

SIAM

Society of Indian Automobile Manufacturers

ANNUAL REPORT 2019-20

Re-Building the Nation, Responsibly



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PRESIDENT'S MESSAGE



Dear Colleagues,

It has been a tough ride for the Indian Automobile industry, with sales sharply declining by about 18% in 2019-20 over 2018-19. The Commercial vehicle sector was the worst hit with about 29% drop in sales in 2019-20. The lower performance of 2019-20 can be attributed to poor customer sentiments, liquidity crisis, higher cost of acquisition due to new safety and environment regulations, including BS IV to BS VI transition, higher upfront insurance premium, lower demand of CVs due to change in Axle weight norms, amongst others.

However, the impact of COVID-19 and consequent lockdown since March 2020, has resulted in further plummeting of sales very sharply, in the last four months. Passenger Vehicles and Two-Wheelers have seen more than 60% drop in sales during April to July 2020, compared to the previous years. However, sales of Three-Wheelers have dwindled by more than 87%. Similarly, in the April to June 2020 period, the Commercial Vehicles sales dropped by about 85%, compared to the previous years. Assuming that there would be some positive traction in coming months, SIAM's preliminary estimates indicate that the year 2020-21 would close with de-growth of various segments between 26% to 45%. COVID-19 overshadowed the landmark achievement of the Industry of moving to BS VI Emission Norms from 1st April 2020, for all categories of vehicles, across the country.

Policy Advocacy

SIAM continued its close engagement with Government of India and put forth the industry's submissions on matters pertaining to regulations, fiscal and trade policies. Some of our representations on fiscal and trade policies that were favourably considered by the Government include :

- No increase in 3rd party insurance premium by IRDAI in FY 20-21
- GST on EVs was reduced to 5%
- Additional income tax deduction of INR 1.5 lakhs was allowed on interest paid for loans to buy EVs
- Depreciation was increased to 15% on vehicles purchased upto 31st March 2020
- Automobiles were excluded from the scope of the Regional Comprehensive Economic Partnership (RCEP), which India did not sign up ultimately



- Registration process for Steel Import Monitoring system of DGFT has been aligned to allow registration of shipments arriving within 15 days and facilitation of multiple login by importers for faster processing.
- Duty drawback cap on passenger vehicle were removed and high-end motorcycles were provided with higher duty drawback. A separate category of AMT vehicles for passenger vehicles was introduced in the duty drawback schedule.
- Customs duty on commercial vehicle CBUs was increased to 40%

During the recent past, SIAM also made several recommendations to Government of India and other stakeholders on various regulations that are / were being made applicable. Some of our representations on Regulations that were favourably considered by the Government include :

- Pan India availability of BS VI grade gasoline and diesel from 20th March 2020, ahead of the implementation date of 1st April 2020
- Option of E10 Reference fuel was allowed for BS VI Four Wheelers
- Notification for BS VI Quadricycles was released with two stage ODB in 2023 and 2025
- Weightage factor of WMTC was suitably aligned to Global regulations.
- Procedures for measuring range of Electric Vehicles in FAME II was retained, as per the recommendations of SIAM
- FASTag was implemented effectively to enable hassle free movement of four wheelers, across toll booths
- Government allowed identification of BS VI vehicles separately, by putting a Green Strip in the coloured sticker of 3rd Registration Plate
- Clarification was given on 'Rent-Motorcycle Scheme' to allow plying of rented two-wheelers across States.

SIAM will continue to engage with the Government on many of the Technical Regulatory matters, which are yet to be resolved. Some of our representations on Regulations currently under discussion with the Government include :

- Implementation of Mandatory Recall Rules with suitable lead time
- Permitting two or more decks in rigid and articulated vehicle carriers
- Additional safety requirements prescribed for 22+D OE buses to also be applicable to buses built by body builders, to create level playing field for OEMs
- Issues related to application of Quality Control Orders (QCO) on Brake Linings, Wheel Rims and Steering Wheels for OEMs
- QCO for Aqueous Urea Solution (AUS 32) to prevent damage After-Treatment Devices fitted in Diesel vehicles for NOx control
- Requisite Lead time for implementation of Battery Waste Management Rules.

COVID -19 Impact

COVID-19 has created an unprecedented situation in the Auto Industry. Production lines had to be stopped and offices had to be closed, which adversely affected the entire automotive business. SIAM sought for immediate interventions of Government (both at the Central and State levels), who responded favourably to many of the representations made by Industry for effective resumption of operations once lockdown restrictions were eased in different parts of the country. Some of the recommendations from SIAM that were favourably considered by the Government include :

- Deferment of statutory compliances with regard to tax payment and returns
- Demurrage waiver was extended on account of lockdown at short notice
- Reduction in repo rate to 4% (from 4.4%) and Reverse repo rate reduced to 3.35 % (from 3.75%)



- RBI special refinance facility of Rs 50,000 crore was given to boost liquidity
- Moratorium period of 90 days for loan repayments was allowed
- In the Foreign Trade Policy, MEIS benefit was extended for 1 year, till December 2020
- 24x7 customs operations was started at designated ports
- Special Air India flights to China were operated for airlifting components, before the lockdown in India
- Trucks carrying both essential and non-essential commodities were allowed to operate
- Validity of e-way bills was extended upto 30th June 2020
- Flexibility was allowed for honoring contracts through ‘Force Majeure’ clause
- Multiple shifts including night shifts were allowed for manufacturing
- Export was allowed through land borders.

We as SIAM continue to engage with the Government of India on minimizing the adverse impact of COVID-19 on the Indian Automobile Sector and some of our recommendations for demand revival, on which we are currently in dialogue with the Government, include :

- GST rate be brought down from 28% to 18%
- Introduce incentive based scrappage policy- monetary incentives in the form of 50% rebate on GST, Road tax and Registration charges
- Fund be allocated for procurement of Diesel / CNG Buses by STUs.

The COVID-19 and the resultant lockdown resulted in complete disruptions in supply of essential vehicle parts from within and outside the country. Stoppage of Plant Operations for components & vehicle production, halting of R&D, Validation & Testing facilities adversely impacted compliance readiness for regulations in the immediate horizon.

We as SIAM engaged closely with Government of India on the need to defer some of the regulations so as to minimize the impact of COVID-19 and some of the regulations which were subsequently deferred include:

- Omission of mandatory supply of Feracrylum Gel in Medical kit
- Implementation of new format Form 22, with suitable lead time for registration of BS VI Vehicles
- Deferment of implementation of Quality Control Order (QCO) for Safety Glass till 1st April 2021
- Relaxation for Localization timelines in FAME Phase 2 for Phased Manufacturing Program (PMP) till October 2020
- Deferment of three mandatory Standards of Two-Wheelers related to Stands, External Projection and Footrests, from October 2020 to January 2022.

Some of the other technical regulations, which we have requested the Government to consider deferring are still under discussion and these include:

- Deferment of Fire Detection and Suppression System (FDSS) for School Buses from April 2020 to April 2021
- Deferment of Crash Safety Standard for Pedestrian Protection for existing models of Passenger Vehicles from Oct 2020 to April 2021
- Deferment of Reverse Parking Alarm System (RPAS) for Commercial Vehicles (Other than M1) from April 2020 to April 2021
- Deferment of Phase 2 Fuel Efficiency Regulations for M1 Passenger Vehicles from 2022 to 2024
- Fuel Efficiency Regulations for Two-Wheelers need not be considered for implementation before 2025



- BS VI Phase 2 Regulations for Commercial Vehicles be deferred by one year to 2024 and Fuel Efficiency Regulation for Light, Medium & Heavy-Duty vehicles be also implemented from 2024 and not before these dates.

The outcomes of these representations, notwithstanding, SIAM and its members are firm in their resolve to supporting Government initiatives for reviving growth.

Auto Expo 2020

The Auto Expo – The Motor Show 2020 was held at India Expo Centre & Mart Ltd, Greater Noida from 5th to 12th February 2020 had a record footfall of 608,526. Spread over an Indoor area of 51,000 square meters and outdoor area of 50,000 square meters, the edition witnessed product displays from 108 exhibitors, including eight global launches, and over 70 launches and unveils. As many as 15 new concepts were showcased. More than 1900 media personnel from India and abroad covered the show extensively over the 8 days.

Some of the important Conferences organized coinciding with Auto Expo included Styling & Design Conclave, Auto Trade Dialogue, 1st Automobile Finance Summit, 1st edition of GEMS (Global Electrification Mobility Summit) and the International Conference on ‘Recycling and Circular Economy in Automotive sector’.

International Engagements

During the year SIAM continued its engagement with the International Automotive Community by hosting the OICA General Assembly 2019 with participation of 20 automotive manufacturing nations and formalized its working relation with Korea Automobile Manufacturers Association (KAMA) by signing a Memorandum of Understanding. Indo German Joint Working Group, with participation of Industry Ministries from both sides, continued dialogues on future trends shaping Mobility space in India. SIAM also participated in the APEC Automotive Dialogue and IAA-India Day event during the Frankfurt Motor Show. SIAM was actively involved on resolving exports concerns especially with Sri Lanka and has conceptualized an Auto Forum for South Asia with participation of associations of the neighboring markets, such as Bangladesh, Nepal, Sri Lanka and Myanmar.

To capture the global paradigm shift on sustainable mobility, evolving mega technology trends, international standards, regulations and policy prescription around Connected, Autonomous, Shared and Electric (CASE), SIAM has deepened its engagements and cooperation in international arena. SIAM participated in UNECE WP.29 and GR Group meetings in Geneva for formulation of Global Technical Regulations. JASIC meeting in Kuala Lumpur enhanced regional cooperation in the Asian Region. SIAM also participated at Technical Committee meeting of OICA, World Ethanol Summit 2020 in Washington and Consumer Electronic Show 2020 at Las Vegas. SIAM also played an important role in the India Pavilion of COP 21 in Madrid in 2019.

International Motorcycle Manufacturers Association (IMMA), elected Mr Rakesh Sharma, Executive Director, Bajaj Auto, as President of IMMA, as a representative of SIAM, for a two-year mandate from April 2020. SIAM also participated at the Global Road Safety Ministerial Conference at Stockholm as an active member of IMMA Road Safety Working Group.

Members of SIAM and JAMA (Japanese Automobile Manufacturers Association Inc.) continued to engage on exchange of information on safety, emission regulations and on mega technology trends. SIAM and JAMA Technical meetings were held in October 2019 on the sidelines of Tokyo Motor Show, and a follow-up meeting of the Two-Wheeler experts during the Auto Expo in February 2020.



Corporate Social Responsibility

Our endeavours in 2019 were not just focused on the Industry, they were also directed towards issues affecting the society. Our thrust on environmental and social issues was significant. I take pride in highlighting the achievements accomplished under the Sukh Da Saah project - an anti-stubble burning initiatives of SIAM, in association with the Confederation of Indian Industry (CII). After achieving remarkable success in 2018 and 2019, the target of zero stubble burning in 2020 on 7,400 acres of agriculture land across 9 villages in Jasso Majra in Patiala looks achievable.

The outbreak of COVID-19 saw the automobile industry rise to the occasion extending all possible support to those working in the frontline, State Governments, and the Government of India. Face shields, hand sanitisers, prototype of ventilators, etc. rolled out of our shop floors. Factory kitchens were transformed into community kitchens providing meals to those affected by the lockdown.

SIAM members had:

- Made a financial contribution of INR 33 crores
- Donated 75 lakh face masks and 90,000 PPE kits
- Served over 20 lakh meals and
- Set up production capacity for over 60,000 ventilators.

As I near the end of my 2 year term as President, SIAM, the tough circumstances notwithstanding, I take great pride in all that we have achieved together and our focus on “Re-Building the Nation, Responsibly.”

SIAM has also embarked upon a unique ‘Environment Lecture Series’ for integrating and mainstreaming the environmental imperative for attaining sustainability in automotive sector. The objective of the lectures is to disseminate knowledge and domain technological advancements to the participants and creating awareness on policy/regulatory landscape.

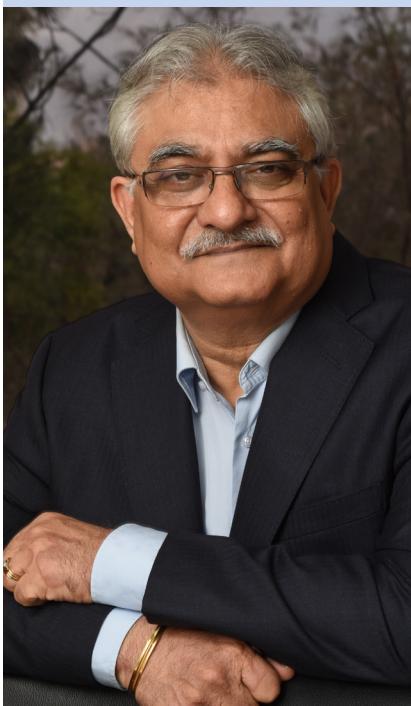
I wish to thank each one of you for your active participation in every activity undertaken in pursuit of achieving SIAM’s goals and the co-operation you have extended to me.

With warm regards,



Rajan Wadhera
President





Mr Rajan Wadhera

President, SIAM &
Senior Adviser,
Mahindra & Mahindra Ltd



Mr Kenichi Ayukawa

Vice President, SIAM &
Managing Director & CEO,
Maruti Suzuki India Ltd



Mr Vinod Aggarwal

Treasurer, SIAM &
Managing Director and CEO,
VE Commercial Vehicles Limited



Mr Rajan Wadhera, President, SIAM delivering his address during the inauguration ceremony of the Auto Expo – The Motor Show 2020, Delhi NCR



(L-R) Mr Sugato Sen, the then Deputy Director General, SIAM; Mr Rajan Wadhera, President, SIAM; Mr Rajesh Menon, Director General, SIAM and Mr Prashant K Banerjee, Executive Director, SIAM during a Press Conference, New Delhi



(L-R) Mr Jeong Mann-Ki, President & CEO, KAMA & Mr Rajan Wadhera, President, SIAM at MoU Signing between KAMA and SIAM, Mumbai



(3rd from right in the first row) Mr Rajan Wadhera, President, SIAM during the Seoul Motor Show



SIAM

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

SIAM provides a window to the Automobile Industry in India and works closely with stakeholders in the formulation of the economic and commercial policies, regulations and standards relating to automobiles. It provides economic and statistical information as well as technical and public policy services to the stakeholders on behalf of Indian Automobile Industry. It publishes Monthly Industry Statistics, Monthly Commodity Price Monitor and other periodic reports. It also organises seminars and workshops on the topics of topical relevance and interest to the industry. It also carries out various public policy activities, particularly in the field of Road Safety and Environment.

SIAM works closely with various Government departments, both at Central and State level and with international bodies like International Organisation of Motor Vehicle Manufacturers (OICA), International Motorcycle Manufacturers Association (IMMA) and coordinate with other counterpart international associations.

SIAM, jointly with ACMA and CII organises Auto Expo, a widely awaited biennial auto exhibition showcasing the trends in the Auto Industry. SIAM also organises regional, as well as segment specific shows across the country.

SIAM aims to promote trade, competitiveness, expansion of market, safety, environment compliance and promotes growth with responsibility.



Performance of The Automobile Industry in 2019-20

Production

The industry produced a total 26,362,282 vehicles including Passenger Vehicles, Commercial Vehicles, Three Wheelers, Two Wheelers and Quadricycles in April-March 2020 as against 30,914,874 in April-March 2019, registering a de-growth of (-) 14.73 percent over the same period last year.

Domestic Sales

The sale of Passenger Vehicles declined by (-) 17.88 percent in April-March 2020 over the same period last year. Within the Passenger Vehicles, the sales of Passenger Cars and Vans declined by (-) 23.58, percent and (-) 39.23 percent respectively while sales of Utility Vehicles marginally increased by 0.48 percent in April-March 2020 over the same period last year.

The overall Commercial Vehicles segment registered a de-growth of (-) 28.75 percent in April- March 2020 as compared to the same period last year. Within the Commercial Vehicles, Medium & Heavy Commercial Vehicles (M&HCVs) and Light Commercial Vehicles declined by (-) 42.47 percent and (-) 20.06 percent respectively in April-March 2020 over the same period last year.

Sale of Three Wheelers declined by (-) 9.19 percent in April-March 2020 over the same period last year. Within the Three Wheelers, Passenger Carrier and Goods Carrier declined by (-) 8.28 percent and (-) 13.27 percent respectively in April-March 2020 over April-March 2019.

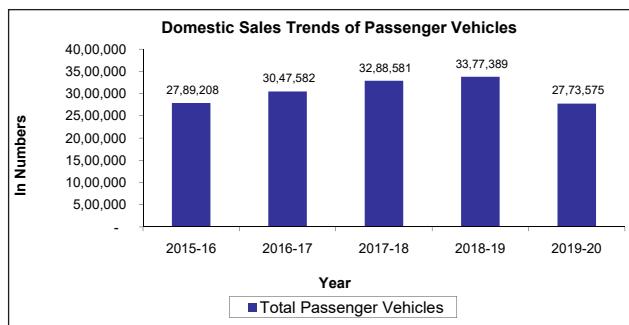
Two Wheelers sales registered a de-growth of (-) 17.76 percent in April-March 2020 over April-March 2019. Within the Two Wheelers segment, Scooters, Motorcycles and Mopeds declined by (-) 16.94 percent, (-) 17.53 percent and (-) 27.64 percent respectively in April-March 2020 over April-March 2019.

Exports

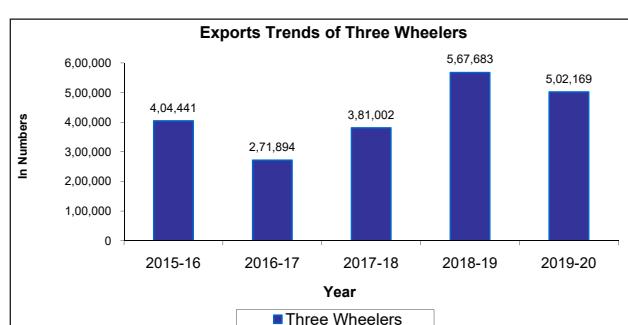
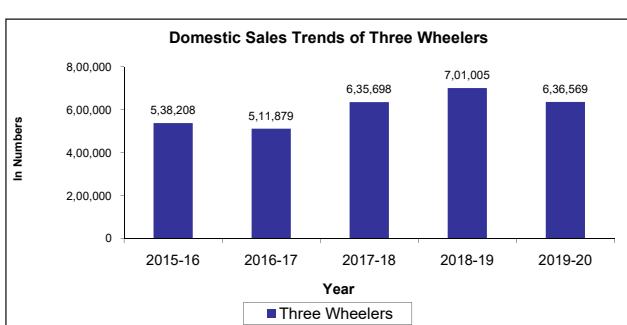
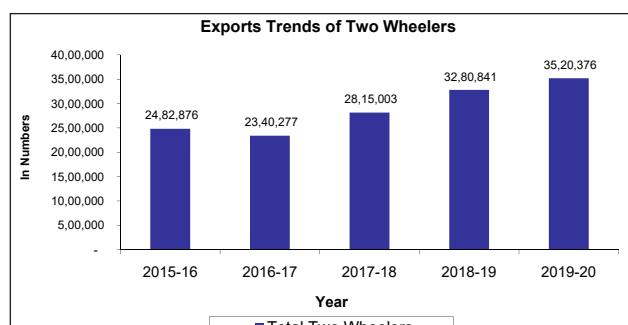
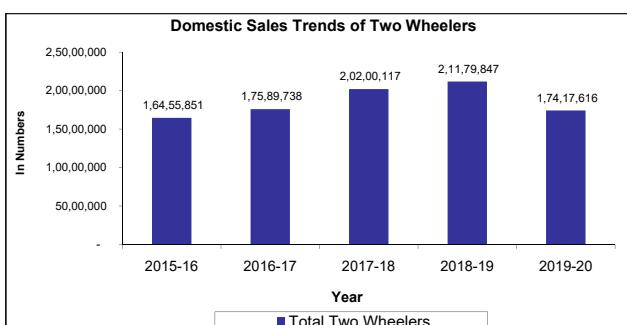
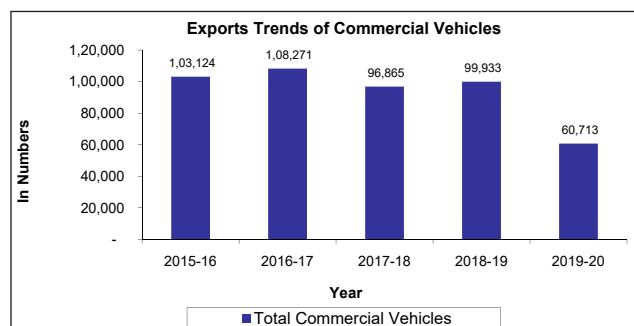
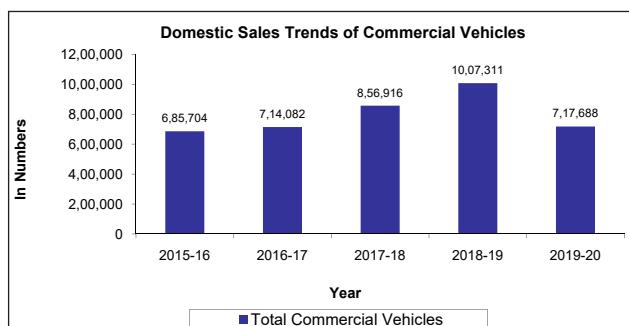
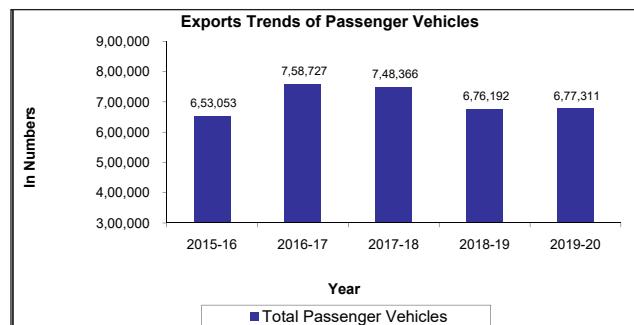
In April-March 2020, overall automobile exports registered a growth of 2.95 percent. While Commercial Vehicles and Three Wheelers exports declined by (-) 39.25 percent and (-) 11.54 percent, respectively. However, Passenger Vehicles exports marginally increased by 0.17 percent and Two wheelers exports registered a growth of 7.30 percent in April-March 2020 over the same period last year.



