). India, China and Brazil will also be requested to join the Forum. This forum is likely to develop as the 'Davos' for Transport. Mr. Atanu Ganguli participated from SIAM.

FIND 2008

SIAM participated in a seminar called FIND 2008 in Finland on May 28, 2008 and presented a perception of the Indian automotive industry, with special regard to technology and challenges for the future. The presentation was well received, with several key executives from the automotive sector showing keen interest in India's automotive activities.

Automotive Regional Cooperation between Italy & India

Italy and India have always been keen to extend relations, and thus a meeting of the Lombardini region was held in Milan, Italy, with participation from Fiat and Magneti Marelli. The event was inaugurated by Mr. S Chakravorty, India's Consul-General to Italy and SIAM made a presentation on the technical capabilities of the Indian Automotive Industry on June 10, 2008.

SIAM Agenda, Initiatives & Events

TECHNEX 2008

'Technex 2008: Global Automotive Technology', a second in its series was organised by SIAM in partnership with Emission Control Manufacturers Associations (ECMA) from April 28 to 30, 2008 in New Delhi. The first Technex had been organised in 2006 at Jaipur.

The conference was attended by 200 people from the automotive industry, government and academia. An exposition was also organised parallel to the conference. The sessions were

chaired by eminent personalities from the Government and the automotive Industry. There were 35 speakers who made presentations on important topics related to the automotive industry like Propulsion, Materials, Safety and Infotronics.

The panel discussion on 'Implementation of Clean Diesel Technologies' by top officials from ministries, oil industry and automotive industry, turned out to be riveting and captured the minds of the audience.



(L to R) Mr. R Devarajan, Special Director, Ashok Leyland, Mr. Toshihiro Iwatake, Vice President, JAMA, Mr. R P Mittal, President, ECMA, Mr. Michael Robinet, Vice President, Global Vehicle Forecasts, CSM and Mr. Dilip Chenoy, DG, SIAM at the Inaugural Session of Technex 2008.



(L to R) Panelists in the Valedictory Session during TechNex 2008 – Dr. Arun Jaura, CTO, Mahindra & Mahindra, Prof. Anand Patwardhan, ED, TIFAC, Dr. Surajit Mitra, Additional Secretary, Ministry of Heavy Industries & Public Enterprises, Dr. Aravind Bharadwaj, ED, Ashok Leyland and Mr. Dilip Chenoy, DG, SIAM.



Panelists at the Plenary Session of Technex 2008



Panelists at the Session on Automotive Infotronics during Technex 2008.



TECHNEX 2008



Sessions during Technex 2008.



SIAM Agenda, Initiatives & Events

SOCIETY & SIAM - SAFE

To create road safety awareness, Society for Automotive Fitness & Environment (SAFE), a SIAM initiative, has been organising campaigns in different parts of the country. These campaigns have generated a lot of interest and created awareness on issues related to road safety and environment protection amongst the participants.

SAFE undertook several initiatives during the year 2007-08. It organised a large number of events across the country to spread safety awareness. It has been working closely with the transport and traffic police departments of many states. In a move to impart road safety education in the country, the member companies supported SAFE initiatives by organising various workshops and safety-related programmes at their dealers' network.

During the year 2007-2008, SAFE organised several driver awareness workshops for corporates and government departments. During the National Road Safety Week in January 2008, SAFE organised a safety awareness drive all over India, which included driver training workshops, safety awareness drives for school students and general awareness camps for citizens. With extensive support from member companies SAFE conducted road safety awareness drives in Indore, Chennai, Mumbai and New Delhi.

In Indore drivers operating different classes of vehicles like city buses, taxis, school/ college buses, hazardous goods carriers etc. were trained. In addition, other road users driving bikes/ cars like college students, Eicher executives/ trainers also participated in the programme.

In Delhi, the training programme covered traffic police officials, DTC drivers, drivers of three wheelers and students.

In Mumbai, various programmes were organised in association with the Transport Department, Government of Maharashtra for driving school trainers, taxi drivers, school bus drivers and BEST drivers.

In Chennai, a training programme was conducted for over 100 driving school trainers.

With the new innovations in training modules and to instill traffic sense into young minds, our members have started simulator-based training workshops for students as well as for general masses. SAFE, in association with Honda Motorcycle and Scooters India had put up two-wheeler simulators during the International Trade Fair at Pragati Maidan in November 2007. Many schools participated in this unique initiative and it was highly appreciated by the Delhi Traffic Police. These simulators were also taken to

individual schools in New Delhi and a workshop on safety was organised for students and teachers.

In another initiative to inculcate traffic sense in young minds, SAFE along with Mercedes Benz India held the Mercedes-Benz Mobile Kids' programme, wherein an inter-school quiz and painting competition was held in 7 schools with participation from over 1,000 children in Chennai. In January 10,000 road safety books were distributed to corporation schools in Chennai.

A road safety awareness campaign for Three wheelers was also organised in association with Delhi Traffic Police and Bajaj Auto. Over 400 three-wheeler drivers participated in a week-long campaign. A special cash award of Rs. 5,000 was given to two drivers of Three wheelers in Delhi who had a year long record of accident free and challan free driving.

The campaign was organised to inculcate good driving habits amongst drivers and apprise them of the benefits of periodic maintenance of vehicles. Technical experts delivered lectures, demonstrated repair techniques, and gave valuable driving tips to drivers. General health check-up camps were also conducted.

During the National Road Safety Week, awareness programmes were conducted through the medium of street plays (nukkad-natak). A 'Don't Drink & Drive' campaign was also carried out.

On World Environment Day, SAFE conducted a one-day free pollution check drive all over the country in partnership with its members and issued free PUC certificates to customers whose vehicles met the prevalent emission limits. Over 1,000 dealers from 250 cities spanning several states of India participated in this drive.

SAFE continued to organise free computerised pollution check camps all over India with the help of dealers of member companies. SIAM has also undertaken a pilot project of connecting 20 pollution check centres in Delhi under the aegis of the Transport Department, Government of NCT of Delhi.

At the invitation of the UN, Director General, SIAM and President, SAFE participated in the historic 62nd session of the UN General Assembly at the UN headquarters in New York on March 31, 2008 which launched the Global Road Safety initiative. SAFE has now become part of a larger global road safety map.

SIAM also participated in a workshop on Motorcycling Safety jointly organised by OECD and International Transport Forum at Norway in June 2008.

