

SIAM

Society of Indian Automobile Manufacturers

ANNUAL REPORT 2020-21

Re-Building the Nation, Responsibly



SIAM

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PRESIDENT'S MESSAGE



I sincerely wish that each one of you is keeping safe and healthy in these tough times. My deepest condolences to the near and dear ones of people we lost during the pandemic.

Safety – A Key Priority

The second wave of Covid-19 came with much greater force, scale and speed. It gave the industry very less time to manage things. A new challenge of oxygen shortage emerged during the second wave. I can proudly say that Indian Automobile Industry put the best foot forward to support the Government in its fight against this deadly virus.

Many members pro-actively discontinued operations to divert industrial oxygen for medical use. Members took various initiatives to augment the supply of medical oxygen to hospitals, support healthcare infrastructure and help local communities. In fact, some members also tied up with PSA Plant manufacturers to de-bottleneck their operations and scale up the production of oxygen plants by over 10 times. By way of CSR, members contributed oxygen generating plants, ventilators, oxygen concentrators, oxygen cylinders, mobile oxygen vans, ICU beds, and much more.

Keeping safety as the topmost priority, Industry is following all SOPs and Government guidelines in its factories and offices. Right from Tier-2 and Tier-3 suppliers, to the factories of Tier-1 supplier partners, to our own factories, to the dealer showrooms and workshops, till the customer, Industry is committed to ensure safety of everyone in the value chain.

With the support of the Government, members have also undertaken large scale vaccination of employees, their family members, and dealer and vendor partners. I urge everyone to continue to follow Covid-19 appropriate behaviour and get vaccinated soon to minimise the risk of infection spread.

The current state of Indian Automobile Industry

A country's economic health has a very close co-relation with the health of its automobile sector. Indian Automobile Industry is a key driver of economic growth in the country. It is the largest sector within manufacturing, contributing to more than one-third of the manufacturing GDP in the country. This Industry gives employment to over 3.7 Cr people directly and indirectly. 15% of country's total GST collection comes from the Automobile Industry.

While these are facts, there is another reality. And that is, that the growth of Indian Automobile Industry has been slowing down. Indian Automobile Industry has been facing a deep structural slowdown even before the Covid-19 pandemic started.



If we look at a 5 year period from 2005 to 2010, Passenger Vehicle segment was growing at a CAGR of 12.9%. This dropped to 5.9% in the next 5 year period from 2010 to 2015.

This further dropped to just 1.3% during 2015 to 2020. Similarly, Two-wheeler segment was growing at a CAGR of 9.8% during the decade of 2000 to 2010. In the next decade from 2010 to 2020, this growth rate fell to 6.4%. During the same decadal periods, Three-Wheeler segment CAGR fell from 9.8% to 3.8% and Commercial Vehicle segment fell from 12.7% to just 3%.

Covid-19 has further increased the problems of the Industry. It has pushed industry back by many years, into the negative zone. At the closing of FY 2020-21, cumulative sales of the passenger vehicle segment were below the level of 2015-16, that for two-wheeler segment were below the level of 2014-15 and for commercial vehicle segment, sales were below 2010-11 level. Three-wheeler segment has been the worst hit, with sales being pushed back by around two decades.

Challenges for the Industry

Today, Industry is facing various immediate and medium-term challenges. First and foremost is, ensuring health and safety of our people amidst the uncertainties posed by the pandemic. Other supply chain challenges include global shortage of semi-conductors, rising commodity prices with significant surge in steel and precious metals, shortage of shipping containers and import restrictions in the form of quality control orders etc. Upcoming new regulations within next 2 years which again will have significant cost impact.

At the same time, as a responsible industry we are focused on sustainable growth of the industry, making vehicles more affordable for the customers, enhancing local content in our products, proactively looking at long term regulations and developing new powertrain technologies to achieve as close as possible to Carbon Net Zero.

Enablers for Sustainable Growth

Industry has identified some key enablers for a long-term sustainable growth. These are:

1) Focus on Atmanirbhar Bharat

I sincerely appreciate the Government's focus on the Atmanirbhar Bharat Mission under the vision of Hon'ble Prime Minister Shri Narendra Modi.

Indian Automobile Industry has been an epitome of Make in India for India and for the World. Over the last four decades, Indian Automobile Industry has created a whole ecosystem of local manufacturing. Thousands of component suppliers down the tiers, including hundreds of joint ventures and technical collaborations with foreign companies, form the backbone of auto manufacturing in India. Not just that, over 8% of total merchandise exports from India come from the Automobile Industry. Annually, industry exports vehicles and components worth more than 27 Bn USD.

At the same time, Industry also realises that much more can be done. In view of this, I am happy to share that both SIAM and ACMA jointly worked out a detailed Localization Roadmap for the Industry. An elaborate study including all major components volume as well as value wise was done to understand the potential for localisation and prepare a clear roadmap. Industry has taken a challenging target of about 15-20% localization in the next 2 to 5 years. This will not only bring us closer to self-reliance, but also generate huge business of about 25,000-30,000 Cr for the MSME sector.

2) A Long-term Regulatory Roadmap

I am also pleased to share that SIAM has pro-actively prepared a long-term regulatory roadmap for the Indian Automobile Industry. The same has been prepared with guidance of all critical industry stakeholders and the policy makers. Road map also incorporates inputs based on global regulations and timelines.



Subsequently keeping the best interest of the nation and our national commitments for environment and safety, the long-term regulatory road map for India has been prepared.

We envisage such a balanced long term Road map in addition to ensuring long term stability will encourage new investments, would facilitate faster localization, and would contribute to sustainable growth of the industry.

With a road map in place, SIAM will continue to engage constructively with all critical stakeholders and the policy makers.

3) New Powertrain Technologies

As a responsible industry, we are committed to reduce the import of crude oil and move as close as possible to Carbon Net-Zero with local manufacturing. To achieve this, Industry is working on developing multiple alternate powertrain technologies.

I am thankful to different Government Ministries including our Parent Ministry, Ministry of Heavy Industries, for their support and encouragement to the industry on multiple technology solutions including Electric, Hybrid, CNG, LNG, Biofuels and Ethanol. India needs a combination of all such technologies to help us bring closer to Carbon Net-Zero. This will help not only help in cleaner environment but a stronger industry and a stronger economy.

4) Scrappage Policy

Scrappage Policy has been a long standing request from the Industry. I am grateful to the Hon'ble Prime Minister Shri Narendra Modi and Hon'ble Minister of Road Transport & Highways Shri Nitin Gadkari, for rolling out a Fitness Based Scrappage Policy for the country. Being fitness based, this policy has the right intention to eliminate vehicles based on road-worthiness, while ensuring road safety and environmental benefit.

To realise the benefits of environment and safety much faster, industry has requested for the vehicle inspection to start much earlier in the life-cycle. Also, to make the policy scalable and quickly implementable all over the country, industry in line with the global practices has requested to allow our interested dealer partners to serve as inspection centres for cars and commercial vehicles. This would enable the fitness policy to be scaled up immediately.

5) Production Linked Incentive Scheme

I am thankful to the Government for announcing a Production Linked Incentive Scheme for the Auto Industry. Industry is keenly waiting for the details of the PLI scheme, with a hope that this scheme will be a support to the industry for boosting domestic manufacturing and enhancing exports.

Industry is working progressively in line with these enablers to maximise production and sales. Each enabler has its own set of challenges in terms of viability, infrastructure etc.

In line industry would continue to engage with the Government to seek their guidance, support and contribute towards a stronger industry and a stronger economy.

Key Highlights of 2020-21

Let me now take you through key activities of SIAM throughout the last year 2020-21. I am grateful to the support of Past Presidents and other members during the first year of my tenure as SIAM President.