Domestic Sales Trends



Exports Trends



Automobile Production Trends					
Category	(Number of Vehicles)				
	2015-16	2016-17	2017-18	2018-19	2019-20
Passenger Cars	25,65,970	27,11,911	27,46,658	27,11,160	21,75,242
Utility Vehicles	7,17,809	9,09,555	10,93,346	10,99,780	11,24,973
Vans	1,81,266	1,80,204	1,80,263	2,17,531	1,33,798
Total Passenger Vehicles	34,65,045	38,01,670	40,20,267	40,28,471	34,34,013
M&HCVs	3,41,287	3,42,761	3,44,592	4,44,356	2,33,979
LCVs	4,45,405	4,67,492	5,50,856	6,68,049	5,18,043
Total Commercial Vehicles	7,86,692	8,10,253	8,95,448	11,12,405	7,52,022
Three Wheelers	9,34,104	7,83,721	10,22,181	12,68,833	11,33,858
Scooters	52,76,138	59,26,499	71,17,795	70,95,164	60,27,198
Motorcycles	1,28,16,203	1,30,88,208	1,51,67,481	1,64,99,424	1,43,59,418
Mopeds	7,37,886	9,19,032	8,69,562	9,05,189	6,49,678
Total Two Wheelers	1,88,30,227	1,99,33,739	2,31,54,838	2,44,99,777	2,10,36,294
Quadricycle*	531	1,584	1,713	5,388	6,095
Grand Total	2,40,16,599	2,53,30,967	2,90,94,447	3,09,14,874	2,63,62,282

*Only Oct-March 2016 data is available for 2015-16

Automobile Domestic Sales Trends					
Category	(Number of Vehicles)				
	2015-16	2016-17	2017-18	2018-19	2019-20
Passenger Cars	20,25,097	21,03,847	21,74,024	22,18,489	16,95,441
Utility Vehicles	5,86,576	7,61,998	9,22,322	9,41,474	9,46,010
Vans	1,77,535	1,81,737	1,92,235	2,17,426	1,32,124
Total Passenger Vehicles	27,89,208	30,47,582	32,88,581	33,77,389	27,73,575
M&HCVs	3,02,397	3,02,567	3,40,781	3,90,732	2,24,806
LCVs	3,83,307	4,11,515	5,16,135	6,16,579	4,92,882
Total Commercial Vehicles	6,85,704	7,14,082	8,56,916	10,07,311	7,17,688
Three Wheelers	5,38,208	5,11,879	6,35,698	7,01,005	6,36,569
Scooters	50,31,678	56,04,673	67,19,909	67,01,430	55,66,036
Motorcycles	1,07,00,406	1,10,94,547	1,26,20,690	1,35,98,190	1,12,14,640
Mopeds	7,23,767	8,90,518	8,59,518	8,80,227	6,36,940
Total Two Wheelers	1,64,55,851	1,75,89,738	2,02,00,117	2,11,79,847	1,74,17,616
Quadricycle	-	-	-	627	942
Grand Total	2,04,68,971	2,18,63,281	2,49,81,312	2,62,66,179	2,15,46,390

Automobile Exports Trends					
Category	(Number of Vehicles)				
	2015-16	2016-17	2017-18	2018-19	2019-20
Passenger Cars	5,32,630	6,02,134	5,80,153	5,13,912	4,90,748
Utility Vehicles	1,18,741	1,54,257	1,66,317	1,58,251	1,83,671
Vans	1,682	2,336	1,896	4,029	2,892
Total Passenger Vehicles	6,53,053	7,58,727	7,48,366	6,76,192	6,77,311
M&HCVs	35,197	43,719	44,093	48,676	24,162
LCVs	67,927	64,552	52,772	51,257	36,551
Total Commercial Vehicles	1,03,124	1,08,271	96,865	99,933	60,713
Three Wheelers	4,04,441	2,71,894	3,81,002	5,67,683	5,02,169
Scooters	2,57,481	2,92,828	3,14,284	3,98,316	3,69,998
Motorcycles	22,10,615	20,27,297	24,83,307	28,65,851	31,36,519
Mopeds	14,780	20,152	17,412	16,674	13,859
Total Two Wheelers	24,82,876	23,40,277	28,15,003	32,80,841	35,20,376
Quadricycle	334	1,556	1,605	4,400	5,185
Grand Total	36,43,828	34,80,725	40,42,841	46,29,049	47,65,754

*Only Oct-March 2016 data is available for 2015-16



Global Auto Industry Performance in 2019

The global auto industry is now at the cusp of a structural change brought in through innovation and technological advancements.

The global vehicle sales dipped to 91.4 million units in 2019 from 95.6 million units in 2018 as headwinds in the auto sector were already being faced since mid-2018. This marked a total of (-)4.5% decline in vehicle sales excluding two-wheeler and three-wheeler sales.

With an exception of European region with a growth rate of 0.3%, all major regions of the world reported a de-growth in the range of (-)1.8% to (-)7.6% in 2019. Amongst the leading automotive markets, Germany, Brazil and France continued to report positive growth trend. On the other hand, vehicle sales in countries like Japan, India and UK plummeted over the previous year.

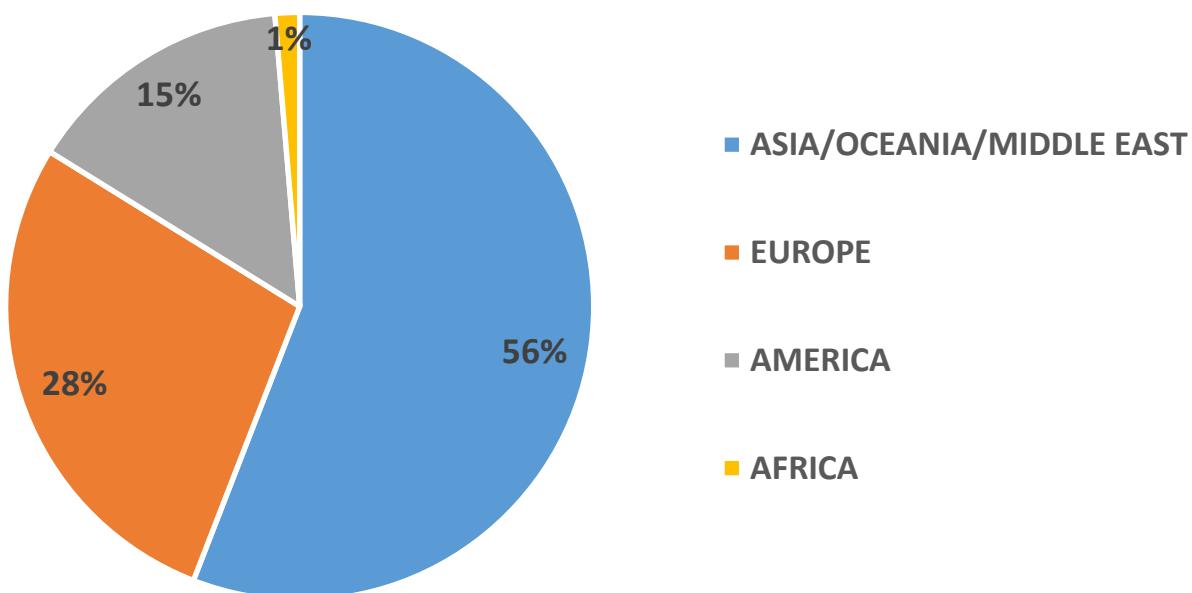
After maintaining the 4th Rank for Global Sales for two consecutive years in 2017 and 2018, India now stands as the 5th largest market in 2019.

With the continuous rise in vehicle prices and consumers being attracted towards ride sharing in

2019, the sales of Passenger Cars fell by a total of 4.3 million units over 2018, registering a decline of (-)6.3%. The regions, such as America and Asia, Oceania, Middle East slowed down to de-grow by (-)9.7% and (-) 8.5% respectively. In certain countries such as Vietnam, Philippines, Romania and Hungary, trends of sustained growth emerged in the current year as well.

As the long-term cost advantages of owning a conventional vehicle juxtaposed with owning an electric vehicle, 2019 proved to be another favourable year for global Electric Vehicle sales, as the global electric vehicle fleet totalled to 7.2 million units in 2019, registering a 40% Y-o-Y increase in total fleet. This growth has been backed by supportive policies and technological advancements in developed and developing Electric Vehicle markets, across the globe. However, countries with highest demands for Electric Vehicles in the world, such as China and USA announced phasing out and reducing purchase subsidies, which impacted Electric Vehicle sales in these countries. Also, with continuous technological improvements and wider

2019: 64.3 mn Passenger Cars sold



models being made available in the Electric Vehicle domain, consumers have also been playing the waiting game to avail the best in the market.

The sales of Commercial Vehicles grew marginally by 0.2% to 27 million units in 2019 over 2018, with USA reporting the highest commercial vehicle sales of 12.8 million units, thereby, leading the America region towards a growth rate of 4.1% in 2019. Barring the Asia, Oceania, Middle East region, all other regions of the world reported growth in Commercial Vehicle Sales.

The global vehicle production in 2019 reached to almost 92 million units, dropping by (-)5.2% over the previous year, out of which almost 3/4th of the total production came from Passenger Cars. Moreover, Asia-Oceania and America regions manufactured 61% & 28% of the total global production of Passenger Cars respectively, in 2019.

While total Commercial Vehicle production inched closer to stand at 25 million units in 2019, the Heavy Buses segment reported the highest de-growth of (-) 3.3% followed by Light Commercial Vehicles and Heavy Trucks, slowing down by (-) 2.0% & (-) 1.4%, respectively.

The total volumes for vehicle sales and production proved to be a dampener for the year 2019. This downturn is expected to persist for a while and face the brunt of the outbreak of the pandemic that has shook several nations and economies of the world since the beginning of 2020. As lockdowns were observed to grapple with the pandemic, the lurking uncertainty, on account of declining manufacturing output and dwindling demand, is expected to jolt the world in 2020, as well.

2/3rd of World's Global Sales was Concentrated in top 7 Countries in 2019

The Global big 7 in Million Units Sold: 2019	
China	25.77
USA	17.48
Japan	5.20
Germany	4.02
India	3.82
Brazil	2.79
France	2.76

The big 7 of Passenger Cars in Million Units Sold: 2019	
China	21.44
USA	4.72
Japan	4.30
Germany	3.61
India	2.96
UK	2.31
Brazil	2.26

The big 7 of Commercial Vehicles In Million Units SOLD: 2019	
USA	12.76
China	4.32
Canada	1.48
Japan	0.89
India	0.85
Mexico	0.60
Thailand	0.54

All data from OICA except for EV data which is from International Energy Agency (IEA). Data does not include 2-wheeler and 3-wheeler sales

Re-Building the Nation, Responsibly

The Indian automobile industry is central to a country's economy, be it growth, affordable mobility solution, consumer confidence or attaining a global stature.

The Indian automobile industry is contributing 7.1% of the country's GDP, employing 8 million people directly and over 29 million people indirectly, through the backward and forward linkages.

India is the Largest 2-wheeler and 3-wheeler producer, 2nd largest heavy bus producer, 4th largest heavy truck producer, 4th largest car producers and 7th largest light commercial vehicle producers in the world.

By 2026, the industry aims to be 3rd largest in the world, contributing to 12% of India's GDP and supporting jobs for an additional 65 million people, directly and indirectly.

The numbers above are the end, and not the means.

The means are the initiatives that the industry has undertaken over the years, especially the last 15 years in:

- democratising mobility through public and private transport
- fostering "Brand India" worldwide
- ensuring energy security
- cohabiting with other industries
- adopting global standards in emissions, safety and manufacturing
- building sustainable communities
- facilitating continuous skill upgradation
- increasing consumer consciousness
- encouraging social green, sustainable development and environment conservation
- promoting Automotive Engineering prowess globally

The industry is the driver of growth for our country, from being one of the biggest employment generating sectors in India, to being one of the largest R&D and manufacturing hubs in the world. The Indian Auto Industry moves a billion people daily, for livelihood & recreation alike, and every single movement from one point to another, ends up adding to the economic activity and income generation. Over the years, the success story of India has been written through this sector's determination and dream to provide mobility to our masses and goods, and thus, bridging the gap between urban and rural landscape. We have come a long way in our journey from making mobility an aspirational thought, to an affordable reality.

While the economic wrath of the pandemic was felt at its peak, the manufacturing output of the country shrank, and resources started to dry up. This did not deter the automakers from their resolve of building the nation responsibly, as innumerable efforts were made by the automobile industry to give back to the society amidst these testing times. As safety and health of the people became a priority, the industry members came forward to offer their support through various relief measures like producing ventilators, PPE kits, surgical masks and sanitisers along with providing basic medical facilities, running community kitchens and making generous donations to Central & State Government's relief funds.

It was through such united and empathetic efforts, the industry stood in solidarity for Re-Building the Nation, Responsibly.

SIAM Annual Activities & Milestones

July 2019

- Press Conference
- Road Safety interaction session with Traffic Officials at New Delhi
- CII Post Budget Interactive Session with Ministry of Finance
- Taxation Group Meeting on Post Budget
- Meeting with Mr. Upendra Gupta, Pr. Commissioner (GST, CBIC) on GST
- Meeting on RCEP with Ministry of Commerce & Industry Officials
- Economic Research Group Meeting
- Meeting on RCEP with Ministry of Commerce & Industry Officials
- Meeting on Non-Tariff Barriers with Ministry of Commerce & Industry Officials
- Meeting with Deloitte Team on Future of Mobility Study
- Sourcing Group Meeting
- Logistics Group Meeting
- CSR Group Meeting
- SIAM Trade fair group meeting
- 50th Meeting of Emissions and Conservation Group
- 43rd SIAM 2W Group Meeting, New Delhi
- SIAM Meeting with CPCB for ELV Guidelines
- Meeting with Transport Commissioner, Tamil Nadu on Registration issues
- Meeting of SIAM Members & HSRP Suppliers for Integration in Vahan
- Meeting at MoRTH on Vehicle Scrappage
- 5th AISC Meeting for vehicles above 3.5T, Pune
- Meeting with NIC for HSRP Integration with Vahan Portal
- **GST rate reduction & income tax benefit for electric vehicles**

August 2019

- Monthly Data Release
- Capacity Building Training Program on Road Accident Investigation and Data Collection for Chandigarh Police Officials
- Meeting with Hon'ble Finance Minister to discuss Industry Concerns
- Future of Mobility In India Study (ERG Group)
- India-Kenya JTC Meeting
- Meeting with Mr. Yogendra Garg, Pr. Commissioner (GST), CBIC
- Meeting on Enhancement of Exports with Hon'ble Minister of State for Commerce & Industry
- Exports Group Delegation to Sri Lanka
- Meeting with Dept. of Heavy Industry on Finalization of GST Concession Certificate
- 6th Automotive Logistics Conclave
- CSR Group Meeting (Pune)
- Display of CNG vehicles at the inaugural function for commencements of work for Development of City Gas Distribution
- SCOE & CMVR-TSC Meeting, MoRTH
- 6th SIAM Connected Vehicles Group Meeting, Chennai
- Workshop on Motor Vehicle (Amendment) Act, 2019 in New Delhi
- 56th CMVR TSC Meeting at ICAT, Manesar
- 2W OBD Meeting with JS, MoRTH
- **Sukh Da Sah Project - Anti Stubble Burning**

September 2019

- Seminar of Vehicle Regulation with Government of Himachal Pradesh
- Monthly Data Release
- Interactive Workshop on Automobile Norms and Safety Regulations in Shimla
- Meeting with Ministry of Commerce on Negotiations under the proposed Economic and Technology Co-operation Agreement (ETCA) with Sri Lanka
- Meeting with Tariff Commission on Study on Import Intensity of India's Exports
- 28th RCEP (Trade Negotiating Committee Meeting) - Delegation
- Taxation Group Meeting on Pre-Budget Memorandum 2020-21
- IAA-India Day 2019 Frankfurt
- Commenced Study on Improvement on Road Infrastructure in Kolkata with JP Research Institute for WBHIDC
- 3W BS VI OBD Meeting at ICAT, Manesar
- 44th SIAM 2W Group Meeting, New Delhi
- SIAM 3W Group Meeting, Bangalore
- SIAM Recycling Group Meeting, Bangalore
- SIAM Pre-meeting for 63rd AISC Meeting in Pune
- 63 AISC Meeting at ARAI, Pune
- Technical Workshop with Transport Department at Shimla
- SIAM Meeting with NIC for HSRP related issues
- Aftermarket Parts Group Meeting

- **Sukh Da Sah Project - Anti Stubble Burning**
- Depreciation rate increase by 15% and deferment in implementation of increase in registration charge

October 2019

- SIAM JAMA Fuel Group Meeting
- Meeting on WLTP and AES/BES Finalisation at ARAI
- Press Conference
- Road Safety Session with School & Colleges
- Consultation Meeting by DPIIT with all Stakeholder Regarding Non-Tariff Measures (NTMs)
- Meeting with Joint Secretary, FT (ASEAN) on Boosting Exports to ASEAN Countries
- Meeting with Dy. Secretary-Ministry of Commerce on Ind-EU FTA
- Meeting with DGFT on Steel Import Monitoring System
- SIAM Trade fair group meeting
- 2W & 3W OBD-II Discussion at NATRIP
- SIAM Meeting with DoT, Meity for M2M
- 32nd SIAM IHG Meeting, Pune
- 7th SIAM Connected Vehicles Group Meeting, Pune
- 14th SIAM JAMA Meeting, Tokyo
- SIAM JAMA 2W Meeting, Tokyo
- SIAM JAMA Emission Meeting, Tokyo
- **Sukh Da Sah Project - Anti Stubble Burning**

November 2019

- Monthly Data Release
- Workshop on IT Solutions for Traffic Violations and Automated Licensing Testing in India at Mumbai
- Parliamentary Standing Committee Meeting to discuss downturn in automotive sector – Its Impact & Measures for Revival
- Meeting with Pr. Chief Commissioner (Customs), JNPT, Mumbai to discuss Classification Dispute on Auto Components of Motor Vehicles
- Council Meeting – International Business (Video Conference)
- OICA General Assembly Meetings, Mumbai
- SIAM-KAMA MoU Signing Ceremony
- CSR Group Meeting
- SIAM Trade fair group meeting
- SIAM-India AutoLPG Coalition Interaction Seminar
- 44th SIAM CMVR Group Meeting
- 1st SIAM ACMA PERT Workshop
- SIAM Service & IMC Group Meeting, New Delhi
- **Sukh Da Sah Project - Anti Stubble Burning**
- National Conference on Cleaner Mobility 2020 & Beyond
- OICA General Assembly in Mumbai

December 2019

- Meeting with BEE for FE Regulations for Two-Wheelers & Passenger Vehicles
- Meeting with negotiators of Chile at Ministry of Commerce & Industry
- Meeting with FIPI for changing BS VI Gasoline Specification
- Monthly Data Release
- Road Safety Competitions with Schools In Delhi
- Human Capital Group Meeting
- Meeting with Dept. of Revenue on Pre-Budget for Union Budget 2020-21
- Meeting with Dept. of Commerce on Chile Negotiators on MRA
- Pre-Budget 2020-21 Consultations Meeting with Finance Minister
- 31st APEC Automotive Dialogue
- Finance, Leasing & Insurance Group Meeting
- Styling & Design Group Meeting
- Railway Wagon Design Conference
- 1st Meeting of Frontier Technology & Innovation Group
- 51st Meeting of Emissions and Conservation Group
- 2W FE Taskforce Meeting, BEE
- 8th Connected Vehicle Group Meeting, Bengaluru
- SIAM Technical Council Meeting, Bengaluru
- Technical Council Meeting
- **SIAM CSR Conclave 2020 SIAM CSR Awards 2020**

January 2020

- Meeting with MORTH on Incoming Regulations
- Press Conference

- National Road Safety Week
- Pre-Budget Consultation 2020-21 – Stakeholders Dialogue at BJP Headquarters
- Meeting with Joint Secretary (DHI) on GST Concession for Purchase of Car by PWDs
- 14th Looking Ahead Conclave 2020
- Vehicle Classification Group Meeting
- Study Submitted to WBHIDC on Improvement on Road Infrastructure in Kolkata with JP Research Institute
- SIAM Trade fair group meeting
- Exhibition of vehicles during National Conclave on Emerging Opportunities in Natural Gas Sector
- SIAM 2W FE Meeting, New Delhi
- SIAM Delegation to Consumer Electronics Show (CES), USA
- SIAM Pre-Meeting 64th AISC, Pune
- 64th AISC Meeting, Pune
- 6th Recycling Group Meeting, New Delhi
- Sustainable Mobility Group Meeting

February 2020

- SCOE Meeting on Emissions at Pithampur
- Meeting with FIPPI on BS VI Fuel Availability
- Monthly Data Release
- Participation at Global Conference on Road Safety
- 09th Auto Trade Dialogue 2020
- Meeting of Auto Forum from South Asia
- Indo German Joint Working Group Meeting
- Taxation Group Post Budget Meeting
- 1st Automobile Finance Summit
- 14th Styling & Design Conclave
- 12th Automotive Design Challenge
- Sourcing Group Meeting
- CSR Group Meeting
- Auto Expo - The Motor Show 2020
- Completion of SIAM Fuel Quality Survey
- Completion of SIAM Fuel Quality Survey
- Sustainable Mobility: Ethanol talks - India by UNICA
- SIAM - FIPPI Interaction Session on BS VI Roll Out
- SIAM Meeting with IHMCL on FASTags, IHMCL
- International Conference on Recycling & Circular Economy, Auto Expo
- SIAM-JAMA 2W Group Meeting, Auto Expo
- Commencement of in-situ Microbial Project in Punjab
- 1st Edition of Global Electrification Mobility Summit (GEMS)

March 2020

- Meeting with Shri Dharmendra Pradhan, Hon'ble Minister of Petroleum & Natural Gas on BS VI Fuel Launch
- Monthly Data Release
- Interaction workshop with School Students and distribution of hygiene kits
- Human Capital Group Meeting
- Meeting with Joint Secretary, Dept. of Commerce on India-Japan CEPA
- Exports Group Meeting
- Meeting with Mr. John Joseph, Member (Tax), CBIC on Taxation Issues
- Sourcing Group Meeting
- 9th SIAM Connected Vehicles Group Meeting, Chennai
- Meeting with JS, MoRTH on reducing 3rd Party Insurance Premium
- Commencement of in-situ Microbial Project in Punjab
- Highest ever exports of two-wheelers at 3.5 million in FY20

April 2020

- Meeting with Shri Prakash Javadekar, Hon'ble Minister of Heavy Industries & Public Enterprises on Demand and Impact of Covid-19
- Representation in Supreme Court for Registration of BS IV Vehicles
- Monthly Data Release
- Health Kit & Goods distribution to Commercial Vehicle Drivers
- Economic Research Group Meeting (VC)

- Activity • Milestone

- SIAM-PwC Webinar on Automotive Industry: Impact of Covid-19 and Navigating the Turbulence
- Economic Research Group Meeting with SIAM President (VC)
- Economic Research Group Meeting
- Sourcing Group Meeting
- Webinar with FnS on Changing Retail Strategy
- SIAM Service & IMC Group Meeting, New Delhi
- Indian Automobile Industry switches to BSVI compliant vehicles
- Commencement of in-situ Microbial Project in Punjab

May 2020

- Meeting with Shri Nitin Gadkari, Hon'ble Minister of Road Transport and Highways on Vehicle Regulation
- Ration Kit distribution to EWS farmers in Punjab
- Exports Group Meeting (VC)
- Taxation Group Meeting (VC)
- International Business Council Meeting (VC)
- Economic Research Group Meeting (VC)
- Ministerial Meeting between Indonesia and India
- Meeting with Secretary, DHI on Scheme to Enhance Competitiveness
- Logistics Group Meeting
- Vehicle Classification Group Meeting
- 45th SIAM 2W Group Meeting
- SIAM Service & IMC Group Meeting
- Mr Rakesh Sharma, ED, Bajaj Auto representing SIAM – Elected as IMMA, President
- CSR Newsletter on Efforts by Automobile Industry Against Covid-19
- Commencement of in-situ Microbial Project in Punjab

June 2020

- Interaction with JCB Management on Industry Issues
- Review for deferment of FE Regulations for 2W, 4W and CVs
- Webinar on "Making collective efforts to build a Greener and sustainable tomorrow"
- Closed-Door Webinar on Demand Generation Ideas
- SIAM-SAP Virtual Industry Summit – "Thriving in the New Normal" – Automotive Edition
- Economic Research Group Meeting (VC)
- Meeting with Mr. Yogendra Garg, Pr. Commissioner (GST), CBIC on VC
- Meeting with Mr B S Bhalla, Additional Secretary, DoC on exports to Bangladesh
- Sourcing Group Meeting
- Finance, Leasing & Insurance Group Meeting
- CSR Group Meeting
- AutoDX Webinar
- 17th GC Meeting & 4th DT Group Meeting
- 10th SIAM Connected Vehicle Group Meeting
- Sustainable Mobility Group Meeting
- CSR Newsletter on Efforts by Automobile Industry Against Covid-19

July 2020

- Meeting with DG, DGFT on Import License of Tyres
- IMMA Steering Committee Meeting
- Press Conference
- Online workshop on Road Safety for School Students
- Taxation Group Meeting (VC)
- Economic Research Group Meeting (VC)
- SIAM> Webinar on Personal Mobility Experience Post Covid-19
- Meeting with Official in Dept of Commerce on Concerns in Brazil
- Logistics Webinar
- Meeting with FIDC
- Design Webinar
- Vehicle Classification Group Meeting
- Meeting with Secretary, DHI on Localisation
- SIAM Trade fair group Meeting
- 52nd Meeting of Emissions and Conservation Group
- 52nd Meeting of Emissions and Conservation Group
- National & International Regulation Council Meeting



SIAM 59th ANNUAL CONVENTION 2019



(L-R): Mr Kenichi Ayukawa, Vice President, SIAM and Managing Director & CEO, Maruti Suzuki India Ltd; Mr Ram Venkatramani, President, ACMA & Managing Director, India Piston Rings Ltd; Mr Uday Kotak, President - Designate, CII & Managing Director & CEO, Kotak Mahindra Bank Ltd; Mr Nitin Jairam Gadkari, Hon'ble Minister of Road Transport & Highways and Micro, Small and Medium Enterprises, Government of India; Mr Rajan Wadhera, President, SIAM and President (Automotive Division), Mahindra & Mahindra; and Mr Vishnu Mathur, Director General, SIAM during the Inaugural Session of the Annual Convention 2019

The Society of Indian Automobile Manufacturers (SIAM), organized its 59th Annual Convention today titled "Moving into A New Era of Auto Industry".

