

SIAM



**Fifth Annual Report
2002-2003**

SIAM

Society of Indian Automobile Manufacturers



An ISO 9001: 2000 certified institution



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President's Message

I am very pleased to present the annual review of the Society of Indian Automobile Manufacturers for the fiscal year 2002-2003. I look back on the year gone by with a sense of satisfaction as we have been able to work to a plan and meet the major targets set for the year.

Policy work, economic and technical services and our emphasis on the corporate citizenship agenda, kept us busy and connected to the Centre and the States. SIAM had a significant role giving policy and procedural inputs to the Governments on behalf of its membership.

Alignment with European regulations has acted as a boon for the Indian Automobile Industry. The entire process of regulation formulation, testing & certification is now much more methodical and streamlined. A planned, comprehensive approach is emerging distinctly. The changes in the requirements are not carried out abruptly and the manufacturers get more time for productionising vehicles conforming to new standards. In the area of Safety, one does see certain regulations being enforced not for making safer vehicles but to make amends for ineffective enforcement by authorities. It is unfortunate in some instances that the Automobile Industry has been singled out for inadequacies in the system. Under MoRT&H, we believe, the trend is changing. A Safety roadmap has been finalised by the Government in consultation with all stakeholders and will be adopted by the country.

After the introduction of CNG for automotive use, there is now increasing interest in LPG for automotive application. Certain cities/ towns are planning compulsory LPG programmes, inspite of the lack of appropriate infrastructure in place. The lesson from the CNG programme in Delhi has been a mixed blessing for all of us. The maturity of the Indian industry was recognized internationally but we cannot forget the pains which all stakeholders underwent when appropriate infrastructure was not available and CNG vehicles were already operational.

There has been a renewed interest in Electric Vehicles. We hope that this segment would get the necessary boost it deserves.



The demands from the society have increased immensely and Regional Transport Officers (RTOs) & State Government of several states sought SIAM help in the areas of In-use vehicle emission management & safety. On the other hand endeavours of SIAM in projecting a buoyant Automobile Industry has reached far corners of the world and there is considerable interest in Indian vehicles specially CNG operated vehicles and safety measures that have been evolved for Alternative Energy Driven Vehicles.

SIAM through SAFE continues its effort in PUCC computerisation and has gone a step ahead in promoting networking of such centres. I am sure, as in the case of computerisation of PUC centres and modernisation of I&C centres, the networking would find due place in the national agenda as recommended by the Expert Committee on Auto Fuel Policy.

On the economic front, WTO and International Trade have significant implications for the Automotive Industry. It is gratifying to note that Government of India appreciate the vital role that auto industry plays in the economic progress of the country and that there is consensus within Government. The industry is aware that this is only an intermediary stage and the manufacturers have to gear up to be competitive in the zero tariff regime well within the next two decades.

The first step towards rationalisation - excise duty cut in Passenger Cars, has borne fruit and one can see significant growth in Passenger Cars segment. Two Wheelers have remained in a double digit growth trend while the Commercial Vehicle segment has shown distinct improvement. The latter may have been triggered by several factors viz the Golden Quadrilateral Project, efforts towards fleet modernization and finally capacity building.

Domestic and international issues were given due priority in our agenda and I dare predict that in coming years SIAM will play a pivotal role with respect to International trade in policy framing and promoting the case of Indian manufacturers overseas. India joining as an Observer in UN/ECE WP 29 is a first step in this direction and towards harmonization with global technical standards.

Our thrust on International linkages was quite evident from the fact that SIAM participated in a large number of International Conferences, Workshops and also took Govt. - Industry joint delegations to focus on various aspects of interest to the auto sector. SIAM participation in the APEC Automotive dialogue was a reflection of the growing recognition of India as an emerging auto nation, committed to globalisation.

I am very optimistic that Auto Industry alongwith the Components Industry would have sustainable growth and would continue to be a substantial contributor to the Indian Economy.

For the sustained growth of the Industry, it is imperative to focus on the rapidly evolving technology, rising customer expectations and increasing role of support services infrastructure including financing, dealership network etc. The success/failure of an Industry depends on its strategic & timely response to these challenges. In keeping with this, our carefully chosen theme - "**Dynamics of Market: Industry Response**" is very relevant as there is a need to consider the directions such changes might lead the automotive industry to and the kind of vehicles the industry might make in future.

In the midst of all this hectic activity, SIAM has continued to re-engineer itself to enhance members' satisfaction by adopting a quality management system to serve members effectively. SIAM received ISO 9001:2000 certification from TUV Sudddeutschland.

As I prepare to hand the baton to my successor, Mr Jagdish Khattar, I do so with a strong feeling of optimism for the Indian Automobile Industry as it accelerates towards being world class. The Made in India brand is becoming a reality.

The response from membership has been truly overwhelming. I express my sincere thanks to the Vice President, Executive Committee members, the auto industry fraternity and the ever vigilant secretariat for the support and encouragement extended to me throughout my tenure as President, SIAM.

3rd September 2003

New Delhi



R Seshasayee

President



About SIAM

SIAM IS AN IMPORTANT
CHANNEL OF
COMMUNICATION FOR
THE AUTOMOBILE
INDUSTRY WITH THE
GOVERNMENT, NATIONAL
AND INTERNATIONAL
ORGANISATIONS.

Society of Indian Automobile Manufacturers (SIAM) is the apex Industry body representing 36 leading vehicle and vehicular engine manufacturers in India.

SIAM is an important channel of communication for the Automobile Industry with the Government, National and International organisations. Dissemination of information is an integral part of SIAM's activities, which it does through various publications, reports, seminars and conferences. It organizes the biennial Auto Expo series of trade fairs in co-operation with Confederation of Indian Industry (CII) and Automotive Component Manufacturers Association of India (ACMA).

The Society works closely with all the concerned stake holders and actively participates in formulation of rules, regulations and policies related to the Automobile Industry.

SIAM provides a window to the Indian Automobile industry and aims to enhance exchanges and communication, expand economic, trade and technical cooperation between the Indian Automotive Industry and its international counterparts. With its regular and continuous interaction with international bodies and organizations it aims to facilitate upgradation of technical capabilities of the Indian Industry to match the best practices worldwide.

SIAM also interacts with worldwide experts to assess the global trends and developments shaping the Automotive Industry. It has been actively pursuing issues like Frontier Technologies viz. Telematics; Promotion of Alternative Fuels including Hydrogen Energy for automotive use through fuel cell vehicles and Harmonisation of Safety and Emission Standards etc.

SIAM has been striving to keep pace with the socio-economic and technological changes shaping the Automobile Industry and endeavours to be a catalyst in the development of a stronger Automobile Industry in India.

SIAM Initiatives & Events - Highlights

THE REPORT WILL HELP
INDIA TO DEVELOP
INFRASTRUCTURE AND
CAPACITY BUILDING TO
EMERGE AS A HUB FOR
VEHICLE DEVELOPMENT,
TESTING & CERTIFICA-
TION FOR GLOBAL
MARKET, ESPECIALLY FOR
THE ASIAN COUNTRIES.

Technical Issues

Preliminary Business Plan for Upgradation of Testing Facilities

At the instance of Ministry of Industries & Public Enterprises (MoHI&PE), the SIAM Task Force on Upgradation of Testing Facilities under the chairmanship of Dr K Kumar, Advisor, Maruti Udyog Ltd submitted its report to MoHI&PE in April 2002 which was accepted in principle by the Ministry. The report will help India to develop infrastructure and capacity building to emerge as a hub for vehicle development, testing & certification for global market, especially for the Asian countries.

The report was well received by Planning Commission and reference to the financial requirements for upgradation of existing facilities and creating new facilities has been made in the 10th five year plan document. The ministry also asked SIAM to prepare a ***Feasibility Report of the Project along with Financial Plan for the project.***

Boston Consulting Group was appointed for making the Preliminary business case which was submitted to MoHI&PE on 15th February 2003. The Business Case substantiates that the investment requirement of Rs 1500 Crores, as earlier proposed in the SIAM Report to MoHI&PE, is vital for fulfilment of Auto Policy laid down by MoHI&PE and is a must for sustainable growth of Indian Industry.

Government is considering funding this project from Automotive Cess Fund and Government Grants.

The matter was discussed in the Development Council for Automobile & Allied Industries, Ministry of Heavy Industry and as decided a Steering Committee has been constituted to oversee the implementation and fund management for the project.

UN/ECE Working Party -29

In compliance of the decision taken by the Union Cabinet regarding India's joining the WP 29 (World Forum for Harmonization of Vehicle Regulations) as an observer, Ministry of Road Transport & Highways constituted a Standing Committee including all stakeholders on a permanent basis. SIAM was a member of the Government - Industry joint delegation which participated in the 130th Session of World Forum for Harmonisation of Vehicle Regulations held at Geneva, on 24th - 27th June 2003,



Initiatives & Events

TELEMATICS IS
PERCEIVED AS A
REVOLUTIONARY RE-
UNION OF
TELECOMMUNICATION
AND INFORMATICS THAT
WILL EMPOWER THE
TRANSPORTATION
INDUSTRY IN FUTURE.

to understand the functioning of WP-29 and the implications of the UN/ECE 1958 and 1998 Agreements being administered by it. The meeting was attended by representatives from 37 countries and 11 Non Governmental Organizations.