We started the year by adopting the theme of "Sound Development of the Industry" in line with Make in India and Atmanirbhar Bharat.



To increase the scale and speed of working, it was decided to empower the segment-wise CEOs Councils – Passenger Vehicle, Two-wheeler, Commercial Vehicle and Three-wheeler, making them the main decision-making bodies. It is good to see that each CEOs Council is very active and is contributing significantly to the “Sound Development of the Industry”

Government, Media, and Civil Society are our critical stakeholders. Our newly formed Engagement & Communication Group has been instrumental in engaging with all our stakeholders. Some of various initiatives include

- Representations backed by strong data and research.
- Economic contribution of our industry.
- Informative and realistic representation of the actual health (Sales performance) of the industry
- Efforts of the industry members to support the Government and serve the society during the pandemic.
- Continuous dialogue with policy makers and senior bureaucrats in the Government.

The Sourcing Group was renamed as the Atmanirbhar Bharat Group with its prime focus on drafting a comprehensive localisation roadmap for the industry, while requesting continuity of imports for our manufacturing.

I am thankful to each participating member that despite complex and critical issues like Scrappage Policy, Ethanol Blending, Flex-fuel etc industry has been able to find common positions which are in the best interest of the nation.

SIAM continued its close engagement with Government and put forth industry's submissions on matters pertaining to regulations, fiscal and trade policies. And will continue these engagements to promote Sustainable Development of Industry

International Engagements

SIAM continued its active participation in both OICA and IMMA.

There have been specific discussions in IMMA with respect to Indian regulations towards attaining harmonization for the Indian Two wheeler industry at global level, especially in the areas of Environment, Safety, Brakes, Lighting, Noise and Road Safety.

We also participated at various OICA engagements, especially for discussing industry stance at OICA shadow groups of WP.29 for analysing the present and upcoming regulations in developed economies so that technologies can be developed in India well ahead of implementation and are not imported.

SIAM also actively participated at meetings of WP.29 and its various GR groups, as a part of the India delegation. This helps India to harmonize & keep abreast with the global regulations and contribute to various technical forums from time to time. The UNECE World Forum for Harmonization of Vehicle Regulations (WP.29) is a unique worldwide regulatory forum within the institutional framework of the UNECE Inland Transport Committee.

We continued our active partnership with JAMA (Japan) with the annual SIAM JAMA Meeting being held virtually for the first time. The meetings discussed issues related to safety and emissions regulations pertaining to various vehicle segments.

We also had online meetings with KAMA (South Korea) to discuss the COVID Impact on the Auto industry and the policy development for electric vehicles in both the countries. A meeting also took place between SIAM and CMTA (Sri Lanka) to discuss the latest policy development and industry performance in the two markets.

Interactions continued with International Associations viz. VDA (Germany), BAAMA (Bangladesh), ACEA (Europe – Passenger Vehicles & Commercial Vehicles), ACEM (Europe – Motorcycles) to share information and gather insights on the auto industry. SIAM, for the very first time, also engaged with the AAAM (African Association Automotive Manufacturers) to look at areas of collaboration to increase the footprint of Indian Auto Sector in the African continent.



Corporate Social Responsibility

During the second wave in April-May 2021, the SIAM Members actively contributed and supported the Society through,

- Augmenting supply of medical oxygen
- Scaling up production of existing PSA plant manufacturers by over 10 times
- Donated 50+ Oxygen Generating Plants
- Donated approximately 9,000 Oxygen Concentrators and Cylinders
- Added capacity of around 3,500 Hospital Beds
- Contributed over 600 Ventilators, BiPAP machines and HFNCs
- Supplied around 20 Mobile Medical Units
- Distributed over 60 Lacs + Meals, Dry Ration Kits, PPEs, Masks, etc.

Road Safety continued to be a focus area for SIAM. The SIAM's Virtual Gallery on Road Safety was launched on the occasion of the National Road Safety Month in January 2021 by Hon'ble Minister for Road Transport & Highways, Shri Nitin Gadkari and Hon'ble Minister for Defence, Shri Rajnath Singh. SIAM with ASRTU also organized road safety awareness virtual workshops for STU drivers across the nation and trained more than 11,000 drivers. Health check-up and Eye check-up camps for Commercial Vehicle drivers were organized in over more than 25 locations in India. We also organized various awareness building campaigns like Pedestrian Walk, Women two-wheeler rally, awareness drives for general public at 119 accident prone road intersections within the capital city of Delhi.

We continued with our social initiative, the Sukh Da Saah (SDS) project which is being implemented since 2018 in Jasso Majra, Patiala in the State of Punjab on anti-stubble burning. We expanded the outreach to 7 more villages, which are in addition to the existing 9 villages. During the year 2020, this project in the originally targeted 9 villages had a success of 95% reduction in stubble burning against the target of zero stubble burning despite the pandemic. In the newly adopted additional 7 villages, the estimated reduction in stubble burning has been impressive 90%.

Some other interesting initiatives undertaken in the last year include 16 editions of a Lecture Series on various subjects of interest to the industry such as Emission Reduction, Vehicle Safety, Circular Economy & Resource Efficiency. SIAM also supported the efforts of the State Governments of Delhi and Uttar Pradesh in implementation of HSRP for old vehicles for the states of Delhi & Uttar Pradesh

Conclusion

As I conclude my first year as SIAM President, I would like to extend my sincere appreciation and gratitude to the Government, Policy Makers, Bureaucrats, friends in the Media, SIAM members including Past Presidents, and Colleagues in the SIAM Secretariat. I would particularly like to thank all the members of SIAM Executive committee for a near 100% participation in all our meetings.

I take pride in all that we have achieved together through our focus on "Sound Development of the Industry".

As we aim to bring back industry on the track of growth, I look forward to your kind support in the future.

With warm regards,

Kenichi Ayukawa
President





Mr Kenichi Ayukawa

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



Mr Vipin Sondhi

Vice President, SIAM &
Managing Director & CEO,
Ashok Leyland Ltd



Mr Vinod Aggarwal

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

SIAM

The Society of Indian Automobile Manufacturers (SIAM) is an apex national body representing all major vehicle and vehicular engine manufacturers (42 companies) in India.

SIAM 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 coordinates 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 2020-21

Production

The industry produced a total 22,652,108 vehicles including Passenger Vehicles, Commercial Vehicles, Three Wheelers, Two Wheelers and Quadricycles in April-March 2021 as against 26,353,293 in April-March 2020, registering a de-growth of (-) 14.04 percent over the same period last year.

Domestic Sales

The sale of Passenger Vehicles declined by (-) 2.24 percent in April-March 2021 over the same period last year. Within the Passenger Vehicles, the sales of Passenger Cars and Vans declined by (-) 9.06, percent and (-) 17.62 percent respectively while sales of Utility Vehicles increased by 12.13 percent in April-March 2021 over the same period last year.

The overall Commercial Vehicles segment registered a de-growth of (-) 20.77 percent in April- March 2021 as compared to the same period last year. Within the Commercial Vehicles, Medium & Heavy Commercial Vehicles (M&HCVs) and Light Commercial Vehicles (LCVs) declined by (-) 28.40 percent and (-) 17.30 percent respectively in April-March 2021 over the same period last year.

Sale of Three Wheelers declined by (-) 66.06 percent in April-March 2021 over the same period last year. Within the Three Wheelers, Passenger Carrier and Goods Carrier declined by (-) 74.49 percent and (-) 26.38 percent respectively in April-March 2021 over April-March 2020.