SOCIETY & SIAM - SAFE AGENDA

SAFE Annual Convention 2008 was organised on June 4, 2008 in Pune in association with the Transport Department, Government of Maharashtra. The theme for the convention was 'A Safer Tomorrow through Training and Technology'. It was inaugurated in the presence of Mr. Ramanath Jha, Principal Secretary – Transport, Government of Maharashtra, Mr. A Sivagnanam, Joint Transport Commissioner – Road

Safety, Government of Tamil Nadu, Mr. C M Kharatmal, RTO, Pune and other senior officials from the Government of Maharashtra, the automotive industry and SIAM.

This year the emphasis of the convention was on disseminating information on new ways of training and the technology available to increase the efficiency of drivers and reduce the numbers of accidents.



(L to R) SAFE Annual Convention 2008 - A Safer Tomorrow through Training and Technology held on 4th June 2008 at Pune - Mr. K K Gandhi, Executive Director, SIAM, Mr. A Sivagnanam, Joint Transport Commissioner, Government of Tamil Nadu, Mr. Ramanath Jha, Principal Secretary, Transport, Government of Maharashtra, Mr. R Devarajan, President, SAFE and Mr. C M Kharatmal, RTO, Pune at the Inaugural Session.



(L to R) SAFE Annual Convention 2008 - Mr. S Sasane, Dy RTO, Mumbai, Mr. R Balasubramanian, Director, CIRT, Mr. Dilip Chenoy, DG, SIAM, Mr. R Devarajan, President, SAFE, Mr. A Sivagnanam, Joint Transport Commissioner, Government of Tamil Nadu, Mr. R K Parimoo, Director, IDTR, Mr. S M Hargapurkar, Dy Director, ARAI and Mr. C M Kharatmal, RTO Pune.



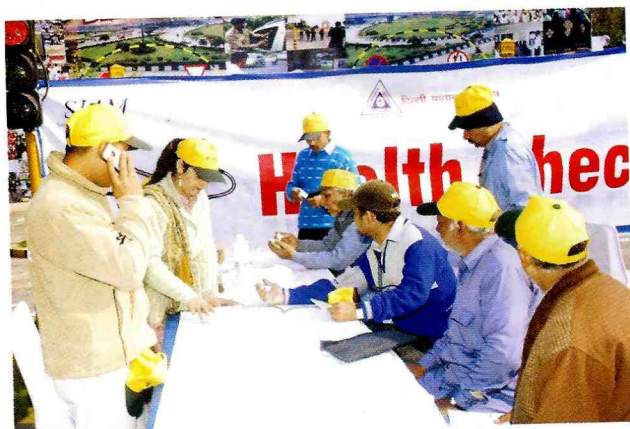
SOCIETY & SIAM - SAFE AGENDA



(L to R) Inauguration of National Road Safety Week at Indore: Mr. Anshuman Yadav, SP, Mr. Vivek Agrawal, Collector, Indore, Mr. Jagat Narayan Joshi, Advisor to Transport Minister, Mr. Rajendra Kumar, IGP, Mr. B P Singh, Commissioner, Mr. A Ramasubramanian, CEO, Eicher Motors, and Mr. Madhukumar, DIG, Police.



Training Session in progress for Students of Holkar Science College.



Health Check Camp for Three Wheeler Drivers at New Delhi.



Three Wheeler Driver Training Programme at New Delhi: Hon'ble Minister of Transport Mr. Haroon Yusuf handing over the cash reward of Rs 5000/- to the best drivers.



(L to R) Three Wheeler Driver Training Programme at New Delhi: Mr. Qamar Ahmed, Joint Commissioner of Police - Traffic addressing the three wheeler drivers in the presence of Mr. A K Sethi, Mr. I Pattabhi, Bajaj Auto Ltd, Mr. K N Krishnamurthy, SAFE, and Mr. Muktesh Chander, Additional Commissioner of Police - Traffic, New Delhi.



National Road Safety Week at Chennai: Mr. C P Singh, Transport Commissioner, Government of Tamil Nadu addressing the students and drivers at the Inaugural Session.



SOCIETY & SIAM - SAFE AGENDA



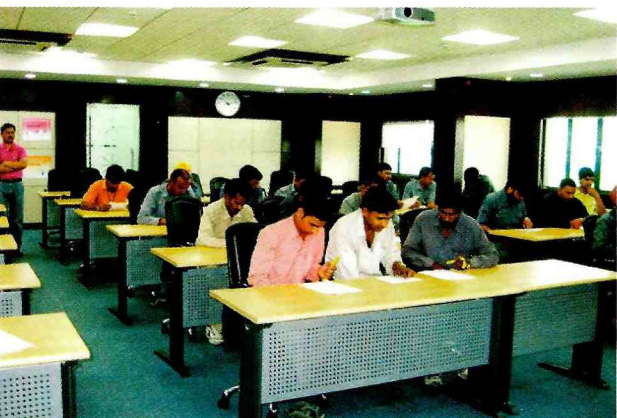
Defensive Driving Refresher Training Programme in progress at Chennai.



RTO officials inaugurated refresher training programme for taxi drivers at RTO office.



Refresher Training Programme conducted for BEST drivers at Mumbai.



Defensive Driving Workshop for Samsung Drivers.



Road Safety Painting Competition at Pragati Maidan, New Delhi.



Mr. Q Ahmed, Joint Commissioner of Police – Traffic distributing prizes to students at India Gate Ground, New Delhi.



SOCIETY & SIAM - SAFE AGENDA



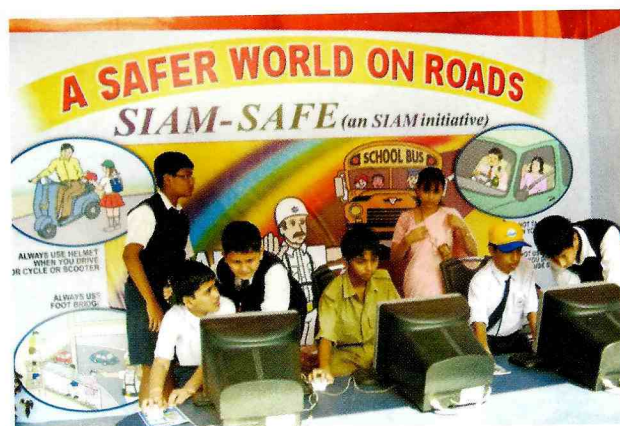
Winner of Mercedes-Benz Mobile Kids from Chennai- Ms. Amrin Bano S from Mrs. Ellen Sharma Memorial Nursery and Primary School, Mylapore, receives award from Mrs. Usha Seshasayee (President, Suraksha), Dr. Wilfried Aulbur (CEO & MD, DaimlerChrysler, India) with Mr. C P Singh, Sp Commissioner & Transport Commissioner, Govt of Tamil Nadu and Mr. R Devarajan (President, SAFE).