The delegation has recommended that India should participate as an observer for a period of at least one year, before committing itself to any of the Agreements.

Telematics in Transportation sector

Telematics is perceived as a revolutionary re-union of Telecommunication and Informatics that will empower the transportation industry in future. In order to explore the future information intensive applications in automobiles, SIAM along with CII, ACMA and iiit-B (Indian Institute of Information Technology, Bangalore) organised a conference on Telematics in the transportation sector entitled "Tele Trans 2003" in Bangalore on 10th & 11th of March 2003 under the Co-Chairmanship of Dr R.A. Mashelkar, Director General, CSIR & Mr. R Seshasayee, President SIAM.

Outcome of the conference was:

- There is a need to cement the community of people interested in telematics. Research organizations, automobile and software companies and Government institutions should interact with each other on an ongoing basis. The fundamental need for this country is to understand who is doing what in telematics.
- A Steering Committee on National level should be created

United Nations Framework Convention on Climate Change (UNFCCC) - Eighth Conference of Parties (COP 8)

SIAM participated in the UNFCCC - COP 8, during 23rd October-1st November, 2002 held in New Delhi, as observer on behalf of OICA - International Organisation of Motor Vehicle Manufacturers.

A detailed report prepared by SIAM on the deliberations was considered at their 46th GEPE (Group of Experts on Pollution and Energy) meeting during 17th-18th December 2002, OICA Offices, Paris.

A major achievement of COP 8 is that the basic rules for the Clean Development Mechanism (CDM) have been laid down and it is expected that CDM should start functioning fully from next year.

Initiatives & Events

TO EVOLVE COMMON
INDUSTRY PLATFORM
ISSUES VITAL FOR
DEVELOPING
COMPETITIVE EDGE FOR
INDIAN AUTOMOBILE
INDUSTRY IN THE
GLOBAL MARKET, SIAM
HAS LAUNCHED A
MISSION ON FRONTIER
TECHNOLOGIES.

Training Programme on Alternative Energy Driven Vehicles & Systems 20th-25th January 2003, New Delhi

A Training Programme was organised by SIAM in association with US Department of Energy and Delhi Transport Corporation (DTC) to disseminate information on alternative energy vehicles and systems and to train the trainers to impart training on safety aspects of these fuels as per the MoU signed between SIAM, National Alternative Fuels Training Consortium, USA and DTC in January 2002.

Representatives from State Transport Departments, State Pollution Control Boards, Vehicle Manufacturers, Fuel System Manufacturers, Diagnostic Equipment Manufacturers, ARAI, CNG Fleet Owners etc participated in the training. The training module covered Legislative and Regulatory Requirements for Alternative Fuels, Components and their installation, Electric and Control Systems, System Specific Electronics, Emissions, Operation of Vehicles, Fuelling Stations and Cylinder Inspection. The audio visual presentations and the hands-on training provided in the course were highly appreciated by the trainees.

Electric Vehicle Demonstration Project

Continuing with the initiatives to increase awareness about the benefits of Electric Vehicles (EVs) particularly their role in reducing vehicular emissions, SIAM has proposed Electric Vehicle Demonstration Projects in Delhi & Hyderabad.

Both the governments have shown interest and have taken cognizance of SIAM suggestions and assured full support and cooperation in taking the programmes forward.

SIAM is also having interactions with officials of Ministry of Non Conventional Energy Sources (MNES) on Electric Vehicle Demo project for principle cities and have sought support from MNES for successful execution of the same.

Mission on Frontier Technologies

To evolve common industry platform issues vital for developing competitive edge for Indian automobile industry in the global market, SIAM has launched a Mission on Frontier Technologies under the Chairmanship of Dr V Sumantran, Executive Director - Passenger Cars Business Unit and ERC, Tata Motors Ltd.

The mission is initially focusing on Fuel Cells, Advanced Electronics & Software integration in Automobiles and Advanced Materials. The mission will also take



Initiatives & Events

A DEMONSTRATION
PROJECT OF
NETWORKING OF
EMISSION TESTING
CENTRES HAS BEEN
INITIATED IN
HYDERABAD.

inputs from the deliberation of several other SIAM committees viz Task Force on Alternative Energy Driven Vehicles, Recycling and Telematics.

The mission also represents the automobile industry in the Core-Group on Automotive Research (CAR) as a part of Industry - Academia interaction initiated by Dr R Chidambaram, Principal Scientific Adviser to Govt. of India. The core group is focusing on expertise required for future R&D thrust in the Auto Industry.

Code of Practice for Truck Cab and Load Body Design

SIAM has constituted a Core Group headed by Mr R Devarajan, Spl Director, Ashok Leyland to draft a Code of Practice for Truck Cab and Load Body Design for submission to the CMVR Technical Standing Committee for further action towards implementing uniform standards for truck body building operation.

Recycling

SIAM has formed a Task Force on Recycling under the Chairmanship of Mr Hans-Michael Huber, Managing Director & CEO, DaimlerChrysler India Private Limited to study the existing regulations for automobiles across the world and explore options that could be applicable under the Indian conditions.

Demonstration Project on Networking of Computerised Pollution Check Centres

As a first step towards modernising the Inspection and Certification system, SIAM had set up model Computerised Emission Testing Centres in various parts of the country. The initiative was strongly supported by State Governments and presently all Emission Testing Centres in Hyderabad, Delhi & Bangalore are computerised and other cities are in the process of having a 100 per cent computerised PUC system. In order to establish a strong data bank of the emission performance of in-use vehicles and to track vehicles which have not undergone the periodic emission check, the data generated at these centres need to be stored at a central location in the respective transport departments for analysis and use as an enforcement tool.

A demonstration project of networking of Emission Testing Centres has been initiated in Hyderabad in association with Transport Department of Andhra Pradesh, and supported by United States Agency for International Development (USAID) & ICICI Bank. It is proposed to network seven centres in Hyderabad to a central server at the Transport Department and provide a model for replicating in other cities.

Initiatives & Events

THE TRANSPORT
MINISTERS OF SIX
STATES HAVE AGREED
TO IMPLEMENT AN I&C
PROGRAMME ON THE
BASIS OF THE SIAM
ROAD MAP.

Measurement of Free Acceleration Smoke from In-Use Diesel Vehicles

Reliability of emission data of in-use vehicles is very critical as this data is now being looked at very seriously by all stakeholders in the in-use vehicle emission management chain. SIAM took an initiative on improving the testing procedure for emission testing of Diesel Vehicles as the present system is highly operator dependant.

Field studies were carried out in several cities using AVL Computerised Diesel Smoke Meter with the provision of measuring the engine oil sump temperature and engine RPM. Based on the outcome of the study, SIAM has recommended that criteria of a minimum oil sump temperature be included in the test procedure and suggested that testing procedure based on engine RPM measurement could also be considered once accurate RPM measurement system is developed and tested for effectiveness after sufficient field studies.

The concept has been considered and is due for implementation.

Model Inspection & Certification Centres in India

In the 30th Transport Development Council Meeting held on 16th & 17th January 2003 at New Delhi, the Transport Ministers of six states have agreed to implement an I&C programme on the basis of the SIAM Road Map. Several cities have expressed their willingness in setting-up such centres. Two committees, one on Technical issues and another on Administrative issues have been formed to develop guidelines for state governments to implement the same uniformly across the country.

Auto Oil Programme

SIAM has initiated an Auto - Oil programme for the country and organised the first Auto Oil Conclave on 20th June 2003 which was attended by senior Government officials and CEOs & senior officials of Auto & Oil companies. Mr R Seshasayee, President SIAM chaired the conclave.

The step has helped in creating a forum to address the concerns of the two industries, which have to work in tandem as both engine technology and fuel quality have to go hand in hand to meet the future stringent emission norms.

Two Task forces have been set up to focus on Technical and Economic Issues respectively and submit their recommendations to form the base for a detailed



Initiatives & Events

A MEMORANDUM OF UNDERSTANDING BETWEEN SAFE (AN SIAM INITIATIVE) AND MITRA EMISI BERSIH (PARTNERSHIP FOR CLEAN AIR), INDONESIA WAS SIGNED, WHICH ESTABLISHES THE INTENTION TO HAVE TECHNICAL COLLABORATION, AND SHARE EFFECTIVE STRATEGIES FOR CLEAN ENVIRONMENT.

auto-oil programme. One of the key tasks for the Task Force on Technical issues would be to look into a National Auto Oil programme for emission factors and source apportionment. The Task Force on Economic / Policy Issues would look into the price parity of fuels, choice and substitution of fuels, quality of fuel etc. A standing committee has also been constituted to look into day to day issues.

International Conference and Exposition on Inspection and Certification of In-use vehicles

9th - 11th July 2003, Agra

SIAM along with Ministry of Road Transport & Highways (MoRTH) and Central Pollution Control Board (CPCB) in partnership with United States Agency for International Development (USAID) and ICICI Bank organised an International Conference and Exposition on Inspection and Certification of In-Use Vehicles from 9th -11th July 2003 in Agra.

The objective of the conference was to bring together various stake holders and highlight the processes being followed internationally for Inspection & Certification (I&C) of in-use vehicles and also provide an opportunity to Countries in Asian region to benefit from the world-wide experience for implementing such systems suitably in their country. An Exposition was also organised parallelly, wherein 15 exhibitors displayed their products and services.