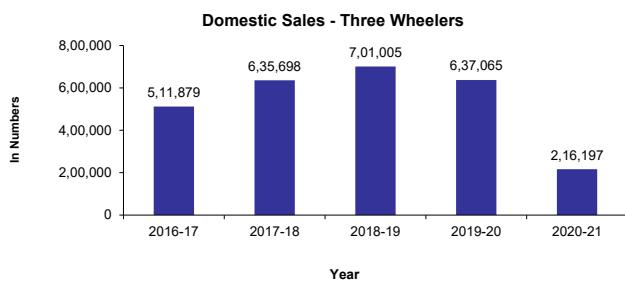
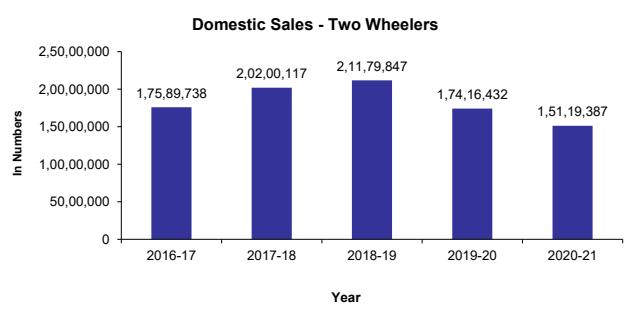
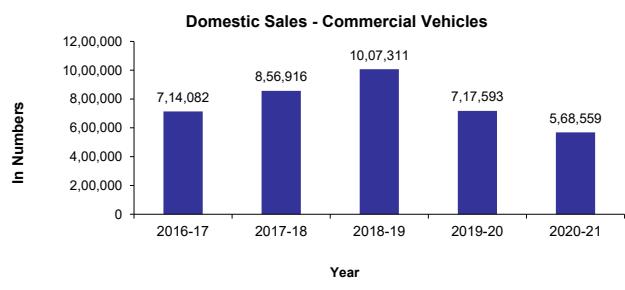
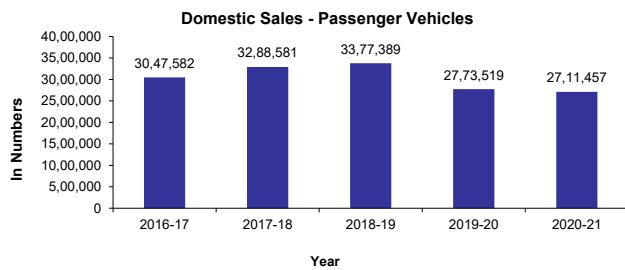
Two Wheelers sales registered a de-growth of (-) 13.19 percent in April-March 2021 over April-March 2020. Within the Two Wheelers segment, Scooters, Motorcycles and Mopeds declined by (-) 19.51 percent, (-) 10.65 percent and (-) 3.07 percent respectively in April-March 2021 over April-March 2020.

Exports

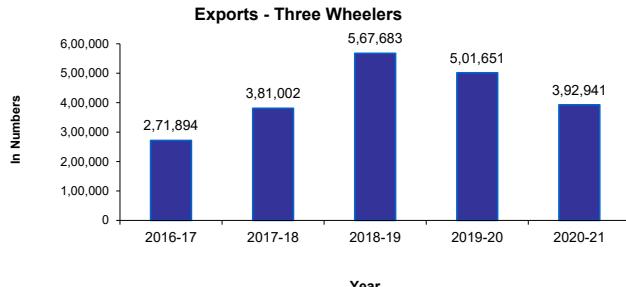
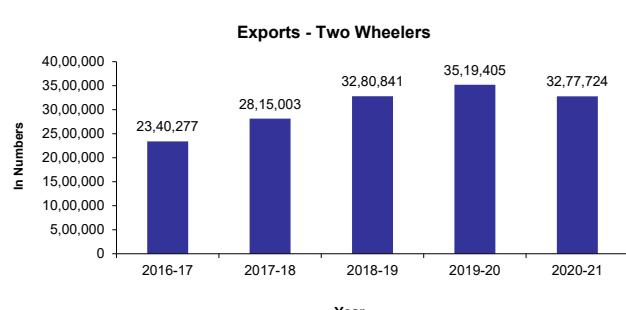
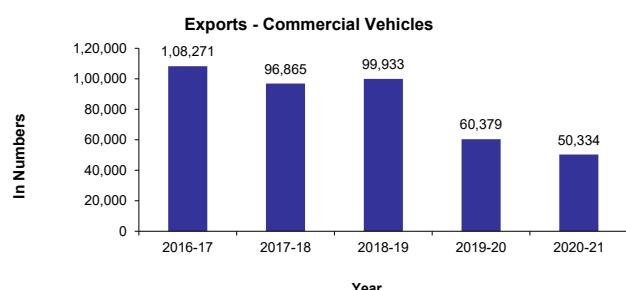
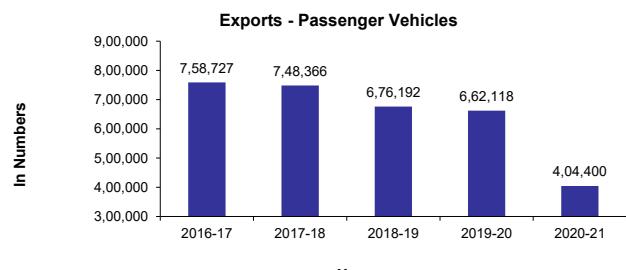
In April-March 2021, overall automobile exports declined by (-)13.05 percent. Passenger Vehicles, Commercial Vehicles, Three Wheelers and Two Wheelers exports also declined by (-) 38.92 percent, (-) 16.64 percent, (-) 21.67 percent, and (-) 6.87 percent respectively.



Domestic Sales Trends



Exports Trends



Automobile Production Trends					
Category	(Number of Vehicles)				
	2016-17	2017-18	2018-19	2019-20	2020-21
Passenger Cars	27,11,911	27,46,658	27,11,160	21,56,868	17,72,972
Utility Vehicles	9,09,555	10,93,346	10,99,780	11,36,209	11,82,085
Vans	1,80,204	1,80,263	2,17,531	1,31,487	1,07,164
Total Passenger Vehicles	38,01,670	40,20,267	40,28,471	34,24,564	30,62,221
M&HCVs	3,42,761	3,44,592	4,44,356	2,32,414	1,81,242
LCVs	4,67,492	5,50,856	6,68,049	5,24,311	4,43,697
Total Commercial Vehicles	8,10,253	8,95,448	11,12,405	7,56,725	6,24,939
Three Wheelers	7,83,721	10,22,181	12,68,833	11,32,982	6,11,171
Scooters	59,26,499	71,17,795	70,95,164	60,27,198	45,59,222
Motorcycles	1,30,88,208	1,51,67,481	1,64,99,424	1,43,56,051	1,31,54,501
Mopeds	9,19,032	8,69,562	9,05,189	6,49,678	6,36,218
Total Two Wheelers	1,99,33,739	2,31,54,838	2,44,99,777	2,10,32,927	1,83,49,941
Quadricycle	1,584	1,713	5,388	6,095	3,836
Grand Total	2,53,30,967	2,90,94,447	3,09,14,874	2,63,53,293	2,26,52,108

