



nd
ANNUAL
REPORT
1999-2000

SIAM

SOCIETY OF INDIAN AUTOMOBILE MANUFACTURERS

2nd ANNUAL REPORT 1999-2000

SIAM

Society of Indian Automobile Manufacturers

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Message from the President



As I look back on the last one year, I see it marked by significant initiatives taken by the SIAM. I would like to provide an overview of the industry growth trends, and some initiatives undertaken

by our association during last year.

The automobile industry's growth in 1999-2000 has been encouraging. The overall industry growth rate was 15% over last year, with the passenger car and multi utility vehicle segments recording the highest growth in the last 20 years of 56% and 10% respectively. The commercial vehicle segment grew by 22% with a stronger growth in the medium and heavy commercial vehicles, while the two wheeler segment grew by 11%. The only decline was the three wheeler segment that witnessed a negative growth of 2%. Though overall exports during the same period registered negative growth, the multi utility vehicles' segment grew by 94%.

For development of the Indian economy, the growth of automobile sector has not only to be sustained but also accelerated. It is our aim that by 2010, the industry, with its backward and forward linkages should contribute 10% of the country's GDP. To exercise this growth, it is very critical that India has a well defined and coherent policy on automobiles. Moreover, with the total phase out of Quantitative Restrictions (QRs) round the corner, the need for an Auto Policy cannot be overemphasised.

Both ACMA and SIAM are in continuous dialogue with the Government and we are sure that the Auto Policy would not only promote value addition and strengthen the industry, but also make India, a significant exporter through R&D and technology leadership.

Besides the growth of the industry, SIAM is also working towards producing increasingly environment friendly vehicles. Environmental and Safety issues continue to be high on our task list. Today, there is a growing recognition of the need for an integrated approach to environmental issues amongst decision-makers.

Recognising this, the industry on its part announced the Emission Road Map for the next 10 years, aiming to reduce the time gap between international and Indian Emission standards. This roadmap will also enable the government to consider formulating the required policies/legislation, oil industry to plan availability of matching fuel and automobile manufacturers to develop and productionise the appropriate technology.

Realising that the States were grappling with similar problems of pollution, accidents and fatalities on road, we have taken steps towards forging closer ties with the State Governments, who are very keen on participating in the environment led programmes. We persuaded the States to work with the industry on joint programmes, thus highlighting an integrated and planned approach.

On realising that I&M formed the key element of reducing pollution by nearly half in the shortest possible time, we have approached the State governments to conduct Inspection and Maintenance programmes and also statutorily enforce them. Today the State Governments have begun to seriously consider setting up of I&M centres and have sought SIAM's assistance in preparing a blue print for the same.

On its part, SIAM, in assistance with State Governments is organising free pollution check camps in various cities in order to increase awareness on the need for periodic maintenance for reduced emission and better fuel efficiency. We are hopeful that together, we can take steps towards significant vehicular pollution control.

Today, we are in a digital economy and it is here to stay. The digital revolution is taking place much faster than the industrial revolution and is impacting economies and lifestyles at an unprecedented pace. E-commerce is the new paradigm. It is a fundamental reshaping of the business enterprise.

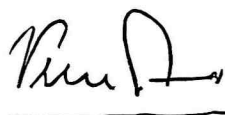
It would be interesting to be part of discussions at SIAM's National Conference where we will witness the transformation of old economy businesses to click and mortar businesses, in the future.

Well, there are challenging times ahead. Significant changes have taken place in the Industry and lots more are expected in the near future. And as an

industry, we need to be fully geared to facing tomorrow, for us and for Indian economy.

Finally, I would also like to acknowledge the unstinted cooperation and support of all SIAM members in the initiatives taken by SIAM in the past one year. I would like to end this message by thanking all the members, office bearers and Executive Committee members who have given me the opportunity to lead SIAM at this crucial juncture. Last but not least, SIAM's efforts have yielded fruit, thanks to the untiring efforts of all members of the Secretariat led by Mr Rajat Nandi. I would like to place on record my appreciation and thanks to Rajat and his team.

21st September 2000
New Delhi



Venu Srinivasan
President

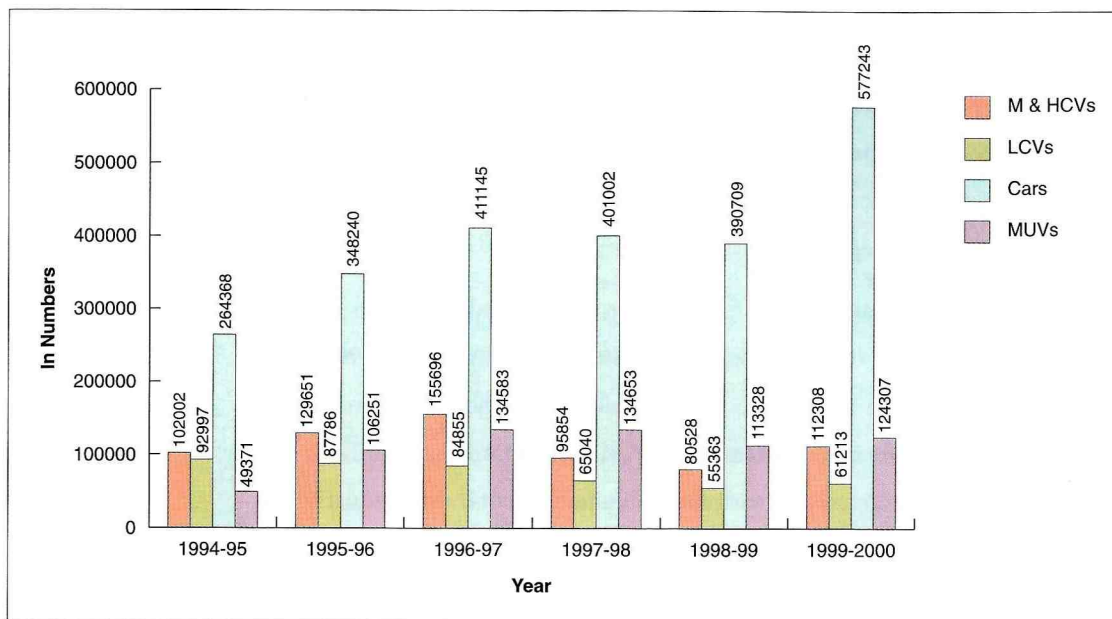
About SIAM

SIAM is an apex Industry body representing 35 leading vehicle and vehicular engine manufacturers. Although SIAM's principal focus remains on technology with emphasis on environmental and safety aspects, it is committed to playing a proactive role on all issues that would promote sustainable development of the Automotive Industry.

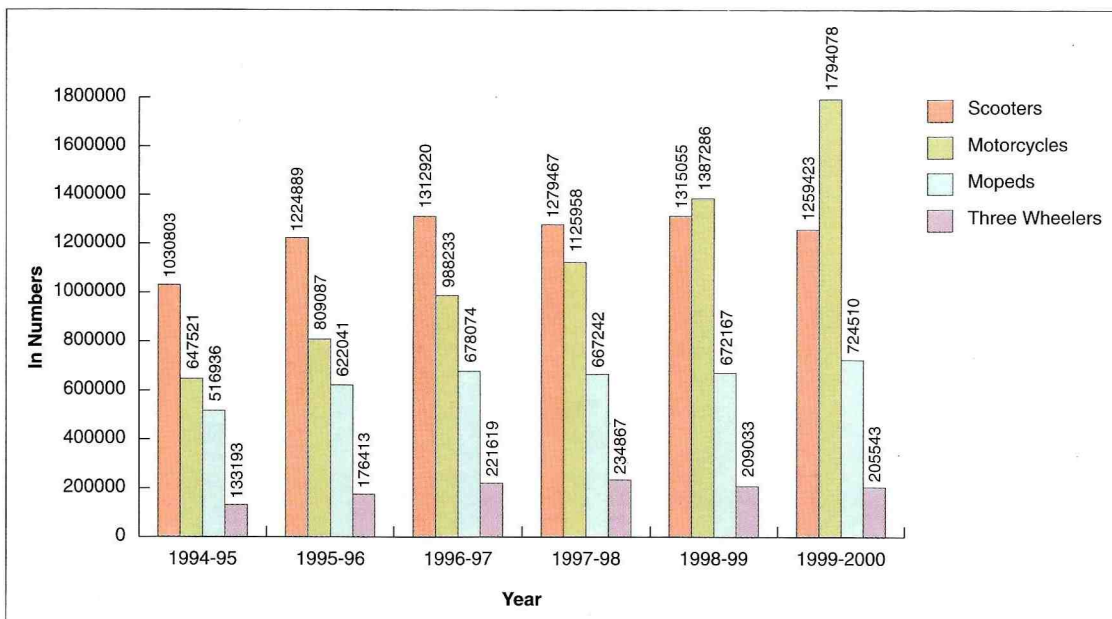
SIAM is an important channel of communication for the Automobile Industry with the Government, national and international organisations. Dissemination of information is an integral part of SIAM's activities, which it does through various publications, reports on production and sales, organising seminars and conferences. SIAM also organises, biennially, the Auto Expo series of Trade Fairs in co-operation with the Confederation of Indian Industry (CII) and Automotive Component Manufacturers Association of India (ACMA).