During the convention, the speakers highlighted how innovation, technological breakthroughs and automation are set to change the future of mobility globally. They deliberated on viable pathways, which will lay the groundwork for future mobility and smart manufacturing.

Talking about the future of mobility, Mr John Moavenzadeh, Executive Director - Urban Mobility Professional Education, Massachusetts Institute of Technology, Senior Advisor, Deloitte & Founder and Managing Partner, Mobility Nexus LLC, stated, "Digitization and new business model would shift mobility focus from products to service. Consumer behaviour today has shifted from vehicle ownership to pay-per-use models. Shared mobility will dominate the future, while traditional mobility will continue to remain relevant."

Mr Vinod Aggarwal, Treasurer, SIAM and MD & CEO, VE Commercial Vehicles Ltd, highlighted that the

Automobile Mission Plan aimed to propel the auto industry as the primary engine of growth for the 'Make in India' program. He also said that in Indian context CASE can have a different connotation, which is Clean, Affordable, Safe and Efficient. Mr Rahul Jain, MD & Senior Partner, The Boston Consulting Group, drew a comparison between global perspectives and Indian context saying that current challenges will lead to increased partnerships across government, infrastructure and overall industry. Mr Martin Peter Schwenk, MD and CEO, Mercedes Benz India Pvt Ltd, spoke on how emerging new trends will impact revenues of companies.

Mr Gurpratap Boparai, MD, Volkswagen India Pvt Ltd & Skoda Auto India Pvt Ltd opened the floor for discussions around Industry 4.0 by mentioning that this revolution would help bring smart manufacturing. However, there has to be a roadmap, which will allow a smooth transition. Prof. B Gurumoorthy, Professor, Indian Institute of Science & Chief Executive, Society for Innovation and Development, said, "Industry 4.0 is about taking digital world with human element into manufacturing in a more autonomous manner where



decisions would be taken by machines based on artificial intelligence."

Prof. Dr Detlef Zühlke, Executive Chairman, smartfactoryKL e.V. commented that mass customization, regional production, online drivers and immediate delivery system will change the market scenario, "We need a stack of standards, which includes interoperability, communication and electromechanical standards. Data is generated in huge amounts today for which AI-driven data analytics is necessary. Today we have comparable products, standards, market pressure and knowledge. We are also dealing with a variety of workforce issues, cybersecurity and legal framework."

Talking in the "CEOs' Panel – Revival of Automotive Industry", Mr Guenter Butschek, CEO & MD, Tata Motors Ltd, reiterated that government must support the industry by lowering the GST before 20th September so that nobody misses out on potential sales expected during the festive season. Clearing the air around EVs, Mr Venu Srinivasan, Chairman, TVS Motor Company Ltd, said that EVs would not replace internal combustion vehicles and all kinds of technologies will continue to co-exist – electric, petrol, diesel fuel and others. Dr Pawan Goenka, MD, Mahindra & Mahindra Ltd, mentioned that auto OEMs should work cohesively in this testing times and urged that government and industry should come together to beat this downturn.

Concluding the day long convention, Dr A R Sihag, Secretary, Department of Heavy Industry, Ministry of Heavy Industries & Public Enterprises, Government of India, commented, "New auto policies are engineered keeping in mind demands of various stakeholders. Extensive discussion on the economic slowdown is impacting consumer sentiments. Even the talk around GST rate reduction will make the customers wait indefinitely, which would impact sales." He further said, "As far as the scrappage policy is concerned, it is under review and the government is laying down the way forward."

Concluding the 59th SIAM Annual Convention, Mr Rajan Wadhera, President, SIAM and President (Automotive Sector), Mahindra & Mahindra Ltd said, "Department of Heavy Industry needs to anchor the auto sector at present. A single decision-making body should be formed for the auto sector on the lines of NAB." He thanked the Secretary that Government is actively considering the scrappage policy. Summarising the key highlights by the speakers today, he said, "Automation and innovative solutions will result in smart manufacturing. We should also be mindful that the 4th revolution of the industry should not reduce jobs. Industry needs to recover faster before BSVI kicks in, which will have its own challenges on sales. Further, we will continue the dialogue with the government on GST reduction."



AUTO EXPO – THE MOTOR SHOW 2020

Auto Expo – The Motor Show 2020, the biennial auto show organized by Society of Indian Automobile Manufacturers (SIAM) with support from Automotive Component Manufacturers Association of India (ACMA) and Confederation of Indian Industry (CII), and was held from February 7 – 12, 2020.

This edition of the Auto Expo culminated and witnessed over 352 product displays from 108 exhibitors. This included 8 Global Premiers, over 70 Launches & Unveils. At the Auto Expo 2020, 35 Electric Vehicles were launched and 15 Concepts were showcased. There were many new brand launches that included Great Wall Motor, Olectra, Haima Automobile. The 2020 Motor show witnessed a record 6,08,526 footfall marking the grand culmination of the Auto Show.

Auto Expo – The Motor Show 2020 was inaugurated by Shri Nitin Gadkari, Hon'ble Minister, Ministry of Road Transport and Highways & Shipping, Micro, Small and Medium Enterprises, Government of India, who felicitated the auto industry for supporting the government in bringing about uniformity and acceptability for BS-VI norms and applauded the Auto Expo for being a platform that brought together the entire auto fraternity advocating positive transformation.

Much like the previous editions, this year witnessed many celebrities who were part of the grand Auto Expo canvas. Some the names include, Shah Rukh Khan, Huma Qureshi, Gul Panag, Narain Karthikeyan, Daler Mehndi, Angad Bedi, Nafisa Ali, Designer Gauri & Nainika, Kusha Kapila, Rahul Singh, Soha Ali Khan and Kat Kristian.

Auto Expo – The Motor Show 2020 was also the platform for the announcement of the World Car of the Year (WCOTY) 10 finalists. WCOTY's 86-member global jury including six judges from India had chosen the Delhi Expo for a significant stop in this year's process to choose the world's best automobiles. Following, there was supposed to be the declaration of the top three, at the Geneva Motor Show in March, while the winners in each of these categories were to be revealed at the New York International Auto Show on April 8, 2020.

Similar to the last Expo, this year's Auto Expo also witnessed a tremendous response on social media. There were more than 50 thousand engagements on its official hashtag, which further garnered over 23 lakh impressions in a span of 8 days. The official hashtag #AutoExpo2020 trended for 6 hours on the first day on Twitter. The official handle of Auto Expo 2020 was disseminating real-time information on various launches, unveilings, daily updates and announcing the 'Lucky Draw' winners on a daily basis. This year's Auto Expo was proud to partner with Facebook India to ensure a better digital experience for those present at the Expo and those aspiring to come to Auto Expo 2020. This year's Auto Expo also gave an insight into the future of mobility stressing on the future of green technology, safety and other important elements. This was experienced by people at the Auto Expo by going to the various Virtual Reality and Augmented Reality booths present across the venue.







**ECONOMIC
&
COMMERCIAL
AFFAIRS**

International Relations & Trade Policy Group

With the start of the 21st century, a new Era of globalization began. After two decades of focus on globalization, the recent past has had interesting developments across the globe, with many economies focusing on increasing domestic value add. While the Government of India had a focus on 'Make in India' in the last 5 years, the efforts in the recent past have been on making our country self-sufficient or Athma Nirbhar. The SIAM International Relations & Trade Policy Group is aligned to this focus of the Government of India, and while there are some necessary imports

to make our products technologically at par with the rest of the world, we would like to maximize 'Make in India for India & the World' in the Automotive Sector and increase our self-sufficiency in high-tech areas, like electronics, EV systems, etc.

This year was interesting for building and furthering SIAM's long-term International Relations with Global Automotive Fraternity. One major milestone was the opportunity for SIAM to host the OICA General Assembly in Mumbai and showcase the changing

Annual Report Card (2019-20)				
S.No.	Deliverables	Measures	Owner	Stakeholders
1	To Build Relations with Global Automotive Fraternity	1. Host the OICA General Assembly	International Relations & Trade Policy Group	Counterpart Associations, Body Representing Global Automobile Industry (OICA) & Members
		2. Host the 9 th Auto Trade Dialogue		Counterpart Associations, Members & Government
		3. Participation in the APEC Automotive Dialogue		Counterpart Associations, Government of various APEC Economies
		4. MoU between SIAM & KAMA		KAMA, SIAM and Members
		5. Hosted the Indo-German Joint Working Group Meeting		VDA, SIAM, ACMA, Government Representatives from Germany & India
		6. Participated in IAA India Day Frankfurt		VDA, SIAM, ACMA, Government Representatives from Germany & India
2	To Provide Trade Policy recommendations	1. Eliminate or else further lower import tariffs on CBUS in markets which don't have any major auto industry, such as Chile, Peru, etc	International Relations & Trade Policy Group	Membership and Government
		2. Auto Annex/MRA proposed in trade deals with Chile, Peru, Sri Lanka		Membership and Government
		3. Participated in 28 th Round of RCEP negotiations to ensure exclusion of Automobile CBUs from any duty reduction		Membership and Government
		4. Robust Rules of Origin for Automobile CBUs		Membership and Government
		5. Submitted policy recommendations for industry policy formulation in Sri Lanka and Bangladesh		Members, Government in Relevant Countries and High Commission of India in these countries
		6. Customs Duty for Commercial Vehicles increased to 40%, the WTO Bound Rate for Commercial Vehicles		Membership and Government



dynamics in the automotive industry in India to the Global Automotive Fraternity. Alongside the Auto Expo, the Auto Trade Dialogue was also organized with participation from countries such as Bangladesh, Germany, Malaysia, Sri Lanka and the UK. Increasing engagement with the neighbouring markets, such as Bangladesh, Sri Lanka, Nepal and Myanmar, has been one of the focus in the last few years. SIAM continued to actively participate and contribute in the meetings and activities of APEC Automotive Dialogue. SIAM and KAMA (Korea Automobile Manufacturers Association) also decided to formalize its working relations by

signing a Memorandum of Understanding (MoU) this year.

On the trade policy front, SIAM was engaged with Commerce Ministry to initiate discussions for trade agreements with markets that have high potential for export of automobiles and exclude automobiles in negotiations with countries that are large automobile manufacturers. SIAM also proposed an Auto Annex/MRA for regulatory alignment in the exports markets. A delegation from SIAM also participated in the 28th Round of the RCEP negotiations in Vietnam to ensure exclusion of automobile CBUs from any tariff reduction.



Participants at the OICA General Assembly in Mumbai



Participants at the 8th Auto Trade Dialogue in Greater Noida



(L-R) Mr Jeong Marn-Ki, President & CEO, KAMA & Mr Rajan Wadhera, President, SIAM at MoU Signing between KAMA and SIAM



Exports Group

Automobile Exports from India has grown substantially over the years, amounting to nearly 4% of total merchandise exports from India and about 18% of the total production volumes. Vehicles & components together are about 8% of India's merchandise exports. Component exports include OEMs exports of CKD kits, which are assembled by subsidiary or distribution partners of member companies, and also parts for the aftermarket in the exports' destinations.

India specific models are generally 'value for money' and, hence, have found strong acceptance in emerging markets. As a result, it is also seen that the share of exports to Neighbouring markets, South East Asia, Latin America and Africa have increased dramatically over the last one decade.

While the rising exports of vehicles has made Indian Automobile Brand names known in many countries, SIAM Exports Group played a pivotal role in establishing 'Brand India' in Automobile Engineering, globally.

The Exports Group, through suitable fostering of the Secretariat, has been quite vibrant and has enjoyed a high level of attendance as well as participation. The group members continued to contribute their understanding and knowledge on international markets for bilateral discussions of the Governments to raise concerns on tariff and non-tariff barriers to trade.

Large share of exports go to the neighbouring markets and hence to develop closer ties with our neighbouring markets, the SIAM Exports Group conceptualized an Auto Forum of South Asia, with participation of Bangladesh, Myanmar, Nepal and Sri Lanka, which now is being discussed with the Government and Counterpart Associations in these countries. The group also plans to do India specific Auto Shows in more countries in our exports markets, and not just limiting to Bangladesh.

On advice of Commerce Ministry, SIAM took a delegation of members to Sri Lanka for bilateral meetings with the association and Ministers and bureaucrats to resolve the concerns of Indian companies in the Sri Lankan market.

Government had conceptualized a scheme for enhancing competitiveness by focusing on exports for select industries, including the auto industry. SIAM Exports Group remained actively engaged with the DHI and NITI Aayog for designing the contours of the scheme.

Along with many important concerns in Exports, SIAM could get many concerns with Duty Drawback resolved. The cap on Duty Drawback for per unit vehicles was taken up with Duty Drawback Division, favourable consideration helped us get the per quantity restriction removed. Also, it was requested that a higher drawback rate for >500 cc motorcycle should be introduced, which was also given due consideration and a 3% duty drawback rate for >500 cc motorcycles was announced.

The AMT category of passenger vehicles were facing concerns in claiming duty drawback since the schedule only mentioned Automatic and Manual Transmission. With efforts from SIAM, a new category of AMT vehicles for Duty Drawback was also introduced.

The concern with discontinuation of MEIS Scrip was also raised with the Government to ensure the current commitment of MEIS upto December 2020 is adhered to.

SIAM Exports Group activities, going forward, will continue to build 'Brand India' in Auto Sector, globally, for export enhancement from India, and focus would remain on highlighting exports challenges to the Government, so that Auto industry may favourable policies within India and in exports markets .



Annual Report Card (2019-20)

S.No.	Deliverables	Measures	Owner	Stakeholders
1	Resolve tariff and non-tariff barriers in exports markets	1. Participated in Ministerial Bilateral meeting between India and Indonesia to resolve concern on Quota system and remove other NTBs	Exports Group	Indian Government, Indonesian Government, Members
		2. Took delegation to Sri Lanka to resolve concerns with Government tender for buses and other barriers to trade		Indian Government, Sri Lankan Government, Members
		1. Provided inputs for Bangladesh Auto Policy		Bangladesh Government, Members
		4. Took member delegation to Commerce Ministry to Discuss concerns with exports to ASEAN		Membership and Government
		5. Auto Annex for Chile, received from Government, in line with SIAM's proposed Auto Annex for select markets		Membership and Government
2	Actions to Strategies Export Enhancement in Long-run	1. Conceptualizing the Auto Forum for South Asia	Exports Group	Membership and Government
		2. Identifying high potential exports market or trade agreements		Membership
		3. Exploring Auto Shows in large Exports Markets to Establish India Brand		Membership
3	Reduce internal inefficiencies	1. Engaged with Government on the Scheme for Increasing Competitiveness of Indian Automotive Sector, with focus on exports		Membership and Government
		2. Represented for continuation of the MEIS Scheme until December 2020		Membership and Government
		3. Looking at aggregation in exports to leverage better freight rates		Membership
		4. Duty Drawback for AMT introduced, per vehicle cap removed and >500 cc vehicles given higher drawback		Membership and Government



(L-R) Mr Sugato Sen, the then Deputy Director General, SIAM & Mr Rakesh Sharma, Chairman, SIAM Exports Group at the Meeting of the Auto Forum of South Asia



Meeting of the Auto Forum of South Asia in Progress, Delhi NCR





Meeting of SIAM Delegation with Mr. Malik Samarawickrama, the then Minister of Development Strategies and International Trade,
Government of Sri Lanka



Meeting of SIAM Delegation with Ms Suja Menon, the then Counsellor (Economic & Commercial), Indian High Commission in Sri Lanka



Economic Research Group

Research is the foundation for any study or report, and in the case of SIAM Economic Research Group, it is the most essential for understanding changing trends in the market and forecasting demand for better planning for the future.

The Economic Research Group is a vibrant group of researchers, economists, and business planners of SIAM member companies. The group goes an extra mile to understand the changing dynamics of the market, capture trends and forecast and analyse sales for better business planning for the industry.

Amongst its efforts to understand the Future of Mobility in India, a study was initiated by the group and discussions continued to make the report comprehensive.

The annual event of the group, the Looking Ahead Conclave was organized in January 2020 with the theme “Automotive Industry and India’s USD5 Trillion Vision: 2020 & Beyond”.

The 14th edition of the event witnessed participation of Economists sharing the Economic outlook of World and Indian economy, Government officials deliberating

on the Role of Auto Sector in the USD 5 Trillion vision, discussions on financial availability and affordability as impediments to growth and deliberations Socio Economic Impact of Regulatory norms and a Way Forward for a USD 350 billion Auto Industry.

Many Marketing & Sales Heads of SIAM member companies joined panel discussion for passenger vehicles, commercial vehicles and two-wheelers to discuss the emerging trends and Forecast for the Future.

However, the unprecedented situation like the COVID-19 and its impact on the overall economy and the auto industry in the short and the long-run were not envisaged in any research or report at the start of 2020, leaving the industry amidst an unplanned and extraordinary situation, with focus shifting from growth to survival.

Post the announcement of the lockdown in India in March, all our economists and researchers, initiated activities to understand the repercussions of COVID-19 and consequent lockdown of the economy in India and abroad.

Annual Report Card (2019-20)

S.No.	Deliverables	Measures	Owner	Stakeholders
1	Generating Industry Forecast	1. Organized Looking Ahead Conclave in January 2020, where FY21 forecast were firmed up	Economic Research Group	Membership
		2. Revised FY21 forecast post COVID-19 pandemic and resultant lockdowns		Membership and Government
		3. Generated long term forecast for under different scenarios		Membership
2	Demand Revival	1. Suggested recommendations for demand revival to Government		Membership and Government
		2. Organized a webinar to understand initiatives industry can take to revive demand		Membership
		3. Did deep dive analysis on cost impact of demand generation submission for the Government		Membership
		4. Conducted a survey on impact of COVID-19 on the industry		Membership
3	Future of Mobility	1. Continued engagement to finalize the Future of Mobility study		Membership



We built scenarios on the economy and phases of lockdown and in turn its impact on the demand for automobiles for FY21. Further, such forecasting exercise was expanded into long-term projection under different situations, which included cost increase due to implementation of certain regulations and no cost increase, to understand when the automobile industry would return to its peak of FY19.

A webinar was conducted with support from consultants and our Marketing & Sales heads to look at ways and

means to revive demand under the current scenario. We also looked at various interventions introduced by other economies to revive the automobile sector in their countries to workout possible interventions by the Government of India.

The year 2020 could be a washout year, however, SIAM will keep researching and working on market understanding and forecasting for quick revival and sustainable growth in the future.



(L-R) Mr Rajiv R Gupta, Vice President – Marketing & Sales, Honda Cars India; Mr Naveen Soni, Sr. Vice President & Functional Head – Sales & Customer Service, Toyota Kirloskar Motors; Mr Shashank Srivastava, Executive Director – Marketing & Sales, Maruti Suzuki India; Mr Vikas Jain, Vice President – Sales & Marketing, Hyundai Motor India; Mr Manohar Bhat, Head – Sales & Marketing, KIA Motor India; Mr. Rajat Mahajan, Partner – Auto & Consumer Sector, Deloitte; engaged in

Discussion on the trends and Demand Forecast for the Auto Sector During the Looking Ahead Conclave, New Delhi



(L-R) Mr Rajive Jain, Executive Vice President and Regional Head – (North India), Kotak Mahindra Bank; Mr N Raja, Chairman, SIAM Economic Research Group, & Managing Director, Toyota Financial Services; Mr Arun Malhotra, Auto Industry Expert; Mr. Shamsher Devan, Vice President & Sector Head – Corporate Rating, ICRA; deliberating financial concerns of the industry, New Delhi



(L-R) Mr Sugato Sen, the then Deputy Director General, SIAM; Mr Pravin Agrawal, the then Joint Secretary, Department of Heavy Industry; Mr. Ashim Sharma, Partner & Group Head Business Performance Improvement Consulting (Auto, Engg. & Logistics), Nomura Research, New Delhi



Taxation Group

The SIAM Taxation Policy, Procedural and Direct tax group remained active for taking forward issues relating to taxation matters in the auto sector.

Since 2019 was an election year, the Union Budget 2019-20 was announced in July 2019, post formation of the Government, and following important announcements were made for supporting adoption of electric vehicles, such as

- INR 10,000 crore outlay for FAME- 2 scheme for a period of 3 years
- GST rate reduction of electric vehicles from 12% to 5%
- Income tax deduction of INR 1.5 lakh on the interest paid on loans taken to purchase electric vehicles.

The slowdown on demand growth pushed the industry to seek Government support for industry revival. A meeting with Hon'ble Finance Minister, Ms Nirmala Sitharaman, was held in August 2019, in which the following points with regards to tax matter was raised:

- GST Rates be brought down to 18% for all categories of vehicles, along with components, to avoid inverted duty structure.
- Withdraw the proposed hike in the vehicle registration fee
- Increase depreciation rate on vehicles
- Budget Allocation for Procurement of Buses by STUs
- Introduce an incentive-based vehicle scrappage scheme to remove old and polluting vehicles from the road. Incentive can be in the form of rebate on GST, rebate on the road tax.
- Make affordable finance available to trade and consumers

As an outcome of the meeting with Finance Minister, an economic package to boost the growth of Indian economy was introduced, which included some specific

interventions for the Automobile industry's revival, based on recommendations by SIAM. A few of these included:

- Removal of ban on purchase of vehicles by Government department
- 15% higher depreciation for all types of vehicles purchased before 31st March 2020
- The deferment in revision of one-time registration fee until June 2020
- Assurance that a Vehicle Scrappage Policy will be announced soon

SIAM Taxation Groups made its policy and procedural recommendation for the Union Budget 2020-21. Union Budget 2020-21 announcements did not have any specific interventions to support Auto industry, however, as was announced in the Phased Manufacturing Programme to promote indigenous manufacturing of electric vehicles and its components, increase in customs duty on CKDs and SKDs of electric vehicles was announced.

SIAM Taxation group took up the following issues in its Post Union Budget 2020-21 suggestions-

- NIL customs duty on Noble Metals used for manufacturing catalytic converters
- Duty exemption for import of critical components for manufacturing of hybrid vehicles.
- Retrospective Amendment of Section 115BAA
- Expansion of 'Work' definition under Section 194C
- Clarification related to TCS on sale of goods by OEMs to their authorised dealers
- Withdrawal of levying TCS on sale of goods above INR 50 lakhs & TDS on contract manufacturing on supply of raw materials
- Relaxation from Chapter VAA -FTA conditions imposed for AEO- T3 & T2 Status holders considering the highest level of compliance meeting, as a trade facilitation measure.