Automobile Domestic Sales Trends					
Category	(Number of Vehicles)				
	2016-17	2017-18	2018-19	2019-20	2020-21
Passenger Cars	21,03,847	21,74,024	22,18,489	16,95,436	15,41,866
Utility Vehicles	7,61,998	9,22,322	9,41,474	9,45,959	10,60,750
Vans	1,81,737	1,92,235	2,17,426	1,32,124	1,08,841
Total Passenger Vehicles	30,47,582	32,88,581	33,77,389	27,73,519	27,11,457
M&HCVs	3,02,567	3,40,781	3,90,732	2,24,428	1,60,688
LCVs	4,11,515	5,16,135	6,16,579	4,93,165	4,07,871
Total Commercial Vehicles	7,14,082	8,56,916	10,07,311	7,17,593	5,68,559
Three Wheelers	5,11,879	6,35,698	7,01,005	6,37,065	2,16,197
Scooters	56,04,673	67,19,909	67,01,430	55,65,958	44,82,304
Motorcycles	1,10,94,547	1,26,20,690	1,35,98,190	1,12,13,662	1,00,19,836
Mopeds	8,90,518	8,59,518	8,80,227	6,36,812	6,17,247
Total Two Wheelers	1,75,89,738	2,02,00,117	2,11,79,847	1,74,16,432	1,51,19,387
Quadricycle	-	-	627	942	-12
Grand Total	2,18,63,281	2,49,81,312	2,62,66,179	2,15,45,551	1,86,15,588

Automobile Exports Trends					
Category	(Number of Vehicles)				
	2016-17	2017-18	2018-19	2019-20	2020-21
Passenger Cars	6,02,134	5,80,153	5,13,912	4,75,801	2,64,927
Utility Vehicles	1,54,257	1,66,317	1,58,251	1,83,468	1,37,825
Vans	2,336	1,896	4,029	2,849	1,648
Total Passenger Vehicles	7,58,727	7,48,366	6,76,192	6,62,118	4,04,400
M&HCVs	43,719	44,093	48,676	22,333	17,548
LCVs	64,552	52,772	51,257	38,046	32,786
Total Commercial Vehicles	1,08,271	96,865	99,933	60,379	50,334
Three Wheelers	2,71,894	3,81,002	5,67,683	5,01,651	3,92,941
Scooters	2,92,828	3,14,284	3,98,316	3,69,998	2,31,972
Motorcycles	20,27,297	24,83,307	28,65,851	31,35,548	30,37,439
Mopeds	20,152	17,412	16,674	13,859	8,313
Total Two Wheelers	23,40,277	28,15,003	32,80,841	35,19,405	32,77,724
Quadricycle	1,556	1,605	4,400	5,185	3,529
Grand Total	34,80,725	40,42,841	46,29,049	47,48,738	41,28,928



Global Auto Industry Performance in 2020

The Global Automotive market has witnessed a period of slowdown over the last two years owing to dip in economic activities and increased vehicle acquisition cost, however, 2020 marks an unprecedented and challenging year for the world economy, and more so for the auto industry. The pandemic led crisis also created disruptions for the automotive value chain as semiconductor and container shortages surfaced on a global level.

Mobility of goods and people became more connected and digitised, involving minimum human interface as social distancing has been the new normal. With public transportation coming to a halt during countrywide lockdowns, the pandemic persuaded customers to have freedom of mobility through personal modes of transportation. Globally, as public transportation took a backseat, personal mobility became pivotal during the pandemic, with sales being driven through the first-time buyer category, notably in the small car vehicle segment.

The global vehicle sales dipped to 78 million units in 2020 from 90.4 million units in 2019 with the COVID pandemic weakening the auto sector sales since the beginning of 2020. This marked a total of (-) 13.8% decline in vehicle sales.

Major automotive markets of the world reported degrowth in vehicle sales. The total vehicle sales in Europe declined by (-) 20.2%, followed by America reporting a degrowth of (-) 18.5% and Asia/Oceania/Middle East vehicle sales falling by (-) 7.8%. While countries reported degrowth, countries like Turkey, Taiwan, and South Korea portrayed a resilient market in the face of the pandemic with a growth rate of 62%, 11% and 6% respectively.

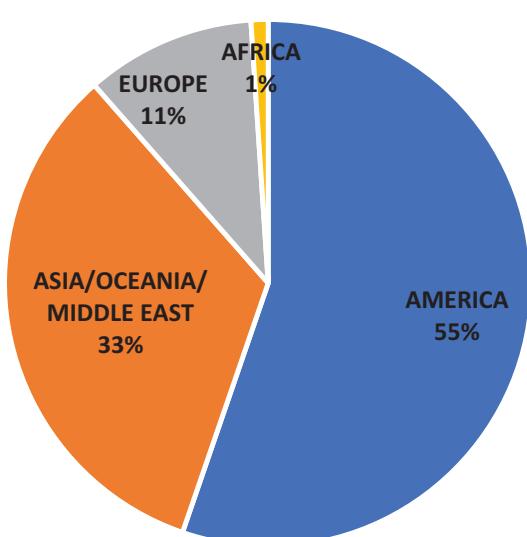
The world rankings for the top-5 largest automotive markets for the year 2020 remained unchanged from 2019 rankings with China (#1), USA (#2), Japan (#3), Germany (#4) and India (#5), with these top 5 countries contributing to over 60% of total global vehicle sales.

GLOBAL VEHICLE SALES

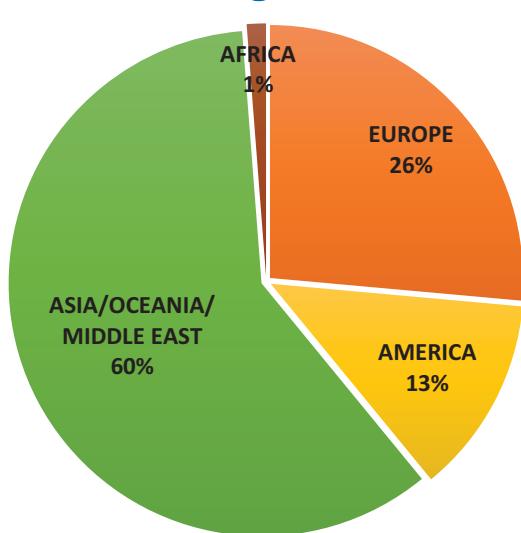
In the year 2020, the Global Vehicle Sales dropped to 78 million units from 90.4 million units in 2019, marking a decline of (-) 13.8%.

The Total Commercial Vehicle sales dropped by (-) 8.7% to 24.4 million units in 2020 from 26.7 million on 2019. The three leading countries for the Commercial Vehicle sales- USA, China & Canada, contributed to 70% of total CV sales across the globe, with India retaining the fifth

2020 Sales % by Region: Commercial Vehicles



2020 Sales % by Region: Passenger Cars



spot in the global Commercial Vehicle Sales in 2020 as well. The sales of Passenger Cars also dropped to 53.6 million units in 2020 from 63.7 million units in 2019, with largest share of sales at 60% concentrated in Asia/Oceania/Middle East region, followed by Europe & America.

GLOBAL VEHICLE PRODUCTION

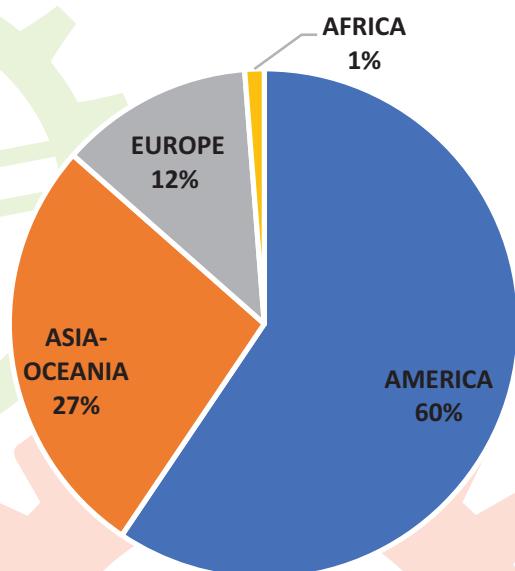
The Global Vehicle production plummeted to 77.6 million units, down by (-) 15.8%, with over 70% of the world's total vehicle production coming from the

Passenger Cars segment. The Asia/Oceania, America & Europe regions manufactured 57%, 22% and 20% respectively, of the total global vehicle production.