School Teachers learning two wheeler riding on Honda Rider Trainer Simulator at Delhi.



School students learning two wheeler riding on Honda Rider Trainer Simulator at Delhi.



Kolkata school students visiting & learning road safety through Interactive games and visual.



Road Safety Nukkad Natak organised for general passes at Pragati Maidan, New Delhi.



Vehicle Maintenance Session.



SOCIETY & SIAM - SAFE AGENDA



Road Safety drive on Two Wheeler Simulator.



Safety features demonstration for customers.



Safe driving demonstrated to customers.



Another PUC Camp organised on World Environment Day Drive in progress.



62nd Session of the United Nations General Assembly at the U N Headquarters, New York.



OVERVIEW OF AUTOMOBILE INDUSTRY

Industry Performance: 2007-08

Domestic Sales

The automobile industry produced 10.83 million vehicles with domestic sales of 9.6 million vehicles in 2007-08. Two wheelers accounted for three-fourth of the market. Passenger vehicles, commercial vehicles and three wheelers accounted for 16 per cent, 5 per cent and 4 per cent of the market, respectively. Domestic sales decelerated on account of factors like rising cost of raw material, reduced availability of finance, especially in semi-urban and rural areas, rising cost of finance etc.

Segment-wise Performance

Passenger Vehicles

The cumulative growth of the Passenger Vehicles segment during April – March 2008 was 12.17 per cent. Passenger Cars grew by 11.79 per cent, Utility Vehicles by 10.57 per cent and Multi Purpose Vehicles by 21.39 per cent in this period.

Commercial Vehicles

The Commercial Vehicles segment grew marginally at 4.07 per cent. While Medium & Heavy Commercial Vehicles declined by 1.66 per cent, Light Commercial Vehicles recorded a growth of 12.29 per cent. Truck segment grew marginally at 1.24 per cent. The Bus segment recorded a growth rate of 26.51 per cent.

Two wheelers

The Two wheelers segment registered a negative growth rate of 7.92 per cent during this period, with Motorcycles and Electric Two wheelers declining by 11.90 per cent and 44.93 per cent, respectively. However, Scooters and Mopeds segments grew by 11.64 per cent and 16.63 per cent, respectively.

Three wheelers

Sales of Three wheelers fell by 9.71 per cent, with sales of Goods Carriers declining drastically by 20.49 per cent and Passenger Carriers by 2.13 per cent during April- March 2008, compared to the previous year.

Exports

Automobile Exports registered a growth of 22.30 per cent during the current financial year. The growth was led by

Two wheelers, which grew at 32.31 per cent. Exports of Commercial Vehicles and Passenger Vehicles grew by 19.10 per cent and 9.37 per cent, respectively. Exports of Three wheelers declined by 1.85 per cent.

Industry Performance: First Quarter of 2008-09

In the first quarter of 2008-09 (April-June 2008), while vehicle production grew by 9.45 per cent, domestic sales grew at a slower pace of 8.19 per cent compared to the first quarter of the previous year (April-June 2007).

Domestic Sales

The growth of the Passenger Vehicles segment during the quarter was 15.08 per cent. Passenger Cars grew by 12.36 per cent, Utility Vehicles by 23.63 per cent and Multi Purpose Vehicles by 29.35 per cent in this period.

Overall the Commercial Vehicles market grew by 9.59 per cent. Medium & Heavy Commercial Vehicles grew at 7.17 per cent and Light Commercial Vehicles recorded a growth of 12.63 per cent.

Sales of Three wheelers declined by 0.36 per cent. While Passenger Carriers grew by 11.24 per cent during April-June 2008, Goods Carriers declined by 18.65 per cent.

Two wheelers grew by 7.15 per cent during this period, with Motorcycles and Scooters growing by 7.97 per cent and 4.90 per cent, respectively. Mopeds grew by 2.35 per cent. However, Electric Two wheelers declined by 8.15 per cent.

Exports

The first quarter of 2008-09 saw automobile exports registering a growth of 24.66 per cent, but not all segments registered positive growth.

Passenger Vehicles and Two wheelers grew by 44.09 and 30.47 per cent, respectively. Exports of Commercial Vehicles declined by 9.91 per cent. Exports of Three wheelers also declined by 18.57 per cent in this period.

Outlook For 2008-09

The industry outlook is positive with expectation of at least marginal improvement in the growth. Segment-wise growth (Y-o-Y) expectations are:

Passenger Vehicles	10 – 12	per cent
Commercial Vehicles	5 – 7	per cent
Two wheelers	4 – 6	per cent
Three wheelers	3 – 5	per cent

OVERVIEW OF AUTOMOBILE INDUSTRY

In Numbers

AUTOMOBILE PRODUCTION TRENDS						
Category	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
Passenger Cars	557,410	782,562	960,487	1,046,133	1,238,021	1,416,482
Utility Vehicles	114,479	146,325	182,018	196,506	222,495	244,648
MPVs	51,441	60,673	67,371	66,661	84,707	101,001
Total Passenger Vehicles	723,330	989,560	1,209,876	1,309,300	1,545,223	1,762,131
M&HCVs	120,502	166,123	214,807	219,295	294,258	291,114
LCVs	83,195	108,917	138,896	171,788	225,724	254,062
Total Commercial Vehicles	203,697	275,040	353,703	391,083	519,982	545,176
Three Wheelers	276,719	356,223	374,445	434,423	556,126	500,592
Scooters	848,434	935,279	987,498	1,021,013	943,944	1,074,933
Motorcycles	3,876,175	4,355,168	5,193,894	6,207,690	7,112,281	6,503,532
Mopeds	351,612	332,294	348,437	379,994	379,987	430,827
Electric Two Wheelers	-	-	-	-	30,454	16,757
Total Two Wheelers	5,076,221	5,622,741	6,529,829	7,608,697	8,466,666	8,026,049
Grand Total	6,279,967	7,243,564	8,467,853	9,743,503	11,087,997	10,833,948