The Indian Automobile Industry has an agenda for the future and SIAM will be a catalyst in its endeavour to achieve global competitiveness and be committed to development, quality and welfare.

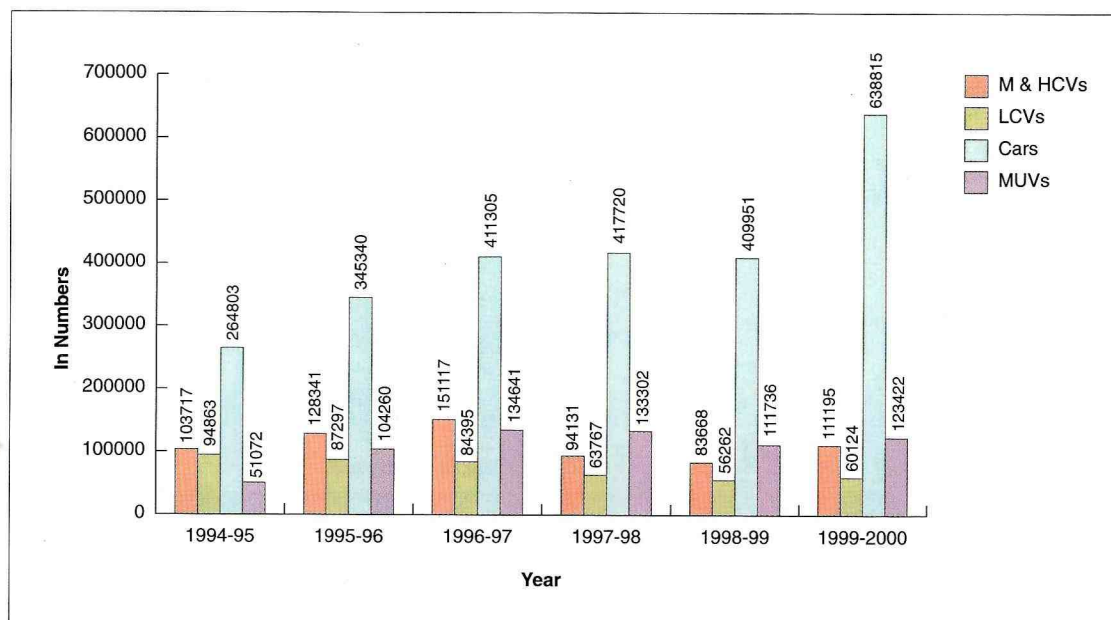
Automobile Production Trend for Four Wheelers



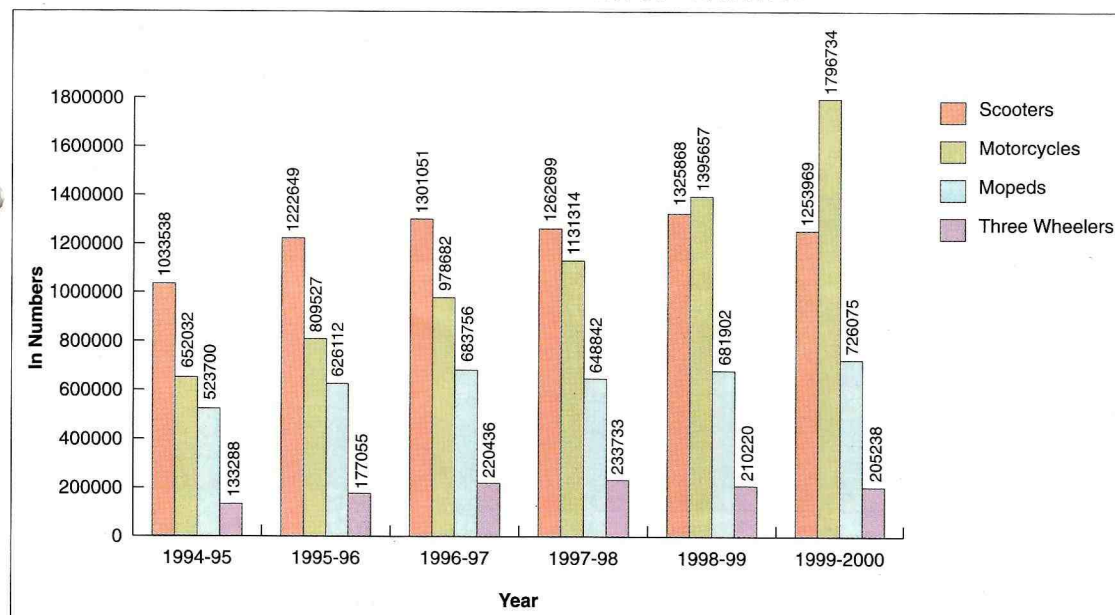
Automobile Production Trend for Two Wheelers & Three Wheelers



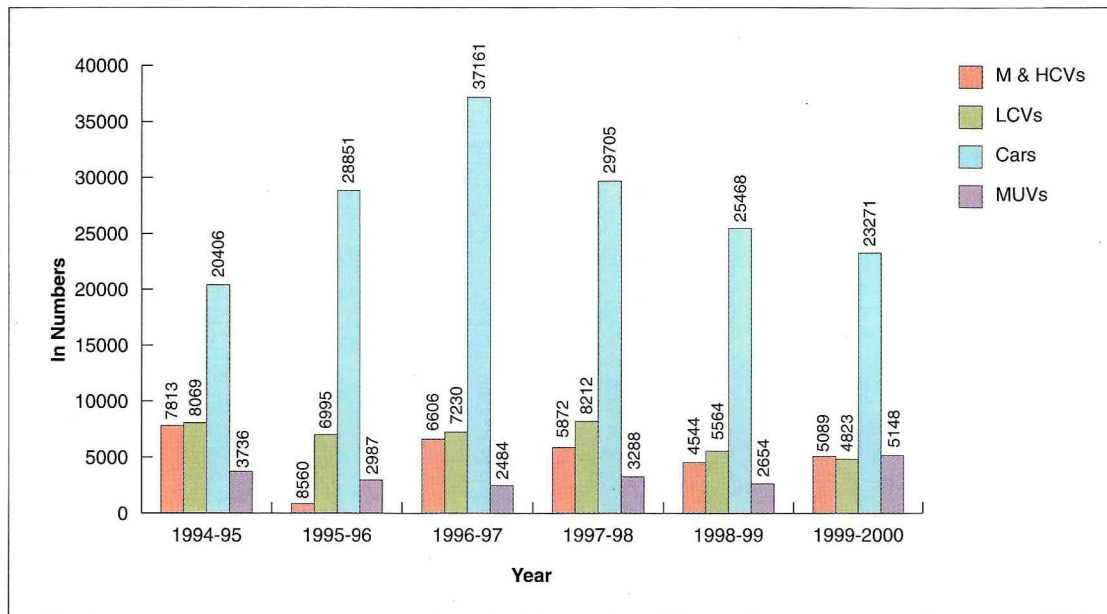
Automobile Sales (Inclusive of Exports) Trend for Four Wheelers



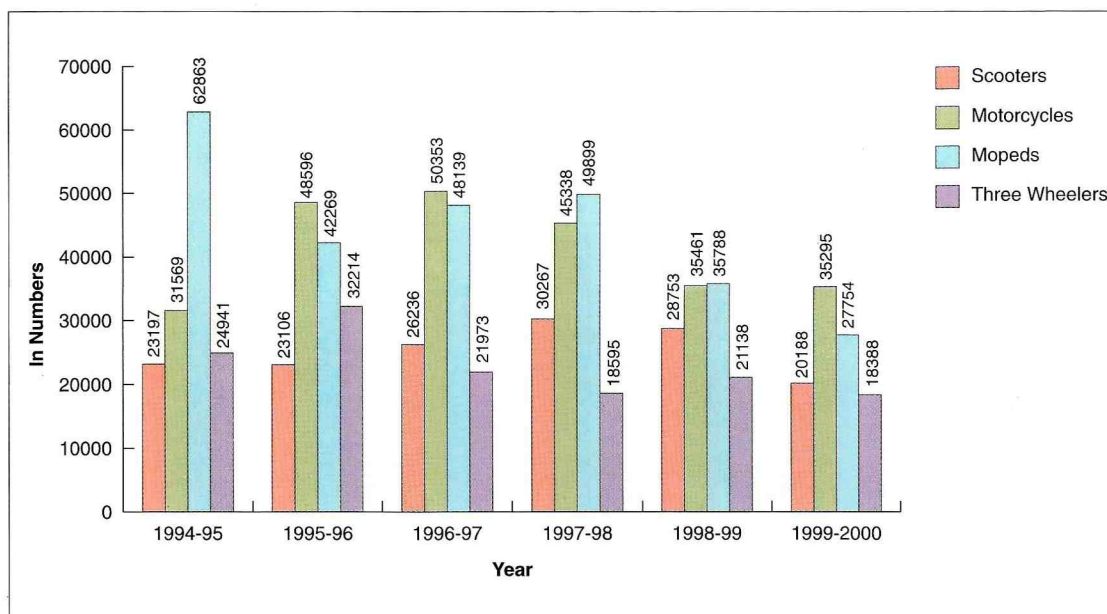
Automobile Sales (Inclusive of Exports) Trend for Two Wheelers & Three Wheelers