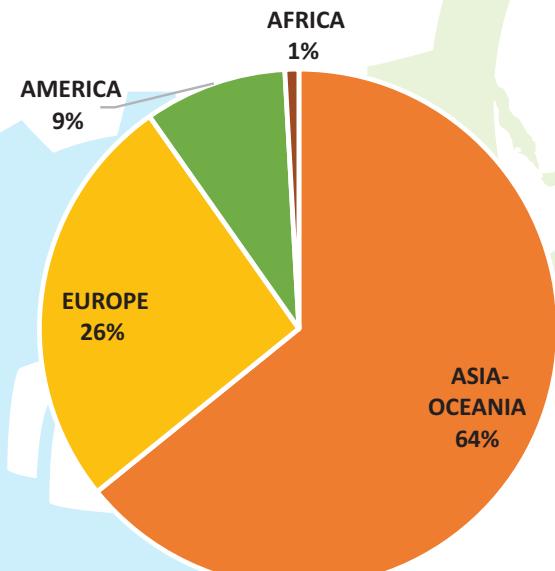
The total production of Light Commercial Vehicle (LCV) in 2020 was 17.2 million as against 20.5 million units in 2019, with USA producing 6.7 million units and contributing a share of 39% of Global LCV Production.

The total Passenger Car production in 2020 was 55.8 million units as against 67.2 million units in 2019. China, Japan and Germany were the top-3 countries in world's Passenger Car production, with India at the fifth spot.

2020 Production % by Region: Light Commercial Vehicle



2020 Production % by Region: Passenger Cars



70% of World's Global Sales Concentrated in Top-7 Countries in 2020

Sl. No.	Top-7 Passenger Car Markets in 2020	
1	China	20.18
2	Japan	3.81
3	USA	3.40
4	Germany	2.92
5	India	2.43
6	France	1.65
7	United Kingdom	1.63

Sl. No.	Top-7 Commercial Vehicle Markets in 2020	
1	USA	11.05
2	China	5.13
3	Canada	1.21
4	Japan	0.79
5	India	0.51
6	France	0.45
7	Thailand	0.45

(in million units sold)

Notes:

1. All data from OICA
2. Data does not include Two-Wheeler and Three-Wheeler Production and Sales

Re-Building the Nation, Responsibly

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

The Indian automobile industry is contributing 6.4% 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 Two-Wheeler and Three-Wheeler producer, 2nd largest Heavy Bus producer, 5th largest Heavy Truck producer, 4th largest Car producer and 9th largest Light Commercial Vehicle producer in the world.

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 the 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 country's masses and goods, and thus, bridging the gap between urban and rural landscape. The Industry has 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 medical oxygen, 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

August 2020

- Meeting with Special Secretary (Logistics)
- Aatmanirbhar Bharat - Sourcing Group Meeting
- SIAM - GT Webinar
- RODTEP Working Group Meetings
- Meeting with Director, ICAT on 2W CAFÉ Norms
- "Webinar - Technological imperatives in Designing & Material Eco-efficiency of ELV Recycling "
- 58th Pre CMVR TSC Meeting
- Webinar - Policy, Regulations & Economic Impact of ELV Recycling
- Participation in SCALE Committee Meetings
- Participation in MNRE on Hydrogen Economy
- Monthly Industry data Release
- Draft GSR 515(E) Form 20 amendment GST concession for Divanganj
- 2020-08-31 GSR 540 Feracylum Omission from R138
- 1st & 2nd SIAM Virtual Lecture Series, Environmentally Sound Management of ELVs in India
- Sukh Da Sah Project - Anti Stubble Burning

September 2020

- Meeting with Ministry of Steel
- Exports Group Meeting
- Taxation Group Meeting
- Meeting with RODTEP Committee
- RODTEP Working Group Meeting
- Exports Group Meeting
- Taxation Group Meeting
- Meeting with Director, ARAI on 2W CAFÉ Norms
- EMG Meeting
- Monthly Industry data Release
- SAFE Annual Convention 2020 : Re-Building the Nation, Responsibly Connecting the Indian vista with improved Safety requirements & Environment Management
- Draft GSR 541 FASTag for old vehicles
- 2020-09-18 SO 3190 Safety Glass CMVR 126 Exemption
- SO 3227(E) Wheel Rim QCO
- GSR 586(E) Driving regulation 2020 handheld device
- Sukh Da Sah Project - Anti Stubble Burning - Announcement of LNG Stations

October 2020

- Meeting with Steel Minister
- Meeting with Railway Minister
- Aatmanirbhar Bharat - Sourcing Group Meeting
- Vehicle Classification Group Meeting
- Meeting on Third Party Insurance Premium for Motor Vehicles
- Taxation Group Meeting
- Exports Small Group Meeting
- India-Myanmar Meeting
- CSR Group Meeting
- Meeting with Delhi Trans Dept. for HSRP Implementation
- SIAM JAMA Tech Reg. Meeting
- 7th Recycling Group Meeting
- Meeting with Delhi Trans Minister for HSRP Implementation
- SIAM JAMA 2W Group Meeting
- 3W CEO Council Meeting
- Aftermarket Parts Group Meeting
- Gas Based Mobility
- Quarterly Press Conference on Industry data
- Two-Wheeler CEO Council
- Eye Check up Camps for DIMTS drivers
- 3rd SIAM Lecture series: 'Indian Auto Industry's BS-VI milestone: Experience & Learnings' on 9th Oct 2020, 4th SIAM Lecture Series : Global Experience on Vehicular Emission Norm, 5th SIAM Lecture Series : Ambient Air Quality Improvement in Indian Cities
- Sukh Da Sah Project - Anti Stubble Burning -
- Microbial Phase II
- SO 3429 CRO Phase V
- GSR 628(E) for Form 22
- MoRTH HSRP Replacement Order
- GSR 661 for Form 20
- Draft GSR 674E Modular Hydralic Trailer_ AIS 158

November 2020

- Logistics Group Meeting
- Aatmanirbhar Bharat - Sourcing Group Meeting
- Pre-Budget Meeting with DHI
- Exports Group Meeting
- Scrapage Policy Meeting
- Lecture Series on 2W & 3W Safety
- 46th SIAM 2W Group Meeting
- Webinar - Safety features of Buses / Commercial Vehicles
- Service Group Meeting
- 46th SIAM 2W Group Meeting
- Sustainable Mobility Group Meeting
- 3W CEO Council Meeting
- Monthly Industry data Release
- Two-Wheeler CEO Council

- Passenger Vehicle CEO Council
- Eye Check up Camps for DIMTS drivers
- GSR 690E FASTag linkage with FORM 51
- MoRTH Communication to States - Feracylum Stay Order
- MoRTH Communication on Vahan TAC & Vehicle Registration
- SO 4252 2W Helmet QCO
- Road Safety Session with School & Colleges
- 6th SIAM Lecture Series on Safety features of Buses/ Commercial Vehicles on 27 November 2020
- Sukh Da Sah Project - Anti Stubble Burning -
- Microbial Phase II