A Memorandum of Understanding between SAFE (An SIAM initiative) and Mitra Emisi Bersih (Partnership for Clean Air), Indonesia was signed, which establishes the intention to have technical collaboration, and share effective strategies for clean environment.

INDUSTRY'S LONG
STANDING REQUEST OF
REDUCING EXCISE DUTY
FOR PASSENGER CARS
AND MULTI UTILITY
VEHICLES WAS
ADDRESSED BY THE
FINANCE MINISTER BY
BRINGING DOWN THE
RATE TO 24%. THIS
ANNOUNCEMENT
IMPACTED THE SALES OF
PASSENGER CARS
POSITIVELY.

Economic Landmarks

WTO Matters:

(a) Rules of Origin

Committee on Rules of Origin (CRO) submitted its report to the WTO General Council in July 2002. SIAM was the only Non-Government Organisation invited for the Inter-ministerial meetings convened by Ministry of Commerce & Industry (MoC&I) to discuss Government of India's position on Rules of Origin.

Chairman, Committee on Rules of Origin of World Trade Organisation has offered a compromise solution on the subject where in automobiles have been clubbed with all other items of Chapter 84 to 90 of Harmonised System of classification. SIAM reiterated its position on 40% value addition for conferring origin. Ministry of Heavy Industries & Public Enterprises has supported SIAM view on the matter.

(b) Market Access

Negotiating Group on Market Access (NGMA), Chair's (Mr Pierre Louis Girard) proposal on Modalities for tariff reduction of non-agricultural products in being deliberated by countries. SIAM is not opposed to tariff reduction as such. Automotive industry has conveyed to the Government that it favours calibrated reduction keeping in view internal structural imbalances.

Competitive benchmarking Study

SIAM Raw Materials & Components Committee headed by Mr Ravi Kant alongwith ACMA jointly commissioned ICRA Advisory Services to do a study on Competitive Benchmarking vis-à-vis China.

The study report is expected to help Indian Automotive industry not only to look at their own competitive advantages & disadvantages at company level but also take up issues with various Government organisations for policy interventions.

Study on Cascading Effect of Embedded Taxes

Following discussions with Mr L Mansingh, Director General, DGFT, SIAM has got a study done through ICRA Advisory Services. The objective of the study was to analyse the impact of indirect and direct central & state (including local) level duties and other levies at different stages of manufacturing which get embedded in the cost of production and where no set off is available for their remission.



Initiatives & Events

SIAM WOULD FACILITATE
CAPACITY BUILDING IN
THIS VITAL AREA
AMONGST THE OEs IN
PARTICULAR AND THE
ENTIRE AUTO INDUSTRY
IN GENERAL.

SIAM would submit the findings to DGFT with a request to develop future export incentives based on the high cascading taxation in the system.

Union Budget 2003-04

SIAM submitted its Pre Budget Memorandum 2003-04 to Ministry of Finance and other ministries.

Industry's long standing request of reducing excise duty for Passenger Cars and Multi Utility vehicles was addressed by the Finance Minister by bringing down the rate to 24%. This announcement impacted the sales of Passenger Cars positively.

The anomaly in excise duty on Bus / Truck bodies was also addressed by the imposition of an ex-factory specific excise duty on body building.

The Finance Minister once again has focussed on Environment friendly technologies and SIAM welcomed the excise duty reduction on Electric Vehicles from 16 to 8%.

The declaration of implementation of VAT by all States and reduction of Central Sales Tax from 4 to 2% were steps in the right direction especially for the auto Industry which operates on multi state locations with a supply chain spread over more than one state all over the country. It was, however, disappointing for automobile industry that VAT was not implemented from 1st April 2003.

Demand Forecast Study

SIAM, ACMA and ATMA jointly commissioned a study, on Demand Projections for Automobiles and Automotive Tyres in India through NCAER.

Working Group on Styling & Design

SIAM formed a new Working Group on Styling & Design under the Chairmanship of Mr Ravi Kant, Executive Director, Tata Engineering. SIAM would facilitate capacity building in this vital area amongst the OEs in particular and the entire auto industry in general.

Initiatives & Events

Eco Tax

Madras School of Economics (MSE) and National Institute of Public Finance and Policy (NIPFP) has submitted an interim report "A proposal to levy taxes on Polluting Inputs and Outputs and Pollution Charges on certain Monitorable Emissions" to Ministry of Environment & Forests (MoE&F).

Salient features of the report include an annual emission tax on diesel cars, levy of resource tax on two wheelers, petrol passengers cars and jeeps based on fuel economy slabs and an excise duty equivalent to the differential between existing prices of petrol and diesel to be levied on diesel cars to neutralise the price advantage in favour of diesel cars.

In its submission to MoEF & MSE, SIAM has argued that no additional fiscal interventions are necessary when both diesel & petrol vehicles meet specified emission norms. Moreover fuel efficiency is a USP for Indian vehicles and it is determined by size, capacity, user behaviour, add-ons etc.

Therefore it would be inappropriate to benchmark fuel efficiency. SIAM representations have resulted in both MoEF & MSE having a re-look at the rationality of such fiscal interventions.



Initiatives & Events

MORE THAN 2000
SCHOOL CHILDREN
PARTICIPATED IN A
SAFETY MARCH AROUND
INDIA GATE CARRYING
PLACARDS AND RAISING
SLOGANS TO DRAW
ATTENTION FOR
MAINTAINING DISCIPLINE
ON THE ROAD.

Corporate Citizenship Initiatives

Automobile Safety & Technology Fairs

In a move to impart road safety education and create awareness amongst people on road safety issues in the country, SIAM and SAFE (an SIAM initiative) organised Automobile Safety and Technology Fairs in Pune and Chennai.

The fairs were visited by more than 1000 School Children per day and interactive programmes were organised to impart education on Safety rules and regulations, through the medium of Visuals, Quiz Programmes and live demonstrations.

The fairs also got participation from Federation of Automobile Dealers Association, State Pollution Control Boards, Transport Department, Component Manufacturers, Automotive Component Manufacturers Association (ACMA), active NGOs working on Road Safety issues, Traffic Police and City Municipal Corporation.

14th Road Safety Week

6th -12th January 2003

SIAM and SAFE in association with Hero Honda Motors Ltd, Delhi Traffic Police & Transport Department, Government of NCT Delhi organised a series of Awareness programmes during Road Safety Week (16th -12th January 2003). These programmes were aimed to actively engage the schools and educate the students on various aspects of 'road safety' who are our future road users and inculcate correct attitudes in them.

More than 2000 school children participated in a Safety March around India Gate carrying placards and raising slogans to draw attention for maintaining discipline on the road. The march was flagged off by the Delhi Police Commissioner Mr R S Gupta. Safety awareness programmes were also organised for school children including safety skits, traffic drills, quiz competition, screening of films on road safety and cultural events.

A training programme for Hill Drivers of Road Transport Corporation on Safe Hill driving, Vehicle Maintenance, Soft Skill Development and Traffic Rules and Regulations was organised in Kotdwara, Uttranchal.

Training sessions were also organised for Instructors of Motor Training Schools of Karnataka and KSRTC & BMTC Drivers in Bangalore.

Initiatives & Events

THE TRAINING
PROGRAMME FOCUSED
ON THE CORRECT
CHECKING PROCESS,
HANDLING OF
COMPUTERISED SYSTEM
AND RECORDING &
STORAGE OF DATA.

Inspection & Maintenance Camps

Continuing the drive of creating awareness on periodic maintenance of vehicles for sustainable performance and emission control, SIAM organised Inspection & Maintenance camps for vehicles at several locations in the cities of Bangalore, Delhi, Shillong & Pune.

Vehicles passing the emission test were issued free PUC Certificates. Vehicles not meeting the norms were rectified free of cost, by vehicle manufacturers, while those that needed extensive maintenance were advised to visit nearby Authorised Workshop. Vehicle users were also educated for better maintenance and improvement in fuel efficiency.

Computerised Pollution Check Centres

A Computerised Mobile Pollution Checking Unit was set up by SIAM in Pune which will be run by an NGO 'Nirdhar' and Pune Traffic Police jointly. The system has both petrol and diesel units, to cater to both type of vehicles.

Computerised Diesel Emission Check Systems for checking diesel vehicles were set up at Gangtok, Bangalore, Hyderabad & Chennai.

Workshop on Soft Skill Development

23rd -24th December 2002, Ajmer

As a part of the initiative of imparting road safety education in the country and address the issue of accidents caused due to behavioural aspects of the drivers, SIAM in association with Rajasthan State Road Transport Corporation (RSRTC) organised a two day workshop on Soft Skills Development of RSRTC drivers at Ajmer.

Training Programme for Pollution Check Centre Operators

23rd - 24th Mar 2003, Hyderabad

Transport Department, Government of Andhra Pradesh along with SIAM organised a two day training programme for all the PUC Centre operators in Hyderabad. This training programme focused on the correct checking process, handling of computerised system and recording & storage of data.