Automobile Exports Trend for Four Wheelers



Automobile Exports Trend for Two Wheelers & Three Wheelers



Automobile Production Trend

In Numbers

CATEGORY	1994-95	1995-96	1996-97	1997-98	1998-99	1999-2000	2000-2001 Apr-Jul
M & HCVs	102002	129651	155696	95854	80528	112308	24455
LCVs	92997	87786	84855	65040	55363	61213	21884
TOTAL CVs	194999	217437	240551	160894	135891	173521	46339
CARS	264368	348240	411145	401002	390709	577243	173839
MUVs	49371	106251	134583	134653	113328	124307	40165
TOTAL Cars & MUVs	313739	454491	545728	535655	504037	701550	214004
Total 4 Wheelers	508738	671928	786279	696549	639928	875071	260343
SCOOTERS	1030803	1224889	1312920	1279467	1315055	1259423	333189
MOTORCYCLES	647521	809087	988233	1125958	1387286	1794078	702855
MOPEDS	516936	622041	678074	667242	672167	724510	246374
TOTAL 2 WHEELERS	2195260	2656017	2979227	3072667	3374508	3778011	1282418
THREE WHEELERS	133193	176413	221619	234867	209033	205543	65857
GRAND TOTAL	2837191	3504358	3987125	4004083	4223469	4858625	1608618

Automobile Sales (Inclusive of Exports) Trend

In Numbers

CATEGORY	1994-95	1995-96	1996-97	1997-98	1998-99	1999-2000	2000-2001 Apr-Jul
M & HCVs	103717	128341	151117	94131	83668	111195	24045
LCVs	94863	87297	84395	63767	56262	60124	18403
TOTAL CVs	198580	215638	235512	157898	139930	171319	42448
CARS	264803	345340	411305	417720	409951	638815	190441
MUVs	51072	104260	134641	133302	111736	123422	37434
TOTAL Cars & MUVs	315875	449600	545946	551022	521687	762237	227875
Total 4 Wheelers	514455	665238	781458	708920	661617	933556	270323
SCOOTERS	1033538	1222649	1301051	1262699	1325868	1253969	331725
MOTORCYCLES	652032	809527	978682	1131314	1395657	1796734	658719
MOPEDS	523700	626112	683756	648842	681902	726075	239331
TOTAL 2 WHEELERS	2209270	2658288	2963489	3042855	3403427	3776778	1229775
THREE WHEELERS	133288	177055	220436	233733	210220	205238	64031
GRAND TOTAL	2857013	3500581	3965383	3985508	4275264	4915572	1564129

Automobile Sales (Inclusive of Exports) Trend

In Numbers

CATEGORY	1994-95	1995-96	1996-97	1997-98	1998-99	1999-2000	2000-2001 Apr-Jul
M & HCVs	7813	8560	6606	5872	4544	5089	1290
LCVs	8069	6995	7230	8212	5564	4823	2523
TOTAL CVs	15882	15555	13836	14084	10108	9912	3813
CARS	20406	28851	37161	29705	25468	23271	6828
MUVs	3736	2987	2484	3288	2654	5148	1346
TOTAL Cars & MUVs	24142	31838	39645	32993	28122	28419	8174
Total 4 Wheelers	40024	47393	53481	47077	38230	38331	11987
SCOOTERS	23197	23106	26236	30267	28753	20188	11114
MOTORCYCLES	31569	48596	50353	45338	35461	35295	13347
MOPEDS	62863	42269	48139	49899	35788	27754	18084
TOTAL 2 WHEELERS	117629	113971	124728	125504	100002	83237	42545
THREE WHEELERS	24941	32214	21973	18595	21138	18388	5257
GRAND TOTAL	182594	193578	200182	191176	159370	139956	59789

SIAM Initiatives & Events

Mega Pollution Check camps

11 November 1999 – 2 December 1999

Recognising the need for increasing awareness on the importance of periodic maintenance, SIAM organised a series of pollution check camps in Delhi from 11 November to 2 December 1999 spread across North, South, East and West Delhi.

Mrs Sheila Dikshit, Hon'ble Chief Minister of Delhi, who inaugurated the camps, lauded the efforts of SIAM and its partner and supporting organisations, chief among them being USAID and the British High Commission. The Chief Minister urged the automobile industry to sustain the movement by holding several such clinics over a period of time.

The other important dignitaries who presided over the inaugural function were the Transport Minister, Mr Parvez Hashmi, H.E, Mr Richard Celeste, US Ambassador and Mr Dilip Biswas, Chairman, CPCB.

More than 65,000 two wheelers were checked and given PUC certificates in the camps. Over 1000 vehicles were checked per day. Technicians from the seven two wheeler manufacturers also carried out minor repairs/tuning of vehicles requiring it. In addition to checking the vehicle for emission, the technicians also did safety checks on critical safety related components like brakes, lights, tyres, horns etc.

Inadequate maintenance was seen to be the chief reason for several vehicles emitting beyond permissible limits. However after minor tuning there was 20-30% reduction in emission and improvement in fuel efficiency by about 20%.

The I&M camps organised in 3 phases at 12 different locations were definitely the first of this kind on such a large scale to be jointly organised by several organisations under one banner. The camps also received tremendous support from several school and college students who assisted in entering test results and the response of vehicle owners in the data cards.

Free Pollution Check camp for Commercial Vehicles

14 December -17 December 1999

SIAM in association with commercial vehicle manufacturers and Transport Department, NCT Delhi organised a 4-day free pollution check camp for buses and trucks. About 1500 buses and trucks were checked for emission.

SIAM distributed booklets on maintenance tips including those on how to conserve fuel, to the drivers of the buses and trucks.

World Bank Mission to Bangkok, Thailand

28 March 2000 – 5 April 2000

In recognition of the work being done by SIAM in the area of vehicular pollution control, the World Bank invited SIAM to be a consultant for the Preparation Mission for the Bangkok Air Quality Management Project. Mr Atanu Ganguli, Executive Officer, SIAM was part of the 5 member mission comprising of Environmental Engineers and Transport specialists.

The main purpose of the Mission was to work with the Bangkok Metropolitan Area and the main project consultants to review the progress of the project, clarify scope of work and time table where necessary.

The mission drew on the expertise gained by SIAM for preparing the clinic sampling plan for motorcycle fleet upgrade to reduce air pollution in Bangkok.

Presently in Thailand there is no regulatory requirement of scrappage of in-use vehicles (either by age or pollution levels). In order to control rising pollution levels, the programme aims to identify gross polluters from the two wheeler parc and carry out minor maintenance on large population of motorcycles (upto 150,000) and replace upto 50,000 motorcycles whose emissions cannot be controlled by minor maintenance with new motorcycles.

Auto Expo 2000

12 January 2000 – 18 January 2000

Asia's largest automotive show was held from 12 January to 18 January 2000 at Pragati Maidan, New Delhi. It surpassed all previous records in terms of numbers of exhibitors, visitors, exhibition area, new launches and business conducted.

There were 18 exhibition halls spread over an area of 65,000 sq mts and over 1000 exhibitors. 25 new vehicles were launched and 26 new vehicles were on display. 22 auto component manufacturers and ancillaries launched new products. There was international participation from 20 countries and business delegations from 21 countries.

In his inaugural speech, Mr Murasoli Maran, Union Minister for Commerce and Industry addressed the concerns of Indian Industry at the prospect of unrestricted import of second hand vehicles. The Minister said that under no circumstances shall we permit India to become a dumping ground. He assured that the Government would take into consideration all aspects of safety, pollution norms, vehicle testing and valuation in this regard. The Minister also stressed on the need for rapid development and modernisation of road infrastructure which under present conditions accounted for a loss of almost Rs 900 crores each year, of which 15% could be attributed to wastage of fuel.

One of the distinctive features of this Auto Expo was the focus on environmental issues. There was a separate pavilion dedicated for this purpose called the Green Pavilion.

A series of seminars and workshops on automotive industry related issues were also held during Auto Expo 2000. SIAM hosted the **1st Asian Two Wheeler Congress on 13 January 2000**. The Chief Guest on the occasion was Mr K Roy Paul, Additional Secretary, Ministry of Environment & Forests and Mr Dilip Biswas, Chairman, CPCB was the Guest of Honour. The Congress was organised by SIAM to provide insights into latest technology

trends in the two wheeler industry, ascertain the role of alternate energy and acceptance of catalytic after-treatment devices. Papers were presented by eminent experts from Italy, United Kingdom, Japan, Taiwan, China and India.

It emerged from the presentations that two wheelers across the world will continue to play important role in transportation; in fact two wheelers in Europe are showing a growing trend.

The experts were also of the view that there is no reason to discriminate against two stroke engines when it meets the same norms as a four stroke.

1st Annual General Meeting of FAMI

12 January 2000, New Delhi

The 1st AGM of the Federation of Asian Motorcycle Industries was held in New Delhi, coinciding with the inaugural of Auto Expo 2000. SIAM is one of the founder members of FAMI. The automotive industry associations of Japan, Malaysia, Taiwan, the Philippines, Thailand, Singapore and Indonesia are also members of FAMI.