SIAM Taxation group remained actively engaged throughout the year, on the procedural side, and following issues were taken up with the Government:

- Hardships being faced by the Automobile OEMs due to classification dispute over imported components/parts of motor vehicles.
- Clarification on the new provision of Section 206C (1H) under the Finance Bill 2020.
- The Finance Act 2020 significantly expanded the scope of Equalization levy (EL) and did not appear to be consistent with main objective of Equalization levy and inadvertently covered many of our Automobile OEMs having foreign Parent Company and Indian Subsidiary Companies with manufacturing plants in India. The SIAM Taxation group made suitable representations to CBDT on this issue.
- Availing ITC by OEMs on vehicles up to 13 seating capacity that were being used for R&D purposes.
- Removal/Relaxation on the ITC eligibility condition in the notification no. 75/2019 dated 26.12.2019
- Facility of transfer of ITC balance in Electronic credit ledger within distinct person
- Demand of NCCD & Infra Cess on vehicles manufactured upto 30.06.2017, lying in stock at manufacturing locations but supplied from 01.07.2017 onwards
- Deferment of GST payment to minimize impact of COVID-19 on automobile industry.
- Provision for taking credit if any additional liability of Excise Duty due to valuation, rate issue, etc raised on Vendor or any additional CVD/SAD liability comes due to Customs assessment of pre-GST imports

Annual Report Card (2019-20)

S.No.	Deliverables	Measures	Owner	Stakeholders
1	To review and analyse policy changes in the country's taxation structure and gauge its impact on automobile industry	1. Analyse the announcements made in Union Budget and provides suitable recommendations	SIAM Taxation Policy, Procedural & Direct Tax Group	Membership and Government
		2. Make Pre-Budget & Post Budget recommendations to the Government		Membership and Government
		3. Based on SIAM's recommendations, Government announced certain interventions for higher uptake of EVs		Government, Membership & Society
		4. Based on SIAM's recommendations, Government announced specific interventions for demand revival in Auto Sector		Government, Membership & Society
		5. The Government has been working on the Vehicle Scrappage policy and the announcement of the policy is awaited.		Government, Membership & Society
2	Work towards simplifying and reducing cost impact of Taxation policy & procedural developments in both Direct & Indirect tax space	1. Interactions with Government on taxation procedural issues mainly at Central Government level and State level only on selective critical points		Membership and Government
		2. Several discussions to resolve procedural issues which led to reduction in tax burden		Membership



- Clarifications given on issue of Dies and Moulds given by OEM's to its Component vendors on FOC basis
- Deferment in Audit/Inquiries/Investigation for 3 months.
- Standardized method for calculation of Road tax was initiated. First pilot was with Punjab, where it was successfully implemented.

Due to COVID-19 related stress in the industry, many suggestions were made by SIAM to ease the compliance requirement and cash flow issues of the companies. Government accepted many suggestions, such as Extension of validity of E-way bills, extension in export period and other GST Compliances and inclusion of COVID-19 related expenses as CSR expenses.



SIAM Taxation Group during the Post-Budget Discussion



SIAM Taxation Group Members during the Pre-Budget Meeting



Finance, Leasing & Insurance Group

The Group continued to work in an accelerated manner on the Finance, Leasing, and Insurance matters related to Motor Vehicles, this year, in view of the widely known Liquidity crisis in the country.

For the first time, SIAM successfully organised an Automobile Finance Summit, on 10th February 2020, on the sidelines of Auto Expo – The Motor Show, held in Delhi NCR. Several notable Speakers from Automobile, Banking, NBFC and Consulting sectors addressed the gathering on various aspects of Automobile Finance and interacted with the audience. Mr Ashok Khanna, Group Head – Auto Loans, HDFC Bank also shared his views with the participants.

The theme of the Summit was – “Making Vehicles Travel from Factories to Home”.

More than 125 delegates, majorly from Automotive and Finance sectors, participated in the summit.

SIAM remained engaged with IRDAI on several issues related to Vehicle Insurance. Like previous year, IRDAI did not increase the Third-Party Premium Rates for Vehicles for FY 2019-20 also; SIAM had made a representation on this.

During the course of the year, the Fire Insurance Premium for several industries was increased, including Automobiles. SIAM made several representations to GIC-Re and IRDAI to continue with the existing

premium rates since the industry was going through an unprecedented downturn and there were not many incidences of fire in the sector. However, the premium rates were increased, effective 1st January onwards.

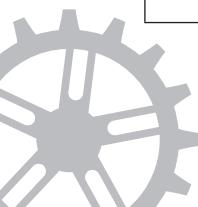
The Group also interacted with FIDC members and had a detailed interaction with them on the current situation of Vehicle Financing in the country. Several senior members from Automobile Finance sector and officials from major Non-Banking Financial Companies (NBFCs) participated in the meeting and exchanged their views on how the business could pan out in the coming months and support required from each other going forward.

As a development, IRDA has recently withdrawn the Long-Term Package policy option covering both Third Party (TP) and Own Damage (OD) components for 3 / 5 years for new Cars / new Two-Wheelers respectively, to be applicable from 1st August 2020 onwards. Own Damage (OD) component of Motor Vehicle insurance was always Optional for customers to purchase.

The Group also interacted with a few private Leasing companies and tried to understand the potential of Corporate and Retail Leasing in the country, the prevailing bottlenecks and discussed the regulatory requirements to make Leasing a popular business in the country.

Annual Report Card (2019-20)

S.No.	Deliverable	Measures	Owner	Stakeholders
1	To rationalise the impact of developments in the Vehicle Insurance & Vehicle Finance domain	1. SIAM made a representation to IRDAI to retain the Third-Party Rates for Motor Vehicles for FY 21. IRDAI maintained the status-quo for insurance premium rates	Finance, Leasing & Insurance Group	Membership and Society
		2. SIAM submitted several representations on Increase in Fire Insurance Premium to GIC-Re and IRDAI		Membership
		3. Organised 1 st edition of Automobile Finance Summit with a special focus on Liquidity Challenges faced by Consumers and Dealers. Several speakers from Banks, NBFCs and Auto sector shared their views in the day-long event		Membership and Society
		4. Organised an interaction between the SIAM group and FIDC members (NBFCs) on the current Vehicle Financing scenario		Membership and Society





Discussions at SIAM Automobile Finance Summit, Delhi NCR



SIAM Automobile Finance Summit, Delhi NCR



Bankers engaged in discussions during SIAM Automobile Finance Summit, Delhi NCR



Meeting of SIAM Group with Indian Banks Association (IBA), Mumbai



Members at SIAM Finance, Leasing and Insurance Group Meeting, New Delhi



Logistics Group

Logistics Group remained engaged with several Government departments throughout the year with an aim to improve efficiency in vehicle transportation in the country, across all modes - Road, Railways and Waterways.

The Group worked very closely with the Railway Board to increase the modal share of Railways and to resolve operational issues in the system, such as Height of Railway Barriers, Multi-Point Unloading, Rationalization of Freight Structure, Faster and Quality Maintenance of Rakes and Induction of Additional Rakes.

Several recommendations of the Group were accepted by the Railways during the year, such as Vehicle Exports to Bangladesh through Railways, Multi-Point Unloading, Induction of additional NMG rakes, Continuation of existing Freight Structure, etc. The SIAM Group has been in regular dialogue with the Railway Board to make Railways a preferred mode of transportation for Automobile Manufacturers.

A Study had been awarded to IIT Delhi to carry out technical simulation exercise on Two-Wheeler Carriers, both Trailers and Trucks, to ascertain whether it was safe to load Two-Wheelers in Triple-deck format and in a Canopy. Two phases of the study have been completed till now and their reports will be submitted to MoRTH

for taking in consideration while making suitable regulatory amendments. SIAM has requested IIT Delhi to initiate work on next phases, as well.

The Group also made several representations to different Government departments for providing suitable assistance in the supply-chain related challenges arising from the Lockdown/Covid-19. A few key suggestions are listed below:

1. Waiver in Demurrage and Detention Charges at Airports and Seaports
2. Faster Clearances of Vehicle Carriers at State Borders
3. Special Passes for movement of Drivers stuck in Containment/Red zone
4. Safety of Drivers and Vehicles being shipped in carriers
5. Ease of Documentation for Exports of Vehicles

SIAM organised 6th edition of Automotive Logistics Conclave on 1st & 2nd August 2019 at Hotel Taj Mahal, New Delhi. The theme of the conclave was – “Automotive Logistics – Need for Optimization of Resources”. Mr N Sivasailam, Special Secretary, Department of Logistics, Ministry of Commerce, delivered the Keynote Address during the Inaugural session.

Annual Report Card (2019-20)				
S.No.	Deliverable	Measures	Owner	Stakeholders
1	To Enhance Efficiency in Outbound Logistics in Automobile Sector	1. SIAM worked closely with the Railway Board for resolution of vehicle transportation related issues impacting the industry	Logistics Group	Membership
		2. As per policy recommendations by SIAM, Railways has permitted Multipoint Unloading for non AFTO rakes in the country. They have also maintained the Freight Structure for another one year		Membership
		3. Submitted several representations to waive off Demurrage and Detention Charges on consignments not getting cleared at Ports due to the Lockdown. Government provided waiver for a few months only		Membership and Government
		4. Initiated a Technical Study to ascertain whether Two-Wheeler Carriers can be loaded in Triple-Deck format and in a Canopy. The Study is being done by IIT Delhi		Membership and Government



A Logistics Webinar was also organised on 24th July 2020 to discuss the current situation of Vehicle Transportation in the country. Mr Pawan K. Agarwal, Special Secretary, Department of Logistics, was the Chief Guest. He shared his views on the current vehicle transportation scenario and progress made on various initiatives by the Government.

The Group also had interactions with officials of Dedicated Freight Corridor Corporation of India Ltd. (DFCCIL) and Inland Waterways Authority of India (IWAI) to understand the progress made by them on developing infrastructure in the country.



6th SIAM Automotive Logistics Conclave, Delhi



Mr Prem K. Verma, the then Chairman, SIAM Logistics Group; Mr N Sivasailam, the then Special Secretary, Logistics, Ministry of Commerce; and Mr B C Datta, Vice President, Hyundai India, during the Inaugural Session of 6th SIAM Automotive Logistics Conclave, Delhi



Members at SIAM Logistics Group Meeting, New Delhi



6th SIAM Automotive Logistics Conclave, Delhi



Sourcing Group

SIAM Sourcing Group worked on several issues throughout the year related to procurement of Raw Material and Components in the country.

DGFT, through a notification in September 2019, made Registration of Imports of Steel and Steel Items, covered under specified HS Codes of Chapter 72, 73 and 86, compulsory on Steel Import Monitoring Systems (SIMS). It is an online portal owned by the Ministry of Steel where importers must upload data of Steel imports in advance, failing which, imports cannot take place. Sourcing Group members had several meetings with concerned officials in DGFT, Ministry of Steel and DHI to relax the conditions related to mandatory registration. Government accepted a few recommendations of the industry.

SIAM is a member of MTD4 and MTD16 committees of BIS on standards formulation. SIAM Co-ordinated for MTD4 meetings in BIS representing the member companies in preparation of Coated Steel Standards.

Air India operated Cargo flights from a few cities in China to New Delhi and Mumbai during the lockdown phase to transport essential items required for production of ventilators and other medical instruments. SIAM coordinated with Air India officials and helped member companies in receiving their import consignments

faster from China. Several SIAM members produced Ventilators during the Lockdown, to avoid their shortage in hospitals.

SIAM is a member of the Inter-Ministerial Committee (IMC) on mandatory BIS marking of Automotive Pneumatic Tyres and Tubes chaired by the Additional Director General of Foreign Trade (DGFT). IMC reviews the list of Tyres, not produced domestically that are notified for Import for Aftersales service by Automobile OEMs and their authorised dealers, without BIS marking. This list of tyre sizes is, thereafter, notified by the Department for Promotion of Industry and Internal Trade of (DPIIT), under Ministry of Commerce.

SIAM collected data from its members related to Tyre sizes to be Added and Retained, as per the existing Exemption List of Tyre Sizes. SIAM has been coordinating with DPIIT on this to get the Tyre sizes included in the revised Exemption List.

Licensing requirement for import of Tyres was another major issue faced by the Automobile industry. DGFT recently notified that Tyres will be moved from "Free" to "Restricted" category, thereby, making License a mandatory requirement for Automobile OEMs to import Tyres. The Group remained engaged with DGFT and DPIIT officials to expedite the process of issuing

Annual Report Card (2019-20)

S.No.	Deliverable	Measures	Owner	Stakeholders
1	To Enhance Efficiencies in Outbound Logistics in Automobile Sector	1. SIAM worked with the Ministry of Steel and other Government departments on the issue of Steel Quality Control Order (QCO)	Sourcing Group	Membership
		2. Worked on Localisation related initiative to reduce Imports in the Automobile sector		Membership and Government
		3. Interacted with DGFT, Ministry of Commerce, on Procurement of Licenses for Tyre Imports		Membership
		4. Interacted with Ministry of Steel, DGFT and DHI on the issue of mandatory Registration of Steel Imports through Steel Import Monitoring System (SIMS) in the country		Membership



licenses so that assembly lines of members do not get disrupted.

To support the “Make in India” and “Atmanirbhar Bharat” initiatives of the Government of India, Automobile industry is committed to promote Manufacturing of Vehicles in the country. Automobile OEMs over the years have substantially reduced their import content by collaborating with Automobile Component and Raw Material Suppliers, and the endeavour has always been to minimise imports to the lowest level. SIAM had several rounds of discussion with member companies and collected data from them on the import content of Steel, Tyres, Tooling, Electronics and Electric Vehicle Components being used in the manufacturing of Automobiles.

With an aim to take these initiatives forward, Ministry of Commerce has requested Automotive sector to reduce its import content and promote localisation in the country.

It has been observed that many items are imported only in cases where Domestic Suppliers are not capable to produce them due to unavailability of technology, unable to match quality standards, low volume imports and pricing issues.

The Group is in the process of preparing a detailed Roadmap on Localisation, in consultation with ACMA and other stakeholders.



Members at SIAM Sourcing Group Meeting, New Delhi



Vehicle Classification, Sales Reporting & Analysis Group

Indian Automotive Market has grown and has attained greater maturity in terms of segments, new body styles, new models, and price re-positioning over years.

The Vehicle Classification, Sales Reporting and Analysis Group has developed several statistical reports, which help various stakeholders in monitoring the Indian Automobile Sector for business investments, growth opportunities, regulatory policies, etc.

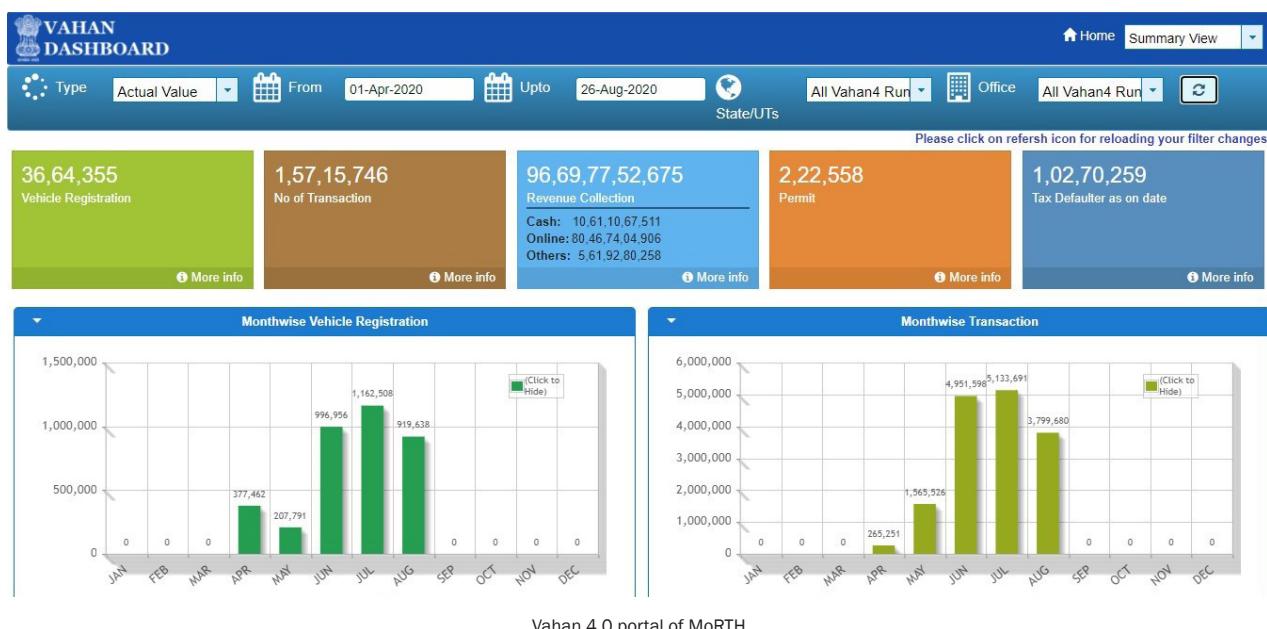
SIAM implemented revised Vehicle Classification from 1st April 2020 onwards. The revised Classification was based upon the suggestions received from members on the new Models and Categories that have been introduced of late. The entire classification was reviewed comprehensively, taking into account varieties of power source including electric, increased axles in commercial vehicles, and specific body types in

Goods and Passenger Commercial Vehicles.

The Group also worked on the issue of reporting of Mild Hybrid Vehicles in SIAM Fuel-wise report. After a few rounds of discussions with group members, finally everyone accepted the “SIAM definition of Hybrid Vehicles” and agreed to report all their vehicles, which meet this definition, under the “Hybrid Fuel” category. All other vehicles that do not meet the definition of Hybrid Vehicles, as agreed to, and submitted by SIAM to Government Authorities, would be reported under the respective Fuels category.

SIAM continued publishing monthly Vehicle Registration Report based upon data from the Vahan Dashboard of Ministry of Road Transport & Highways. The Dashboard has been evolving with time by including additional fields.

Annual Report Card (2019-20)				
S.No.	Deliverable	Measures	Owner	Stakeholders
1	To review the Vehicle Classification on a regular basis for accurate publishing of Statistical Reports	1. SIAM implemented the Revised Vehicle Classification for preparing Statistical Report as per the emergence of new models, body types, fuel types and categories	Vehicle Classification, Sales Reporting & Analysis Group	Membership, Government, Media and Society
		2. SIAM started publishing Vehicle Registration Report also on monthly basis, as per the Vehicle Registration data available on the Vahan Dashboard of MoRTH		Membership, Government, Media and Society



Styling & Design Group

To strengthen Government of India's "Make in India" mission, SIAM has also been promoting "Create in India" by capability building in the area of Automotive Styling & Design and has been striving to develop required design capacity within Indian R&D set-up. The SIAM group seeks to build bridges between the Styling & Design community in India and their global counterparts to share information and enhance mutual skills and capabilities.

The Group is actively engaged with Indian Design academia and has helped select Design institutes set up their curriculum / lab facilities and also support young talent by conducting interactive workshops.

"Explore a new world of Mobility: Re-imagining emotional connect with the customers" - the 14th edition of Styling & Design Conclave and 12th edition of the Automotive Design Challenge (ADC) was organised on 6th February 2020, during the sidelines of Auto Expo - The Motor show, in Delhi NCR (with above mentioned theme). Several eminent speakers from India and abroad attended the day-long conference.

The final evaluation round of ADC 2019 - "Autonomous

Transportation 2040 - Indian Megacities" also took place on the same day. There was enthusiastic participation from all major design colleges across country and in-total 140 entries were submitted. Following are top 3 winners:

- First prize: Onkar Kumar from DYPDC School of Design
- Second prize: Sujith S Kumar from National Institute of Design
- Third prize: Aritra Deb from DYPDC School of Design

SIAM in coordination with a few members organised a Design Webinar called - "SIAM Student Connect Series" for students and interacted with them on the current situation in Automobile Design, during the pandemic. Design Professionals briefed students on how they can better prepare themselves for challenges and opportunities, post Covid. More than 70 design students participated in the event.

The Group also expanded its reach on Social Media and strengthened connect with nex Gen Design Community, such as Facebook.

Annual Report Card (2019-20)				
S.No.	Deliverable	Measures	Owner	Stakeholders
1	To promote Automotive Styling & Design domain in the country	1. SIAM group interacted with Professors and Students of Design Colleges to promote Automotive Styling & Design curriculum. This was done with an aim to bridge the gap between the industry and academia	Styling & Design Group	Membership and Society
		2. A Design Webinar was also organised where senior Automobile Design Professionals interacted with students and guided them, with a special emphasis on current situation of Covid		Membership and Society
		3. SIAM organised Styling & Design Conclave where several speakers spoke and shared knowledge on latest design concepts and technologies		Membership and Society
		4. Like every year, an annual Automotive Design Competition (ADC) was organised for students to judge their skill-sets and design thinking		Membership and Society





Discussion during the Conclave, Delhi NCR



Mr Saurabh Singh, Head-Design, Maruti Suzuki; Mr Anil Saini, Director-Design, General Motors Technical Centre; and Mr Nilay Dembi - Principal Designer, Mahindra at the Inaugural Session of SIAM Styling & Design Conclave, Delhi NCR



Mr Onkar Kumar, from ADYPU, being awarded the First Prize in Automotive Design Challenge 2019



(3rd from left) Prof. Pradyumna Vyas, Former Director – National Institute of Design, being felicitated for his contribution to Transportation Design



Human Capital Group

SIAM Human Capital Group is Chaired by Mr. Sudhakar Panda, Sr. Vice President - HR, Fiat India Automobiles Pvt. Ltd. and Co-Chaired by Mr. R Anandakrishnan, Executive Vice President - HR & IT, TVS Motor Company Ltd. The Group works on various issues related to the ASDC, HR, IR, Labour, Benchmarking, Compensation & Benefits, etc.

The Group regularly interacts with Automotive Skills Development Council (ASDC) to look into their activities and also guides ASDC on overall policy directions. Members of the group are actively supporting activities being carried out by Automotive Skills Development Corporation (ASDC) during the year.

A Compensation and Benefit Survey has been conducted every year by Aon Hewitt within SIAM Members. Aon Hewitt has been conducting the survey since 2008, facilitated by SIAM. The study aims understanding and benchmarking Reward Trends in the Automobile Industry and offers a unique platform for organizations to interact and share knowledge and insights on their compensation models.

SIAM Members have a common uniform process for sharing benchmarking data and feedback from members on various issues. In the past one year, members have shared data on Group Medical Insurance, Privilege Leave Policy, Pool Vehicles, etc.

Annual Report Card (2019-20)				
S.No.	Deliverable	Measures	Owner	Stakeholder
1	To work on HR and IR Related issues	<ol style="list-style-type: none">1. 12th Compensation & Benefits Survey was conducted by SIAM through AON. In addition to the compensation and benefits benchmarking study, the following modules were also included- Executive Compensation Study, Sales & Services Study, R&D Study and Productivity Study2. In 2020, Benchmarking have been conducted on Group Medical Insurance, Pool Vehicles, Privilege Leave Policy.	Human Capital Group	Membership



CSR Group

SIAM organised the 4th annual SIAM CSR Conclave on 23rd December 2019 at New Delhi to highlight the contributions of the auto industry in driving sustainable development through various social welfare initiatives. The panels focussed on the theme of the event Social Empowerment. Sustainable Impact, and how CSR activities are essential in improving lives of people through self-sustainable development projects. The conclave witnessed participation of key industry leaders to ensure inclusive development of the society, while protecting the ecology. Mr Arjun Ram Meghwal, Hon'ble Minister of State for Heavy Industries & Public Enterprises, Government of India, inaugurated the CSR Conclave and released the Compendium. He narrated the significance of social welfare activities as an integral part of Indian culture and iterated the importance of being mindful of the 3Ps-Ped (trees), Paani (water) and Plastic to protect our environment, "We must plant trees, conserve water and reduce the usage of single-use plastic through individual as well as corporate efforts. To that effect, I applaud SIAM's initiative of discontinuing the use of single-use plastics at their events. These are the small steps that need to be adopted and appreciated in order to preserve our ecosystem." The sessions highlighted high incidents of road accidents in India and the importance of addressing this complex problem by raising awareness about safe mobility. The discussion also touched upon the necessity of encouraging, educating and enforcing road safety laws by making students ambassadors of road safety and other session was Showcase opportunity to the SIAM Member companies to share the best practices in CSR activities. The star speaker of the conclave, Dr Madhav Chavan, Founder, Pratham, recalled the early years of CSR in India and compared it to how it is practised today by the corporate sector, "The attitude of the companies towards CSR activities

has matured." He also highlighted the importance of investing in the technical education through vocational programs related to auto sector, "Today, the onus must also be on promoting sustainable development in underdeveloped areas."