December 2020

- Meeting with ATMA on Tyre Localisation
- Meeting on Definition of Retail Sales
- SIAM - ACMA - EY Meeting on Localisation Roadmap Study
- Vehicle Classification Group Meeting
- Meeting with IBA to discuss Vehicle Financing Scenario for Three Wheelers Segment
- ERG Meeting
- RODTEP Committee Meeting
- Pre-Budget Meeting with Ministry of Finance
- Meeting with Delhi Trans Min. for HSRP Implementation
- Webinar - Technology and Safety Features of Two & Three Wheelers
- Meeting with UP Trans Dept. for HSRP Implementation
- Webinar - Safety Features of Passenger Vehicles
- 3W CEO Council Meeting
- Gas Based Mobility Group Meeting
- Participation in MNRE on Hydrogen Economy
- Monthly Industry data Release
- Two-Wheeler CEO Council
- Eye Check up Camps for DIMTS drivers
- Safe Mobility Competitions on Road Safety with Schools
- 7th SIAM Lecture Series Safety Features of Passenger Vehicles
- 8th SIAM Lecture Series on Technology and Safety Features of Two & Three Wheelers
- Draft GSR 797 Co-driver Airbag

January 2021

- 2nd SIAM Automobile Finance & Insurance Summit
- Meeting with SBI
- Meeting with SBI on 3W Financing
- Meeting with Punjab National Bank on 3W Financing
- Meeting with Steel Ministry
- Meeting with IIB on Motor Vehicle Insurance
- Exports Group Meeting
- Taxation Group Meeting
- ERG Meeting
- Looking Ahead Conclave
- Exports Group Meeting
- Taxation Group Meeting
- 47th SIAM 2W Group meeting
- 46th SIAM CMVR Group
- 65th AISC Meeting
- 3W CEO Council Meeting
- Gas Based Mobility Group Meeting
- CV CEO Council Meeting
- EMG Meeting
- Quarterly Press Conference on Industry data
- Two-Wheeler CEO Council
- Meeting of PV CEOs Sub Group on "LVHV"
- National Road Safety Month 2021
- SIAM 9th Lecture on Connected Mobility
- Eye Check up Camps for DIMTS drivers
- Starting of HSRP project for UP

February 2021

- 15th SIAM Styling & Design Conclave
- Meeting with ATMA on Localisation of Tyres and Rubber
- Meeting with MeitY on Semiconductors
- Meeting with IIT D on 2W Carrier Study
- Finance, Leasing & Insurance Group Meeting
- Meeting on Vehicle Leasing
- Webinar on Budget Announcements
- Taxation Group Meeting
- CSR Group Meeting
- 9th SIAM 3W Group Meeting
- 59th CMVR TSC Meeting
- 59th Pre CMVR TSC Meeting
- JS DPLIT - QCO for Safety Glass
- 9th SIAM 3W Group Meeting
- Manufacturing, Industry 4.0 and Ease of Doing Business (EODB)
- Presentation from BCG on Confluence of Energy and Mobility"-Making India's Mobility fuels sustainable and economically Viable.
- CV CEO Council Meeting
- FMS 2021 along with CII
- Participation in MNRE on Hydrogen Economy
- Monthly Industry data Release
- Two-Wheeler CEO Council
- MoRTH SOP VLT registration and activation in Vahan
- SO 902(E) Safety Glass QCO Deferment to April 2022
- National Road Safety Month 2021
- SIAM 10th Lecture: Imperatives of ELV recycling & circular economy
- Road Safety Rolling Trophy handing over to School

- Eye Check up Camps for DIMTS drivers
- Road Safety Advisorial 2021

March 2021

- Meeting with ISA on Localisation of Steel
- Meeting on Scrappage Policy with MoRTH
- Vehicle Classification Group Meeting
- Taxation Group Meeting
- CSR Group Meeting
- CSR Conclave & Awards
- 1st Meeting with Director, ICAT on Catcon Market Survey
- Meeting with UP Trans Dept. for HSRP Implementation
- Meeting with MoRTH/NIC/ICAT for Recall Portal
- 8th Recycling & Materials Group Meeting
- Meeting with NIC/ICAT for Recall Portal
- SIAM meeting with MeitY on CRO
- Meeting with CMVR Group for Proposal on BIS Audit Options
- Meeting with Delhi Trans Min. for HSRP Implementation
- 1st Meeting with Director, ICAT on Catcon Market Survey
- 3W CEO Council Meeting
- Frontier Technology Group
- Manufacturing, Industry 4.0 and Ease of Doing Business (EODB)
 - “a. Update on ASDC Activities by ASDC
 - b. Overview on the New Labour Codes for the Auto Industry by Deloitte India ”
- EMG Meeting
- Monthly Industry data Release
- Two-Wheeler CEO Council
- Meeting of PV CEOs Sub Group on “LVHV”
- **GSR 173 (E) - Vehicle Recall**
- **GSR 1232 (E) - MoRTH Vehicle Recall Percentages of vehicle owner reporting the same issue**
- SO 1231(E) Implementation Section 39 and 40 MVA
- SO 1232(E) Recall Percentages
- Draft GSR 177(E) Non renewal after 15 years Govt Vehicles
- Draft GSR 190 RVSF - Vehicle Scrappage Policy
- Draft GSR 191 (E) - Registration Renewal Rules & Fee - ELV
- SO 1219 (E) - Tractor & Semi Trailer
- S.O 1665 - Designated officer for Vehicle recall
- GSR 148 Co-driver airbag Implementation
- Draft GSR 144E WVSCOP Implementation
- Draft GSR 278 (E) AUTOMATED TESTING STATIONS.
- GSR 166 (E) All India Tourist Vehicles Rules
- MoRTH to Select States for Physical Inspection
- SO 1248(E) CRO Consolidated Items
- 2021-03-19 MoRTH Communication on 5% scrap incentive
- SO 1406 MoRTH Wheel rim for all categories
- Draft GSR 220(E) Concession in MV tax on production of Scrap Certificate
- GSR 221 Corrigendum to GSR 173 on Recall GSR 870
- SO 1407 Safety Glass Alignment in CMVR April 2022
- GSR 240 Electronic Forms alteration, retro fitment, license
- SO 1433 MVA sections notified
- 11th SIAM Lecture Series on Environment Lecture on ‘Management & handling of hazardous chemicals in automotive sector: National & International Regime

April 2021

- 7th Automotive Logistics Conclave
- Meeting on Anti-Dumping Duty on HR and CR Steel
- Meeting with NXP on Semiconductor Shortage
- Taxation Group Meeting
- CSR Group Meeting
- 48th SIAM 2W Group Meeting
- SIAM meeting with MeitY on CRO
- Meeting with MoRTH/NIC/ICAT for Recall Portal
- Meeting with CMVR Group for Proposal on BIS Audit Options
- Meeting with Delhi Trans Min. for HSRP Implementation
- 48th SIAM 2W Group Meeting
- 3W CEOs Council Meeting
- CV CEOs Council Meeting
- Lecture on Hybrid & Electric Vehicle Homologation
- Monthly Industry data Release
- Two-Wheeler CEOs Council
- Passenger Vehicle CEOs Council
- 12th SIAM Lecture Series on xEVs in India – Drilling Down into Testing, Homologation & Safety
- SO 1665 Designated officer Recall
- **Draft GSR 278(E) - AUTOMATED TESTING STATIONS**
- **GSR 277 (E) Amendment to FORMS - Transfer of ownership on Death**
- **Draft GSR 287 (E) SPV, 2W fire responder, insulated van Type Approval Requirements**

May 2021

- Meeting on Quality Control Order (QCO) for Pressing Tools and Punches
- Meeting on Availability of Oxygen for Automotive Applications
- Meeting on Container Shortage and High Freight Rates
- Taxation Group Meeting
- 47th CMVR Group Meeting
- Lecture on on-road safety and maintenance of Electric Vehicles
- Monthly Industry data Release
- **Draft GSR 331 Tyres AIS-142**
- **Draft GSR 352E Registration Fee Exemption for BOV**
- SO 2132 Wheel Rim QCO deferment