AUTOMOBILE DOMESTIC SALES TRENDS						
Category	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
Passenger Cars	541,491	696,153	820,179	882,208	1,076,582	1,203,531
Utility Vehicles	113,620	146,388	176,360	194,502	220,306	243,589
MPVs	52,087	59,555	65,033	66,366	83,091	100,865
Total Passenger Vehicles	707,198	902,096	1,061,572	1,143,076	1,379,979	1,547,985
M&HCVs	115,711	161,395	198,506	207,472	275,556	270,994
LCVs	74,971	98,719	119,924	143,569	192,209	215,823
Total Commercial Vehicles	190,682	260,114	318,430	351,041	467,765	486,817
Three Wheelers	231,529	284,078	307,862	359,920	403,910	364,703
Scooters	825,648	886,295	922,428	909,051	940,617	1,050,109
Motorcycles	3,647,493	4,170,445	4,964,753	5,810,599	6,547,195	5,768,330
Mopeds	338,985	307,509	322,584	332,741	354,760	413,759
Electric Two Wheelers	-	-	-	-	29,762	16,391
Total Two Wheelers	4,812,126	5,364,249	6,209,765	7,052,391	7,872,334	7,248,589
Grand Total	5,941,535	6,810,537	7,897,629	8,906,428	10,123,988	9,648,094

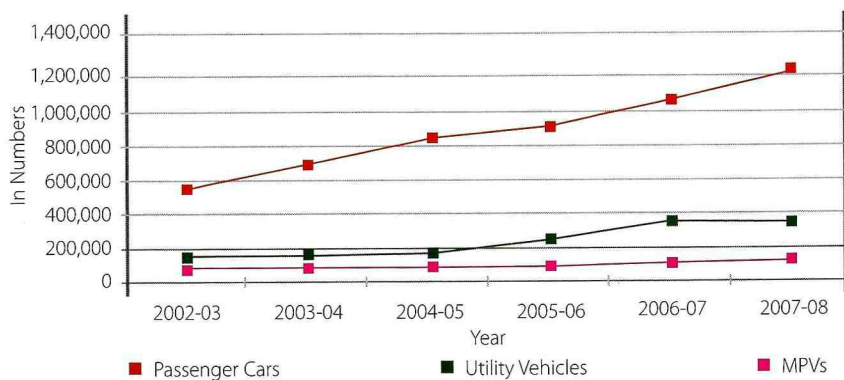
AUTOMOBILE EXPORTS TRENDS						
Category	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08
Passenger Cars	70,263	125,320	160,670	169,990	192,723	211,110
Utility Vehicles	1,177	3,049	4,505	4,489	4,399	6,301
MPVs	565	922	1,227	1,093	1,330	1,007
Total Passenger Vehicles	72,005	129,291	166,402	175,572	198,452	218,418
M&HCVs	5,638	8,188	13,474	14,078	18,610	22,100
LCVs	6,617	9,244	16,466	26,522	30,927	36,899
Total Commercial Vehicles	12,255	17,432	29,940	40,600	49,537	58,999
Three Wheelers	43,366	68,144	66,795	76,881	143,896	141,235
Scooters	32,566	53,687	60,699	83,934	35,397	25,482
Motorcycles	123,725	187,287	277,123	386,054	545,592	776,141
Mopeds	23,391	24,078	28,585	43,181	38,655	18,224
Total Two Wheelers	179,682	265,052	366,407	513,169	619,644	819,847
Grand Total	307,308	479,919	629,544	806,222	1,011,529	1,238,499