Interactions with Central and State Governments on Automobile Industry Related Issues

September 2002 - August 2003

Interactions with	Issue
Commerce Secretary	WTO - Market Access
Additional Secretary, MoC&I	WTO - Market Access
Jt Secretary, MoC&I	Rules of Origin
Dy Secretary, MoC&I	Rules of Origin
Advisor, MoF	Direct and Indirect Taxes
Chairman, CBEC	Pre Budget Memorandum
Director (TRU), MoF	Post Budget issues
Director, CX6, MoF	Refund of special duty of excise
Joint Secretary, Central Board for Direct Taxes	Tax Collection at Source
Director, CBEC (TRU), MoF	Central Excise issues
Secretary, Empowered Committee of State Finance Ministers for Implementation of VAT	Value Added Tax
Spl Secretary, MoEF	Eco Tax
Secretary, MoHI&PE	Auto Policy
Director General, DGFT, MoC&I	Conditions of Import and Export
Revenue Secretary, MoF	Overview of Auto Industry Growth Scenario
Chairman, CBEC, MoF	Overview of Auto Industry Growth Scenario
Principal Scientific Adviser to Gol	Frontier Technologies
Secretary, MoHI&PE	Development Council for Automobile & Allied Industries
Dy Secretary, Ministry of Steel	Availability & Price of Steel
Secretary, MoRT&H	Fitment of Power Steering
Joint Secretary, MoRT&H	Implementation of Safety Standards
Secretary, MoRT&H	Inspection & Certification of In-use Vehicles
Joint Secretary, MoRT&H	Action Plan for Inspection and Certification
Secretary, MoHI&PE	Upgradation of Testing Facilities
Secretary, MoEF	Ban of Use of Ozone Depleting Substances
Special Secretary, MoEF	Review of Noise Norms for CVs and MUVs
Department of Science & Technology, Govt of India	Hydrogen Road Map for India
Secretary, MNES	Alternative Energy Driven Vehicle Programme
Joint Secretary, MNES	Hybrid Electric Vehicles
Planning Commission	Bio Fuels
Sr Advisor, MNES	Bio Fuels

State Governments

Interactions with	Issue
Minister of Transport, Tourism and Power, Govt of NCT Delhi	Electric 3 wheeler Demonstration Project
Principal Secretary, Municipal Adm. & Urban Dev. Dept, Government of Andhra Pradesh	Electric 3 wheeler Demonstration Project
Principal Secretary, Department of Tourism, Govt of Andhra Pradesh	Electric 3 wheeler Demonstration Project
Member Secretary, Andhra Pradesh Pollution Control Board	Electric 3 wheeler Demonstration Project
Addl Secretary, Department of Tourism, Govt of Andhra Pradesh	Electric 3 wheeler Demonstration Project
Transport Commissioner, Govt of Andhra Pradesh	Electric 3 wheeler Demonstration Project
Municipal Corporation of Hyderabad	Electric 3 wheeler Demonstration Project
Andhra Pradesh Central Power Distribution Company Ltd (APCPDCL)	Electric 3 wheeler Demonstration Project
Minister of Transport, Govt of Maharashtra	In-use vehicle emission management
Minister of Transport, Govt of Meghalaya	In-use vehicle emission management, Road Safety issues
Principal Secretary Environment & Chairman, West Bengal Pollution Control Board	In-use vehicle emission management
Principal Secretary, Transport, Govt of West Bengal	In-use vehicle emission management
Secretary Transport & Environment, Govt of Meghalaya	In-use vehicle emission management, Road Safety issues
Director (PVD) and Joint Secretary Transport, Govt of West Bengal	In-use vehicle emission management
Transport Commissioner, Govt of Karnataka	In-use vehicle emission management, Road Safety issues
Transport Commissioner, Govt of Tamil Nadu	In-use vehicle emission management
Transport Commissioner, Govt of Kerala	In-use vehicle emission management
Principal Secretary, Transport, Govt of Uttar Pradesh	Inspection and Certification - International Conference
Secretary Environment, Govt of Uttar Pradesh	Inspection and Certification - International Conference
Principal Secretary Environment & Chairman, West Bengal Pollution Control Board	Introduction of Alternative Fuel Driven Vehicles
Transport Commissioner, Govt of Karnataka	Introduction of LPG vehicles
District Magistrate, Agra, UP	Action Plan for Agra
Minister of Transport, Govt of Sikkim	Computerisation of Diesel Pollution Checking System
Transport Commissioner, Govt of Andhra Pradesh	Pilot Project on Networking of PUC Centres
Transport Commissioner, Govt of Rajasthan	Computerisation of PUC Centres
Mayor of Pune	Automobile & Technology Fair
Police Commissioner, Pune	Launch of Mobile Pollution Computerised Pollution Checking Centre, Automobile & Technology Fair
Transport Commissioner, Govt of Maharashtra	Integrated Approach to Vehicular Pollution



International Visits and Delegations

SIAM delegation attends World NGV Conference, Washington, D.C.

8th-11th October 2002

An SIAM delegation participated in the world NGV Conference 2002 and made presentation on status of Natural Gas Vehicles Programme in India.

The Conference gave insights into the CNG/LPG Vehicle Technologies, Government Policies, Regulations and Standards being adopted in countries, worldwide. The Delegates from several countries especially South East Asia and Latin America expressed interest in studying Indian standards and regulations and also procuring Indian Vehicles since the Indian Standards and Regulations seem to be quiet advanced.

Mr Ajay Maken, Hon'ble Transport Minister, Government of NCT of Delhi also joined the SIAM delegation for a meeting with Mr Al Ebron, Director, National Alternative Fuel Training Consortium (NAFTC).

7th JASIC Asia Government and Industry Meeting

October 2002

The meeting was co-organised by the Land Transportation Office (LTO) of the Philippines and Japan Automobile Standards Internationalisation Centre (JASIC) under the support of the Japanese Ministry of Land, Infrastructure and Transport (MLIT). India was represented by officials from MoRT&H, MoHI&PE, ARAI and SIAM. The participating countries discussed the issues that must be addressed in order to realise certification and harmonisation under the 1958 and 1998 agreements respectively.

Global Forum on Personal Transportation, Dearborn - USA

12th & 13th November 2002

On personal invitation of United States Secretary of Energy, Mr Spencer Abraham, SIAM delegation led by Dr Pawan Goenka, Chief Operating Officer, M&M and Chairman, SIAM Task Force on Alternative Energy Driven Vehicles participated in the Global Forum which had representation of about 120 participants from countries, worldwide from Automobile Industry, Energy suppliers, Government Authorities, Research Institutions and aimed at exploring initiatives for improving energy efficiency of vehicles.

International Visits and Delegations

Partnership for Cleaner Fuels and Cleaner Vehicles, United Nations, New York, USA

14th & 15th November 2002

This partnership evolved as an outcome of the World Summit on Sustainable Development (WSSD) held in Johannesburg in year 2002. Elimination of lead from gasoline and reduction of sulphur content in developing countries were discussed. SIAM shared the Indian scenario and future recommendations with respect to improvement on fuel quality and tightening of emission standards. The Indian experience of phasing out lead from gasoline was also shared with the group. This partnership formed a clearing house for disseminating information on the above subject to help in smooth transition to cleaner fuels by developing countries.

2nd Meeting of Clean Air Training Network for Asia, Hongkong

14th - 15th December 2002

The objective of the CATNet-Asia meeting was to create standard quality training material on Air quality which could be used by countries in the region to put in place systems for Air Quality Management. The 'Train the Trainers' programme for Alternative Fuels and Systems initiated by SIAM was also shared in the meeting and was very much appreciated. SIAM alongwith representatives from MoEF, NEERI, CPCB, etc will be participating in future meetings also.

SIAM participates in the Regional Workshop on Better Air Quality in Asian and Pacific Rim Cities (BAQ 2002), Hong Kong

16th - 18th December, 2002

To share technological and control experience and information on Air Quality in the region, BAQ 2002 was co-organised by Clean Air Initiatives for Asian Cities (CAI-Asia), Air Pollution in Mega Cities of Asia (APMA) Project, California Air Resources Board (CARB) and other development agencies. 18 delegates from India representing SIAM, TERI, CSE, CPCB, MoEF, NEERI, IIT Delhi, West Bengal Pollution Control Board, MoRT&H, Transport Department of Maharashtra & Karnataka attended the workshop.

Problems of air pollution in Asia with focus on cities like Delhi, Shanghai, Chile, Busan, South Korea, Kathmandu, Los Angeles etc were discussed in the workshop. SIAM made a presentation on its initiatives regarding In-use Vehicle Management and Training on Alternative Fuels. The Workshop enabled SIAM to network with neighbouring countries and interact with development organisations like The World



International Visits and Delegations

Bank, ADB, CARB, US-EPA etc for future partnership in Projects on Air Quality Improvement

SIAM visits Automobile Testing & Research Centres in Tianjin, China 20th February 2003

In order to study the facilities at some of the test centres located in China, SIAM mounted a visit to Tianjin Motorcycle Technical Centre (TMTC) and Tianjin Internal Combustion Engine Research Institute (TICERI).

TICERI and TMTC were set up by the Automotive Department of the former Ministry of Machine Industry and Tianjin University. TMTC is the first motorcycle technical centre in China and was set up in 1994.

Seminar on Clean Air for Asia, Beijing, China 17th-19th February 2003

In order to discuss the impact of Research & Development and Technology on environmental performance in power and urban transportation, a Quadripartite Seminar on Clean Air for Asia was organised jointly by institutions in USA, Japan, China and CII. SIAM made the lead presentations on Impact of Environmental regulations and policies in reducing transport pollution.