- Global Road Safety Week
- COVID assistance project : Vehicles to be used as ambulance at Delhi
- 13th SIAM Lecture Series on EV in India: On-Road Safety, Operation and Maintenance

June 2021

- Meeting with Commerce Ministry on Steel
- Meeting with Railway Board
- Meeting with DPLT on QCO for Punches
- Vehicle Classification Group Meeting
- Meeting with CMTA
- 1st Meeting with Director, ICAT on Catcon Market Survey
- 10th SIAM 3W Group meeting
- Meeting with MoRTH on Vehicle Scrap
- Meeting with NIC/ICAT for Recall Portal
- 9th Recycling Group Meeting
- Meeting with DoT on V2X
- Meeting with NIC/ICAT for Recall Portal
- 13th SIAM Connected Vehicles Group Meeting
- 33rd IHG Meeting
- IHG and CMVR & safety call for Crash related standards
- 09th Service Group
- 1st Meeting with Director, ICAT on Catcon Market Survey
- 10th SIAM 3W Group meeting
- Gas Based Mobility Group Meeting
- CV CEO Council Meeting
- Monthly Industry data Release
- Two-Wheeler CEO Council
- World Environment Day Free PUC drives and 14th SIAM Lecture Series on “Ecosystem Restoration: Initiatives by Indian Auto Industry”
- Draft GSR 433 Co-Driver air bag new draft notification June 2021- Deferment by 4M
- Draft SO - Vehicle Classification on usage
- GSR 393(E) WVSCOP Implementation
- COVID assistance project : Vehicles to be used as ambulance at Delhi
- Startign of publishing Scrappage Centres at Delhi
- 201 CNG Stations announced for gaseous fuels
- Extension of FAME Phase-2

July 2021

- Meeting on Amendments in Consumer Protection Rules
- Meeting on Container Shortage and High Freight Rates
- Discussion on Long Term Third Party Insurance
- Meeting on Vehicle Leasing
- Meeting with CBIC on Faceless Assessment Programme
- Interactive Session Between CMTA & SIAM
- Meeting on Iran
- Meeting with MoF
- Meeting with VDA and AAAM
- Taxation Group Meeting
- ERG Meeting
- 66th AISC Meeting
- Meeting with NIC/ICAT for Recall Portal (Trigger Calculation)
- Roundtable between Auto Industry & Gas Companies
- Strengthening NGV Ecosystem in India
- DIGITAL INNOVATION AND SMART MANUFACTURING INDUSTRY 4.0 AND BEYOND.
- CV CEO Council Meeting
- Knowledge sharing session on 2nd Wave of COVID 19 Effect on Workforce Management by SIAM members and Deloitte India
- Overview of Project Management Certification Program by PMA India
- Quarterly Press Conference on Industry data
- Two-Wheeler CEOs Council
- Passenger Vehicle CEOs Council
- SafetyNiti 2021: Occupational Safety and Health in the Auto Sector Supply Chain: It's good for business
- 15th SIAM Lecture Se-reis on Digital Innovation and Smart Manufacturing: Industry 4.0 and Beyond

● Activity ● Milestone



SIAM 60th ANNUAL CONVENTION 2020



(L-R): Shri Nitin Jairam Gadkari, Hon'ble Minister of Road Transport and Highways and Minister of Micro, Small and Medium Enterprises; Shri Piyush Goyal, Hon'ble Minister of Railways and Minister of Commerce and Industry; and Shri Prakash Javadekar, Hon'ble Minister of Environment, Forest and Climate Change, Minister of Information and Broadcasting and Minister of Heavy Industries and Public Enterprises, Government of India at SIAM Annual Convention 2020.

Society of Indian Automobile Manufacturers (SIAM) organized its 60th Annual Convention on 4th September 2020 on a virtual platform, titled "Re-Building the Nation, Responsibly". At the session, Shri Prakash Javadekar, Hon'ble Union Minister of Environment, Forest & Climate Change, Information & Broadcasting and Heavy Industries & Public Enterprises, Government of India, was the Guest of Honour for the session assured the automobile industry of support from the Government in reviving demand that had taken a dire hit owing to the COVID 19 pandemic.

Putting across recommendations to the Government towards boosting demand in the automobile sector, Mr Rajan Wadhera, (then) President, SIAM & Senior Advisor, Mahindra & Mahindra thanked the Government for all the support it had extended to the auto sector such as reduction in the repo rates, credit access, etc. He reemphasized the need for more specific steps to boost demand in the sector, especially during the festive season. Some of the key asks from the government included lowering of GST rates from 28 to 18% across all vehicle categories and automotive components, an incentive based vehicle scrappage policy and concrete steps towards realizing the vision of the Automotive Mission Plan.

Mr Uday Kotak, President, CII and Managing Director & CEO, Kotak Mahindra Bank, highlighted the Government of India's high sensitivity to lives, livelihoods and the

overall economy during the pandemic. It was time for the Government and the industry to join hands and work in partnership to salvage the current slump.

Reassuring the automobile industry, Shri Prakash Javadekar, said that Infrastructure is the only answer to the growth story of India and the Government intended to invest 100 lac crore towards infrastructure projects over the coming times that would hugely benefit the automobile industry. While acknowledging the auto industry's recommendation for reduction in GST rates, he further added that GST reduction will ultimately benefit the Government and he will take it up with the Finance Minister and PMO. He also assured that a well-entrenched vehicle scrappage policy will come soon that will bode well for the automobile industry.

Mr Kenichi Ayukawa, (then) President Elect, SIAM and Managing Director and CEO, Maruti Suzuki India, said that the industry was looking forward to sound development which means, increase in production, sales, exports and more localization of parts including electronics. It means self-reliant i.e. Aatmanirbhar Bharat.

Mr Vikram Kirloskar, Past President, SIAM & Vice Chairman, Toyota Kirloskar Motor, in his opening remarks for the session said that the industry has made tremendous investments in upgrading to BSVI and various technological pathways in the past year and we have lost much of our cash reserve. The impact



of the recent pandemic on the industry has been unprecedented.

Shri Nitin Jairam Gadkari, Hon'ble Union Minister of Road Transport & Highways and Micro, Small and Medium Enterprises, Government of India graced the occasion for the plenary session on "A Long-Term Regulatory Roadmap and Infrastructure Development".

Welcoming the industry recommendations, Guest of Honour, Shri Nitin Jairam Gadkari, Hon'ble Union Minister of Road Transport & Highways and Micro, Small and Medium Enterprises, Government of India, expressed his satisfaction with the Industry's global standards on many regulatory fronts. He stressed on the need for long-term regulatory roadmap and infrastructure development for the benefit of automobile industry and indicated that it is time for the country to focus on alternative biofuel technologies, such as that of ethanol, methanol, LNG, and so on.

While thanking the guests and dignitaries, Mr Vinod Aggarwal, Treasurer, SIAM & Managing Director and Chief Executive Officer, VE Commercial Vehicles reemphasized on country's dependence on infrastructure development and economic growth especially for the growth of CV sector.

Applauding the Government's Aatmanirbhar Bharat mission, Dr Pawan Goenka, Past President, SIAM and Managing Director, Mahindra & Mahindra said that the auto industry is a shining example of Aatmanirbhar Bharat where the sector has grown at 16% CAGR over the last 25 years. He touched upon the sector's sizeable investments in R&D and that it employed around 37 million people in the entire value chain. There were plans to augment exports, reduce imports, create more jobs and up investments in R&D. In the automotive components space, the imports were to the tune of 1 Lac crore and necessary steps were taken to reduce the number in 4~5 years. For this to happen, significant steps were implemented such as reducing current logistics costs, relaxing duties and taxes, entering into

FTAs and similar other trading pre-requisites with bigger automobile markets.