The event concluded with the presentation of 2nd SIAM CSR Awards presented to the NGOs working with SIAM members on various CSR activities.

SIAM CSR group consolidated the data received from the member companies on their efforts during COVID-19 and released a newsletter which was shared with the government and the industry stakeholders.

Automobile Industry Responds to COVID-19

Intrepid efforts to contain the spread of COVID-19 have brought screeching standstill to commerce activities in India. The automobile Industry is one of the worst-hit. The industry which was already reeling with an economic slowdown struggled with imports of auto-components and keeping vehicle assembly line whirring. Automobile and component manufacturing plants were shut down across the country with an estimated loss of more than Rs. 2,300 crores in turnover for each day of closure.

However, these unprecedently testing times have not deterred the automakers from their resolver of building the nation responsibly. Many OEMs have come forward to extend their hand of support through various relief efforts. From hearty donations to the Union and State Governments, production of medical equipment like ventilators, PPE, surgical masks, gowns and sanitizers, to the distribution of dry ration and food kits to those who cannot go out and earn during the lockdown, automakers were taking multiple steps to support the nation in all possible ways during these difficult times.



Annual Report Card (2019-20)

S.No.	Deliverables	Measures	Owner	Stakeholders
1	SIAM CSR Compendium 2019	Released SIAM CSR Compendium 2019	CSR Group	Membership, Government & Society
2	SIAM CSR Conclave 2019	1. Organised 4 th edition of annual SIAM CSR Conclave 2019 – Social Empowerment, Sustainable Impact		Membership, Government & Society, Media
		2. Organised 2 nd SIAM CSR Awards for NGOs working with Member companies		Membership & Society

CSR activities and contribution by member companies during COVID-19



Rs 33 Cr.+
Financial Support
to Govt. Relief Funds



75 Lakh+
Face Masks



20 Lakh+
Meals Served



90,000+
PPE Kits



Production Capacities
Set Up for
60,000+
Ventilators



1700+
Temporary Beds



**Reached
Across India**

Other Essentials - Healthcare equipment, on-road ambulances, hygiene kits, soaps, sanitizer and face shields, among others



Beneficiaries

Migrant workers, truck drivers, low income households, healthcare professionals, police personnel, elderly people and children, among other marginalized communities





(L to R) Mr. Rajesh Menon, Director General, SIAM; Mr. Naveen Soni, Chairman, SIAM CSR Group, Mr. Arjun Ram Meghwal, Hon'ble Minister of State for Heavy Industries and Public Enterprises, Government of India; Mr. Sushant Naik, Co-Chairman, SIAM CSR Group



Mr. Arjun Ram Meghwal, Hon'ble Minister of State for Heavy Industries and Public Enterprises, Government of India



Dr. Madhav Chavan, Founder, Pratham



(L to R) Mr. Vinod Kulkarni, Deputy General Manager - Corp. Sustainability, Tata Motors; Ms. Anu Mehta, Dy. General Manager & Head-CSR, Honda Cars India; Mr. Rakesh Baweja, Vice President - Plant Services & EHS, Fiat India; Mr. Ashish Singh, Manager-CSR-Skill Development, Maruti Suzuki India; Mr. Srinivas Mekala, General Manager-CSR, Auto Farm Sector, Mahindra & Mahindra; Mr. S.P. Mohapatra, Toyota Kirloskar Motor



Trade Fairs Group

SIAM Trade Fairs group works with an aim to increase the visibility of the Indian Automobile industry.

The Group acts as the Organizing Committee for India's largest Biennial event 'Auto Expo – The Motor Show' jointly organized with Automotive Component Manufacturers Association of India (ACMA) and Confederation of Indian Industry (CII) at the India Expo Mart (IEML) in Greater Noida.

Today, the Auto Expo is reckoned to be one of the premier Auto Shows in the world and is a part of the global calendar of OICA recognised Auto Shows. For the Indian auto industry, the Auto Expo is a launch pad for new models and a showcase of contemporary as well as future mobility technologies, manufacturing capabilities and the high growth potential that exists in the Indian market for personal and public mobility.

Apart from organizing the series of Auto Expos, the Group also acts as organising committee of Indo - Bangla Automotive Show in Dhaka, Bangladesh. The intention is to create vast business opportunities for the Indian automotive industry in Bangladesh. Several high-level delegation and roundtables are also organised on the side lines of the show.

SIAM organised several Trade Fair group meetings last year in Delhi NCR under the Chairmanship of Mr Gurpratap Boparai, Chairman, SIAM Trade Fair Group and Managing Director, Skoda Auto Volkswagen India and Co-Chairman, Mr Sanjeev Handa, Vice President – Head, Corporate Communication, Maruti Suzuki India to discuss and plan the organising of Auto Expo – The Motor Show 2020.

Auto Expo – The Motor Show 2020 was organised successfully from February 5 – 12, 2020, where 5 February 2020 was exclusive media preview and 6 February 2020 was media preview, special guests and dealers' day.

The group formed few sub-committees to decide 'Day wise theme', promotion of the show and F&B management of the show. The daywise theme of the Motor show created a positive buzz amongst the media and was also a hit for general visitors. The 2020 Motor show witnessed a record 6.08 Lakh footfall marking the grand culmination of the Auto Show.

Annual Report Card (2019-20)

S.No.	Deliverable	Measures	Owner	Stakeholders
1	SIAM trade fairs group works with an aim to increase the visibility of the Automobile industry.	<ol style="list-style-type: none">Organised Auto Expo – The Motor Show 2020Providing a platform for member companies:<ul style="list-style-type: none">To showcase their latest offerings and technologies.Showcasing future concept vehicles & technologiesTo Engage and interact with this generation and future generation B2C customers to get fresh ideas, exploring collaborations, partnerships venturesFocused media coverageProviding all mobility ecosystem, entertainers, games, automobile art etc. under one roof for the visitors	Trade Fairs Group	<p>Membership, Government, Society</p> <p>Membership, Government, Society</p> <p>Membership, Government, Society</p> <p>Membership, Government, Society</p>





Members at Trade Fairs Group Meeting, New Delhi



TECHNICAL AFFAIRS

Two Wheeler Group

The Indian two-wheeler industry, largest in the world, has successfully and in shortest possible time, less than 3 years, migrated from BS IV in 1st April 2017 to BS VI emission norms with effect from 1st April 2020. These norms have called for huge amount of investment of resources and developmental efforts as vehicles have moved from carburettor to electronic fuelling technology, changes in engine design, advanced after-treatment devices, On-Board Diagnostics and calibration. India's BS VI Emission norms is ahead of the comparable Euro 5 Emission Norms in Europe which will be implemented for all models from January 2021. Indian 2W at BS4 stage were around 15-25% more fuel efficient than their European counterpart and even BS6 have further improved Fuel Efficiency by around 5% than BS4, hence we can Claim that Indian 2Ws are most fuel efficient in the world.

The Group members were also actively engaged in discussions with ICAT regarding the implementation of On-Board Diagnostics II (OBD-II), which is the Phase 2 of BS VI Emission Norms. After successful representation, MoRTH agreed to SIAM's proposal of implement the same in a phased two-step manner. The group is also working with other stakeholders to cater to special kinds of vehicles such as fire

responders. SIAM has commenced initial discussions on the subject of fuel economy for two-wheelers with Bureau of Energy Efficiency.

As on today, Indian 2Ws comply with all the UN ECE safety regulations related to 2Ws and on and above, Indian two-wheelers will now be safer as they will have globally unique requirements for Stands, Footrests and External Projections from 1st January 2022. Hence we can claim that Indian 2Ws are the safest in the world.

The Two-Wheeler industry is also working with the Government of India for preparing Quality Control Order for helmets for two-wheeler riders with the aim to curb sub-standard products in the market. The Government of India has also allowed inter-state movement of commercially registered Two-Wheelers used by individual, for tourism purposes.

International Motorcycle Manufacturers Association (IMMA), the voice of the global motorcycle industry, has elected Mr Rakesh Sharma, Executive Director, Bajaj Auto as President of IMMA as a representative of SIAM, for a 2-year mandate. Mr Sharma had been previously holding office as Vice-President in IMMA, elected in May 2019.

Annual Report Card (2019-20)

S.No.	Deliverable	Measures	Owner	Stakeholder
1	To ensure the growth of 2W industry in India in a sustainable manner and navigate the industry through regulation formulation.	<ol style="list-style-type: none">Based on the representations made by the SIAM Two-Wheeler Group, MoRTH issued the final notification deferring the implementation of following mandatory Standards for Two-Wheelers to 1st January 2022, which was earlier being planned for implementation from 1st October 2020:<ol style="list-style-type: none">AIS-146 : Requirements for StandsAIS-147 : Requirements for External ProjectionAIS-148 : Requirements of FootrestsMr Rakesh Sharma, ED, Bajaj Auto has been elected as President, IMMA for a 2-year tenure till 2022.	Two Wheeler Group	Membership





SIAM Two Wheeler Group



(L-R) Mr R Narsimhan, Vice President (R&D), Bajaj Auto; Mr Harjeet Singh, Chairman, SIAM 2W Group & Executive Advisor, Hero MotoCorp & Mr Suraj Agarwal, Co-Chairman, SIAM 2W Group & VP, Honda Motorcycle & Scooter India Pvt. Ltd.



(L-R) Mr Rakesh Sharma, SIAM, India with former IMMA President, Mr Johannes Loman, FAMI



SIAM 2W Group meeting in progress, New Delhi



Electric Mobility Group

India is quickly catching up to electrification. Department of Heavy Industry, Government of India, implemented Phase-II of FAME India Scheme from 1st April 2019 in with an outlay of Rs 10,000 Crores. Under the FAME India Scheme (both FAME Phase-1 and Phase-2), more than 300,000 hybrid and electric vehicles have been supported (till July, 2020). In addition to this, various Indian States are also launching state EV policies to further accelerate xEV adoption and inviting investments through local manufacturing of such vehicles and their critical components. One of the most recent electric vehicle policies, launched by Delhi, aims at having 25% share of BEVs in new vehicle registrations by 2024.

SIAM supports Central Government and State Governments for formulation of respective policies for hybrid and electric vehicles. Various recommendations made by SIAM on operational guidelines for implementation of FAME-II like minimum eligibility criteria, testing parameters and procedures, warranty terms for batteries were accepted by Government

of India. Many Indian States have also incorporated recommendations made by SIAM through its White Paper on Electric Vehicles in their State EV policies and through direct consultation. SIAM also supports 'Aatmanirbhar Bharat' mission by advising the policy makers on the local manufacturing of EVs. The Electric Mobility Group of SIAM, through extensive consultation with members, has communicated many recommendations to DHI for smooth implementation of Phased Manufacturing Program, the program under the Department to promote local EV manufacturing.

SIAM conducted an extensive study of reuse/recycling of lithium-ion batteries globally and in India which can become the reference point for suitable policy in this area in the country and has made recommendations for the Battery Waste Management Rules 2020 which are being drafted by Ministry of Environment, Forests and Climate Change, Government of India.

The objective of the Indian auto industry to provide cleaner transportation through electrification need

Annual Report Card (2019-20)

S.No.	Deliverables	Measures	Owner	Stakeholders
1	To serve as a communication channel between Government and Industry on e-mobility	1. Organized the 1 st Edition of Global Electrification Mobility Summit (GEMS) on 7 th and 8 th Feb 2020 the during Auto Expo 2020 which succeeded to create a Global discussion platform for electrification.	Electric Mobility Group	Membership and Government
		2. Organized a industry consultation with DHI on 16 th Oct 2019 to resolve key issues regarding FAME-II		Membership and Government
		3. SIAM communicated the Automobile Industry position during DPIIT – CII National Consultation Forum for Make in India 2.0		
2	To support Government on Policy and Regulation related issues	1. Provided critical inputs on localization criteria, timelines, components to be localized to DHI for smooth implementation of Phased Manufacturing Program.	Electric Mobility Group	Membership and Government
		2. Made submissions on various technical and administrative issues of FAME-II like Battery Capacity Test Standard, Test Cycle for measurement of EV range, Inclusion of Category of Vehicles, Inclusion of Battery Swapping for 2/3 Wheelers etc.		Membership and Government
		3. Provided critical inputs to MoEF on Battery waste management rules 2020 after extensive industry consultation.		Membership and Government
		4. Supported DHI to formulate Expression of Interest for procurement electric buses by various buses under FAME-II Scheme.		Membership and Government
		5. Supporting BIS in formulation of standards for traction batteries, traction motors, and EV charging stations		Membership



to be communicated for a balanced discourse, through a continuous dialogue with stakeholders. In this context, SIAM organized the 1st edition of GEMS (Global Electrification Mobility Summit) in Feb, 2020. Participated by over 200 foreign and Indian delegates, this two-days summit hosted three countries as 'Guest Countries' – France, Germany & Japan. The Summit succeeded in its endeavor to create the platform to bring everyone on board to begin the journey of electrification in its true sense.

SIAM also partnered with Department of Heavy Industries (Government of India) in creating an India Pavilion at COP 25 held on 3rd Dec 2019 in Madrid, Spain and presented on the industry perspective and readiness for electric mobility in India.

The market developments of the last decade and the shared vision among some policy makers, industry players and civil society suggest a potentially transformative acceleration of xEV adoption during



Glimpse of Global Electrification Mobility Summit (GEMS) 2020, Delhi NCR



Indian Pavilion at COP25, Madrid



Inaugural Session of Global Electrification Mobility Summit (GEMS) 2020, Delhi NCR



the 2020s. At the outset of this decade, however, the Covid-19 pandemic has disrupted economic activity and markets around the world. The extent and pace of the potential rebound of the auto-industry will depend on a range of factors, including the social distancing norms, the pace at which confinement measures

are eased, potential second waves of the pandemic, the pace of economic recovery and the willingness and ability of consumers to purchase. Government policy will also be critical. SIAM would look forward to proactively work and contribute towards electrification roadmap in the country.

Battery Reuse and Recycling Market Framework for Development of the Ecosystem



Recommendations of SIAM study on lithium ion battery reuse and recycling

ELECTRIC VEHICLES - IMPACT ANALYSIS CATEGORY WISE (POST COVID)

SIAM expects COVID to negatively impact every electrical vehicle segment in the short term, with certain segments like e-rickshaws and e-autos having clear long term potential, being affected the most due to social distancing norms.

Automotive Sub-Segments	Regulatory Dynamics			Economic and Social Dynamics			Supply Chain Dynamics		Short Term Outlook (1-2 yrs)	Long Term Potential 2030
	Future Fuel Economy Regulation	FAME Phase III	Future Gov. Mandates on EVs	Economic Slowdown	Increasing Fuel Prices	Travel Restrictions & Country Lockdown	Excess Supply from China	Supply Chain Disruption		
E-2W	⬆️	⬆️	⬆️	⬇️	⬆️	⬆️	⬆️	⬇️	🔴	High
E-Rickshaw	-	⬆️	⬆️	⬇️	⬆️	⬇️	⬆️	⬇️	🔴	High
E-Auto	⬆️	⬆️	⬆️	⬇️	⬆️	⬇️	⬆️	⬇️	🟡	High
E-Car (Personal)	⬆️	⬆️	⬆️	⬇️	⬆️	⬆️	⬆️	⬇️	🔴	Low
E-Car (Commercial)	⬆️	⬆️	⬆️	⬇️	⬆️	⬇️	⬆️	⬇️	🔴	Medium
E-Bus	⬆️	⬆️	⬆️	⬇️	⬆️	⬇️	⬆️	⬇️	🟡	High

Level impact: ⬆️ Negative ⬆️ Positive | Overall impact: 🔴 Negative Outlook 🟡 Neutral Outlook 🟢 Positive Outlook

Analysis of post-COVID scenario of e-mobility



CMVR & Safety Group

The automobile sector continues to stand out as one of the most regulated sectors in India. The previous year saw many more regulations being mandated by the Government, moving a step towards global harmonization, and creating a safer and more efficient vehicular ecosystem.

The much-awaited Motor Vehicle (Amendment) Act, 2019 was released - that has been on the forefront of our parent ministry's to-do list. The Bill amends the Motor Vehicles Act, 1988 to address issues such as third-party insurance, regulation of taxi aggregators, and road safety. For the first time, the amendment enables government to order a recall of a vehicle that causes harm to the environment or to the public/user of the vehicle.

Under Committee D of MoRTH, which was tasked with drafting the rules for vehicle recall, SIAM worked in close coordination with the Ministry to provide necessary support on the subject of vehicle recall taking into account SIAM's experience through the SIAM Voluntary Vehicle Recall Code.

The past 12 months saw the implementation and introduction of new regulations such as Microdots, Tyre Puncture Repair Kit, Reverse Parking Alert System (for other than M1) and revised overall maximum vehicle dimensions, to name a few.

February 2020 saw the outbreak of COVID-19 in India, and the Indian economy has not been immune to its impact. The slowdown of operations, disruption in

Annual Report Card (2019-20)				
S.No.	Deliverable	Measures	Owner	Stakeholder
1	To navigate the industry through administrative issues, assist in formulation of technical standards and ease implementation hurdles in Automotive Regulations	<p>As a result of regular interactions and pursuance SIAM was successfully able to bring about the following regulatory achievements :</p> <ol style="list-style-type: none">1. Inclusion of Green strip on 3rd registration plate (sticker) for BS VI vehicles.2. Tyre Puncture Repair Kit was notified for implementation on 'if fitted' basis with immediate effect.3. Upon SIAM representation to DPIIT, QCO on Safety Glass was deferred by 6 months i.e., to 1st April 20214. Amendments to overall Max Vehicle Dimension under Rule 93 that would provide for standardization in the dimensions of the Motor Vehicles which would be in line with international standards. Several SIAM recommendations found place in the final notification, such as increasing the vehicle carrier (N) height to 4.75m.5. Fitment of Microdot on 'if fitted' basis on vehicles and their parts, components, assemblies & sub-assemblies a per AIS-155.6. After numerous interactions with MoRTH on resolution on implementation timelines for Vehicle recall, many SIAM concerns have been addressed in the new Motor Vehicle (Amendment) Act, 2019 passed in September 20197. Extensively involved in formulation of Recall Rules for CMVR in Committee D under MoRTH wherein many critical submissions by SIAM has been suitably addressed.8. Actively involved in harmonization of AIS standards with IS standards	CMVR & Safety Group	Membership



availability of parts and services across sectors, delay in logistics, etc., had a grave impact on automobile supply chains across all segments. This would leave a lasting impact on the economic growth of the nation. Due to supply chain disruptions and the overall economic impact, the health of the industry is under severe threat. SIAM made a submission to the government, including a few recommendations /measures by way of deferment of some already notified regulations, that may bring some urgent relief to the industry in these difficult times.

Simultaneously, the industry also saw a forceful intervention from the government in implementation of

Quality Control Orders, with the aim of controlling the penetration of sub-standard parts in the aftermarket and encourage indigenous manufacturing to reduce the huge trade imbalance, in the long run. Safety glass, wheel rims, helmets, music systems are a few such instances where the Government has already come out with draft/final QCO's. SIAM welcomes this step as it will address the safety concerns arising out of penetration of spurious parts into the aftermarket and raise the level of safety on the roads. However, applicability of QCO on OEMs imports would be detrimental for the Indian Automobile industry and would only mean increased procedural hurdles and adversely impact the ease of doing business in India.



SIAM CMVR & Safety Group Meeting, Pune



Connected Vehicles Group

The industry is witnessing a phase when both industry and government are working towards utilizing the untapped benefits of the Intelligent Transport Systems for Automobile sector – at a time when we are in the midst of a shift from a product-based industry to a service-based industry.

Advanced Driver Assist System (ADAS) and connected vehicle ecosystems have taken center-stage with demonstrated ability to solve issues such as traffic, road safety and environmental deterioration. Although OEMs in India have the necessary technology available with them to provide mobility solutions it is a matter of policy and infrastructure that India currently needs to develop, learning from developing countries, with all stakeholders joining hands together. Therefore, SIAM's Connected Vehicle Group has worked upon drafting the Roadmap for Introduction of ADAS Technologies in India. The recommendations from the roadmap

take into consideration the current infrastructure in the country and serves as a roadmap for introduction of vehicle technologies for the next 15 years. If ADAS comes as a standard feature on all new vehicles sold in India, the rate of road-related deaths will come down by a good margin. However, if brands have to implement such a feature on all cars, the cost of production and also the final market price will shoot up.

It's all the more important to have level playing field and define applications / functions performance requirements keeping in mind end user needs, user services and usage pattern. This approach shall ensure that ITS is not vehicle centric. This shall also include a standard framework for back-end (end to end) connectivity. To streamline the aforementioned aspects, the group has held frequent interactions in the past with upcoming stakeholders such as map providers, ITS solution providers, etc.

Annual Report Card (2019-20)

S.No.	Deliverable	Measures	Owner	Stakeholder
1	To navigate the industry through administrative issues, assist in formulation of technical standards and ease implementation hurdles in Automotive Regulations	<ol style="list-style-type: none">1. Deep dived into formulating a Vehicle & Infrastructure Roadmap for ITS for the automobile industry.2. Regularly representing at TED, BIS Forums on Traffic Management, Cyber Security & Functional Safety, ADAS, Bus ITS, Reverse Parking Alert System, Role of ITS in Autonomous, VTS and TPMS.	Connected Vehicles Group	Membership





9th SIAM Connected Vehicle Meeting, Bengaluru



SIAM Delegation at CES, Las Vegas



10th SIAM Connected Vehicle Meeting, Chennai



SIAM Delegation at CES, Las Vegas



Digitization Group

The collaborative initiative by SIAM a few years back, resulted in the auto industry becoming the first in India to set up standards for data exchange through the cloud-based platform of AutoDX. Since then, the AutoDX has gained great momentum and has now supported a cumulative of almost 19 million transactions, with 5.7 million transaction having taken place in 2019 itself. The average monthly transaction on this platform have been close to 467K in 2019, wherein eight suppliers crossed their annual minimum commitments. Hero MotoCorp, Bajaj Auto, Tata Motors and TVS Motors are some of the OEMs that have adopted AutoDX. After six successful years of autoDX, SIAM in collaboration with ACMA organized a Webinar on autoDX: One Standard, One Industry, One Network in June 2020 for its respective memberships to showcase the journey thus far and to bring Industry Leaders on this platform to share their experiences on the same.

The current situation due to the outbreak of COVID-19 in India has brought about a new normal that is IT empowered. Tremendous work and effort have been put in by all organisations to move operations virtually ever

since the announcement of the nationwide lockdown and continued efforts are being made by the IT groups to make Work From Home more efficient and seamless. It is being deliberated that for efficient functioning, educating on and establishing the cadence of any dos and don'ts of remote functioning may be established with the support of this group.

The year 2019 also saw the launch of the Digital Roadmap Study jointly undertaken by SIAM and ACMA with the objective to develop a transformation roadmap to adopt digital technologies in the automotive industry across the value chain, product and industry ecosystem. The report assessed the current digital maturity within the industry through one-on-one interviews within the industry across verticals such as strategy & planning, supply chain, manufacturing, logistics & warehouse, sales & marketing and aftersales and gives key recommendations for digital adoption in the auto sector along with necessary interventions from the government and other concerned stakeholders for incorporation these measures.