Joint visit of SIAM and officials of Transport Department, Government of Andhra Pradesh to Inspection and Certification Centres in Hong Kong and Singapore

A team of officials from SIAM and Government of Andhra Pradesh visited Inspection and Certification Centres in Hong Kong and Singapore. The tour enabled the officials to study various processes for efficient Transport system followed in Asian countries with a key focus on Vehicle Inspection system. The team also met Environment and Transport Department officials in both the countries.

SIAM participates in FAMI Meetings, Hamamatsu, Japan 4th - 7th March 2003

Federation of Asian Motorcycle Industry (FAMI) has established a task force for harmonisation of regulations under the Chair organisation of Japanese Automobile Manufacturers Association (JAMA). SIAM participated in the FAMI meeting which discussed the issues of Evaporation Emission Regulation, Durability Testing, Harmonisation of World Motorcycle Testing Cycle (WMTC), Exchange of information on non-regulated pollutants, Particulate Matter, Fuel Economy Regulation and Development status of Alternative Energy Driven Vehicles

International Visits and Delegations

SIAM represents South Asia region in the CAI-Asia Executive Council 9th - 10th June 2003

Clean Air Initiatives for Asian Cities (CAI-Asia) is a body promoted by Asian Development Bank (ADB), The World Bank and several other development agencies with the objective to promote Clean Air in various cities in the world. SIAM has been invited to represent South-Asia in the Executive Council. Mr. KK Gandhi E.D.(Tech), the SIAM nominee, participated in the deliberations and we hope, SIAM and the member companies would be able to play a larger role in shaping the vehicular regulation policies of South Asian countries.

SIAM participation in APEC Automotive Dialogue

SIAM was invited by the Chairman of the APEC Automotive Dialogue to participate as an observer in the APEC meeting held in March 2003 and subsequently to make a Presentation to their members during the annual plenary session held in Hawaii, USA during 25th -27th June 2003 as an important nation with robust automotive industry.

SIAM presentation focused on the emerging Indian economy and the robustness of automotive industry. The Presentation also incorporated the recent strides made by Indian Automobile Manufacturers in indigenous design and development of new platforms.

130th Session of World Forum for Harmonisation of Regulations (WP-29) 24th - 27th June 2003

SIAM participated in the 130th Session of World Forum for Harmonization of Vehicle Regulations held at Geneva, on 24th - 27th June 2003, as a part of a Government - Industry joint delegation led by Joint Secretary MoRT&H to understand the functioning of WP-29 and the implications of the UN/ECE 1958 and 1998 Agreements being administered by it.

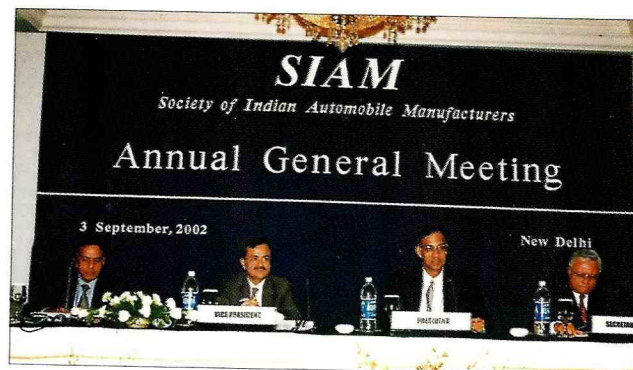
5th Urban Air Forum of USEPA

SIAM participated in the 5th Urban Air Forum and back to back meetings with USEPA at San Diego, Research Triangle Park Raleigh and USEPA Headquarters at Washington DC, USA. USEPA has a Memorandum of Understanding with MoEF for furthering partnership to address air quality issues. The study tour & the workshops were designed to create awareness amongst the key stake holders & draw lessons on air quality from the US experience.

Important Events



(L) SIAM Annual Convention 2002.



(R) Office bearers at the 4th Annual General Meeting in Year 2002.



(L) Minister for Home & Minor Irrigation, Govt of Karnataka - Mr Mallikarjun Kharge and Mr B Ramanath Rai, Transport Minister, Govt of Karnataka gracing the Programme on Awareness on Road Safety for Drivers in Bangalore.



(R) Transport Minister, Govt of Karnataka inaugurating a computerised Pollution Checking Centre in Bangalore.



(L) SIAM officials along with Members and Government officials at the 7th JASIC Asia Government and Industry Meeting.



(R) Study tour to Taiwan.

Important Events



(L) Mr Ajay Maken, Minister for Transport, Tourism and Power, Govt of NCT Delhi alongwith SIAM delegation at the World NGV Conference 2002 at Washington DC.



(R) Mr K K Gandhi, ED (Tech), SIAM presenting the Indian Scenario on Natural Gas Vehicles at NGV 2002.



(L) Inauguration of the Free I & M Camp for Passenger Vehicles in Bangalore.



(R) Lamp lighting ceremony of Automobile Safety and Technology Fair, Pune in progress as Mayor of Pune city Ms Dipti Chowdhary, looks on.



(L) Mrs Sheelarani Chunkath, Chairperson, Tamil Nadu Pollution Control Board addressing the gathering at the Inauguration of computerised diesel emission check centre in Chennai.



(R) SIAM delegation attending a seminar on Pollution Control for vehicles in Sri Lanka.

Important Events



(L) A demonstration of remote sensing system for measuring emissions from vehicles for Indian Delegation at the BAQ 2002, Hongkong.



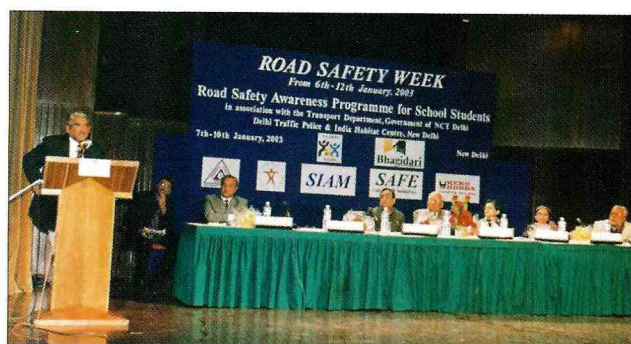
(R) Representatives from various stakeholders at the Workshop on International Vehicle Emission Model at New Delhi.



(L) Week long drive on Road Safety - Mr R.S. Gupta, Commissioner of Police, New Delhi along with Mr Maxwell Pereira, Joint Commissioner, Delhi Traffic Police at the Inaugural function.



(R) Mr R S Gupta, Delhi Police Commissioner flagging the safety march of school students at the India Gate Lawns.



(L) Mr Maxwell Pereira, Joint Commissioner, Delhi Traffic Police addressing the school students. Seated from left are Mr Raj Liberhan, Director, IHC; Mr Ajay Maken, Transport Minister, Govt of NCT Delhi; Mr Brijmohan Lal, Chairman, Hero Honda; Mrs Sindhushree Khullar, Secretary cum Commissioner Transport, Delhi Govt, Ms Geeta Sagar, Secretary - Education, Delhi Government and Mr Rajat Nandi, Director General, SIAM.



(R) Inaguration of Safety Expo 2003 at Chennai.

Important Events



(L) Tremendous response from School Children during Safety Expo 2003 at Chennai.



(R) Glimpse of the exhibition : Safety Expo 2003.



(L) Joint visit of SIAM, ARAI and officials of Transport Department, Government of Andhra Pradesh to Inspection and Certification Centres in Singapore & Hong Kong.



(R) Mr S B Subedi, Transport Minister, Govt of Sikkim inaugurating the computerised Diesel Emission Test System in Gangtok.



(L) Mr Subhas Chakraborty, Minister for Transport & Sports, Govt of West Bengal and Prof Dr Tanwir Yazid Mukawi, Hon'ble Dy Minister for Environment Impact, Ministry of Environment, Republic of Indonesia gracing the International Conference on Inspection & Certification of In-use Vehicles at Agra. Also seen are Mr A T Kusre, General Manager, ICICI Bank; Mr N V Iyer, Advisor, Bajaj Auto; Mr Walter North, Director, USAID and Mr M N Muralikrishna, President, SAFE.



(R) Exchanging of MoU between President SAFE and Chairman, MEB, Indonesia.

Important Events



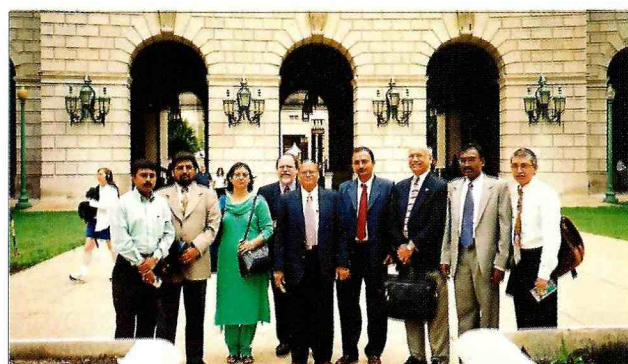
(L) Mr Subhas Chakraborty launching a Poster on Safe driving at the I&C Conference in Agra.