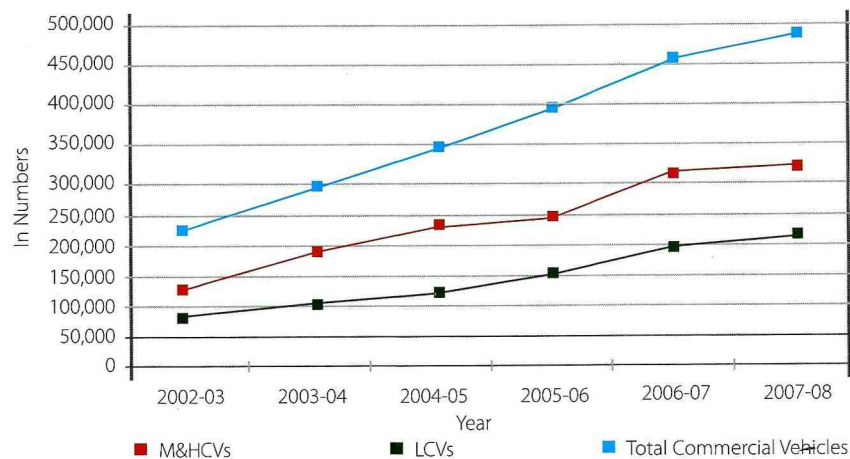
OVERVIEW OF AUTOMOBILE INDUSTRY

AUTOMOBILE DOMESTIC SALES TRENDS

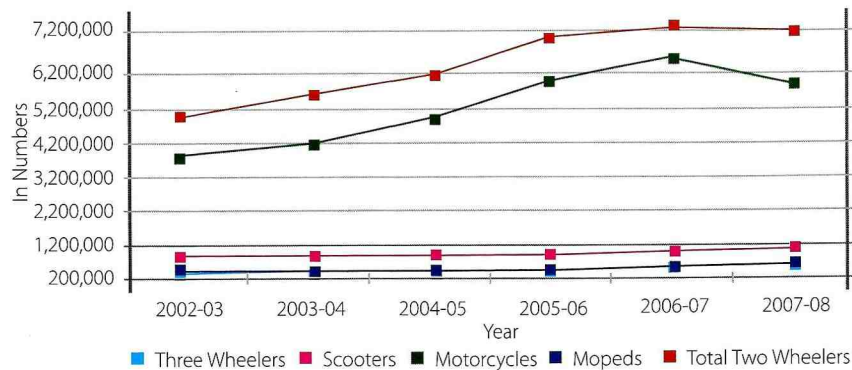
Passenger Vehicles



Commercial Vehicles



Two & Three Wheelers

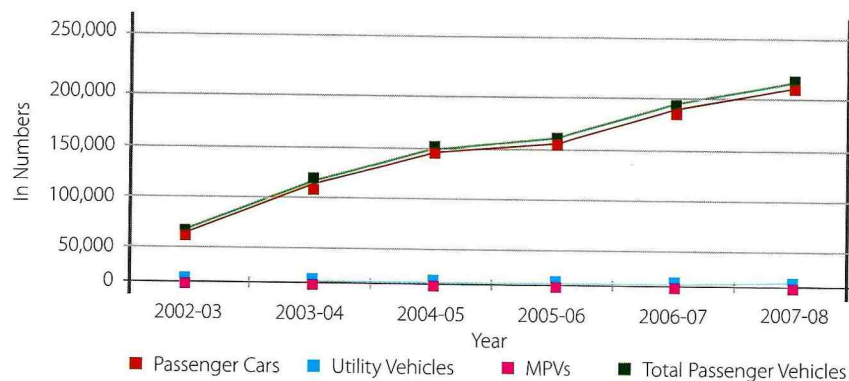




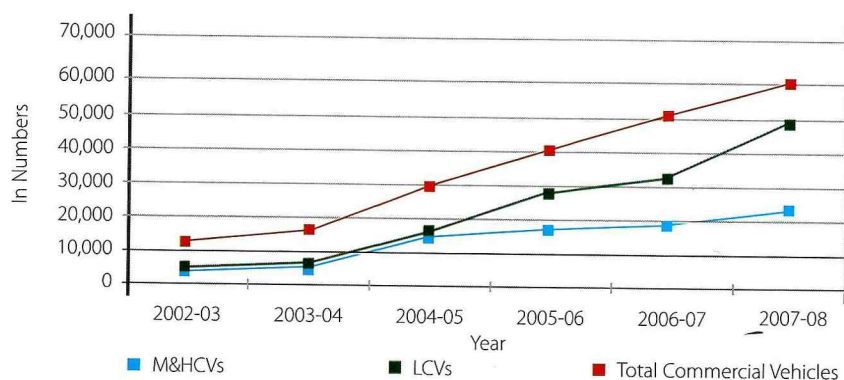
OVERVIEW OF AUTOMOBILE INDUSTRY

AUTOMOBILE EXPORTS TRENDS

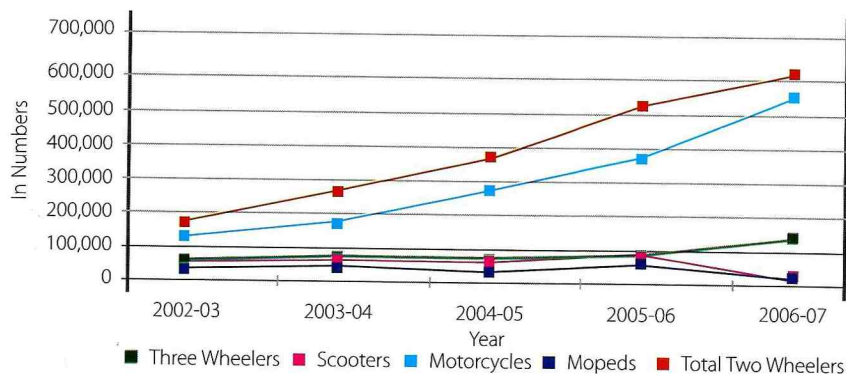
Passenger Vehicles



Commercial Vehicles



Two & Three Wheelers





SIAM OFFICE BEARERS

SIAM Executive Committee 2007-2008

COMPANY	MEMBER	ALTERNATE
Tata Motors Ltd.	Mr. Ravi Kant (President)	Mr. Prakash M Telang
Mahindra & Mahindra Ltd.	Dr. Pawan Goenka (Vice President)	Mr. Ketan Doshi
Eicher Motors Ltd.	Mr. S Sandilya (Treasurer)	Mr. A Ramasubramanian
Ashok Leyland Ltd.	Mr. R Seshasayee	
Bajaj Auto Ltd.	Mr. Madhur Bajaj	Mr. Rajiv Bajaj
Cummins India Ltd.	Mr. Anant J Talaulicar	Mr. Arun Ramachandran
Force Motors Ltd.	Mr. Abhay Firodia	Mr. Sudhir Mehta
Ford India Pvt. Ltd.	Mr. Michael Boneham	
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
Piaggio Vehicles Pvt. Ltd.	Mr. Ravi Chopra	
Royal Enfield	Mr. Siddhartha Lal	Mr. R L Ravichandran
Scooters India Ltd.	Mr. Ajai Kumar	
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	
Volvo India Pvt. Ltd	Mr. Eric Leblanc	Mr. G V Rao

COUNCILS & GROUPS



Mr. R Seshasayee

A Council on International Business

Chairman: *Mr. R Seshasayee, Managing Director, Ashok Leyland Ltd.*

The Council on International Business has been constituted to enable SIAM to achieve the aim of internationalisation of the Indian automobile industry. The Council's activities are divided into three focused areas – policy formulation, relation building and export promotion.



Mr. S Sandilya

1. Trade Policy Group

Chairman: *Mr. S Sandilya, Chairman, Eicher Group*

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



Mr. A S Puri

2. International Relations Group

Chairman: *Mr. A S Puri, Senior General Manager, Tata Motors Ltd.*

The SIAM International Relations Group is trying to establish relations with other international associations and embassies of several countries. Its activities are geared to establish a positive image of the Indian automobile industry. The group also spearheads SIAM initiatives on various international platforms like APEC Automotive Dialogue, etc.



Mr. Arvind K Saxena

3. Exports Group

Chairman: *Mr. Arvind K Saxena, Vice President - Marketing, Hyundai Motor India*

This Exports Group aims to facilitate market access for members by helping them get export support from the Government. It also plans to participate in road shows, auto shows and in India Pavilions overseas. It provides inputs to the Government for the preparation of Foreign Trade Policy & Procedure.

COUNCILS & GROUPS



Mr. Venu Srinivasan

B. Council on Economic Affairs

Chairman: *Mr. Venu Srinivasan, Chairman & Managing Director, TVS Motor Company*

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



Mr. Ketan Doshi

1. Economic Research

Chairman: *Mr. Ketan Doshi, Head- Strategy, Mahindra & Mahindra*

The SIAM Economic Research Group has been constituted to spearhead industry research and provide inputs to members. It is working on developing a quarterly report on 'State of the Indian Automobile Industry' for members and also invites various experts for brainstorming sessions. The group is actively working towards an Economic Conclave next year.



Mr. K K Swamy

2. Taxation Policy Group

Chairman: *Mr. K K Swamy, Former Deputy Managing Director, Toyota Kirloskar Motors*

The group worked on budget issues and other policy issues like payment for foreign technology collaboration, recent amendments to Packaged Commodities Rules, 1977, Education Cess, Auto Cess etc. During the year, several experts were invited to share the latest developments like Mr. S Madhavan, Executive Director, PricewaterhouseCoopers on the proposed structure of GST, Union Budget 2008-09 etc.