Annual Report Card (2019-20)

S.No.	Deliverable	Measures	Owner	Stakeholder
1	To identify and carry forward IT initiatives for the automotive sector to enhance OEM / dealer / customer day-to-day activities	<ol style="list-style-type: none">Group is working on an implementation plan for the top 4 identified technologies of the Digital Transformation Roadmap study carried with ACMA and Kearney.Tremendous work and effort have been put by all organisations to move operations virtually ever since the nationwide lockdown and continued efforts are made by the IT groups to make Work From Home more efficient and seamless.AutoDX has gained momentum and has supported a cumulative of almost 19M transactions, with 5.7M transaction in 2019 itself.	Digitization Group	Membership



Members at AutoDX Governing Council Meeting, Bengaluru

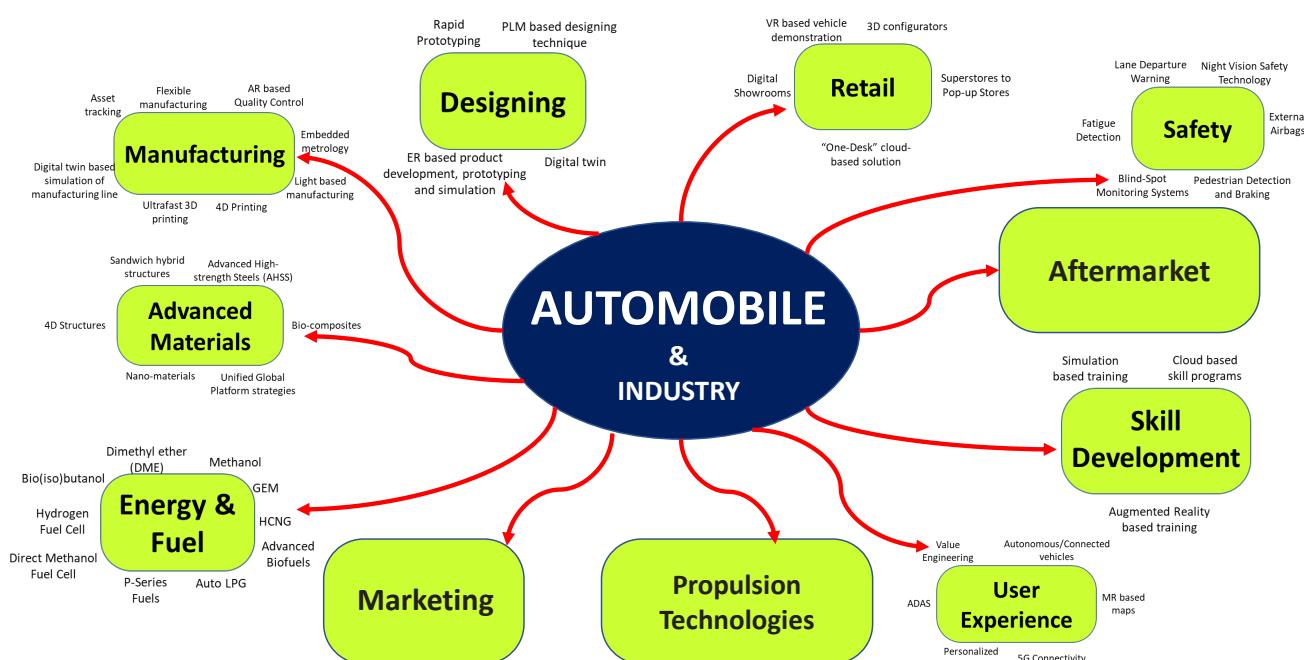


Frontier Technology Group

The automobile industry is one of the most technology driven sectors with innovation being an integral part of the mission to create safer and cleaner mobility solutions. There are various research and development activities being continuously carried out globally to make the vehicles efficient, safe and sustainable to satisfy the needs of consumers. With the invention of first automobile in 1886 powered by a gas engine, vehicle technology has come a long way with use of highly advanced combustion technologies and artificial intelligence.

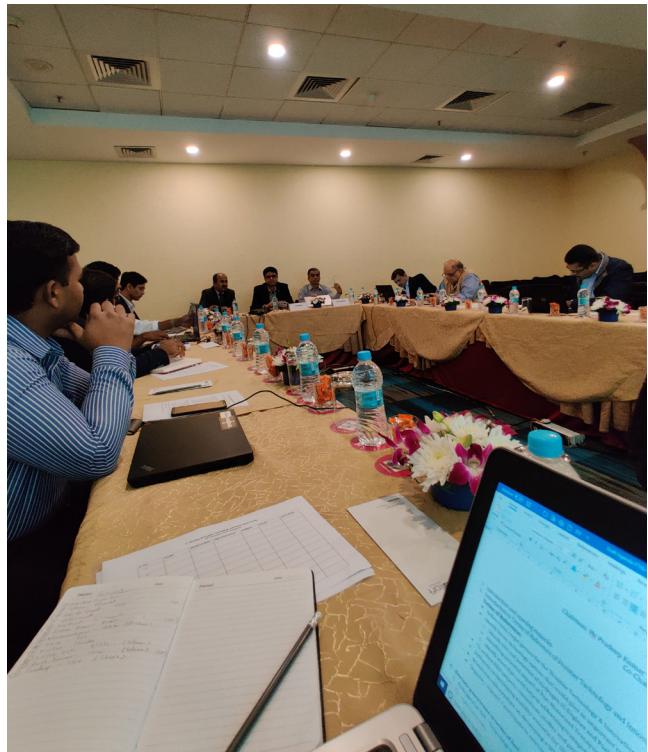
While Indian Automobile Industry is meticulously working hard to comply with different regulations and quality and safety standards, it is also important to be at par with the global trends in technology, research, and innovation. With this intent SIAM formed a new Group, Frontier Technology and Innovation Group (FT&IG) in 2019 with an objective to keep Indian

Automobile Industry abreast with latest and future trends in technologies in this sector and bring it at par with automobile fraternity in developed economies. This Group will bridge the gap between industry, institutions, academia, and government and, therefore, create cooperative framework for development of advanced technologies, supporting and strengthening, research & developments, and innovations in order to ensure their cross-sector pollination. FT&IG will be involved in exploring new technologies in different aspects of automotive industry, motivating innovation and supporting adoption of the most relevant and viable technology options. All the R&D/pilot projects, research studies, and any other projects particularly in the field of new technologies will be taken up by this group. Below are some of the aspects on which this group will be working and a map of latest technologies in these areas





(L-R) Mr Prashant K Banerjee, Executive Director, SIAM; Mr Mr Pradeep Kumar Thimmaian, Vice President, DICV, Mr R Narasimhan, VP (R&D), Baja Auto Ltd



Frontier Technology Group Meeting, Bengaluru



Frontier Technology Group Meeting, Bengaluru



Frontier Technology Group Meeting, Bengaluru



Recycling & Materials Group

The Indian automotive sector is highly conscious environmentally and has demonstrated its strong commitment towards reducing the environmental impact of production and use of vehicles by adopting advanced engineering technologies to attain a balance amongst economic, social and ecological imperatives.

On the occasion of the 14th edition of the Auto Expo, SIAM, under the aegis of the Recycling & Materials Group, organized the International Conference on 'Recycling and Circular Economy in Automotive sector' at the Auto Expo to showcase the circularity of materials in automotive sector and establish a 'cradle to cradle' model aimed at eliminating waste through recycling and reuse of end-of-life vehicles. The objective of the conference was to highlight the continual utilization of resources replacing the traditional linear economy, which envisages a 'Take, Make, Dispose' model of production, which is in line with the draft National Resource Efficiency Policy 2019, ELV Guidelines and Recycling Guidelines issued by the Government of India. The conference was held in partnership with the EU-REI, JARA, JAMA, and SMMT. ACMA, MRAI and

Toxics Link were our National collaborators.

With the growing demand in electric vehicles, high volumes of Li-ion batteries are anticipated at the end of life of these vehicles. This has initiated a lot of deliberation regarding second/third use of batteries in aftermarkets. In view of the anticipated rise of Li-ion batteries for automobiles in India, a need was felt to assess the situation of recycling/reuse of Lithium-ion batteries fitted in electric vehicles globally and in India. Therefore, a study on the subject was commissioned, in collaboration with SIAM E-Mobility Group through Frost & Sullivan that can become a reference point in this area in the country.

We are also pleased to see a lot of movement in the area of vehicle recycling with the release of the draft guidelines for Authorized Vehicle Scrapping Facility, wherein SIAM has been recognized as an accreditation agency. For the past many years, SIAM has worked a great deal in the area and held various seminars/ workshops with various stakeholders and will continue to remain engaged in doing so.

Annual Report Card (2019-20)

S.No.	Deliverable	Measures	Owner	Stakeholder
1	To navigate the industry through administrative issues, assist in formulation of technical standards and ease implementation hurdles in Automotive Regulations	<ol style="list-style-type: none">Organised the International Conference on Recycling & Circular Economy at Auto Expo in collaboration with MoEF&CC and MoS along with EU-REI, UNEP, JARA, JAMA, SMMT, MRAI and Toxic Links.Owing to SIAM's continuous involvement in the area of vehicle recycling, SIAM has been identified as an accreditation agency for Authorised Vehicle Scrapping Facility.Involved in monitoring various activities under different ministries pertaining to vehicle recycling / scrapping along with detailed examination of best practices and learnings of global vehicle recycling practices.Commissioned a study in collaboration with SIAM's E-Mobility Group on Battery recycling and reuse through Frost & Sullivan.	Recycling & Materials Group	Government, Society & Membership



Dr G K Pandey, Ex-Member, NGT; Mr Souvik Bhattacharja, Associate Director -Integrated Policy Analysis Division, TERI; Mr Sujit Kumar Bajpayee, Joint Secretary, MOEF&CC, Mr Pravin Agrawal, Joint Secretary, DHI, MoH, Ms Ruchika Chaudhary Govil, Joint Secretary, Ministry of Steel & Mr Prashant K Banerjee, ED, SIAM, Delhi NCR



Recycling & Materials Group Meeting, New Delhi



(L-R): Mr Vikram Kasbekar, Executive Director Operations (Plants) & CTO, Hero MotoCorp; Mr Tom Bird, President, Bureau of International Recycling; Ms Robin Wiener, President, Institute of Scrap Recycling Industries; Mr Prashant K Banerjee, Executive Director, SIAM and Mr Sanjay Mehta, President, Material Recycling Association of India, Delhi NCR



International Harmonization Group

Harmonization is a priority for the Industry and where applicable EU regulations are getting adopted in CMVR in the form of various AIS/IS standards. SIAM is a regular participant at the GR group meetings, WP 29, OICA and IMMA meetings as a part of the India delegation and contributes in providing technical inputs at various forums from time to time. Further SIAM interacts and collaborates with partner organisations like JAMA, VDA, etc. and works out strategy for policy formulation in internal forums for mutual benefit.

SIAM International Harmonization Group created mirror groups of WP 29 to discuss and prepare India position on various regulations being discussed under these six working groups. SIAMIHG Group meets every quarter for review and status update.

OICA provide us the Platform for presenting India views through the OICA shadow groups of WP.29. In the past SIAM took OICA route for submitting our position on certain important issues.

Considering the growing importance of regulations and related implications, it is important that we prioritise the regulations considering the benefits to our society. Also new regulation implementation should be preceded by development of adequate infrastructure & technology development in the country to get the best value for society at an optimal cost. It is now imperative that there is a long-term roadmap of regulations and supporting infrastructure which would be needed for the ever-growing mobility needs of the masses while providing safe and sustainable framework for the mobility. This

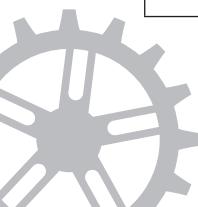
will help the industry to prepare in advance, look for opportunity of local development of technology at optimal cost and help in the #AatmaNirbharBharat mission of Government of India. Taking cognizance of such developments, IHG's Governance structure serves as a platform for engaging in regular exchanges of developments at various forums and formulating the stance of the Indian Automobile Industry.

Internally, SIAM is proactively studying in great detail the present and upcoming regulations in developed economies such as Europe, America, Japan and China with the aim to draw out a more structured approach to regulation introduction while taking into account the best practices and learnings from other countries while keeping in mind the mobility aspects unique to India.

It is a matter of great pleasure that on 21st April 2020, Mr Rakesh Sharma (Executive Director, Bajaj Auto) took over as President of International Motorcycle Manufacturers Association (IMMA) as a candidate from SIAM for a two-year tenure till 2022. IMMA has a membership of Powered Two and Three-Wheeler (PTWs) manufacturers association from various countries and regions across the world including USA, Canada, Australia, Europe, Japan, Thailand, Vietnam, Taiwan, Indonesia, Malaysia, apart from SIAM in India. IMMA promotes mobility through safe, sustainable motorcycling by advocating the development and harmonization of technical regulations in United Nations, affecting the motorcycle industry and by advancing inclusive policies for motorcycling.

Annual Report Card (2019-20)

S.No.	Deliverable	Measures	Owner	Stakeholder
1	To channelise the industry expertise to ensure right representation of India views in various international forums and also for prioritising harmonisation activities	<ol style="list-style-type: none">Analysing the present and upcoming regulations in developed economies with the aim to draw out a more structured approach to regulation introduction so that technologies can be developed in India well ahead of implementation and are not imported.Serves as a platform to discuss industry stance at OICA shadow groups of WP 29.Mr Rakesh Sharma (Executive Director, Bajaj Auto) took over as President of IMMA as a candidate from SIAM for a two-year tenure till 2022	International Harmonization Group	Membership





IMMA RSWG Meeting in Progress, Geneva



30th SIAM IHG Meeting, New Delhi



(L-R) Dr Tapan Sahoo, Chairman, IHG & Sr. Vice President - Engineering & R&D, Maruti Suzuki India Ltd; Mr Anilkumar C, Co-Chairman, SIAM IHG & Sr GM - Body & Trims - Cars, Tata Motors Ltd, New Delhi



SIAM-JAMA 2W Group Meeting held at Auto Expo – The Motor Show 2020, Delhi NCR



Sustainable Mobility Group

The erstwhile Clean Fuel Technology Group was envisioned and renamed as “Sustainable Mobility Group”, on 6th May 2019. The CFT Group was thought to be restrictive in its approach and mandate. In this regard, the Chairman of the Group during the meeting held 6th May 2019 in Pune had stated that the Indian automotive sector is transforming rapidly into a new paradigm, with the advancements in technology, cleaner fuels, mobility services towards sustainable mobility. The Chairman with the consensus of the members rechristened the Group as Sustainable Mobility Group (SMG) to make it more inclusive and representative of sustainability mobility. During the last two meetings held on 16th January 2020 and 26th June 2020 wherein the imperatives of sustainable mobility for achieving the goals of sustainable development were discussed. Accordingly, the Group is debating on the key sustainable priorities related to automotive sector viz. material eco-efficiency, restricting the use of hazardous substances and green manufacturing cleaner, infusion of advanced automobile technology, cleaner & alternative fuels, recycling, and circular economy. Thus, the sustainable mobility group has an overarching mandate and fosters principles of accessibility, equity, affordability, social inclusiveness, sustainability, health, and ecological integrity.

The highlights of the key activities implemented during the last year are summarized in following paras:

1. Implementation of Sukh Da Saah project by deploying in-situ crop residue management:

SIAM has been implemented the Sukh Da Saah (SDS) project since 2018 in the larger interest of social cause of adopting best agricultural practices and improving air quality. The project showcased environment friendly in-situ technology (zero pollution) in 9 villages of Patiala District on 7400 acres of agricultural land under 3 farmers co-operatives in Jasso Majra. SIAM had conceptualized the project for stubble management through mulching the crop residues in agricultural soil which known as in situ technology. Further to make it more comprehensive and participatory, SIAM joined

hands with CII on the suggestion of Chairman of the Clean Fuel Technology Group (now Sustainable Mobility Group) during a meeting at Pune on 13th July 2018. The objectives of the project are (i) to demonstrate best agricultural practices and improving air quality, (ii) showcase the project as a testimonial of building the nation, responsibly, (iii) validate the in-situ technology before specific target stakeholders like farmers, policy makers, judiciary, activists and media, and (iv) allow feasible replication in other areas.

During the ongoing COVID-19 pandemic, SIAM helped the needy farmers to tide over the COVID crisis and distributed 255 ration kits (1 kit enough for 4 persons for 20 days) to the affected farm laborers and marginal farmers of Jasso Majra (the area where the project is being implemented) as a part of its social responsibility. SIAM gesture was appreciated by villagers and Punjab Government.

To help the farmers, 46 equipment and several technical trainings and workshops were organized with scientists and experts from various agriculture colleges, agriculture department, and equipment manufacturers, as a part of handholding and skill development. This enabled the farmers to understand the technology, equipment operation, efficient crop waste management methods, effective harvesting and meeting other challenges that may arise. The consistent handholding of farmers has been the key element for the stupendous achievements under the project. Consequently, the Sukh Da Saah project in its first year 2018-19 reduced the stubble burning up to 71%, the stubble burning is reduced up to 81% & in 2019-20 and this year's target is zero stubble burning.

2. Implementation of an Innovative Concept in Agricultural Biotechnology- a Microbial Consortium for the faster in-situ decomposition of agricultural residues in Punjab

Indian Automobiles Manufacturers (SIAM) collaborated with Punjab Pollution Control Board (PPCB) to oversee the implementation of field trials of Re-life, a microbial



consortium provided by the Gujarat Life Sciences (P) Ltd., Vadodara as eco-sustainable in-situ solution to the crop residue burning. SIAM along with its partners viz. the India Paryavaran Sahayak Foundation (IPS) Foundation, Confederation of Indian Industry (CII), Agriculture Welfare Department & TIET and individual farmers applied the multi-microbial spray of 'Re-life' on about 38 acres of farmland in in different district/villages of Punjab to see its efficacy and assess the potential for commercial application. The whole operation is supervised by the Punjab Pollution Control Board and SIAM through several meetings with the partners and collaborators under the Chairmanship of Chairman, PPCB to oversee the progress during the project. Apart from collaborators, several experts from Punjab Agriculture University and Gujarat Life Science(P) Ltd. also participated in the meetings.

Outcome and Way Forward for Re-life application:

The Re-life was applied in different places by different partners, however, there was a clear-cut and remarkable increase in macro-micronutrients in the soil. The increase in Total Organic Carbon is indicative of high carbon content in soil organic matter, which enhances soil fertility, moisture retention and, carbon sequestration that help in mitigating air pollution and climate change.

The crop residues are reservoirs of nutrients and proper management as shown in different field trials will not only help in recycling of nutrients back to the soil but also help in moisture retention. An increase in beneficial microorganisms in the soil will improve soil health. About 40 per cent of the nitrogen (N), 30 to 35 per cent of the phosphorus (P), 80 to 85 per cent of the potassium (K), and 40 to 50 per cent of the sulfur (S) taken up by rice crop remains in vegetative plant parts at crop maturity. The direct economic benefits to farmers due to application of Re-life- a microbial digester inter alia include less use of inorganic fertilizers, increased moisture retention means less water use and improvement in soil health etc. A replication program involving partners, collaborators, agriculture organizations, Government of Punjab, and Gujarat Life Science (Vadodara) is suggested to take up in larger area in Punjab in the coming season.

3. Multi-media Blitzkrieg Campaign for Promotion of in-situ Crop Residue Management:

SIAM as well as Sukh Da Saah project is a household name in rural Punjab because of multimedia awareness campaign launched in 2018 & 2019 through PTC News and PTC Punjabi, the most popular TV channels in Punjab through video spots and TV debates to promote in-situ technology. There were total 270 video spots spread out in a span 24th October-13th November 2018. Out of these spots, 60 spots were with the appeal by the President, SIAM for farmers for not burning the stubbles in the fields. The TV campaign launched by SIAM, generated much needed awareness and positive impact on the masses particularly on the farmers of the region. In fact, the campaign was a huge hit. Like previous year, SIAM launched a multimedia campaign with 324 videos starting from 30th September 2019 extending throughout October including videos with the appeal from the President, SIAM.

In addition, SIAM has further intensified the multimedia campaign to expand its outreach and zone of impact across the length and width of Punjab particularly targeting Mandis with the Moving Van project. The Mandis are the hubs of farmers, agrarian communities, retailers, brokers, and people associated with agricultural activities and farmers are available in large numbers during daytime. It is the captive audience which SIAM moving Vans campaign project has targeted with digital campaign and Nukkad Naatak popular among masses and rural community. The two vans were got fitted with large LED screen which will show videos, advertisements, short videos etc. related to the anti-burning. The anti-stubble burning campaign is highly popular amongst the farming community and masses.

These Vans have been flagged off on 4th November 2019 at Kisan Bhawan, Sector- 39 in Chandigarh by Mr. K. S. Pannu, Secretary, Agriculture, Government of Punjab. He along with his officials of Department of Agriculture, and SIAM graced the occasion. In Patiala, on the same day, Prof. S.S Marwah, Chairman Punjab State Pollution Control Board flagged off the Vans along with officials of PPCB and SIAM. Apart from the above, two episodes on experts' debate on the in-situ stubble management focusing on SIAM project in Punjab were



aired on PTC News in December 2018 and February 2020. SIAM published a report on the Sukh Da Saah project encapsulating and highlighting the key outcome of 2019 for dissemination amongst the stakeholders. The report was released by Mr. Rajan Wadhera, President, SIAM in a conference held in November 2019 in New Delhi.

4. Momentous Conferences/Events Organized by SIAM:

During the last year SIAM has organized high profile national and international conferences in various thematic areas of automotive sustainability which are transforming the automotive sector rapidly. Under the guidance of Sustainable Mobility Group, SIAM has organized the following conferences during the last year:

- (i) International Conference on 'Recycling & Circular Economy in Automotive Sector' held on 10th February 2020, Auto Expo, Noida,
- (ii) SIAM partnered with EU/GIZ in organizing the workshop on 'Recycling & ELV Regulations' held on 11th February 2020 in Noida-as part of institutional networking and strengthening collaboration, and
- (iii) National conference on 'Cleaner Mobility, beyond 2020: Automotive Sector as an Agent of Positive Change' organized in November 2019.

These conferences were organized in corollary to the path breaking and first of its kind conference organized on the international conference on 'International Material data System IMDS and End of Life Vehicle (ELV) Regulations' in March 2019 in Delhi. The high number of participants and high-profile speakers from India and abroad covering the cutting-edge topics were the hallmark of the conferences. The efforts of SIAM to organize such conferences were appreciated by the Sustainable Mobility Group during meeting at Pune and unanimously approved the second edition of conference on 'IMDS and EVs Regulation as well as 'Cleaner Mobility, Beyond 2020: Automotive Sector as an Agent of Positive Change' in the current year. SIAM as a part of institutional networking and strengthening collaboration and networking has collaborated with EU/GIZ and organized a workshop on 'Recycling & ELV

Regulations' organized on 11th February 2020 in Noida. In furtherance and strengthening of the collaborative efforts, SIAM is contemplating more such events jointly with national and international organizations, in future.

5. SIAM Transitioning into an Advocacy Institution of sustainable mobility through Message Triangle:

SIAM is evolving as a leading platform for sharing knowledge and best practices in automotive sector to curb environmental pollution based on life cycle concept. Accordingly, SIAM is strengthening its collaborative approaches with Government and national & international organizations to promote stricter, and enforceable regulations. SIAM is establishing itself as an agent of positive change for nurturing its motto of building the nation, responsibly. So as to further strengthening the collaboration and communication, SIAM is enhancing its interface with stakeholders based on the guiding principle of 'message triangle' through organizing meetings, debates, lectures, webinars, conferences and workshops for stakeholders from industry, Government, national and international organizations. Accordingly, the SIAM is focusing on the principles of 'Message Triangle'- – A success mantra for sustainable mobility:

Promoting SIAM as a platform for organizing more meetings, events, lectures, conferences, and webinars for sharing cutting edge technology, knowledge building and best practices to achieve sustainability based on life cycle concept

Enhancing SIAM's collaboration for networking with Government and national & international organizations for harmonized and enforceable regulations

Strengthening advocacy and outreach, for disseminating information and knowledge to its members and various stakeholders through proactive interactions, lectures series, videos, TV debate & messaging etc.

All SIAM events, projects and programmes strive to integrate the Message Triangle- for achieving business sustainability and sustainable goals.