FAMI has been established with the following objectives:

- to promote consultation in connection with the development of the motorcycle Industry (including marketing, design etc) in Asia
- to act as advisors in connection with all aspects of the motorcycle industry in Asia, including study of technology, related legislation etc
- to promote, liaise and encourage relations with motorcycle industries and association in Asia
- to collect, review, update and supply data, information and documentation on the motorcycle industry and all related subjects

On this occasion the FAMI website was also launched to facilitate exchange of information between FAMI members. The website can presently be accessed by FAMI members.

Auto Industry rolls out Future Emission Norms : A Roadmap

April 2000

In April this year SIAM took a major initiative of announcing the Emission Road Map for the next 10 years. This is the first time that such a Road Map has been laid down specifying not just the targeted emission limits but also the required fuel quality. This Road Map aims to reduce the time gap between International and Indian Emission standards. The proposed time frame for progressive tightening of emission norms and improvement in fuel quality will enable the government to consider formulating the required policies/legislation, oil industry to plan availability of matching fuel and automobile manufacturers to develop and productionise the appropriate technology.

The following aggressive schedule have been proposed for implementation of future

emission norms in the country, which will reduce the gap between European & Indian norms from 13 years in 1991 to 1 year for passenger cars & 2 years for MUVs and commercial vehicles for meeting Euro IV equivalent norms which would be in place in Europe in 2005-2006 for new Type Approvals.

Passenger Cars :

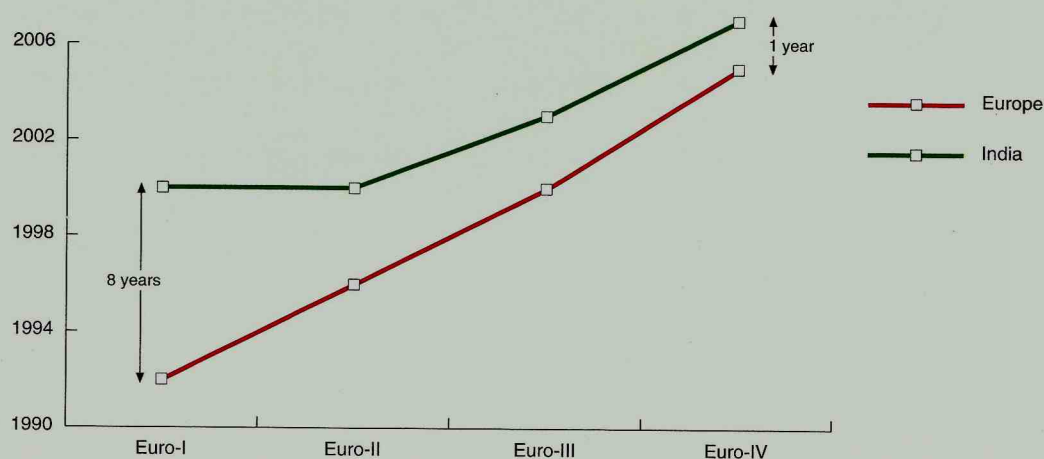
The Euro III equivalent norms will be met by April 1, 2003 for New Type Approval and by April 1, 2004 for all production. This will be followed by Euro IV equivalent norms by 2006 and 2007 respectively. The Euro II equivalent norms for passenger cars have already been implemented in the NCR, and can be implemented in other cities, six months from the date of notification and subject to availability of 0.05% sulphur petrol and diesel.

Future Norms proposal for Passenger Car Segment

Norms Level	India Norms	Europe Norms		SIAM Proposal		Principal parameters of fuel specification (per EU)
		New TA	All Production	New TA	All Production	
Euro 0	1996		1983			
Euro I	2000		1992			
Euro II		1996/1997		2000 *		Petrol & Diesel Sulphur max 0.05%
Euro III		1/1/2000	1/1/2001	1/4/2003	1/4/2004	Petrol: Sulphur ppm max 150 Diesel : Sulphur ppm max 350
Euro IV		1/1/2005	1/1/2006	1/4/2006	1/4/2007	Petrol: Sulphur ppm max 50 Diesel : Sulphur ppm max 50

* NCR : Other cities - 6 months from date of notification

Adoption of Emission Norms in Europe & India for Passenger Cars



Multi-utility vehicles / Commercial vehicles

While the Euro II equivalent norms for MUVs have been implemented in the NCR, they will be enforced in other metros from October 1, 2000 and in the rest of the country from April 1, 2002. For commercial vehicles, the Euro II equivalent norms will be implemented from April 1, 2002 for New Type approval and April 1, 2003 for All Production.

Industry has proposed to go straight to Euro IV equivalent norms, to be implemented by 2007 for new Type Approval and 2008 for all production. The suggested skipping in the Euro III equivalent norms for MUVs and CVs is to cut short the gap between European Norms and Indian Norms. Moreover, considerable capital investment and amortisation thereof within a short period of time is not feasible in the Indian scenario of low levels of production.

Future Norms proposal for MUV Segment

Norms Level	India Norms	Europe Norms		SIAM Proposal		
		New TA	All Production	New TA	All Production	Principal parameters of fuel specification (per EU)
Euro 0	1996	1983				
Euro I*	2000	1993/94				
Euro II*						
Class I	-	1/1/1997	1/1/1998	1/4/2002 [#]		Petrol & Diesel
Class II & III	-	1/10/1997	1/10/1998	Do		Sulphur max 0.05%
Euro III**						
Class I	-	1/1/2000	1/1/2001	Skip		Petrol Sulphur ppm max 150
Class II & III	-	1/1/2001	1/1/2002	Skip		Diesel ; Sulphur ppm max 350
Euro IV**						
Class I	-	1/1/2005	1/1/2006	1/4/2007	1/4/2008	Petrol Sulphur ppm max 50
Class II & III	-	1/1/2006	1/1/2007	1/10/2007	1/10/2008	Diesel ; Sulphur ppm max 50

Light Duty Vehicles are classified as:-

* In Europe for Euro I and Euro II

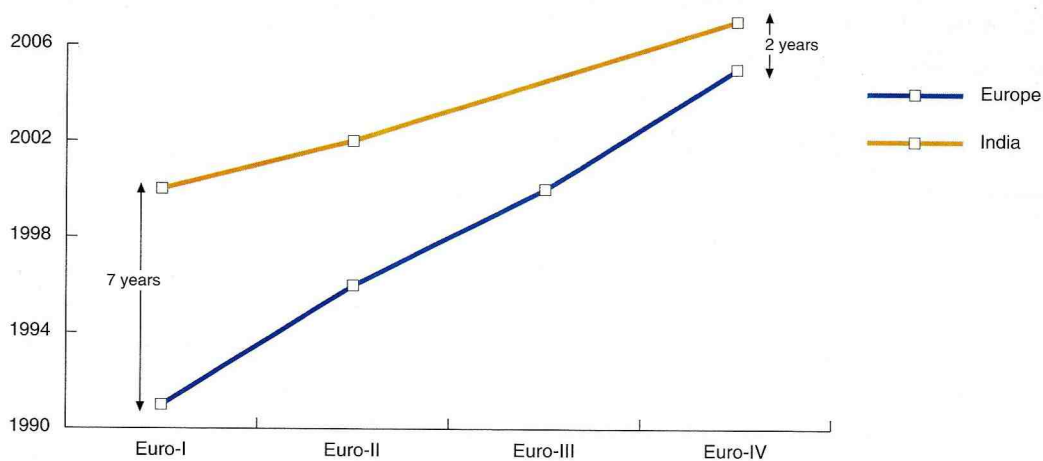
Class I (rw ≤ 1250kgs)
 Class II (1250 < rw ≤ 1700kgs)
 Class III (rw > 1700kgs)

NCR : 1/04/2000, Other Metros : 1/10/2000

** In Europe for Euro III and Euro IV

Class I (rw ≤ 1305kgs)
 Class II (1305 < rw ≤ 1760kgs)
 Class III (rw > 1760kgs)

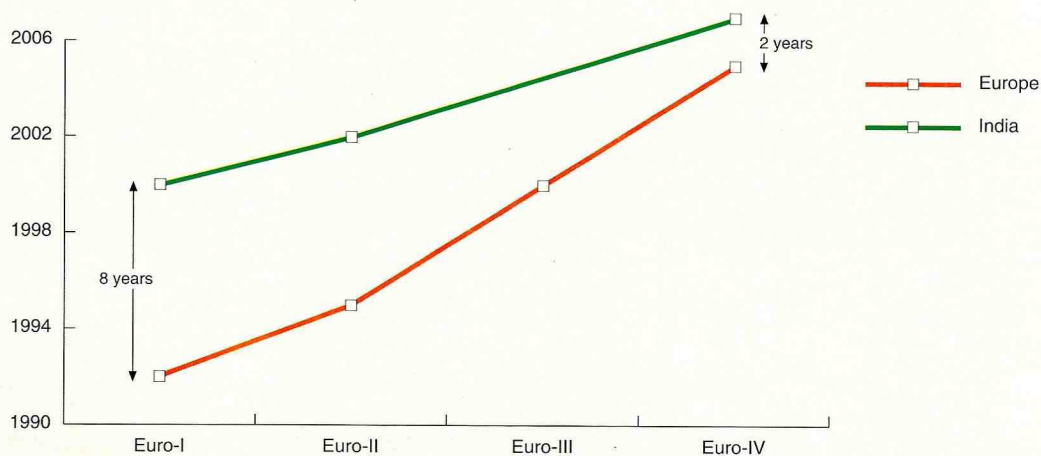
Adoption of Emission Norms in Europe & India for MUVs