Mr. D D Goyal

3. Taxation Procedural Group

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

Apart from preparation of pre-budget & post-budget memorandum on procedural issues, the Taxation Procedural Group organised various knowledge sharing and mutual problem solving sessions. A number of experts were also invited to share their knowledge on specific issues.

COUNCILS & GROUPS



Mr Sudam Maitra

4. Sourcing Group

Chairman: *Mr. Sudam Maitra, Executive Director, Maruti Suzuki India*

The SIAM Sourcing Group created a platform for bringing together the Sourcing Heads of various companies. It has initiated a monthly analysis of prices of various raw materials and is working with ACMA to develop an appropriate course for imparting training to the suppliers. In the current environment of rising input prices, the group is engaged in close dialogue with relevant government bodies to control the situation. To check rising steel prices, several meetings were held with Alloy Steel Producers Association (ASPA), Ministry of Steel and Ministry of Heavy Industries & Public Enterprises.



Mr. Prince Augustin



Mr. Yash Yadav

5. Human Capital Group

Chairman: *Mr. Prince Augustin, Senior Vice President, Mahindra & Mahindra*

Co-chairman: *Mr. Yash Yadav, Vice President-Human Resources, General Motors India*

The newly constituted SIAM Human Capital Group met to identify its purpose and objectives and constituted four committees (Learning & Development, Workforce Development/ ITI, Compensation & Industrial Relations) to deliberate and take forward issues of concern. The group understands that a multi-pronged approach would be necessary to address all human resources related issues affecting the automotive industry and the committees are actively working on various projects.



Mr. R Bhurat

6. Group on Anti Counterfeiting

Chairman: *Mr. R Bhurat, Vice President, Mahindra & Mahindra*

The group's objective is to reduce the size of the counterfeit market and spread awareness. To work towards achieving this goal, the group has taken the consent of the Executive Committee for submission of Power of Attorney by participating members. This would enable the group to take action in continuation to the three rounds of investigation in the local automotive market. The group plans to conclude the investigation rounds held a few months back. The action taken under the umbrella of SIAM would have better impact, leading to profits of OEMs and government.

COUNCILS & GROUPS



Mr. Rajesh Uppal

7. IT Initiatives Group

Chairman: Mr. Rajesh Uppal, Chief General Manager, Maruti Suzuki India

This group aims to promote the use of Information Technology among member companies by creating a regular forum of discussions, sharing of best practices and creating awareness of new trends and developments. The group is also working towards creation of a National Register for vehicle registration and driving licence records.



Mr. M Takedagawa

C. Council on Demand Management

Chairman: Mr. M Takedagawa, President & CEO, Honda Siel Cars India Ltd.

The Demand Management Council has been 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 have acquired importance with the growing size of the industry like finance availability, logistics and insurance facility, used vehicle business, participation in domestic trade fairs and vehicle categorisation.

1. Passenger Cars and MUVs Group

Chairman: Mr. M Takedagawa, President & CEO, Honda Siel Cars India Ltd.

This group was set up to look into commercial issues related to the passenger cars industry. Several issues were covered during the 'Looking Ahead' Conclave for passenger vehicles.



Mr. Eric Leblanc



Mr. P M Telang

2. Commercial Vehicles Group

Chairman: Mr. Eric Leblanc, Managing Director, Volvo India

Co-chairman: Mr. P M Telang, President, Tata Motors

This group was set up to look into commercial issues related to the commercial vehicles industry. Several issues were covered during the 'Looking Ahead' Conclave for commercial vehicles.



Mr. Pawan Munjal

3. Two wheelers Group

Chairman: Mr. Pawan Munjal, Managing Director, Hero Honda Motors Ltd.

This group was set up to look into commercial issues related to the two-wheeler industry. During the 'Looking Ahead' Conclave, a focused session on the Two wheelers segment was organised by the group.

COUNCILS & GROUPS



Mr. Ravi Chopra

4. Three wheelers Group

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

This group was set up to look into commercial issues related to the three-wheeler industry. Some of the issues were discussed during the 'Looking Ahead' Conclave.



Mr. K Sridharan



Mr. Ravi Pisharody

5. Finance & Leasing Group

Chairman: Mr. K Sridharan, Chief Financial Officer, Ashok Leyland

Co-chairman: Mr. Ravi Pisharody, Vice President (Sales & Marketing) – CVBU, Tata Motors

The Finance & Leasing Group is initiating a dialogue with finance companies to ensure greater transparency and risk grading in the credit delivery system.



Mr. Sudhir Mehta

6. Trade Fairs Group

Chairman: Mr. Sudhir Mehta, Director, Force Motors Ltd.

This new group has been set up to take decisions regarding participation in various trade fairs and exhibitions within the country. One of the major decisions taken by this group is to hold annual Regional Fairs at various places, starting with a special show on Buses & Emergency Vehicles in Bangalore in March 2009. The group would also act as the organising committee for the 10th Auto Expo and other shows.



Mr. Rajiv Dube

7. Vehicle Classification Group

Chairman: Mr. Rajiv Dube, President (PCBU), Tata Motors

The group is working towards establishing SIAM as the most authentic source of data on the Indian automobile industry. Any changes or revisions in SIAM's monthly statistical report are carried out by this group. It is working on collecting state-wise data and model-wise data for all vehicle segments.

COUNCILS & GROUPS



Mr. M M Singh

8. Logistics Group

Chairman: *Mr. M M Singh, Executive Director, Maruti Suzuki India*

The SIAM Logistics Group is working on three broad issues: Railways, Roads & Ports and Consolidation among members. The group is interacting with the Railways to explore various technological options/solutions to address the issue of transportation of vehicles through railways.

Apart from this initiative, the group is also exploring opportunities of collaboration among members. It is also interacting with the Tariff Authority for Major Ports. Many logistics experts and service providers have shared their experiences with the group.



Mr. P Balendran

9. Insurance Group

Chairman: *Mr. P Balendran, Vice President, General Motors India*

The Insurance Group 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.



Mr. Mayank Pareek



Mr. Anil Dua

10. Retail Group

Chairman: *Mr. Mayank Pareek, Chief General Manager (Marketing), Maruti Suzuki India*

Co-chairman: *Mr. Anil Dua, Vice President, Hero Honda Motors*

This group would work towards establishing linkages with dealers (FADA). It would also work towards making the pre-owned vehicle business attractive for organised players to enter.