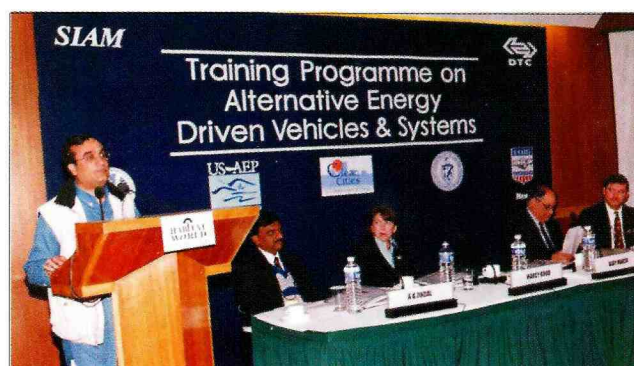
(R) SIAM participation in 5th Urban Air Forum of US Environment Protection Agency.



(L) Indian Government - Industry delegation in the 150th session of WP-29 in Geneva.



(R) Meeting with USEPA officials in Washington DC.



(L) Mr Ajay Maken, Delhi Transport Minister speaking at the Inauguration. Seated from left are Mr A K Jindal, DTC; Ms Marcy Rood, USDoE, Mr K K Gandhi, SIAM and Mr Al Ebron, NAFTC.



(R) SIAM participation in FAMI meeting, Hamamatsu, Japan.

Overview of Performance

Automobile Industry Performance during 2002 - 03

During the year 2002-03 the automobile industry registered a growth of around 15 per cent in numbers and 14 per cent in value terms.

The excise duty reduction on passenger cars and Utility Vehicles (UVs) announced in the Union Budget 2003-04 impacted the sales of passenger vehicles positively. In the coming months too, it would boost sales of passenger vehicles i.e. both Cars and UVs, as it has reduced the acquisition cost to the customer. Passenger car sales saw a growth of 6.5 %, whereas Utility vehicles registered a growth of 9.65%. The cumulative growth of overall passenger vehicles during the year has been 4.9%.

The two wheeler segment grew by 16% in 2002-03 with 48,73,989 units sold against 42,03,725 in 2001-02. Motorcycles account for 28.36% of the sales volume of all two wheelers. Three Wheelers have also performed well, with a growth of 13%. Goods carriers have fuelled the growth in this segment with a 47% increase in sales.

The performance of the commercial vehicle segment showed very encouraging results. Overall growth rate for the year has been 30% over the same period in the previous year. Medium and Heavy Commercial Vehicles segment grew by 29% with Goods Carrier registering a growth of 31.48%. Light Commercial Vehicles segment performed well with a growth of 32.40% where in Passenger and Goods Carrier grew by 29.33% and 33.36% respectively.

The performance of the automobile industry on the export front was also quite encouraging. In the passenger car segment we saw a growth rate of around 42% in 2002-03 over 2001-02. Exports from the Two Wheeler segment has also grown significantly by 72%. Overall automobile industry export growth in 2002-03 was 65% over last year.



Overview of Performance

Automobile Industry Performance during April-June 2003

During April-June 2003, the industry recorded a growth of 6%. The current trend continues to be positive, signifying further recovery in the coming months.

Sales of Passenger Vehicles comprising of Passenger Cars, Utility Vehicles and Multipurpose Vehicles registered a growth of 28.2 %. The Commercial Vehicle segment has performed well with a growth of 20% in April-June this year when compared to the corresponding period of the last fiscal.

Acceleration in infrastructure activity including the Golden Quadrilateral, fleet rationalisation and improved availability of easy finance have contributed to a 21% growth in the Goods M&HCV sales. Light Commercial Vehicles segment performed well with a growth of 21%, Passenger and Goods Carrier grew by 3% and 29% respectively.

Two-Wheelers have registered a growth of 3% during April-June 2003. Within the Two-Wheeler segment, the motorcycle sub-segment continues to be the growth driver, recording a growth of more than 7% during April-June 2003.

Three-Wheelers have shown a decline of 3% in April - June 2003 compared to the same period last year.

Exports have been in the positive territory with Passenger Vehicles, Commercial Vehicles, Three-Wheelers and Two-Wheelers registering positive growth rates ranging between 3% and 120%. In overall terms, exports grew by a healthy 79% in April-June 2003 compared to the same period last year.

Automobile Industry outlook for the remaining period of 2003-04 is positive.

Statistics

Automobile Production Trend

In Numbers

Category	1998-99	1999-00	2000-01	2001-02	2002-03
M & HCVs	80528	112311	87784	96752	120081
LCVs	55363	61213	68922	65756	82865
Total CVs	135891	173524	156706	162508	202946
Passenger Cars	390709	577347	513415	564052	606088
UVs	113328	124308	127519	105667	114881
Total Passenger Vehicles	504037	701655	640934	669719	720969
Total 4 Wheelers	639928	875179	797640	832227	923915
Scooters / Scooterettee	1315055	1259423	879759	937506	850102
Motorcycles / Step Through	1387286	1794078	2183785	2906323	3914626
Mopeds	672167	724510	694974	427498	344691
Total Two Wheelers	3374508	3778011	3758518	4271327	5109419
Three Wheelers	209033	190259	203234	212748	271224
Grand Total	4223469	4843449	4759392	5316302	6304558

Automobile Domestic Sales Trend

In Numbers

Category	1998-99	1999-00	2000-01	2001-02	2002-03
M & HCVs	79124	106261	81960	89999	116167
LCVs	50698	55350	54625	56672	75034
Total CVs	129822	161611	136585	146671	191201
Passenger Cars	384483	615318	567728	570863	593762
UVs	109082	118323	122832	104253	114316
Total Passenger Vehicles	493565	733641	690560	675116	708078
Total 4 Wheelers	623387	895252	827145	821787	899279
Scooters / Scooterettee	1297115	1233781	876224	908268	835508
Motorcycles / Step Through	1360196	1761439	2114693	2887194	3705893
Mopeds	646114	698321	643461	408263	332588
Total Two Wheelers	3303425	3693541	3634378	4203725	4873989
Three Wheelers	189082	172135	181899	200276	226052
Grand Total	4115894	4760928	4643422	5225788	5999320

Automobile Export Trend

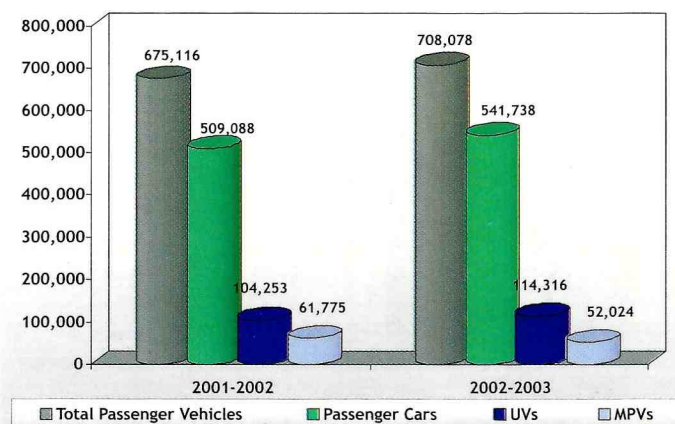
In Numbers

Category	1998-99	1999-00	2000-01	2001-02	2002-03
M & HCVs	4544	5089	5510	4824	4804
LCVs	5564	4823	8260	7046	5900
TOTAL CVs	10108	9912	13770	11870	10704
Passenger Cars	25468	23272	22990	50088	70547
UVs	2654	5148	4122	3077	1106
Total Passenger Vehicles	28122	28420	27112	53165	71653
Total 4 Wheelers	38230	38332	40882	65035	82357
Scooters / Scooterettee	28753	20188	25625	28332	30116
Motorcycles / Step Through	35461	35295	41339	56880	126122
Mopeds	35788	27754	44174	18971	23330
Total Two Wheelers	100002	83237	111138	104183	179568
Three Wheelers	21138	17725	16263	15462	43443
Grand Total	159370	139294	168283	184680	305368

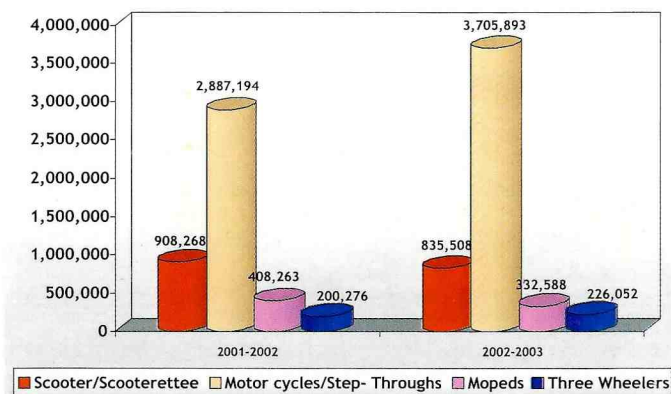
Note: The data presented reflects the old classification of vehicles.