Future Norms proposal for Commercial Vehicle Segment

Norms Level	India Norms	Europe Norms		SIAM Proposal		
		New TA	All Production	New TA	All Production	Principal parameters of fuel specification (per EU)
R 49	1992					
Euro 0	1996		1983			
Euro I	2000	1/7/1992	1/10/1993			
Euro II	-	1/10/1995	1/10/1996	1/4/2002	1/4/2003	Diesel:Sulphur max 0.05%
Euro III	-	1/10/2000	1/10/2001	Skip		Diesel:Sulphur ppm max 350
Euro IV	-	1/10/2005	1/10/2006	1/10/2007	1/10/2008	Diesel:Sulphur ppm max 50

Adoption of Emission Norms in Europe & India for Commercial Vehicles



Two & Three wheelers

For Two & Three Wheeler segment, India 2000 norms (far stricter than Euro II norms), are one of the strictest in the world and have already been

implemented from April 1, 2000. Though the Stage II (India) norms will be applicable from April 1, 2005, the Stage III (India) norms will only be implemented in 2009 after a technical feasibility review in 2005.

Future Norms proposal for Petrol 2-Wheeler Segment

Norms		India Norms	SIAM Proposal	Principal fuel specification
CO g/km	HC+NO _x g/km			
4.5	3.6	1996		
2.0	2.0	2000		
1.5	1.5	Stage II	1/4/2005	Sulphur ppm max 150
1.25	1.25	*Stage III	1/4/2009	Sulphur ppm max 50

* The stage III norms need to be reviewed in 2005 for technical feasibility

Future Norms proposal for Petrol Three Wheeler Segment & Diesel Two/Three Wheelers Segment

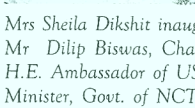
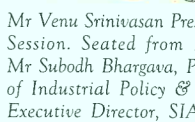
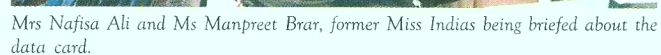
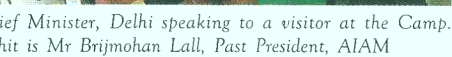
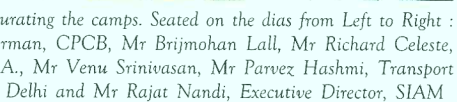
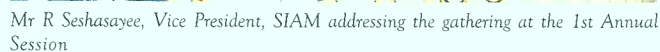
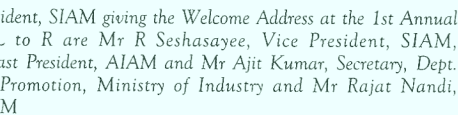
Norms	Year	SIAM Proposal				
		For 3-wheelers GVW less than 1.5 tonnes g/km and Diesel Two-wheelers				
		Diesel (2&3W)			Petrol (3W)	
		CO	HC+NO _x	PM	CO	HC+NO _x
Stage I (2000)	1/4/2000	2.72	0.97	0.14	4.0	2.0
Stage II	1/4/2005	1.00	0.85	0.11	2.25	2.0
Stage III*	1/4/2009	0.64	0.70	0.09	1.88	1.88
Principal fuel specification	Stage II	Sulphur ppm max 350			Sulphur ppm max 150	
	Stage III	Sulphur ppm max 50			Sulphur ppm max 50	

* The stage III norms need to be reviewed in 2005 for technical feasibility

History of Emission Regulation in India:

- 1989 Idle Emission Regulation
- 1991 Mass Emission Regulation (CO & HC) (Hot Start; Indian Driving Cycle)
- 1995 Fitment of Cat Converters for cars in four metros
- 1996 Tightening of emission limits (CO, HC & NO_x), Evaporative Emission & Crank Case Emission Regulation
- 2000 India 2000 norm
 - Euro-I equivalent for all 4-wheelers
 - Bharat Stage-II (Euro-II equivalent) norms in NCR for non-commercial 4-Wheelers
 - Tightest norms in the world for two wheelers

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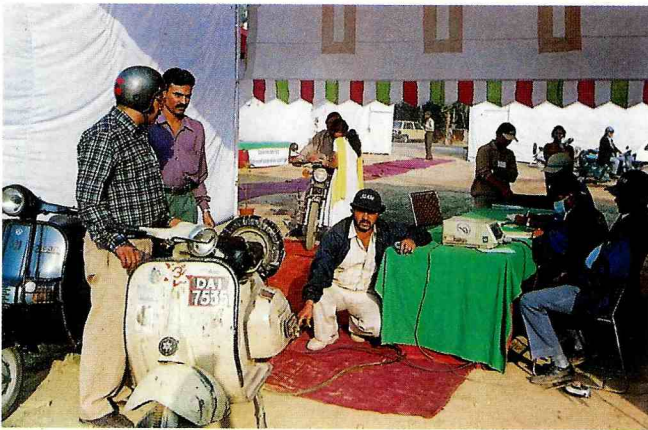
Important Events



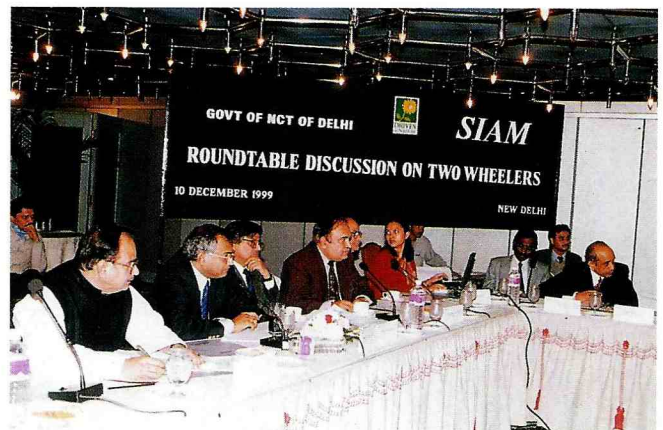
A word of encouragement for the school students from the Chief Minister of Delhi



SIAM organised a two day Refresher Programme for PUC centre Technicians in Calcutta



A scooter being tested for the emission levels



Roundtable discussion on Two Wheelers. Dr A K Walia Health Minister, Govt. of NCT Delhi listening to one of the presentations

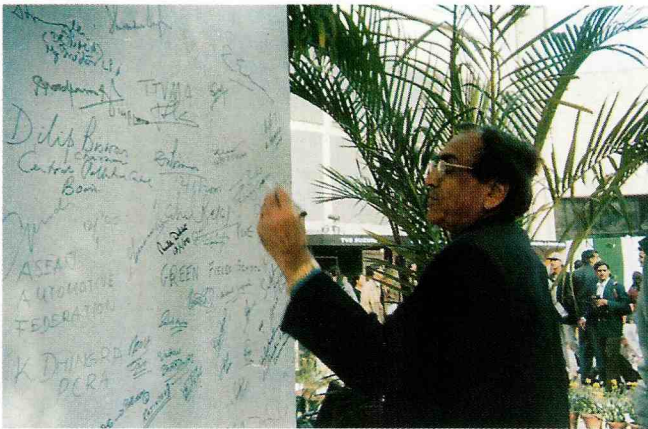


SIAM hosted the 1st Asian Two Wheeler Congress at New Delhi, coinciding with Auto Expo 2000



Mrs Shiela Dikshit, Chief Minister of Delhi visiting the Green Pavilion at Auto Expo 2000

Important Events



Remembering Mr Pran Talwar. Mr Talwar writes a message on the Graffiti Wall at the Auto Expo Fair grounds



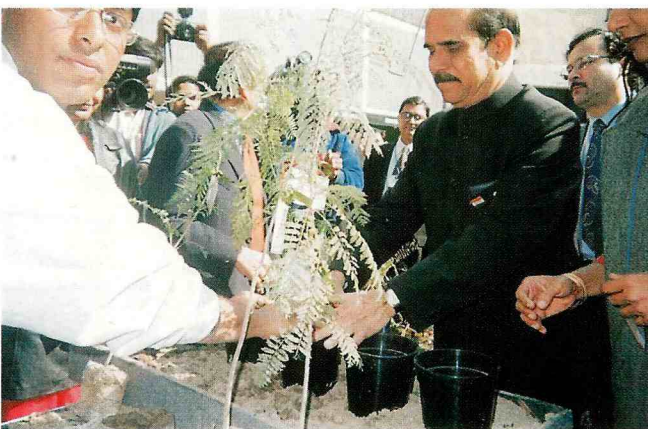
1st AGM of the Federation of the Asian Motorcycle Industries (FAMI) was held in New Delhi on 12 January 2000