Dr. Pawan Goenka



Dr. Wilfried Aulbur

D. Technical Council

Chairman: *Dr. Pawan Goenka, Vice President, SIAM and President – Automotive, Mahindra & Mahindra*

Co-chairman: *Dr. Wilfried Aulbur, Managing Director & CEO, Mercedes-Benz India*

The objective of forming a new apex Technical Council was to seek reports from all the SIAM Technical Groups and seek guidance for cohesive approach of SIAM groups. The Technical Council would ensure that the objectives and activities of each group complement each other and are geared towards the overall development of the Indian automobile industry.

COUNCILS & GROUPS



Mr. J K Deb

1. Group on Emissions & Conservation

Chairman: Mr. J K Deb, Vice President, Fiat India

The Group on Emission and Conservation deliberated upon and developed a SIAM consensus on Fuel Economy/ CO₂ regulations. Several meetings were held with the sub-committee of Standing Committee on Implementation of Emission Legislation (SCOE) under the supervision of Dr. G K Sharma, Director, NATRIP.

Apart from this, the group discussed the draft BS IV notification text including the testing procedure for BS IV vehicles and the SIAM position and action point with respect to the introduction of E10 in India. Representatives of Emission & Conservation group also participated in four meetings of the Auto Fuel Policy Review Committee under the Chairmanship of Mr. M B Lal and presented SIAM inputs on Global Vehicle Technology. The group also worked on drafting the Type Approval procedure for BS IV vehicles and for two & three wheelers.



Mr. S Ravishankar



Mr. I V Rao

2. Group on CMVR & Safety Regulations

Chairman: Mr. S Ravishankar, Sr. General Manager, Tata Motors

Co-chairman: Mr. I V Rao, Executive Managing Officer, Maruti Suzuki India

This group, which comprises of all the Technical Heads of member companies, focuses on safety related regulations, WP.29 activities, harmonisation of regulations etc. The committee provided inputs on draft standards, alignment of existing AIS & IS to advanced levels of ECE regulations and EEC directives. The working group provided technical inputs on the safety standards under preparation in the various AISC panels and status of safety facilities at the testing agencies for preparedness for meeting notified standards.



Mr. Harjeet Singh



Mr. R M Kankar

3. Group on Two wheelers and Three wheelers (Technical)

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

Co-chairman: Mr. R M Kankar, Chief Engineer (R&D), Force Motors

The Group on Two wheelers and Three wheelers finalised the SIAM position on CO₂ regulations. The group also represented the SIAM position on various issues such as spray suppression of Two wheelers, issues raised by the Maharashtra Transport Commissioner on leg guard, saree guard, handhold and angle of exhaust. Members of the group also regularly participated in the IMMA and WP.29 meetings on issues related to WMTC, brakes etc. Indian regulations pertaining to two & Three wheelers are periodically reviewed and action on behalf of the industry for representation at appropriate forums is decided. The issue

COUNCILS & GROUPS

related to testing of Three wheelers on GVW has been raised and the group is responding to the Government appropriately.



Mr. C V Raman

4. Group on Styling & Design

Chairman: Mr. C V Raman, Chief General Manager, Maruti Suzuki India

The Styling and Design Group has been set up to give greater exposure and an enabling atmosphere to the designer community. The group has decided to initiate industry academia dialogue by meeting all the major engineering & design institutes in India, organising the National Automotive Styling Challenge (NASC) and the Styling & Design Conclave annually. The group has also decided to set up a webpage under the SIAM banner to appraise the public regarding the Styling & Design initiatives, case studies, academic roadmap etc.



Dr. Aravind Bharadwaj

5. Group on Automotive Infotronics

Chairman: Dr. Aravind Bharadwaj, Executive Director (Advanced Engineering), Ashok Leyland

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. The group also organises exhibitions, national/ international conferences. It is also spearheading the SIMBA project.



Dr. Arun Jaura

6. Group on Frontier Technologies

Chairman: Dr. Arun Jaura, Group – Chief Technical Officer, Mahindra & Mahindra

The group on Frontier Technologies aims to develop alternate propulsion technologies, especially hybrid electric vehicle technologies. The group is also doing a project on hydrogen-CNG blend with the Ministry of New & Renewable Energy and Indian Oil, apart from other initiatives. The group has been involved in establishing the Indian Hydrogen Association and it would be working towards World Hydrogen Technologies Convention 2009.

COUNCILS & GROUPS



Mr. A Ramasubramanian

7. Group on Auto Engines & Fuel

Chairman: Mr. A Ramasubramanian, Chief Executive Officer, Eicher Motors

The Auto Engines and Fuel Group is expected to identify the bottlenecks in the Indian system for introduction of advanced engines and after-treatment devices for meeting future emission regulations. Issues related to existing fuel quality and SIAM position for future fuel specification would also be discussed. SIAM Fuel Charter for BS V Emission norms would also be worked out.



Capt. Mohan Ram

8. Group on Recycling

Chairman: Capt. Mohan Ram, Advisor, TVS Motor Company

This group deliberates on Recycling and End of Life of Vehicles taking cognisance of existing regulations and experience worldwide. The group interacts with international experts and recently represented the country at the International Automobile Recycling Congress in Munich.



Mr. T M Balaraman



Mr. Z A Mujawar

9. Group on International Harmonisation

Chairman: Mr. T M Balaraman, General Manager, Bajaj Auto

Co-chairman: Mr. Z A Mujawar, General Manager, Mahindra & Mahindra

This was the first time that this group was formed in SIAM. Process for SIAM participation and submission of SIAM comments to international bodies were discussed. SIAM interaction in all Indian Shadow Group increased in the last year. Several SIAM members have participated in WP.29 meetings of GRPE, GRSP, GRSG, GRE, GRB and GRRF. Outcome of these meetings and SIAM participation in IMMA and OICA meetings were also discussed.



Mr. Pankaj Narula



Mr. B Mani

10. Service Head Forum

Chairman: Mr. Pankaj Narula Chief General Manager, Maruti Suzuki India Ltd.

Co-chairman: Mr. B Mani, General Manager, Hyundai Motor India

The Service Head Forum discusses the best practices adopted by the service departments of OEMs and measures adopted to enhance customer loyalty and satisfaction.

COUNCILS & GROUPS



Mr. Anant Talaular

11. Group on Diesel Image

Chairman: Mr. Anant Talaular, Managing Director, Cummins India Ltd.

The group organised the 'Diesel City' Pavilion during Auto Expo 2008. This group also has active participation from technology providers such as Bosch and Delphi. Some of the activities proposed for the group include finalisation of a PR Agency for Diesel Image and consideration of having the Diesel City concept, which was highly appreciated, being replicated in other parts of the country.