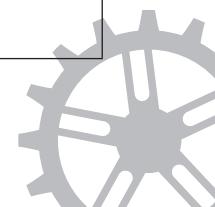
6. SIAM Virtual Environment Lecture Series:

The Society of Indian Automobile Manufacturers (SIAM) has embarked upon a unique Environment



Annual Report Card (2019-20)

S.No.	Deliverables	Measures	Owner	Stakeholders
1	Sukh Da Saah (SDS) project	<ol style="list-style-type: none"> SDS Project commenced in 2018 by deploying in-situ technology on 7400 acres in 9 villages in Jasso Majra. The 2nd year of project implementation has achieved 81% reduction in stubble burning bettered from 2018-19 of 71%. Report of SDS project was released in November 2019 in New Delhi for dissemination of outcome. The target for 2020-21 is zero stubble burning. 		Government & Society
2	Implementation of microbial project	<ol style="list-style-type: none"> Re-life, a microbial consortium was applied on the 38 acres of lands by SIAM partners in Punjab. The project is being implemented by SIAM in collaboration of Punjab PCB and Agriculture department along with CII, IPS Foundation, Farmers etc, As per the test results, the microbial application enhanced the availability of nutrients in the soil indicating faster decomposition of stubbles in agricultural fields. The project may be replicated on a larger scale elsewhere in Punjab 		Government & Society
3.	Multi-media publicity campaign	<ol style="list-style-type: none"> The multimedia campaign was launched in 2018-19 through the most popular channels of Punjab viz. PTC Punjabi & PTC News SIAM launched a solo multimedia campaign with 324 videos starting from 30th September 2019 with the appeal from the President, SIAM. The campaign was watched by at least 60 lakhs people in Punjab and Haryana. In addition, 2 Vans fitted with large LEDs with a team of Nukkar Naatak were launched in November 2019 in Chandigarh for further strengthening the ground level campaigning having connect with farmers 		Government & Society
4	Conferences/ Events Organized	<ol style="list-style-type: none"> SIAM organizes momentous Conferences/ Events for dissemination of latest advancements made in the automobile sector. International Conference on 'Recycling & Circular Economy in Automotive Sector' organized on 10th February 2020. SIAM partnered with EU/GIZ for workshop on 'Recycling & ELV Regulations' in February 2020, and SIAM organized a conference on 'Cleaner Mobility, beyond 2020' in November 2019. SIAM is contemplating more such events jointly with national and international organizations, in future 	Sustainable Mobility Group	Government & Society
5	Sustainable Mobility through Message Triangle	<ol style="list-style-type: none"> SIAM is focusing on the principles of 'Message Triangle' - A success mantra for achieving business sustainability and sustainable goals by following measures: Promoting SIAM as a platform for organizing more meetings, events, lectures, conferences, and webinars for sharing cutting edge technology, knowledge building and best practices to achieve sustainability. Enhancing SIAM's collaboration & networking with Government and national & international organizations for harmonized and enforceable regulations Strengthening advocacy and outreach, for disseminating information and knowledge to its members and various stakeholders through proactive interactions, lectures series, videos, TV debate & messaging etc. 		Government & Society
6	Virtual Environment Lecture Series	<ol style="list-style-type: none"> SIAM has embarked upon a unique Environment Lecture Series for integrating and mainstreaming the environmental imperatives for attaining business sustainability in automotive sector. The objective of the lecture series is to disseminate domain knowledge, latest development, and technological advancements. Lecture series will be creating awareness on policy/regulatory landscape, imparting circularity of materials and elucidating a 'cradle to cradle' model aimed at eliminating waste through recycling and reuse of End-of-Life vehicles. Lectures also envisages the economics of recycling, technology in designing material and developing recycling infrastructure in the country. 		Government & Society



Lecture Series for integrating and mainstreaming the environmental imperative for attaining business sustainability in automotive sector and sustainable development goals in general. The Environmental Lectures Series on Sustainable Mobility will inter alia envisage topics from following themes:

- (a) Material eco-efficiency & sustainability
- (b) Restricting the use of hazardous substances and Green Manufacturing,
- (c) Infusion of advanced powertrain technology
- (d) Cleaner & alternative fuels
- (e) E=Emissions, OBD, RDE & electronic control systems
- (f) Life-cycle concept, recycling, and circular economy

Out of these thematic areas, a list of topics for ten lecture series is prepared. At the outset, the lecture series on the 'Environmentally Sound Management of ELVs in India' envision following twin lectures as detailed below:

- (i) 1st Lecture on Policy, Regulations, & Economic Impact of ELV Recycling on 20th August 2020
- (ii) 2nd Lecture on Technological imperatives in Designing & Material Eco-efficiency of ELV Recycling on 27th August 2020

The objective of the lecture series is to disseminate domain knowledge, latest development and technological advancements in automobile industry to the stakeholders, creating awareness on policy/regulatory landscape, imparting circularity of materials and elucidating a 'cradle to cradle' model aimed at eliminating waste through recycling and reuse of End-of-Life vehicles. In addition, the lectures will also delve on the economics of recycling, technology in designing material and developing recycling infrastructure in the country.

The twin lectures will highlight the continual utilization of resources replacing the traditional linear economy, which envisages a 'take, make, dispose' model of production.



Sustainable Mobility Group Meeting, Pune



Sustainable Mobility Group Meeting, Pune



Use of happy-seeder in fields in Punjab



Application of microbial spray in fields





Launch of Sukh Da Saah Report by Mr. Rajan Wadhera, President, SIAM



Inaugural session of international conference on 'Recycling and Circular Economy' February 2020



Launch of Van Project by Mr. K.S. Pannu, Secretary, Department of Agriculture, Punjab



A view of participants of national conference on 'Cleaner Mobility, Beyond 2020' in November 2019



Emissions and Conservation Group

The year 2020 is a milestone year for the Indian Automobile Industry, with the fastest transition to cleaner stage of emission norms. On 1st April 2020, India has leapfrogged from Bharat Stage IV norms to Bharat Stage VI norms. This transition however, happened much earlier ahead of deadline due to Hon'ble Supreme Court order and with a huge amount of investment of resources and many economic challenges.

Before mandatory implementation of BS VI, SIAM successfully closed requirement of in service conformity for BS IV vehicles for one cycle (this requirement was imposed by MoRTH over and above BS4 regulation), SIAM successfully closed the issue with limited testing restricting to Type 1 mass emission test.

The new emission norms have also called for changes in BS VI Test Procedures. In this regard, SIAM requested inclusion of option of testing vehicles with E10 reference fuel, apart from E5, for Four Wheelers. SIAM also requested to change weightage of WMTC (World Motorcycle Test Cycle), the Driving Cycle for BS VI Two Wheelers in order to align with Euro 5 test procedures. Both these requests have been considered by Govt. Government of India also launched BS VI Emission Norms for Quadricycles which were implemented from May 2020. In line with the recommendations of SIAM, WMTC Test Cycle will be adopted with limit values aligned to Euro 5. The implementation of OBD II to be in two phases in 2023 and 2025.

SIAM through EnC subgroup worked to iron out the issues like procedural corrections in coast down test, road load set-up, SCR indicator for low-powered N1 category of vehicles, and also suggested many editorials to remove ambiguity in interpretation. SIAM also contributed in IRDE committee to work out RDE chapter in BS6 emission procedure (AIS – 137) headed by Mr Tyagi, Director, ICAT.

The BSVI emission norms also called for changes in emission limits for CNG BS VI vehicles (to meet both THC and NMHC emission limits). Trials conducted by SIAM along with Indian Institute of Petroleum shown

that the fuel consumption penalty is expected to be around 3-8%, which is contributed for conversion CH4 into another greenhouse gas CO2, without any environmental benefit. SCOE (Standing Committee on Emission Legislation) chaired by Joint Secretary, MoRTH has acknowledged the concern of penalty on fuel consumption. However, as-on-date manufacturers are continuing with the notified norms as suggested by Ministry due to constraints in modifying the BSVI notification.

The BS VI emission norms implemented from 1st April 2020, happen to be the most stringent emission norms till date with use of advanced emission reduction technologies and low polluting gasoline and diesel fuels. As per EPCA, the lesser number of vehicles will contribute lesser pollution. Therefore, EPCA conceptualized colored stickers, to restrict plying of Diesel vehicles (with Orange Stickers) during high polluting days. Light Blue and Orange sticker affixed on Petrol and Diesel Four Wheeled Vehicles respectively. SIAM EnC group proposed Green Strip on existing Light Blue and Orange sticker to differentiate a BS VI vehicle, from BS IV vehicle. In this way Green Strip on the stickers may exempt BS VI vehicles from ban on plying in future. This will be mandatory w.e.f 1st October, 2020.

Government of India in 2016 September had notified that it would be mandatory for vehicle manufacturers to manufacture only BS VI vehicles from 1st April 2020. However, some State Governments had issued orders suggesting cut-off dates for registration of BS IV vehicles ahead of 31st March 2020. Therefore, SIAM sought intervention of MoRTH for allowing sales and registration upto 31st March 2020 and filed a petition in the Supreme Court praying that BS IV vehicles be sold & registered till 31st March 2020. Also, due to lockdown announced by Government of India, registration of BS IV vehicles prior to 31st of March 2020 was disrupted. This matter is still being heard and the outcome is awaited as MoRTH is compiling other details, as requested by the Honorable Court. On 13th August, the Hon'ble Court pronounced its order permitting registration of vehicles sold before



31st March 2020 whose details are present on the VAHAN portal (except for Delhi).

As the commitment from the Oil Industry to supply BS VI fuel across the country was only from 1st April 2020, vehicle manufacturers were in a dilemma whether to launch BS VI vehicles earlier in the market. To understand preparedness of Oil Industry for availability of BS VI Fuel, SIAM along with FIPI organized an interaction of automobile and oil industry on 19th February 2020. To synchronize delivery of BS VI vehicles by OEMs, SIAM requested sharing of location wise availability of BS VI fuel prior to 1st April 2020. Oil Marketing Companies present during the meeting also confirmed supply of BS VI fuel from all the refineries (except Guwahati) from end of January 2020. This was further corroborated by a joint field Survey undertaken by SIAM members in January end where it was found that sulphur in the fuel was almost at BS VI level. Later, Government of India announced the launch of pan India availability of BS VI fuel by MoPNG from 21st March 2020.

Since fuel has a direct impact on vehicular emissions and after-treatment systems, SIAM initiated a survey of gasoline and diesel fuel quality in five Indian cities in 2018-19. The samples from retail outlets within the city and outskirts were collected during winter and summer months and sent to Indian Institute of Petroleum for quality testing. After analyzing 120 samples, it was found that while most of the parameters were within the standard limit, some other parameters like aromatics and benzene content for gasoline samples and cetane number for diesel (winter) were found to be out of specification. One other important observation in the survey was that ethanol blending in gasoline was negligible with only 6% samples having ethanol blending of either 5 or 10%.

BS VI first time notified In-service conformity requirements similar to European countries. In view of this, it was necessary to understand on how to conduct In-service checks and understand difficulties in Indian

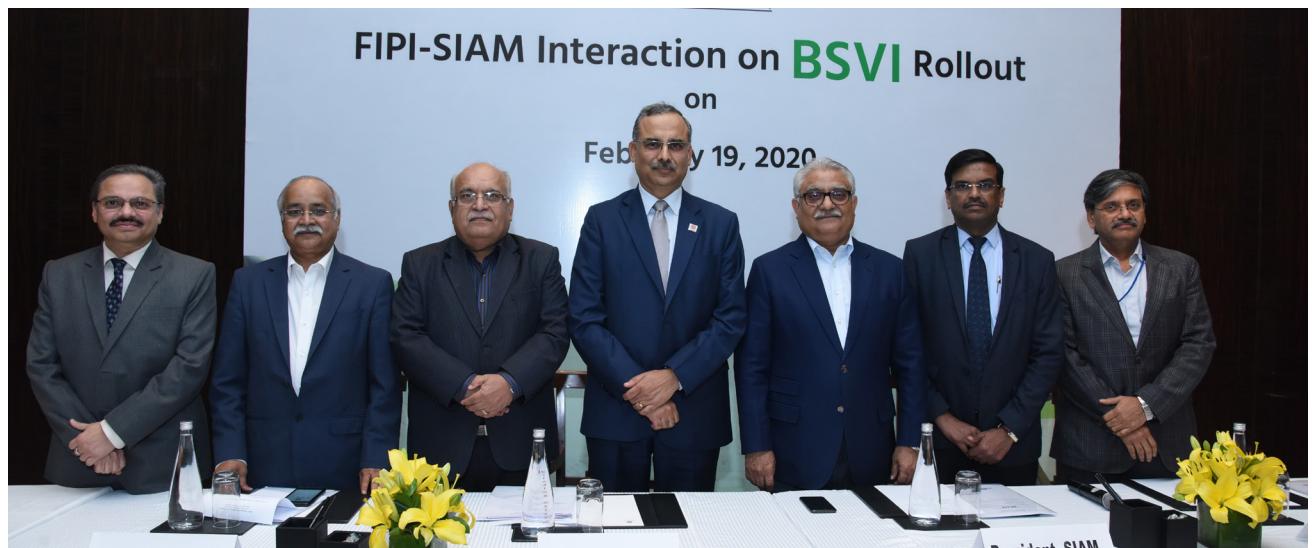
Annual Report Card (2019-20)				
S.No.	Deliverables	Measures	Owner	Stakeholders
1	Transition to BS VI norms	1. SIAM sought intervention of MoRTH for allowing sales & registration upto 31 st March 2020. Subsequently, SIAM had filed a petition in Supreme Court praying that BS IV vehicles be sold & registered till 31 st March 2020. Later on account of Lockdown SIAM requested that Unregistered BS IV Vehicles be registered post 31 st March 2020	Emissions and Conservation Group	Membership and Government
		2. To synchronize delivery of BS VI vehicles by OEMs, SIAM requested sharing of location wise availability of BS VI fuel prior to 1 st April 2020. Also, SIAM members undertook a joint field Survey in end Jan 2020 - Sulphur in BS IV fuel, almost at BS VI level		Membership, Government & Society
		3. Requested GoI to notify BS VI Emission Norms for Quadricycles		Membership and Government
		4. Requested inclusion of option of testing vehicles with E10 reference fuel, apart from E5, for four wheelers.		Membership and Government
		5. SIAM Proposed to affix Green Strip on existing Light Blue and Orange sticker to differentiate a BS VI Vehicle, from BS IV Vehicle. Green Strip on the stickers may exempt BS VI vehicles from ban on plying.		Government
2	Strategizing Fuel Efficiency norms with Industry and Government	1. SIAM made submission to GoI that Phase 2 FE regulations for M1 vehicles be deferred by 2 years from 2022 to 2024		Membership and Government
		2. Develop HDPE & L&MDPE Regulations based in BS VI Data and a suitable timeline to be finalised for implementation.		Membership and Government
3	Advising Government on various fuels and related aspects	1. SIAM has requested thorough MoPNG that AUS 32 should be made available at fuel retail outlets so as to ensure availability and consistent quality. SIAM has also proposed a Quality Control Order for AUS 32 to DHI.		Government



context due to unique situation unlike Europe. SIAM has voluntarily done In-service conformity check on BS IV vehicles and report was prepared and submitted to the Ministry during 60th SCOE meeting on 22nd August 2019.

Indian Real Driving Emission procedure finalized including Family concept (based on Europe + India Unique requirements).

Besides regulations, we have the moral responsibility to pass-on a safer and cleaner planet to the Next Generation.



Interaction of SIAM and FIPI on rollout of BS VI fuels, New Delhi



51st Meeting of Emissions and Conservation Group of SIAM, New Delhi



Service & Inspection, Maintenance & Certification Group

The SIAM Service Heads Group holds regular interactions to discuss the on-ground execution of regulations eg., support on issues such as HSRP / FasTag implementation, closure of information related to voluntary recalls, creating awareness about fire hazards due to use of non-approved fitments & compliance of service workshops to environmental norms. A dedicated workshop was also held for SIAM members to deliberate and share constructive views

on the draft of the new Motor Vehicle (Amendment) Act, 2019, with special focus on vehicle recall to ensure road safety. Support was also provided by Service group for workshops conducted for traffic & police officials. The efforts and contribution of the group were also greatly recognized and appreciated during the nation-wide lockdown due to COVID-19 outbreak, primarily for aiding in the services for vehicles required for transportation of essential goods.

Annual Report Card (2019-20)				
S.No.	Deliverable	Measures	Owner	Stakeholder
1	To combat issues related to maintenance procedures and on-ground hurdles faced by OEMs post the sale of vehicles	<ol style="list-style-type: none">SIAM's Voluntary Recall Code continues to be the one-stop platform for all vehicle recalls conducted by SIAM members, since Govt policy is awaited.As a proactive step, SIAM engaged in dialogue with its members to educate their customers on safe vehicle usage and maintenance practices.Group took proactive measures for providing service to vehicles involved in essential services during COVID-19 lockdown.Actively monitors various guidelines issued for Service Centres to carry out operations in environmentally friendly manner.	Service & Inspection, Maintenance & Certification Group	Society



SIAM Service & IMC Group Meeting, New Delhi



SIAM Service & IMC Group Meeting with ASDC, New Delhi



Three Wheeler Group

The Indian three-wheeler industry has undergone many technical developments in the area of environment and safety regulations. The Group transited to BS VI Emission Norms from 1st April 2020 in just 3 years, after moving to BS IV Emission Norms from 1st April 2017, across the country. The Standing Committee on Emissions chaired by Joint Secretary, Ministry of Road Transport & Highways have in-principle concurred to SIAM's OBDII 2-stage implementation proposal for BS-VI 3W, with OBDII-A from 2023 and OBDII-B from 2025. Revised noise standard have been notified by Bureau of Indian Standards as per IS 3028 (Part 3): 2018 for 3W in moving condition, which is aligned with ECE R9.07.

Further, the stringent Brake performance norms, Safety provisions for occupant of three-wheelers (e.g. fitment of doors for passenger compartment, driver/passenger seats dimensions, adequate leg space dimensions, etc.) and affixing Reflective tapes at front and rear of vehicle; are implemented from 1st April 2020. EPCA recommended to enhance the permit numbers for BS VI Three-Wheeler Registration in Delhi to the Hon'ble Supreme Court and allowing multiple vehicles EV 3Ws be registered by companies for providing last mile and short distance connectivity. Removal of Permits for Electric Three-Wheelers are also being discussed.

Annual Report Card (2019-20)				
S.No.	Deliverables	Measures	Owner	Stakeholders
1	OBD for BS VI Three Wheelers	In Principle agreement by Government to split OBD II for BS VI Three-Wheelers in two steps in 2023 and 2025	Three Wheeler Group	Membership and Government
2	Enhancement of Permits	Hon'ble Supreme Court is considering Enhancement / Removal of Permits of Electric Three Wheelers		Membership and Government



Technical Council

The Technical Council being Chaired by Mr K N Radhakrishnan, Whole Time Director and CEO, TVS Motor Company and Co Chaired by Mr Anuj Kathuria, CEO, Ashok Leyland Ltd has been meeting up and led to structured engagement of thought leaders for media interactions and communication outreach to support objectives of BTNR initiatives of SIAM for the Technical

Groups i.e. Electric Mobility, Connected Vehicle, Recycling, Styling n Design, Sustainable Mobility and Frontier Technology and Innovation. The council has helped group Chairs & Cochairs deliberate industry issues of importance and facilitating them formulate strategic and tactical action plan for the year.



SIAM Technical Council Meeting, Bengaluru



(L-R) Mr Prashant K Banerjee, Executive Director, SIAM; Mr K N Radhakrishnan, Whole Time Director & CEO, TVS Motor Company (Chairman); Mr Anuj Kathuria, Chief Operating Officer, Ashok Leyland (Co Chairman); Mr Ashwath Ram, Managing Director, Tata Cummins Pvt Ltd and Cummins India Ltd



SIAM and JAMA Engagements

For more than a decade SIAM and JAMA have been engaged on exchange of information on safety, emission regulations and mega technology trends. This is an annual meeting being hosted by SIAM and JAMA alternatively in India and Japan. SIAM and JAMA started interactions in the year 2006 in JAMA Office in Tokyo with aim to understand each other's position on various safety and emission regulations being discussed in WP 29. in October 2019, both the associations conducted a series of meetings over a span of three days on the sidelines of Tokyo Motor Show 2019.

Tokyo Motor Show 2019:

In Tokyo, SIAM – JAMA Meeting was scheduled back to back with Tokyo Motor Show so that the delegation may also visit the show.

Both the associations and their members envisaged the benefits from these interactions and proposed to extend the scope of meetings and, hence, in addition to the SIAM JAMA Technical Regulation, the two associations also started organizing SIAM JAMA Two-Wheeler Group Meeting and SIAM JAMA Emission Group Meeting. These engagements helped Japanese and Indian automobile industry's commitment to work together for steady and sustainable development, and for mutual advancement.

SIAM JAMA 14th Technical Regulation Meeting discusses all the technical regulations in place & proposed to come in near future. Discussions are held about the market situation, business opportunities

and areas of collaboration between Japan and India around crucial topics of Sustainable Mobility, Technical Regulations, Vehicle Safety, Fuel-Efficiency, Emissions, Electrification of Mobility, Intelligent Transportation System (ITS) and Connected Vehicles which is assuming greater relevance by the day. Discussions revolve around important motor vehicle platforms, market trends, business and investment environments, trade agreements (WTO, RCEP and other bilateral agreements), market stimulation measures, Government automotive policies, harmonization of automotive technical regulations, environmental issues, road safety education, and auto shows

SIAM JAMA Two-Wheeler Meeting: The group discusses various regulatory requirements related to two wheelers viz. emissions, safety, etc.

The SIAM JAMA engagement provides opportunity for the vehicle manufacturers of both the countries for a detailed and insightful discussion on various automotive topics. In the process, it enables members from both the associations to assess the dynamic market situation in both the nations and further evaluate areas of collaboration.

On this sidelines of SIAM JAMA Meeting, SIAM Delegation was also invited for a visit at Honda Car Head Quarters in Wakoshi, Japan for the information sharing about Special purpose vehicles for differently abled people which is also an important priority agenda for us in India as well.



SIAM JAMA 14th Technical Regulation Meeting





SIAM Delegation at the Tokyo Motor Show



SIAM Delegation at Honda Car Head Quarters, Wakoshi, Japan



SIAM JAMA Two Wheeler Meeting, Tokyo



SIAM JAMA Emission Group Meeting, Tokyo



Aftermarket Parts Group

Aftermarket Parts Group actively worked in the area of promoting genuine parts through four key pillars Consumer Awareness; Quality Standards, Enforcement and Common Digital Platform.

Industry plagued by menace of counterfeit/ sub-standard parts being sold in aftermarket. The recent Quality Control Orders (QCO) would be a welcome step in the Group's endeavour to promote genuine parts. However, at the same time, our endeavor has been to ensure ease of doing business when such QCO are implemented. With an intent to enhance affordability, Group has also worked on policy framework on spare parts to be included in recycling policy. Policy on

refurbishment for economy parts in-line with European policy.

The Group in its continued efforts to promote genuine parts is looking to engage consumers at large by creating a common digital platform for all SIAM member companies. The outcome would be a common app under the SIAM banner instead individual apps of member companies to enable the consumers dealing with multiple brands to be aware/verify/check authenticity of their purchased parts through a single app. It is envisaged that a common app under the SIAM umbrella would have better visibility and outreach.

Annual Report Card (2019-20)				
S.No.	Deliverable	Measures	Owner	Stakeholder
1	Promotion of Genuine Parts	Worked on bringing Quality Control Measures	Aftermarket Parts Group	Membership



SIAM Aftermarket Parts Group at Toyota Kirloskar Motor Plant, Eco Park and National Parts centre visit, Bidadi, Bangalore



Initiatives of SIAM – SAFE

SIAM – SAFE stayed on course to supporting society

Environment protection and Road Safety are matters of urgent public health and developmental import. Environment protection is the practice of protecting the natural environment by individuals, organisations and governments. SIAM and SAFE are relentlessly working on disseminating knowledge and encouraging behavioural change for a greener environment by organising vehicle maintenance and free PUC drives, tree plantation, supporting reduction in stubble burning etc. With regard to road safety, SIAM-SAFE provided road safety training to students, drivers and vehicle owners through the year. With a view to promoting road safety interventions in the different states, SIAM organised interactions with several State Governments during 2019-20. Interactions were held with the Governments of Himachal Pradesh, Chandigarh, West Bengal and others. SIAM and its members and associates reached out to millions of people through the various initiatives.