Passenger Vehicles

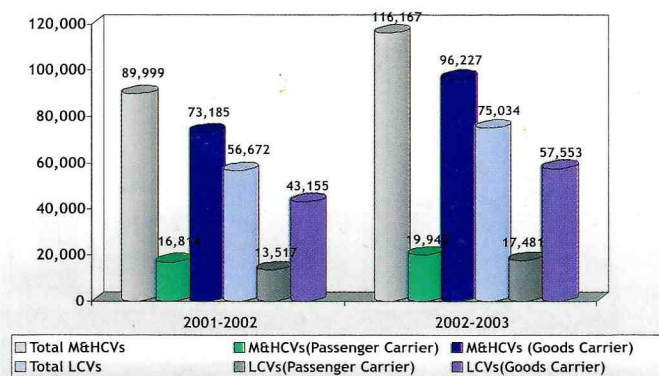
Automobile - Domestic Sales Trend



Two & Three Wheelers



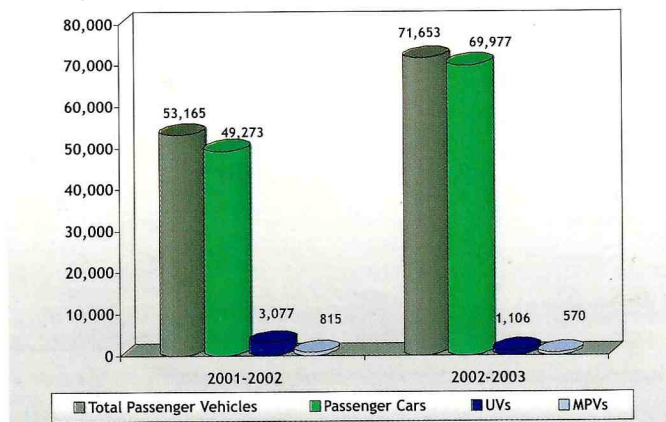
Commercial Vehicles



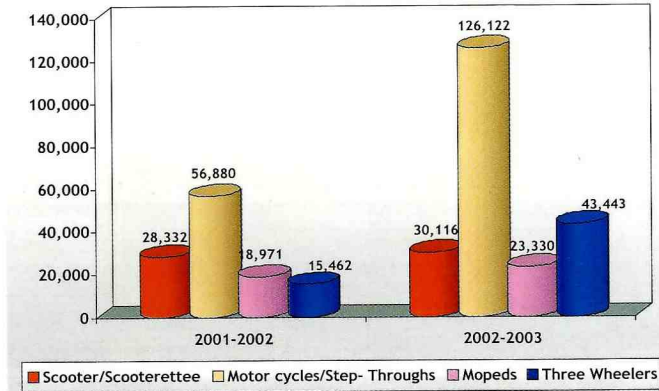
Note: The data presented reflects the new classification of vehicles.

Passenger Vehicles

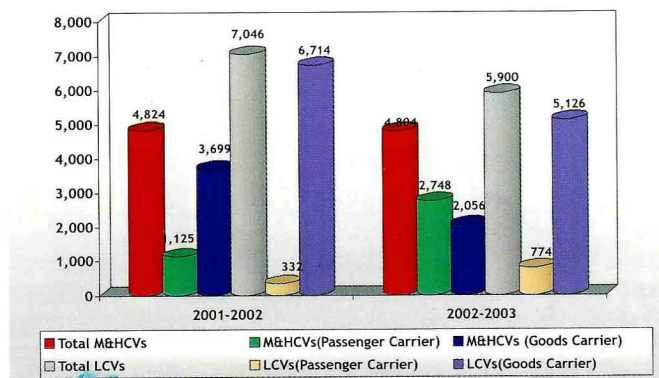
Automobile - Export Trend



Two & Three Wheelers



Commercial Vehicles



Note: The data presented reflects the new classification of vehicles.



SIAM Office Bearers

Executive Committee 2002 - 2003

Company	Member	Alternate
Ashok Leyland Ltd	Mr R Seshasayee (President)	
Maruti Udyog Ltd	Mr Jagdish Khattar (Vice President)	Dr K Kumar
Eicher Motors Ltd	Mr S Sandilya (Treasurer)	Mr Rakesh Kalra
Bajaj Auto Ltd	Mr Madhur Bajaj	
Bajaj Tempo Ltd	Mr Abhay Firodia (Past President)	
DaimlerChrysler India Pvt Ltd	Mr Hans-Michael Huber	Mr S M Kadlaskar
Fiat India Pvt Ltd	Mr Alberto Montanari	Mr Ramesh L Adige
Ford India Pvt. Ltd	Mr David E Friedman	Mr Vinay Piparsania
General Motors India Pvt Ltd	Mr Aditya Vij	Mr P Balendran
Hero Honda Motors Ltd	Mr Pawan Munjal	
Hyundai Motor India Ltd	Mr J I Kim	Mr B V R Subbu
Kinetic Engineering Ltd	Mr Arun Firodia	Mr M K Khera
Mahindra & Mahindra Ltd	Mr Anand G Mahindra	Mr Alan Durante
Tata Cummins Ltd	Mr Ravi Venkatesan	Mr V K Jayaswal
Tata Motors Ltd	Mr Ravi Kant	Mr V Krishnan
Toyota Kirloskar Motor Ltd	Mr Atsushi Toyoshima	Mr K K Swamy
TVS Motor Company Ltd	Mr Venu Srinivasan (Past President) Mr C P Raman	
Volvo India Pvt Ltd	Mr Ulf Nordqvist	Mr Mansoor Ahmed

Committees, Sub Committees, Working Groups, Task Forces And Core Groups (2002 - 2003)



Mr. Abhay Firodia

Task Force on Classification of Vehicles

Chairman - Mr Abhay Firodia, Chairman & Managing Director, Bajaj Tempo Ltd.

The Task Force on Classification under the Chairmanship of Mr Abhay Firodia interacted during the year under review to bring about consensus on various issues on classification of vehicles such as - Model wise Details; Reporting of CKD/ SKD in the New Format; Reporting of State wise Sales Data in New Format; Reporting of Price Data; Reporting of Import data and Break-up of Petrol/ Diesel/ CNG/ LPG/ Electric/ 2 Stroke/ 4 Stroke Vehicles.



Mr. Ravi Kant

Raw Materials & Components Committee and Working Group on Styling and Design

Chairman - Mr Ravi Kant, Executive Director (CVBU), Tata Motors Ltd.

SIAM Raw Materials & Components Committee headed by Mr Ravi Kant has been concentrating on intensive deliberations with components and raw materials manufacturers. SIAM and ACMA had jointly initiated a study through ICRA Advisory Services on Competitiveness of Indian Automotive Industry. The Working Group on Styling and Design has been set up to give greater exposure and enabling atmosphere to our designers to be able to assimilate customer expectations into products being manufactured.



Mr. K K Swamy

Committee on VAT Implementation

Chairman - Mr K K Swamy, Dy. Managing Director, Toyota Kirloskar Motor Ltd

The Committee under the Chairmanship of Mr K K Swamy had several interactions with CII, State Governments and Central Government regarding Implementation of VAT from 1st April 2003. Despite extensive efforts by the committee, it was disappointing for automobile industry that the VAT was not implemented from 1st April 2003. The Committee would continue its dialogue with stakeholders for early implementation of VAT.



Mr. Arun Firodia

Task Force on Capacity Building - HR

Chairman - Mr Arun Firodia, Chairman, Kinetic Engg. & Kinetic Motor Company Ltd

The Committee under the Chairmanship of Mr Arun Firodia focused on the issue of increasing awareness levels of the Service and Marketing officials of the member companies in specific areas like measuring emissions from in-use vehicles, safety features built in the vehicles etc which could then be shared with dealership and service network.



Mr. Aditya Vij

Task Force on Telematics (Intelligent Transport Systems)

Chairman - Mr Aditya Vij, President & Managing Director, General Motors India Ltd

SIAM along with CII, ACMA and iiit-B (Indian Institute of Information Technology, Bangalore) organized a conference on Telematics in the transportation sector "Tele Trans 2003" in Bangalore. The outcome of the conference has suggested creation of a Steering Committee on National level to draw a policy framework to drive Telematics.



Dr. V Sumantran

Mission on Frontier Technologies

Chairman - Dr V Sumantran, Executive Director (PCBU and ERC), Tata Motors Ltd

The Mission identified the frontier technologies required for future Automobiles in order to make them world class. This initiative was welcomed by Dr R Chidambaram, Principal Scientific Adviser to Government of India under whose Chairmanship the Industry-Academia has been initiated. Under the initiative of Industry-Academia interaction a "Core Group on Automotive Research (CAR)" has been constituted to identify the R&D needs of the Indian Automotive Industry and development of Experts database.



Mr. Hans-Michael Huber

Task Force on Recycling

Chairman - Mr Hans-Michael Huber, Managing Director & CEO, DaimlerChrysler India Pvt Ltd

The committee under the Chairmanship of Mr Hans Michael Huber focused on Recycling and End of life vehicles in view of the existing recycling laws world wide and increasing usage of recyclable products in the European market.



Mr. Rajesh Uppal



Dr. K Kumar



Dr. Pawan Goenka



Mr. R R Akarte

Core Group on IT Initiatives

Chairman - Mr Rajesh Uppal, General Manager, Maruti Udyog Ltd

The Core Group under the Chairmanship of Mr Rajesh Uppal continued its dialogue with several State Transport Authorities besides the Ministry of Heavy Industries & Public Enterprises and Ministry of IT & Communication on a computerized model for registration of vehicles in the States with the final objective of networking vehicles registration data throughout the country and creating a Centralised Data Bank at Ministry of Road Transport & Highways.