Mr. Harjeet Singh



Mr. I V Rao

E. SAFE (Society for Automotive Fitness & Environment)

President: Mr. Harjeet Singh, Associate Vice President, Hero Honda Motors

Vice President: Mr. I V Rao, Managing Executive Officer-Engineering, Maruti Suzuki India

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 endeavour to fulfill its commitment. It supports and enhances the industry's role as a responsible corporate citizen in the country. SAFE organises seminars with state governments and other stakeholders and also organises road safety awareness campaigns for students, drivers and the 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 Venkatesan	Premier Automobiles Ltd.
1980 & 1981	Mr. C V Karthik Narayanan	Standard Motor Product of India Ltd.
1982 & 1983	Mr. R J Shahaney	Ashok Leyland Ltd.
1984 & 1985	Mr. V Krishnamurthy	Maruti Udyog Ltd.
1986 & 1987	Mr. S L 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 Lal	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.

* Since deceased



MEMBERS OF SIAM

1. Ashok Leyland Ltd.

2. Atul Auto Ltd.

3. Asia Motor Works Ltd.

4. Bajaj Auto Ltd.

5. BMW India Pvt. Ltd.

6. Cummins India Ltd.

7. Electrotherm (India) Ltd.

8. Eicher Motors Ltd.

9. Fiat India Automobiles Pvt. Ltd.

10. Ford India Pvt. Ltd.

11. Force Motors Ltd.

12. General Motors India Pvt. Ltd.

13. Greaves Cotton Ltd.

14. Hero Honda Motors Ltd.

15. Honda Motorcycle & Scooter India Ltd.

16. Honda Sael Cars India Ltd.

17. Hindustan Motors Ltd.

18. Hyundai Motor India Ltd.

19. International Cars & Motors Ltd.

20. India Yamaha Motor Pvt. Ltd.

21. Kinetic Motor Company Ltd.

22. LML Ltd.

23. Mahindra & Mahindra Ltd.

24. Mahindra Renault Pvt. Ltd.

25. Maruti Suzuki India Ltd.

26. Mercedes-Benz India Pvt. Ltd.

27. Premier Ltd.

28. Piaggio Vehicles Pvt. Ltd.

29. Royal Enfield

30. Scooters India Ltd.

31. Simpson & Co. Ltd.

32. SkodaAuto India Pvt. Ltd.

33. Suzuki Motorcycle India Pvt. Ltd.

34. Swaraj Mazda Ltd.

35. Tata Motors Ltd.

36. Tatra Vectra Motors Ltd.

37. TVS Motor Company Ltd.

38. Toyota Kirloskar Motor Pvt. Ltd.

39. Volvo India Pvt. Ltd.

40. Volvo Buses India Pvt. Ltd.

41. Volkswagen India Pvt. Ltd.



AFFILIATIONS WITH OTHER INSTITUTIONS

INDIA

All India Motor Transport Congress

Aluminium Association of India

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 Diesel Engine Manufacturers Association

Indian Institute of Petroleum

Indian Machine Tool Manufacturers Association

Indian Institute of Metals

Indian Institute of Technology, New Delhi



AFFILIATIONS WITH OTHER INSTITUTIONS

Indian Rubber Institute

Indian Institute of Foreign Trade

Insurance Regulatory and Development Authority

Institute of Road Traffic Education

National Institute of Design

National Automotive Testing and R&D Infrastructure Project (NATRIP)

Petroleum Federation of India

Research & Information Systems for Non-aligned and Other Developing Countries

Technology Information Forecasting and Assessment Council (TIFAC)

Tractor Manufacturers Association

The Automotive Research Association of India

The Energy and Resources Institute

United States Agency for International Development

Vehicle Research & Development Establishment (VR&DE)

Western India Automobile Association



AFFILIATIONS WITH OTHER INSTITUTIONS

OVERSEAS

European Automobile Manufacturers Association (ACEA), Brussels

National Association of Motor Vehicle Manufacturers (ANFAVEA), Brazil

Asia Pacific Economic Cooperation Automotive Dialogue

ASEAN Automotive Federation

Asian Motorcycle Union (UAM)

Association of Indonesian Automotive Industries (GAIKINDO), Indonesia

Associazione Nazionale fra Industrie Automobilistiche (ANFIA), Italy

Association of Fabricas de Automotores, Buenos Aires, Argentina

Automotive Federation Malaysia

Automotive Research & Testing Centre, Taiwan

Automotive Policy Planning, METI, Japan

Automotive Trade Policy Council, USA

Chambers Syndicate des Constructeurs d Automobiles, Paris, France

China Association of Automobile Manufacturers, Beijing, P R China

Clean Air Initiatives of Asian Cities (CAI-Asia)

The Ceylon Motor Traders' Association (CMTA), Sri Lanka

Federation of Asian Motorcycle Industries, Singapore

Federal Chamber of Automotive Industry, Australia

Federation of Nepalese Chambers of Commerce & Industry, Nepal

Federation of Asian Motorcycle Industries, Singapore

Indonesian Motorcycle Industry Association, Jakarta, Indonesia

International Motorcycle Manufacturers Association, Geneva

Japan Automobile Manufacturers Association Inc, Tokyo, Japan

Japan Automobile Standards Internationalisation Centre, Tokyo, Japan

Korea Automobile Manufacturers Association, Seoul, Korea



AFFILIATIONS WITH OTHER INSTITUTIONS

Malaysia Automotive Association

Mitra Emisi Bersih, Indonesia

Motor Vehicle Manufacturers Association, Italy

Motorcycle and Scooter Assemblers and Distributors Association of Malaysia

Motorcycle Development Programme Participants Association, Philippines

Philippine Automotive Federation

National Alternative Fuel Training Consortium, USA

National Highway Traffic & Safety Authority, USA

Nepal Auto Dealers Association, Nepal

Organisation Internationals des Constructeurs d Automobiles (OICA), France

SAE International, USA

Singapore Motorcycle Trade Association, Singapore

Taiwan Transportation Vehicle Manufacturers Association, Taiwan

Thai Automotive Industry Association, Thailand

Thailand Automotive Institution, Thailand

Thai Auto Parts Manufacturers & Traders Ltd., UK

The Society of Motor Manufacturers & Traders Ltd., UK

Transport Research Laboratory, UK

US Department of Commerce

US Department of Energy

US Environment Protection Agency

Verband der Automobilindustrie e.v. (VDA), Germany

Vietnam Register, Vietnam

SIAM

Society of Indian Automobile Manufacturers

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