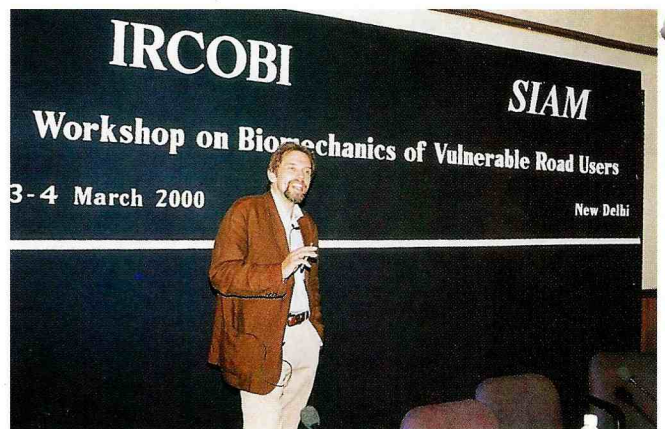
Mr Murasoli Maran, Union Minister for Commerce and Industry plants a sapling at the Auto Expo Fair grounds



President, SIAM addressing the FAMI delegates



Mr Manohar Joshi, Union Minister for Heavy Industry & Public Enterprises plants a sapling at the Auto Expo Fair grounds



SIAM in association with IRCOBI organised a Workshop on Biomechanics of Vulnerable Road Users in March 2000

Important Events



Roundtable on Integrated Approach to Vehicular Pollution Control in Calcutta



Mr Rajeev Talwar, Principal Secretary, Environment, Govt. of NCT Delhi addressing the Seminar on Emerging Diesel Technologies on 30 June 2000



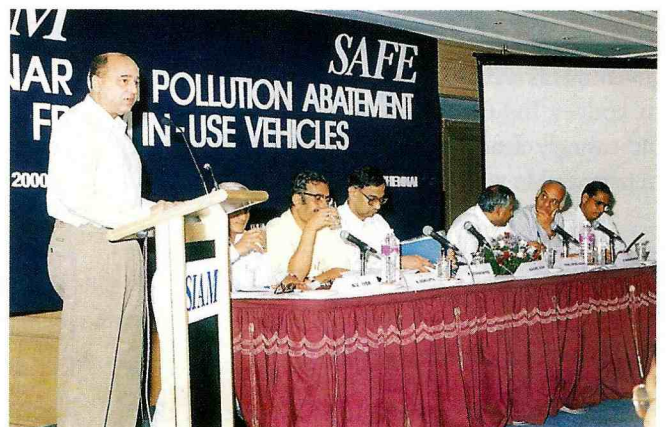
Environment Secretary and Transport Secretary, Govt. of W. Bengal at the Roundtable discussion



Mr Ashoke Joshi, Secretary., Ministry of Surface Transport addressing the Symposium on Regulation Relating to the Automobile Industry on 23 June 2000



Roundtable discussion on Integrated Approach to Vehicular Pollution Control underway in Hyderabad



Mr. Ashoke Joshi, Secretary, Ministry of Surface Transport addressing the I&M Seminar at Chennai

Interaction with State Governments

SIAM organised a series of Roundtable discussions with various state government officials on the problem of vehicular pollution and the measures that need to be taken to control the same.

Roundtable on Two Wheelers

10th December 1999 at New Delhi

Roundtable on Integrated Approach to Vehicular Pollution Control

14th January 2000 at New Delhi

24 January 2000 at Calcutta

25th February 2000 at Bangalore

6th April 2000 at Hyderabad

7th April 2000 at Chennai

Senior Environment Ministry, Transport Ministry and State Pollution Control Board officials actively participated in these Roundtables. Through presentations Technical Heads of SIAM member companies briefed participants on :

- history of emission legislation in India
- present norms compared to other countries
- roadmap for future emission norms
- technologies employed
- role of fuel quality and
- importance of Inspection and Maintenance.

The roundtables have been very effective in giving us an insight into the concerns of the various state governments and have also provided us with a forum to convey Industry's commitment to providing increasingly cleaner vehicles and our desire to work in partnership with various stakeholders.

Post-Refresher Course for PUC Centre Technicians

Bangalore and Calcutta

In India presently only transport vehicles, that is, buses, trucks, taxis and auto rickshaws are

required to undergo yearly fitness certification. The large population of personalised vehicles comprising scooters, motorcycles, mopeds, passengers cars and multi utility vehicles are required to get Pollution Under Control (PUC) certificates once in 3 or 6 months as the requirement of respective states may be.

An assessment of the present PUC system reveals that :

- Statutory control on functioning of centres absent
- Test centres allowed to carry out repairs
- Certificate issuing system not foolproof
- Road side enforcement checks inadequate
- No quality assurance to verify correctness of certificates
- Low awareness among users
- No formal inspection procedure
- No follow up on vehicles that fail to comply

A major problem is that there is no proper calibration of equipment which leads to faulty readings. SIAM recognising the need for educating the technicians on the importance of proper calibration of emission testing equipment has been organising Refresher Course for Technicians in association with the respective state governments and manufacturers of emission testing equipment.

Bangalore

19 April 2000 to 21 April 2000

PUC Centre Technicians' Training programme was organised by SIAM and SAFE in association with Karnataka Pollution Control Board, Transport Department and Neptune Equipment Pvt Ltd.

Technicians from 60 centers in Bangalore participated in the programme.

Calcutta

26th and 27th May 2000

Similar programme was organised in Calcutta in association with West Bengal Pollution Control Board, Transport Department, Auto Emission Testers Association and Neptune Equipment Pvt Ltd.

A total of 118 technicians participated in the programme from 67 Emission Testing Centers based in Calcutta. Service Personnel from Member Companies like Tata Engineering, Hindustan Motors, Bajaj Auto Ltd and TVS Suzuki participated in the programme to explain about new technologies which have been adopted in vehicles and how to maintain them.

The programme was inaugurated by Dr K K Bagchi, Chairman, Pollution Control Board.

The programme included theoretical discussion and practical demonstration of the correct method of using the testing equipment, its maintenance, calibration and other related issues.

Symposia

Symposium on Regulations relating to the Automobile Industry

23 June 2000, New Delhi

SIAM organised a Symposium on Regulations relating to the Automobile Industry with specific focus on the approach to formulation of standards and the problem of glare and the solutions thereto.

The Symposium was inaugurated by Mr Ashoke Joshi, Secretary (R&TH), Ministry of Surface Transport (MoST).

The Symposium was attended by representatives of the automobile industry, testing agencies, government officials, research institutes, headlamp manufacturers and NGOs.

Some of the key points emerging from the Symposium include:

- I. There is need for a roadmap for safety regulations clearly laying down the direction for the next ten years to enable industry adopt appropriate technologies to address safety concerns.
- II. The vehicle population profile in India is unique, consisting of about 70% two wheelers and a very large proportion of non-motorised vehicles. In view of this, it would be important to bring bicycles, pedestrians, animal driven and other non-motorised vehicles under the ambit of safety regulation in addition to motor vehicles which are covered under the Motor Vehicles Act, as is the practice followed internationally.
- III. An institute dedicated to Road Safety should be set up to coordinate the diverse issues pertaining to safety, determine solutions and promote R&D for safety.
- IV. There is need for stronger emphasis on driver training.
- V. Regulations will not yield the desired results unless they are effectively enforced. Enforcement agencies should have the required knowledge and equipment to enforce such laws.
- VI. Some of the factors responsible for the problem of glare are :
 - Non-optimal bulb-lamp combination i.e. use of wrong bulbs in a headlamp not designed for the bulb
 - Bad quality of reflector used in the lamp
 - Misalignment of the lamp
 - Not using dip beam when required
 - Poor weather conditions
 - Spurious or badly designed bulbs

Automatic dipping devices like Auto Dipper have been tested in many countries several years ago but were never recommended for fitment as they were not established as effective beyond doubt. Such devices have not been mandated anywhere in the world and experts do not consider them capable of solving the problem of glare.

The problem of glare can be tackled to a great extent by :

- Preventing the use of unauthorised bulbs
- Ensuring proper alignment of lamps
- Enforcing proper use of high, low and dipped beam
- Creating awareness among drivers on the need to be considerate and to use the right beam

Seminar on Emerging Diesel Technologies

30 June 2000-1 July 2000, New Delhi

Diesel and petrol have been used as automotive fuels for over century now. Today however, many people are questioning the use of diesel in automobiles. The concerns are primarily on account of known and suspected impacts on health.

SIAM organised a seminar on "Emerging Diesel Technologies" to provide an insight into the role of diesel in today's transportation in India and the developed countries like Italy, USA, and Austria, the existing technologies and emerging diesel technologies that hold the promise of substantial reduction in emissions. The role of fuel quality in controlling emission from diesel vehicles was discussed. There were presentations by medical experts on health issues.

The Chief Guest on the occasion, Mr Rajeev Talwar in his address said that the Industry should be ready to meet the next stage of emission norms for all vehicle types, irrespective of whether the same is met by diesel, petrol or CNG technology. The choice of green technology should lie with the Industry, so long as it meets the stipulated emission norms, he said.