Task Force on Upgradation of Test Facilities

Chairman - Dr K Kumar, Advisor, Maruti Udyog Ltd

The Task Force under the Chairmanship of Dr K Kumar, Advisor, Maruti Udyog Ltd, pursued work on the Preliminary Business Case for the Report on Upgradation of Testing Facilities prepared last year.

Task Force on Alternative Energy Driven Vehicles

Chairman - Dr Pawan Goenka, Chief Operating Officer, Mahindra & Mahindra Ltd

The Task force under the Chairmanship of Dr Pawan Goenka worked closely with the Government at both Central and State Levels on promotion of Alternative Energy Driven Vehicles. Many of the SIAM recommendations on fiscal incentives, capital subsidy, soft loans for electric vehicles have either been accepted or are being considered positively by the Government. SIAM proposal for Electric Vehicle Demonstration Project has received positive response from several State Governments including that of Delhi and Andhra Pradesh. A Training Programme on Alternative Fuel Vehicles & Systems was successfully organised in association with DTC and Department of Energy, US Government.

Technical Committee on Emissions

Chairman - Mr R R Akarte, General Manager (Vehicle Testing), Tata Motors Ltd.

Emissions Committee under the Chairmanship of Mr R R Akarte deliberated on the emissions roadmap proposed by the Expert Committee on Auto Fuel Policy and forwarded technical inputs to the relevant Sub-Groups of the Expert Committee. Many of the SIAM submissions have been positively taken up by the Expert Committee.



Mr. A Ramasubramanian

CMVR, Safety and Regulations Committee

Chairman - Mr A Ramasubramanian, COO, Eicher Tractors and Former Director, Tech. & Chief of Prod Dev. Eicher Motors Ltd

The Committee under the Chairmanship of Mr A Ramasubramanian, Chief Operating Officer, Eicher Tractors worked actively on issues related to formulation and implementation of safety regulations, classification of vehicles and formalisation of the Road Map for Safety Standards prepared by it last year. With India joining WP-29 (World Forum for Harmonisation of Vehicle Regulations), the Committee also looked into the aspects related to harmonization of regulations.



Mr. M N Muralikrishna

Society for Automotive Fitness & Environment (SAFE)

President - Mr M N Muralikrishna, Technical Adviser, TVS Motor Company

SAFE's governing council having membership from vehicle manufacturers, ARAI, IIP, CIRT and several NGOs has been focusing on issues of road safety and in-use vehicle emission management with various Government Departments in all major cities. Road safety education has always been one of the major areas of focus for SAFE and under this initiative school children have been educated through visits in various automobile manufacturing facilities and interactive programmes in partnership with Traffic and Transport Departments of State Government. In partnership with SIAM and Federation of Asian Motorcycle Industries (FAMI) a poster for safe motorcycle driving was launched in Agra. Other initiatives included driver training programmes undertaken in major cities with special focus on attitudinal change, Traffic rules, Fuel conservation and other safety tips. SAFE has played a pivotal role in developing Computerisation of Pollution Check Centres and now working on Networking of the computerised Centres



Mr. N V Iyer

Two and Three Wheeler Sub-Committee

Chairman - Mr N V Iyer, Adviser, Bajaj Auto Ltd

The Two and Three Wheeler Sub-Committee under the Chairmanship of Mr N V Iyer met regularly to consolidate industry viewpoint on future emission norms for 2005 and beyond, durability of catalytic converters, deterioration factor for 2-wheelers, use of alternative fuels, in-use vehicle norms and other relevant issues.



Mr. R Devarajan



Mr. Sudam Maitra



Mr. T M Balaraman



Mr. R P Sharma

Commercial Vehicle Sub-Committee

Chairman - Mr R Devarajan, Spl. Director (PD), Ashok Leyland

The Sub-Committee under the Chairmanship of Mr R Devarajan, Spl Director, Ashok Leyland, deliberated upon the Code of Practice for Truck Cab & Body Design and Approval

Passenger Cars and UVs Sub-Committee

Chairman - Mr Sudam Maitra, Chief General Manager (Engg), Maruti Udyog Ltd

The Sub-Committee under the Chairmanship of Mr Sudam Maitra worked on various issues related to passenger cars with respect to finalisation of idle emission norms and other related areas.

Working Group on CMVR

Chairman - Mr T M Balaraman, Deputy General Manager (PE), Bajaj Auto Ltd

The Working Group under the Chairmanship of Mr T M Balaraman, DGM, Bajaj Auto Ltd interacted regularly and actively assisted CMVR, Safety & Regulations Committee in various tasks taken up by the Committee.

Working Group on Fuels

Chairman - Mr R P Sharma, Technical Adviser, Mahindra & Mahindra Ltd

The Working Group under the Chairmanship of Mr R P Sharma focused on the use of Ethanol gasoline blend in vehicles. The Working Group is interacting with Oil companies to study the effect of use of 5% Ethanol Diesel blend and bio-diesel in vehicles.



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 Product of India Ltd
1969	Mr A H Tobaccowala	Tata Engg. & 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 Engg. & 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 Lall	Hero Honda Motors Ltd
1997/98 & 1998/99	Mr V M Raval	Tata Engineering
1999/00 & 2000/01	Mr Venu Srinivasan	TVS Motor Company
2001/02 & 2002/03	Mr R Seshasayee	Ashok Leyland Ltd

* Since deceased

Members of Society of Indian Automobile Manufacturers

- | | |
|---|---------------------------------|
| 1. Ashok Leyland Ltd | 19. LML Ltd |
| 2. Atul Auto Ltd* | 20. Mahindra & Mahindra Ltd |
| 3. Bajaj Auto Ltd | 21. Majestic Auto Ltd |
| 4. Bajaj Tempo Ltd | 22. Maruti Udyog Ltd |
| 5. Daewoo Motors India Ltd | 23. Piaggio Vehicles Pvt Ltd |
| 6. DaimlerChrysler India Pvt Ltd | 24. Premier Automobiles Ltd |
| 7. Eicher Motors Ltd | 25. Royal Enfield Motors |
| 8. Fiat India Pvt. Ltd | 26. Simpson & Co. Ltd |
| 9. Ford India Pvt. Ltd | 27. SkodaAuto India Pvt Ltd* |
| 10. General Motors India Pvt. Ltd | 28. Swaraj Mazda Ltd |
| 11. Greaves Ltd | 29. Tata Cummins Ltd |
| 12. Hero Honda Motors Ltd | 30. Tata Motors Ltd |
| 13. Hindustan Motors Ltd | 31. Tatra Udyog Ltd |
| 14. Honda Sael Cars India Ltd | 32. Toyota Kirloskar Motor Ltd |
| 15. Honda Motorcycle & Scooter
India (Pvt) Ltd | 33. TVS Motor Company Ltd |
| 16. Hyundai Motor India Ltd | 34. Vehicle Factory, Jabalpur |
| 17. Kinetic Engineering Ltd | 35. Volvo India Pvt. Ltd |
| 18. Kinetic Motor Company Ltd | 36. Yamaha Motor India Pvt. Ltd |

Note: * Membership effective from 2003



Affiliation & Liaison with other Associations & Institutions

INDIA

MOU Partner: Delhi Transport Corporation, New Delhi
All India Motor Transport Congress, New Delhi
Association of State Road Transport Undertakings, New Delhi
Automotive Component Manufacturers Association of India, New Delhi
Automotive Tyre Manufacturers Association, New Delhi
Automotive Research Association of India, Pune
Bureau of Indian Standards, New Delhi
Central Institute of Road Transport, Pune
Central Road Research Institute, New Delhi
Confederation of Indian Industry, New Delhi
Federation of Automobile Dealers Association
Indian Institute of Petroleum, Dehradun
Indian Machine Tool Manufacturers Association, New Delhi
Vehicles Research & Development Establishment, Ahmednagar

OVERSEAS

MOU Partner: Mitra Emisi Bersih (Partnership for Clean Emission), Indonesia
MOU Partner: National Alternative Fuel Training Consortium, USA
Founder Member: Federation of Asian Motorcycles Industries, Singapore
Association of Fabricas de Automotores, Buenos Aires, Argentina
Associazione Nazionale fra Industrie Automobilistiche, Torino, Italy
Chambers Syndicate des Constructeurs d Automobiles, Paris, France
China Association of Automobile Manufacturers, Beijing, P R China
Japan Automobile Manufacturers Association Inc, Tokyo, Japan
Organisation Internationales des Constructeurs d Automobiles, Paris, France
Verband der Automobilindustrie e.v. Frankfurt, Germany
Indonesian Motorcycle Industry Association, Jakarta, Indonesia
Korea Automobile Manufacturers Association, Seoul, Korea
Motorcycle and Scooter Assemblers and Distributors Association of Malaysia, Pinang, Malaysia
Motorcycle Development Program Participants Association, Pasig City, Philippines
Singapore Motorcycle Trade Association, Singapore
Taiwan Transportation Vehicle Manufacturers Association, Taipei, Taiwan
Thai Automotive Industry Association, Bangkok, Thailand
The Society of Motor Manufacturers & Traders Ltd, London, UK
Japan Automobile Standards Internationalisation Centre, Tokyo, Japan

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