The sustained efforts and some positive results, notwithstanding, we are confronted by unacceptably high number of fatalities, estimated at an average of

1.35 million people killed each year. In addition, as many as 50 million people are injured on Indian roads each year.

While we persevered on our mission, the outbreak of the COVID-19 pandemic around the first quarter of 2020 has severely impacted the country and the globe. SIAM-SAFE swung into action swiftly and has, till date reached out to 10,000 commercial vehicle drivers, provided then with free food, health kits consisting of face mask, sanitizer and liquid hand wash to help them protect themselves by adopting a safe hygiene regime.

As the Industry, the country, and the globe as a whole gears to address the ramifications of the outbreak, SIAM-SAFE, on its part, strengthens the resolve to support protection of the environment and improving safety on Indian roads. SIAM-SAFE will work towards promoting sustainable solutions to address the twin challenges by reaching out to all through webinars, online training, lectures series etc. and proceed towards our goal of spreading the knowledge and information on environment and safety.

Annual Report Card (2019-20)

S.No.	Deliverable	Measures	Owner	Stakeholder
1	Safety on road and fatality reduction (awareness, training and education, accident data analysis and IM&C)	<ol style="list-style-type: none">1. SIAM continued its interaction with State Governments on automobile technology.2. Environment protection campaign across the nation along with SIAM members and their dealer network was organized on 5th June 2020, World Environment Day and a Webinar on “Making Collective efforts to build a Greener and Sustainable Tomorrow” was also organized.3. SIAM worked with IMMA’s members to showcase best practices adopted world wide in the area of two-wheeler safety.4. SIAM- SAFE organized free distribution of health kits, ration kits and food to commercial vehicle drivers and poor farmers in Punjab during the COVID 19 pandemic.5. During National Road Safety Week in January 2020, SIAM-SAFE organized a wide range of activities including training, eye checkup and health fitness camps, across the nation.6. Along with Delhi Traffic Police, SIAM organized Road Safety School online outreach Programs. Various competitions on road safety and online road safety awareness lectures were conducted for schools students, teachers and parents.	Initiatives of SIAM – SAFE	Society, Government, Media & Membership



INDIAN AUTOMOBILE INDUSTRY'S INITIATIVES ON ROAD SAFETY

2019 - 2020





SIAM COUNCILS & GROUPS 2019-20

A. COUNCIL ON INTERNATIONAL BUSINESS



Chairman: Dr Pawan Goenka

Managing Director,
Mahindra & Mahindra Ltd.

1. INTERNATIONAL RELATIONS & TRADE POLICY GROUP



Chairman: Mr Ketan Doshi

Sr. Vice President –
New Business Development
Mahindra & Mahindra Ltd.



Co-Chairman: Mr Rahul Bharti

Executive Vice President – Corporate
Planning & Government Affairs,
Maruti Suzuki India Ltd.

2. EXPORTS GROUP



Chairman: Mr Rakesh Sharma

Executive Director &
Whole-Time Director,
Bajaj Auto Ltd.



Co-Chairman: Mr Rudrarup Maitra

Head – International Business (CV),
TATA Motors Ltd.

B. COUNCIL ON MARKET



Chairman: Mr S S Kim

Managing Director & CEO,
Hyundai Motor India Ltd.

1. VEHICLE CLASSIFICATION, SALES REPORTING & ANALYSIS GROUP



Chairman: Mr Ramakrishnan

Global Head- Customer, CVBU,
TATA Motors Ltd.



Co-Chairman: Mr Narender Kukreti

Deputy General Manager,
Toyota Kirloskar Motor Pvt Ltd.

2. TRADE FAIRS GROUP



Chairman: Mr Gurpratap Boparai

Managing Director,
SKODA AUTO Volkswagen India
Pvt Ltd.



Co-Chairman: Mr Sanjeev Handa

Vice President (Corporate
Communications),
Maruti Suzuki India Ltd.



3. LOGISTICS GROUP



Co-Chairman: Mr Nidhish Kuchhal
General Manager -Logistics,
Mahindra & Mahindra Ltd.

6. DIGITIZATION GROUP



Chairman: Mr Vijay Sethi
CHRO, CIO & Head-CSR,
Hero MotoCorp Ltd.

4. CSR & COMMUNITY SERVICES GROUP



Chairman: Mr Naveen Soni
Senior Vice President- Sales &
Customer Service, Toyota Kirloskar
Motor Pvt. Ltd.



Co-Chairman: Mr Neeraj Bhalla
Vice President –
Head Digital Center & Strategy,
Mahindra & Mahindra Ltd.

5. SERVICE & INSPECTION, MAINTENANCE AND CERTIFICATION GROUP



Chairman: Mr Sanjoy Gupta
Head - Customer Care,
Mahindra & Mahindra Ltd.



Co-Chairman:
Mr Sriniwas Chakravarty
Head – Technical Service India,
SKODA AUTO Volkswagen India Pvt. Ltd.

C. COUNCIL ON ECONOMIC AFFAIRS



Chairman: Mr Shekar Viswanathan
Vice Chairman &
Whole-Time Director,
Toyota Kirloskar Motor Pvt. Ltd..

1. SOURCING GROUP



Chairman: Mr Hemant Sikka
President & CPO,
Powerol & Spares Business,
Member of the Group Executive Board
Mahindra & Mahindra Ltd.



Co-Chairman: Mr Jagadish Hegde
Director & Sr. Vice President,
Isuzu Motors India Pvt Ltd.



2. ECONOMIC RESEARCH GROUP



Chairman: Mr Narayan Swamy Raja
Managing Director
Toyota Kirloskar Motor Pvt. Ltd.



Co-Chairman: Mr B Srinivas
Sr. Vice President,
Strategy, Product Planning, Bus
Sales & Marketing,
VE Commercial Vehicles Ltd.

5. DIRECT TAX GROUP



Chairman: Mr Anantharaman T
General Manager – Tax & Finance,
Mercedes-Benz India Pvt. Ltd.



Co-Chairman: Mr Sanjeev Agarwal
Head – Taxation & Customs
BMW India Pvt. Ltd.

3. TAXATION POLICY GROUP



Chairman: Mr Vinod Aggarwal
Managing Director and CEO,
VE Commercial Vehicles Ltd.



Co-Chairman: Mr Rajesh Shukla
Head – Indirect Taxation,
TATA Motors Ltd.

6. FINANCE, LEASING & INSURANCE GROUP



Chairman: Mr Gopal Bansal
Chief Financial Officer,
SML Isuzu Ltd.



**Co-Chairman:
Mr Surendra Srivastava**
Chief Executive Officer,
Maruti Insurance Broking Pvt Ltd.

4. TAXATION PROCEDURAL GROUP



Chairman: Mr D D Goyal
Executive Director – Finance,
Maruti Suzuki India Ltd.



Co-Chairman: Mr Mohan Raghavan
Senior Vice President – Indirect Tax,
Mahindra & Mahindra Ltd.

7 HUMAN CAPITAL GROUP



Chairman: Mr Sudhakar Panda
Senior Vice President – HR,
Fiat India Automobile Pvt. Ltd.



**Co-Chairman:
Mr R Anandakrishnan**
Executive Vice President (HR & IT),
TVS Motor Company Ltd.



8. AFTERMARKET PARTS GROUP



Chairman: Mr Yash Pal Sachar
General Manager,
Honda Car India Ltd.



Co-Chairman: Mr Sushant Naik
Global Head, Government &
Public Affairs,
TATA Motors Ltd.



Co-Chairman:
Mr Sanjoy Chatterjee
Head – Bazaar Sales,
Mahindra & Mahindra Ltd.



Co-Chairman: Mr Vikram Gulati
Country Head & SVP –
Extn. Affairs, CSR, PR, CG,
Toyota Kirloskar Motor Pvt Ltd.

D. TECHNICAL COUNCIL



Chairman: Mr K N Radhakrishnan
Director & CEO,
TVS Motor Company Ltd.



Chairman: Capt. N S Mohan Ram
Advisor,
TVS Motor Company Ltd.



Co-Chairman: Mr Anuj Kathuria
Chief Operating Officer,
Ashok Leyland Ltd.



Co-Chairman:
Mr Shrikant Deshmukh
General Manager, Certification and
Tech Regulations,
Mercedes-Benz India Pvt Ltd.

1. ELECTRIC MOBILITY GROUP



Chairman: Mr Mahesh Babu
MD & CEO – Mahindra Electric
Mahindra & Mahindra Ltd.



Chairman: Mr Ashwath Ram
Managing Director,
TATA Cummins Pvt Ltd and
Cummins India Ltd.



Co-Chairman: Dr S J Dhinagar
Vice President –
Advanced Engineering,
TVS Motor Company Ltd.



Co-Chairman: Mr Rajendra M Petkar
President & CTO,
TATA Motors Ltd.



4. CONNECTED VEHICLES GROUP



Chairman: Mr N S Talib
AVP & G. Operating Head
Manufacturing,
Honda Cars India Ltd.



Co-Chairman:
Mr Randeep Singh Khokhar
Senior General Manager,
TATA Motors Ltd.

5. STYLING & DESIGN GROUP



Chairman: Mr Saurabh Singh
Head, Design Studio,
Maruti Suzuki India Ltd.



Co-Chairman: Mr Nilay Dembi
Senior Principal Designer,
Automotive Sector,
Mahindra & Mahindra Ltd.

6. FRONTIER TECHNOLOGY & INNOVATIONS GROUP



Chairman:
Mr Pradeep K Thimmaian
Vice President,
Daimler India Commercial
Vehicles Ltd.



Co-Chairman: Mr R Narasimhan
Vice President (R&D),
Bajaj Auto Ltd.

E. NATIONAL & INTERNATIONAL REGULATIONS COUNCIL



Chairman: Mr R S Sachdeva
Chief Operating Officer,
VE Commercial Vehicles Ltd.



Co-Chairman: Mr Abraham Joseph
Chief Technology Officer,
Bajaj Auto Ltd.

1. EMISSIONS & CONSERVATION GROUP



Chairman: Mr C V Raman
Senior Executive Director –
Engineering,
Maruti Suzuki India Ltd.



Co-Chairman: Mr R Velusamy
Senior Vice President,
Mahindra & Mahindra Ltd.

2. CMVR & SAFETY REGULATIONS GROUP



Chairman: Mr S Ravishankar
Executive Advisor –
Product Development,
Ashok Leyland Ltd.





Co-Chairman: Mr Deepak Sawkar
Senior Vice President,
Engineering & R&D
Maruti Suzuki India Ltd.



Co-Chairman: Mr Anil Kumar
Senior General Manager –
Body & Trim Cars,
TATA Motors Ltd.

3. TWO WHEELERS GROUP



Chairman: Mr Harjeet Singh
Executive Advisor – Technical,
Hero MotoCorp Ltd.



Co-Chairman: Mr Suraj Agarwal
Vice President,
Honda Motorcycle & Scooter
India Pvt. Ltd.

F. COMMERCIAL VEHICLES CEO'S COUNCIL



Chairman: Mr Girish Wagh
President, CVBU,
TATA Motors Ltd.

4. THREE WHEELERS GROUP



Chairman: Mr V Pattabiraman
Associate Vice President,
TVS Motor Company Ltd.



Chairman: Mr Diego Graffi
Chairman & Managing Director,
Piaggio Vehicles Pvt. Ltd.



Co-Chairman: Mr Arvind Kumbhar
Divisional Manager (R&D),
Bajaj Auto Ltd.

H. TWO WHEELERS CEO'S COUNCIL



Chairman: Mr K N Radhakrishnan
Director & CEO,
TVS Motor Company Ltd.

5. INTERNATIONAL HARMONIZATION GROUP



Chairman: Dr Tapan Sahoo
Senior Vice President -
Engineering & R&D,
Maruti Suzuki India Ltd.



I. PASSENGER CAR CEO'S COUNCIL



Chairman: Mr Vikram Kirloskar
Vice Chairman,
Toyota Kirloskar Motor Pvt. Ltd.

K. SAFE – SOCIETY FOR AUTOMOTIVE FITNESS & ENVIRONMENT



President: Mr Anupam Shrivastava
Vice President –
Government Affairs & CSR,
Bajaj Auto Ltd.

J. MUVS CEO'S COUNCIL



Chairman:
Mr Shekar Viswanathan
Vice Chairman &
Whole-Time Director,
Toyota Kirloskar Motor Pvt. Ltd.



Vice President:
Mr Mahesh Rajoria
Adviser,
Maruti Suzuki India Ltd.



SIAM EXECUTIVE COMMITTEE 2019-20

COMPANY	MEMBER	ALTERNATE MEMBER
Ashok Leyland Ltd	Mr Anuj Kathuria	
Atul Auto Ltd	Mr J J Chandra	
Bajaj Auto Ltd	Mr Rakesh Sharma	Mr Eric Vas
BMW India Pvt Ltd	Mr Vikram Pawah	Mr Vinod Pandey
Cummins India Ltd	Mr Ashwath Ram (Co-opted)	Ms Anjali A Pandey
Daimler India Commercial Vehicles Pvt. Ltd.	Mr. Satyakam Arya	Mr Pradeep T.
Fiat India Automobiles Pvt Ltd	Mr Ravi Gogia	Mr Partha Datta
Force Motors Ltd	Dr Abhay Firodia	Mr Prasan Firodia
Hero MotoCorp Ltd	Mr Pawan Munjal	Mr Harjeet Singh
Hindustan Motors Finance Corp Ltd	Mr Uttam Bose (Co-opted)	Mr Prakash Sahu
Honda Cars India Ltd	Mr Gaku Nakanishi	Mr Praveen Paranjape
Honda Motorcycle & Scooter India Pvt Ltd	Mr Atsushi Ogata	Mr V Sridhar
Mahindra & Mahindra Ltd	Mr Rajan Wadhera	Mr Veejay Ram Nakra
Maruti Suzuki India Ltd	Mr Kenichi Ayukawa	Mr Rahul Bharti
Mercedes-Benz India Pvt Ltd	Mr Martin Peter Schwenk	Mr Shekhar Bhide
Nissan Motor India Pvt Ltd	Mr Sinan Ozkok (Co-opted)	Mr Rakesh Srivastava
Renault India Pvt Ltd	Mr Venkatram Mamillapalle	Mr Jatin Aggarwal
Royal Enfield (A Unit of Eicher Motors)	Mr S Sandilya (Co-opted)	
Simpson & Co. Ltd.	Mr P S Rajamani	
SKODA AUTO Volkswagen India Pvt. Ltd.	Mr Gurpratap Boparai	Mr Pankaj Gupta
Tata Motors Ltd	Mr Shailesh Chandra	Mr Sushant Naik
Toyota Kirloskar Motor Pvt Ltd	Mr Masakazu Yoshimura	Mr Vikram Gulati
Toyota Kirloskar Motor Pvt Ltd	Mr Vikram Kirloskar (Co-opted)	
TVS Motor Company Ltd	Mr K N Radhakrishnan	Mr Sudarshan Venu
VE Commercial Vehicles Limited	Mr Vinod Aggarwal	Mr B Srinivas
Volvo Group India Pvt Ltd	Mr Suresh Chettiar	Mr Umesh D S

As on 14th August 2020



PAST PRESIDENTS

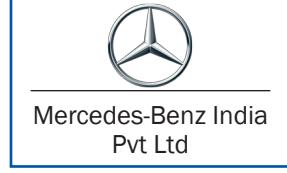
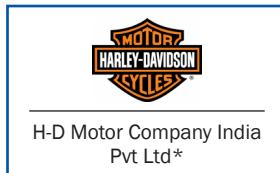
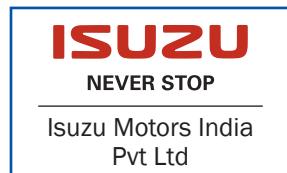
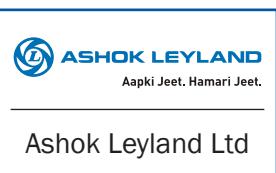
YEAR	NAME	COMPANY
1960	Mr Lalchand Hirachand*	Premier Automobiles Ltd
1961	Sir L P Misra*	Hindustan Motors Ltd
1962 & 1963	Mr A E L Collins*	Ashok Leyland Ltd
1964	Mr Keshub Mahindra	Mahindra & Mahindra Ltd
1965 & 1966	Dr M A Chidambaram*	Automobile Products of India Ltd
1967 & 1968	Mr K V Srinivasan*	Standard Motor Products IndiaLtd
1969	Mr A H Tobaccowala*	TELCO Ltd
1970 & 1971	Mr A Sivasailam*	Simpson & Co. Ltd
1972 & 1973	Mr N K Firodia*	Bajaj Tempo Ltd
1974 & 1975	Mr J E Talaulicar*	TELCO 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 India Ltd
1982 & 1983	Mr R J Shahaney	Ashok Leyland Ltd
1984 & 1985	Dr V Krishnamurthy	Maruti Udyog Ltd
1986 & 1987	Mr S L Bhattar*	Hindustan Motors Ltd
1988/89 & 1989/90	Mr B De Souza*	Mahindra & Mahindra Ltd
1990/91 & 1991/92	Dr Abhay Firodia	Bajaj Tempo Ltd
1992-1993	Mr Subodh Bhargava	Eicher Motors Ltd
1993/94 & 1994/95	Mr Vinod L Doshi*	Premier Automobiles Ltd
1995/96 & 1996/97	Dr Brijmohan Lall*	Hero MotoCorp Ltd
1997/98 & 1998/99	Mr V M Raval*	TELCO Ltd
1999/00 & 2000/01	Mr Venu Srinivasan	TVS Motor Company Ltd
2001/02 & 2002/03	Mr R Seshasayee	Ashok Leyland Ltd
2003/04 & 2004/05	Mr Jagdish Khattar	Maruti Udyog Ltd
2005/06 & 2006/07	Mr Madhur Bajaj	Bajaj Auto Ltd
2007/08 & 2008/09	Mr Ravi Kant	Tata Motors Limited
2009/10 & 2010/11	Dr Pawan Goenka	Mahindra & Mahindra Ltd
2011/12 & 2012/13	Mr S Sandilya	Royal Enfield (Unit Eicher Motors)
2013/14 & 2014/15	Mr Vikram Kirloskar	Toyota Kirloskar Motors Ltd
2015/16 & 2016/17	Mr Vinod K Dasari	Ashok Leyland Ltd
2017/18	Dr Abhay Firodia	Force Motors Ltd
2018/19 & 2019/20	Mr Rajan Wadhera	Mahindra & Mahindra Ltd

* Since deceased

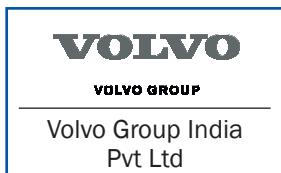
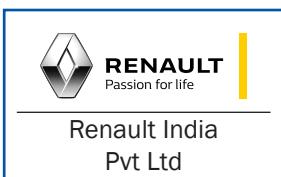
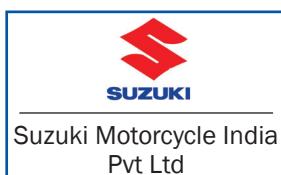
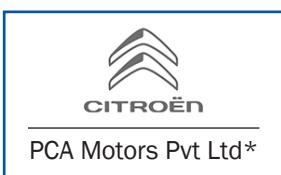
Note: The names of the Companies are as they were known then.



SIAM MEMBERS



SIAM MEMBERS



In alphabetical order
*Associate Member
As on 14th August, 2020



LINKAGE WITH OTHER INSTITUTIONS IN INDIA

All India Motor Transport Congress
Alloy Steel Producers Association
Aluminium Association of India
Asian Development Bank
Association of Indian Forging Industry
Association of State Road Transport Undertakings
The Associated Chambers of Commerce and Industry of India
Automotive Component Manufacturers Association of India
Automotive Services Equipment's Association
Automotive Skills Development Council
Automotive Tyre Manufacturers Association
Bureau of Indian Standards
Central Institute of Road Transport
Central Road Research Institute
Center for High Technology
Confederation of Indian Industry
Delhi Transport Corporation
Delhi Metro Rail Corporation
Federation of Automobile Dealers Association
Federation of Indian Chambers of Commerce and Industry
Indian Auto LPG Coalition
Indian Diesel Engine Manufacturers Association
Indian Institute of Foreign Trade
Indian Institute of Petroleum
Indian Institute of Technology
Indian Machine Tool Manufacturers Association
Indian Rubber Institute
Insurance Regulatory and Development Authority of India
Institute of Road Traffic Education
International Centre for Automotive Technology
National Automotive Testing and R&D Infrastructure Project
National Council of Applied Economic Research
National Institute of Design
National Skill Development Corporation
The National Association of Software and Service Companies
Petroleum Federation of India
Petroleum Planning & Analysis Cell
Research & Information Systems for Non-aligned and Other Developing Countries
Society for Automotive Fitness & Environment
Technology Information Forecasting and Assessment Council
The Automotive Research Association of India
The Energy and Resources Institute
Tractor Manufacturers Association
Vehicle Research & Development Establishment
Western India Automobile Association

In alphabetical order



OVERSEAS LINKAGE

ASEAN Automotive Federation (AAF)
Asia Pacific Economic Cooperation Automotive Dialogue (APEC AD)
Associação Nacional dos Fabricantes de Veículos Automotores (ANFAVEA)
AusTrade Commission, Australia
Auto Alliance, USA
American Auto Policy Council (AAPC), USA
Automotive Federation of Malaysia (AFM), Malaysia
Automotive Policy Planning, METI, Japan
Automotive Research & Testing Centre, Taiwan
Bangladesh Automobiles Assemblers and Manufacturers Association,
Bangladesh Motorcycle Assemblers and Manufacturers Association
Ceylon Motor Traders' Association (CMTA), Sri Lanka
China Association of Automobile Manufacturers (CAAM), P R China
Clean Air Initiatives of Asian Cities (CAI-Asia)
Comité des Constructeurs Français d'Automobiles (CCFA), France
European Automobile Manufacturers Association (ACEA), Europe
European Association of Motorcycle Manufacturers (ACEM).
Federal Chamber of Automotive Industry (FCAI), Australia
Federation of Asia Motorcycle Industries (FAMI), Singapore
Federation of Nepal Chamber of Commerce & Industry, Nepal
FOURIN
Fuels and Lubes Asia (F&L Asia)
Global Automotive Industry Dialogue (GAID)
Gulf Cooperation Council (GCC)
Indonesia Automotive Federation
Indonesian Automotive Industry Association (GAIKINDO), Indonesia
Indonesian Motorcycle Industry Association, Indonesia
Indo Bangladesh Chamber of Commerce and Industry
International Motorcycle Manufacturers Association (IMMA)
International Organization of Motor Vehicle Manufacturers (OICA)
Japan Automobile Manufacturer Association (JAMA), Japan
Japan Automobile Standards Internationalisation Centre, Japan
Korean Automobile Manufacturers Association (KAMA), South Korea
Motor Vehicle Manufacturers Association, Italy



Motorcycle and Scooter Assemblers and Distributors Association of Malaysia
Myanmar Automobile Manufacturers and Distributors Association (MAMDA)
National Alternative Fuel Training Consortium, USA
National Association of Automobile Manufacturers of South Africa (NAAMSA)
National Highway Traffic & Safety Authority, USA
Nepal Auto Dealers Association (NADA)
Philippine Automotive Federation, Philippines
SAE International, USA
Singapore Motorcycle Trade Association, Singapore
Taiwan Transportation Vehicle Manufacturers Association, Taiwan
Thailand Automotive Institution, Thailand
The Indonesian Motorbike Assemblers' Association (PASMI) , Indonesia
The Society of Motor Manufacturers and Traders (SMMT), UK
The Thai Automotive Industry Association (TAIA), Thailand
The United Nations Economic Commission for Europe (UNECE)
Transport Research Laboratory, UK
UK Trade & Investment (UKTI)
US Department of Commerce, USA
US Department of Energy, USA
US Environment Protection Agency, USA
Verband der Automobilindustrie e.v. (VDA), Germany
Vietnam Register, Vietnam

In alphabetical order



SIAM

Society of Indian Automobile Manufacturers

Core-4B, 5th Floor India Habitat Centre, Lodi Road, New Delhi-110 003 (India)

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