The key points that emerged from the seminar and the subsequent Roundtable were as follows:

1. The current diesel engine is no more the noisy, smoke belching power plant. Today it is difficult to tell if a car is powered by diesel or petrol engine. There has been considerable reduction in emission of CO, HC & Particulate Matter. It is 30% more fuel efficient than a gasoline engine, 20% more fuel efficient than a gasoline direct injection engine and produces 27% less CO₂
2. Sulphur in the fuel is extremely critical in any air quality improvement strategy because it not only affects new vehicles but also the large population of in-use vehicles.
3. PM size is not affected by emission technologies be it Euro I or Euro IV. It is also not affected by the sulphur level in the fuel. The number of smaller particles also does not increase with reduction in PM mass.
4. It is imperative to reduce sulphur in diesel to enable use of emission control technology and for the long term durability of emission solutions. (An apt comment was made by one of the speakers – "Who needs Sulphur? The customer doesn't need it, the OEM does not require it, Even the after treatment manufacturer does not want it. Certainly the environment doesn't need the sulphur")
5. The upgradation in fuel quality and vehicular technology should be done in a coordinated manner with sufficient lead time given to both oil and auto industries. Fuel quality should be related to emission standards.
6. To meet European emission standards, it is essential to have European quality of fuel.
7. Impact of vehicular pollution on air quality cannot be generalised. It depends on number of local factors like topography, meteorological conditions, lifestyle etc.
8. The Health Effects Institute (HEI) has summarised the findings of 51 papers presented by various authors regarding carcinogenicity of diesel emissions. However, in no case it has been conclusively proven that there is a definite link between diesel emissions and cancer.
9. Results of experiments done on animals cannot be extrapolated to human beings. There is need for detailed study into the impact of particulate matter on human health. No study has proved statistically & conclusively an association between diesel emissions and lung cancer.
10. There are no risk free solutions and neither are there infinite resources. Therefore risks have to be evaluated and solutions adopted on the basis of costs and environmental benefits.
11. There is need to develop adequate infrastructure to handle sophisticated technologies in vehicles and fuel quality. Adequate lead time must be provided for upgradation.

Seminar on Inspection & Maintenance of In-use Vehicles

5th August 2000, Coimbatore

SIAM in association with CII and SAFE organised a seminar on I&M for in-use vehicles. The seminar coincided with Auto Focus 2000 which was held in the commercial hub of Southern India-Coimbatore from 3-6 August 2000.

Chief Guest on the occasion was Mr S Abdul Jabbar, Dy Transport Commissioner, Government of Tamil Nadu.

In his theme addressed Mr Jabbar emphasised that there is need to have proper system of Inspection & Maintenance and felt that this kind of activity involves a lot of investment and it would be difficult for the State Government to set up permanent I&C Centres on their own. He was also of the opinion that private organisations with credentials should be allowed to set up these Centres under the State Transport Departments.

Mr S P Shah, Managing Director, Neptune Equipments Ltd., Mr Srivatchan, General Manager, TVS Iyengar & Sons rolled out a detailed plan for setting up Inspection & Certification Centres as a Commercial Venture for private companies. For any such I&C centres it is important that the State Government duly recognises and authorises these centres to undertake fitness certification. As these centres would be using the state-of-the-art equipment for testing in-used vehicles, it is evident that for such projects to be self-sustaining the fee structure will have to be more than what is presently levied under the Central Motor Vehicle Rules. Moreover, the present Inspection and Certification carried out by Transport Department is only for

Transport (Commercial) Vehicles and the private passenger cars and Two wheelers have not yet been brought into the ambit periodic I&C.

The seminar clearly brought out that setting up and operating Inspection & Certification Centres will have to be initiated by the Government with active support from related agencies.

Seminar on I&M Systems: Solutions for Pollution Abatement from in-use Vehicles

30 August 2000, Chennai

SIAM and SAFE jointly organised a seminar on Pollution Abatement Solutions at Chennai

Delivering the Inaugural address, Mr Ashoke Joshi, Secretary, Ministry of Surface Transport (MoST) said that I&M System should be implemented as a proactive approach by stakeholders rather than requiring to be mandated by the Courts. He also pointed out that there is lack of public awareness for Inspection & Maintenance (I&M) and awareness of public is necessary in order to make I&M a success.

At this Seminar, President, Society for Automotive Fitness & Environment (SAFE) presented a draft Roadmap for I&M Systems for India which includes code of practice for operation of Authorised Testing Stations (ATS), selection of contractors for ATS, qualification of personnel, fee structure, phasing in of all vehicles under the ambit of I&M Systems and necessary modifications required in CMVR for implementation of I&M Systems.

Code of Practice for Bus Body: Design, Manufacture & Approval

June 2000

The Bus Body building activity in India is by and large in the unorganised sector. Most of the body builders in unorganised sector possess inadequate technical capabilities and tend to adopt arbitrary practices, both in design and manufacture. This is the major reason for the existence of a large number of unsafe and uncomfortable buses, suffering poor reliability and durability, on Indian roads.

In 1998, SIAM commissioned two surveys, one relating to Bus Body building in the North and another on Driver Cabin and Load Body Design of trucks. The surveys revealed some startling facts.

- Of 65 units surveyed for the study on bus body building, 55 units came under category "C". Category "C" units have equipment of low standard and process capability and possess only fabrication capabilities.
- Only 8 units had quality control function and even in these Quality control was not systematic.
- Design and Development is virtually non-existent.

After a thorough study of data collected from the surveys, SIAM embarked on development of a "Code of Practice for Bus Body Design,

Manufacture & Approval". The first draft of the Code of Practice has been completed and is being discussed with bus body builders, vehicle manufacturers, STUs and other stakeholders.

This Code of Practice lays down the standards which bus bodies have to conform in their design and manufacture from the point of view of safety and comfort. An Accreditation Procedure for Bus Body builders is proposed so that only bodies built by such accredited builders are accepted at the time of vehicle registration. The code includes the procedure for Type Approval and Conformity of Production Certification, so that the desired objective of upgraded bus bodies is achieved.

The Code consists of the following parts -

Part I. Bus body Design

Part II. Bus Body Design & Manufacture Guidelines

Part III. Type Approval & COP Procedure

Part IV. Accreditation of Bus Body Builders

This code is applicable to single-deck buses with a minimum seating capacity of 23 passengers and a maximum seating of 55 passengers.

The document will be finalised after the discussion in the CMVR-Technical Standing Committee, under the Chairmanship of Mr B Bhanot.

E-Commerce - The New Paradigm in Business

The digital revolution is transforming societies the world over much faster than the Industrial revolution. The speed at which this transformation is being brought can be seen in this extract from a United States Department of Commerce's report on *The Emerging Digital Economy*

Quote

The Industrial Revolution was powered by the steam engine, invented in 1712 and electricity, first harnessed in 1831. Because it required a network to contain and transmit its power, electricity's potential had to wait until 50 years after it was first harnessed before the first power station was built in 1882. It took another 50 years before electricity powered 80% of factories and households across the country. Early uses of electricity were limited.

The digital revolution is happening much more quickly. The harnessing of light for nearly instantaneous communications and the ability to use microscopic circuits to process and store huge amounts of information are enabling the current economic transformation. In 1946, the world's first programmable computer, the electronic numerical integrator and computer (ENIAC), stood 10 feet tall, stretched 150 feet wide, cost millions of dollars, and could execute up to 5,000 operations per second. Twenty five years later, in 1971, Intel packed 12 times ENIAC's processing power into a 12 mm² chip with a \$200 price tag. Today's personal computers (PCs) with Pentium processors perform in excess of 400 million instructions per second (MIPS). At the current pace of development, by 2012, PCs will be able to handle 100,000 million instructions per second.

Where advances in telecommunications and computing occurred parallelly, today they converge in the Internet. The Internet ties together computing power on desks, in factories and offices around the world through a high-speed communications infrastructure.

Unquote

Businesses in virtually every sector of the economy are beginning to tap the potential of the Internet to cut the cost of purchasing, manage supplier relationships, streamline logistics and inventory, plan production and reach new and existing customers more effectively.

The magnitude of growth of the Internet and E-Commerce can be gauged from the following data:

- Fewer than 40 million people around the world were connected to the Internet during 1996.
- By the end of 1997, more than 100 million people were using the Internet.
- As of December 1996, about 627,000 Internet domain names had been registered. By the end of 1997, the number of domain names more than doubled to reach 1.5 million.
- Traffic on the Internet has been doubling every 100 days.

A glimpse of the effectiveness of the Internet can be seen in the achievements of "Digital Pioneers"-Dell Computers and Sun Microsystems. Just one year after launching its site, Dell Computer saw online sales peak to US\$ 1 million a day. Documenting its return on marketing investment from Web publishing, reports that it slashed more than US\$1 million from its marketing costs in January 1995 (the first month of its accumulated data).

The Internet is fast becoming a ubiquitous part of world culture and business. People who till a few years ago did not know about the Internet, use it today to send email, purchase online, book tickets etc.

It would be relevant to take a look at some of the indicators :

	Present level on 31 March 2000	Target 2008
Total number of Personal computers (PCs)	4.3 million	20 million
Internet subscribers	0.77 million	35 million
Internet users	3.2 million	100 million
Cable TV Subscribers	37 million	70 million
Fixed phones	26 million	125 million
Television sets	75 million	225 million

Source : NASSCOM

Information Technology is not new for the automotive industry. Computer aided Design (CAD), Computer aided manufacturing (CAM) are already being used to reduce product design and development cycle.

The Automotive Industry by virtue of the nature of its operations involving tiers of suppliers is well placed to derive the advantages that e-commerce offers in terms of increased efficiencies, facilitate easier business practices and lower costs. Moreover, the automotive industry will have to leverage emerging e-technologies since the Internet is fast becoming an integral part of the daily lives of a large number of people. Internet will be a useful tool for Customer Relationship Management. The Internet not only has great reach but also the potential to expand the richness of products and services by increasing information content and degree of customisation facilitated by a two way flow of information, from as well as to the customer.

The Automotive Industry can look at Business to Business (B2B) and also Business to Customer (B2C) e-commerce transactions.

Some of the advantages of Inter-enterprise Communication-of many online

- Reduction in inventory
- Collaborative Engineering
- Reduction in purchase cost
- Improved customer service

The benefits for the buyer and seller

Buyer

Streamline spending

Supplier

Reach buyers & marketplace

Collaborate & source	Integrate supply chain
Connect globally	Differentiate products
Massive savings	Reduced costs

Recently Toyota announced that it will soon begin producing the Camry Solara to customer order in just five days and will do the same for other models later this year. This news has astounded an Industry which has a minimum cycle time of 30 months for developing and building a new vehicle and requires 30 to 60 days to produce a customer order.

A Goldman Sachs study has found that an automotive marketplace can reduce the cost of a vehicle by upto 14%.

Such announcements hold a lot of promise for the Indian automotive Industry as it strives for global competitiveness. The industry would have to leverage e-technologies in the post-QR era when costs would be crucial in the drive towards rapid technology upgradation.

In India Business to customer (B2C) E-Commerce transaction is in nascent stage and thus may not become an instant hit for buying purposes for some more time. The reason is simple because our markets are highly fragmented and we also do not have tested cyber laws and financial instruments. But (B2B) business-to-business transaction could grow much faster as compared to business to business to consumer as companies and trade are better equipped in terms of the systems and infrastructure and interfaces to embrace this method of conducting business with each other.

Executive Committee 1999-2000

Company	Member	Alternate Member
TVS-Suzuki Ltd	Mr Venu Srinivasan (President)	Mr C P Raman
Ashok Leyland Ltd	Mr R Seshasayee (Vice President)	
Eicher Motors Ltd	Mr Subodh Bhargava (Treasurer)	
Bajaj Auto Ltd	Mr Rahul Bajaj	Mr Madhur Bajaj
Ford India Ltd	Mr Phil Spender	Mr B S Rathor
Bajaj Tempo	Mr Abhay Firodia	Mr M G Chopda
Daewoo Motors India Ltd	Mr S G Awasthi	
Eicher Motors	Mr S Sandilya	Mr Rakesh Kalra
Hindustan Motors Ltd	Mr A Sankar Narayanan	Mr B K Chaturvedi
Hyundai Motor India Ltd	Mr Yang Soo Kim	Mr A P Gandhi
Hero Honda Motors Ltd	Mr Pawan Kant Munjal	
LML Ltd	Mr Deepak Singhanian	Mr R D Jayal
Mahindra & Mahindra Ltd	Mr Anand Mahindra	Mr Alan Durante
Maruti Udyog Ltd	Mr Jagdish Khattar	Dr K Kumar
Majestic Auto Ltd	Mr Pankaj Munjal	Mr Mahesh Munjal
The Premier Automobiles Ltd	Mr Maitreya V Doshi	Mr Ramesh Adige
Tata Engineering	Mr Ravi Kant	Mr J Ramnath
Tata Cummins	Mr Ravi Venkatesan	Mr Yul J Tarr
Yamaha Motors Escorts	Mr T Suganuma	

Committees/Sub-Committees/Task Forces	Chairman/Co-Chairman/Convenor
Emissions Committee	Dr Pawan Goenka Mahindra & Mahindra
CMVR & Safety Regulations Committee	Dr K Kumar Maruti Udyog
Two & Three Wheeler Sub-Committee	Mr N V Iyer Bajaj Auto Ltd
Commercial Vehicle Sub-Committee	Mr A S Ramasubramanian Eicher Motors Ltd
Passenger Car-Sub-Committee	Mr I V Rao Maruti Udyog
WTO Committee	Mr Anand Mahindra Mahindra & Mahindra Mr S Sandilya Eicher Group
Infrastructure Committee	Mr S G Awasthi Daewoo Motors Mr Phil Spender Ford India
Committee on Consumer Affairs	Dr Till Becker De Freitas Mercedes Benz India Mr A P Gandhi Hyundai Motors
Task Force on Used Vehicles	Mr Phil Spender Ford India
Task Force on Vehicle Classification	Mr Abhay Firodia Bajaj Tempo
Task Force on Passenger Cars	Mr Jagdish Khattar Maruti Udyog
Task Force on Definitional Issues related to Auto Policy	Mr Ramesh Adige Fiat India
Working Group on CMVR	Dr P D Singhal Tata Engineering Mr T M Balaraman Bajaj Auto Ltd
Society of Automotive Fitness & Environment (SAFE)	Mr R Ramakrishnan (President) Ashok Leyland Dr K Kumar (Vice President) Maruti Udyog Mr Harjeet Singh (Treasurer) Hero Honda Motors
Working Group on Fuels	Mr R P Sharma Mahindra & Mahindra

Past Presidents

Year	Name	Company
1960	Mr Lalchand Hirachand*	Premier Automobile Ltd
1961	Sir L P Misra*	Hindustan Motors Ltd
1962 & 63	Mr A E L Collins*	Ashok Leyland Ltd
1964	Mr Keshub Mahindra	Mahindra & Mahindra Ltd
1965 & 66	Dr M A Chidambaram*	Automobile Products of India Ltd
1967 & 68	Mr K V Srinivasan	Standard Motor Prod. Of India Ltd
1969	Mr A H Tobaccowala	Tata Engg. & Locomotive Co Ltd
1970 & 71	Mr A Sivasailam	Simpson & Co Ltd
1972 & 73	Mr N K Firodia*	Bajaj Tempo Ltd
1974 & 75	Mr J E Talaulicar	Tata Engg. & Locomotive Co Ltd
1976 & 77	Mr Rahul Bajaj	Bajaj Auto Ltd
1978 & 79	Mr P N Venkatesan	Premier Automobiles Ltd
1980 & 81	Mr C V Karthik Narayanan	Standard Motor Prod. Of India Ltd
1982 & 83	Mr R J Shahaney	Ashok Leyland Ltd
1984 & 85	Mr V Krishnamurthy	Maruti Udyog Ltd
1986 & 87	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
1992-93	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

* Since deceased

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Mahindra & Mahindra Ltd

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24, Homi Mody Street
Mumbai-400 001
Tel: +91-22-2049131
Fax: +91-22-204 5474

Toyota Kirloskar Motor Ltd

Plot No. 1
Bidadi Indl. Area
Bidadi,
Ramnagar Taluk
Bangalore(Rural) Dist-562 109
Tel: +91-8113-87001-39
Fax: +91-8113-87076-79

TVS-Suzuki Ltd

Jayalakshmi Estates
No.8, Haddows Road
Chennai-600 005
Tel: +91-44-8272233
Fax: +91-44-8257121

Vehicle Factory Jabalpur

Govt of India
Ministry of Defence
Ordnance Factory Board
Jabalpur (M.P.)- 482 009
Tel: +91-761-330002
Fax: +91-761-330436

Volvo India P. Ltd

201 Embassy Square
148 Infantry Road
Bangalore-560 003
Tel: +91-80-2282909/10
Fax: + +91-80-2284448

Yamaha Motor Escorts Ltd

19/6 Mathura Road
Faridabad-121 006
Tel: +91-129-284931-36
Fax: +91-129-284841

Affiliation & Liaison with other Associations & Institutions

INDIA

- ☐ All India Motor 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
- ☐ Ball & Roller Bearing Manufacturers Association of India, New Delhi
- ☐ Bureau of Indian Standards, New Delhi
- ☐ Central Institute of Road Transport, Pune
- ☐ Confederation of India Industry, New Delhi
- ☐ Electronics Components Industries Association, New Delhi
- ☐ Energy Management Centre, New Delhi
- ☐ Federation of Automobile Dealers Association, Mumbai
- ☐ Indian Institute of Petroleum, Dehradun
- ☐ Indian Machine Tool Manufacturers Association, New Delhi
- ☐ Vehicles Research & Development Establishment, Ahmednagar

OVERSEAS

- ☐ MOU-Partner : The Society of Motor Manufacturers & Traders Ltd, London, UK
- ☐ Federation of Asian Motorcycles Industries, Singapore
- ☐ Association of Fabrics de Automotores, Buenos Aires, Argentina
- ☐ Associazione Nazionale fra Industrie Automobilistiche, Torino, Italy
- ☐ Chambers Syndicate des Constructeurs d Automobiles, Paris, France
- ☐ Japan Automobile Manufacturers Association Inc, Tokyo, Japan
- ☐ Manufacturers of Emission Controls Association, Washington DC, USA
- ☐ American Automobile Manufacturers Association of the US Inc, USA
- ☐ Organisation Internationals des Constructeurs d Automobiles, Paris, France
- ☐ The Association of Swedish Automobile Manufacturers & Wholesalers, Stockholm, Sweden
- ☐ Verband der Automobilindustrie e.v. Frankfurt, Germany

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SIAM

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