Praising the automobile industry's resilience, adaptability and innovation potential, Guest of Honour, Shri Piyush Goyal, Hon'ble Union Minister of Commerce & Industry and Railways, Government of India, commented on the need for India to produce world class products indigenously and therefore building of Global scale plants in the auto sector that are at par with international standards is required. Improving the scale and quality of what we were producing and exporting to the rest of the world was necessary.

Also, talking from a demand perspective, Mr Goyal also said that due to pandemic, the demand for shared mobility reduced. Although trends indicated that people would continue to buy cars, try out self-drive, autonomous and EVs, and therefore, as a corollary, the automobile sector's health would eventually improve. Goyal continued to do all that it could to help the auto industry. It also looked at devising innovative models to boost exports. Some of which are currently prevalent like the credit guarantee model, creating automotive hubs and clusters, partnering with states to make land availability easier, and adopting a more competitive approach to domestic manufacturing.

On increased localisation in the automotive segment, Mr Goyal opined that, Best-in-class make and design, use of innovative technologies, smart packaging and intelligent product pricing always go a long way in fetching desired results. He also touched upon skilling being another aspect that needs to be looked into, to ace in domestic manufacturing.

Applauding, Mr. Wadhera for his exemplary leadership and steering the industry amidst these turbulent times, Mr Deepak Jain, President, ACMA and Chairman and Managing Director, Lumax Industries summed up the session thanking Piyush ji for recognising the auto component industry as a champion sector that maximises its potential in exports.



**ECONOMIC
&
COMMERCIAL
AFFAIRS**

International Relations & Trade Policy Group

New form of trade relations and market access is being looked at in the current digitized world. After two decades of focus on globalization, and the recent past seeing more focus on increasing domestic value add, now we are seeing developed world looking at bilateral and plurilateral Digital Trade Agreements.

Against this background, Government of India has defined a clear focus on 'Make in India' and increased efforts for making our country self-sufficient or Atma 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 semi-conductors, electronics, EV systems, etc.

This year was interesting for building and furthering International Relations with Global Automotive Fraternity in the new Virtual world. We embarked on a new journey to establish close relations with the African

Association of Automotive Manufacturers (AAAM), while continuing to be actively engaged in OICA, IMMA and APEC Automotive Dialogue and continuing to have our interactions with the counterpart associations.

On the trade policy front, SIAM was engaged with Commerce Ministry to deliberate on the defensive and offensive interests of the Auto Sector in the Trade agreements in-discussion that includes Canada, the UK, the Europe, Iran and the SACU. SIAM also requested Government to explore trade deals with other markets of interest to the auto sector and proposed an Auto Annex/MRA for regulatory alignment in the exports markets.

SIAM also engaged with the Ministry of Heavy Industries, NITI Aayog and Commerce Ministry in the formulation of Production Linked Incentive (PLI) for auto and auto components.

To conclude with, International Relations & Trade Policy group has kept its focus at making Indian automobile industry globally competitive and bringing maximum benefits to local manufacturing.

Annual Report Card (2020-21)

S.No.	Deliverables	Measures	Owner	Stakeholders
1	Production Linked Incentive (PLI) Scheme for Exports	<ul style="list-style-type: none">SIAM has always conveyed to the Government that local auto manufacturers need to be cost competitive in order to increase exports from India.Engaged actively with DHI, NITI Aayog and Ministry of Commerce during the draft and consultation stages of PLI scheme.Government of India has launched PLI for Auto and Auto Components with a budget outlay of Rs 57,000 crores, which highest of all PLI schemes for various industries.	International Relations & Trade Policy Group	Members and Government
2	To Provide Trade Policy recommendations to the Government of India recommendations to the Government of India	<ul style="list-style-type: none">Eliminate or else further lower import tariffs on CBUs in markets which don't have any major auto industryAuto Annex/MRA proposed in trade dealsSpecific Recommendations for Canada, Iran, the EU, the US, and the South African Customs Union (SACU)Robust Rules of Origin for Automobile CBUs	International Relations & Trade Policy Group	Members and Government



Annual Report Card (2020-21)

S.No.	Deliverables	Measures	Owner	Stakeholders
3	Resumption of India - EU FTA	<ul style="list-style-type: none"> SIAM has made rational submission backed with calculations to the policy makers. Submitted assessment covering all aspects of investments, volumes, competitiveness, etc. 		Members and Government
4	Build Relation with Global Auto Associations & Counterpart Associations	<ul style="list-style-type: none"> Participation in the Asia-Pacific Economic Cooperation (APEC) Automotive Dialogue 	International Relations & Trade Policy Group	Counterpart Associations, Government of various APEC Economies
		<ul style="list-style-type: none"> Meeting with Korea Automobile Manufacturers Association (KAMA) 		KAMA and SIAM
		<ul style="list-style-type: none"> Meeting with African Association of Automobile Manufacturers (AAAM) 		AAAM and SIAM
		<ul style="list-style-type: none"> Robust Rules of Origin for Automobile CBUs 		Members and Government



Exports Group

2020-21 was a difficult year due to various challenges posed by the pandemic across the globe. Significant price increase of commodities and inputs; multiple disruptions in supply chain; container unavailability and rising cost of international logistics; lockdowns, economic challenges and import restrictions in exports markets, increasing competition, etc., were all reasons for negatively impacting exports of automobiles from India.

The export performance of the industry in the last three financial years can be seen in the table provided below:

Category	2018-19	2019-20	2020-21
Passenger Vehicles	6,76,192	6,62,118	4,04,400
Commercial Vehicles	99,933	60,379	50,334
Three Wheelers	5,67,683	5,01,651	3,92,941
Two Wheelers	32,80,841	35,19,405	32,77,724
Quadricycle	4,400	5,185	3,529
Grand Total	46,29,049	47,48,738	41,28,928

Import restriction in Sri Lanka; the US Sanctions in Iran; lockdowns and disruption in other big markets, like Bangladesh, Africa, Latin America; regulations favouring other countries; etc. were some challenges taken up by SIAM with the Government of India, High Commissions abroad and Governments in the export markets. Two-wheeler exports performance was better than the other segments due to the increased requirement of e-commerce and last mile deliveries in many exports markets.

Discontinuation of MEIS (Merchandise Exports from India Scheme) from December 2020, and the ceiling limit imposed of Rs 2 crore MEIS per IEC for the period September 2020 – December 2020 was also taken up with the Government. SIAM also supported RoDTEP Committee with the background data and calculations for tax and duties embedded in product prices for the HS Codes of Automobile products.

While the group actively participated in the policy development for Production Linked Incentive Scheme, in discussion, for the Auto and Auto Components Sector, it also got involved in the Bangladesh auto policy development and provided important recommendations. SIAM will continue to work with the Governments in Exports markets to help them develop their auto policies.

The long-run agenda of the industry to increase penetration in Neighbouring markets, South East Asia, Latin America and Africa were taken up with the Government and interactions were also organized with CMTA (Ceylon Motor Traders' Association) and AAAM (African Association of Automotive Manufacturers). SIAM advocated for better market access in the developing and underdeveloped countries, through trade agreements.

While Indian Automobile Brands have been able to establish itself in the developing markets, SIAM is taking up with the Government the agenda of establishing 'Brand India' in Automobile Engineering, globally.

The Exports Group has been quite vibrant and has enjoyed a high level of attendance as well as participation. The group members continued to contribute actively by sharing their experiences and knowledge on international markets. The intelligence gathered through interactions with the members were most important in raising trade inhibitors with Government.

With increased vaccination across the globe and overall improvement expected in the pandemic situation, the group plans to organize India specific Auto Shows in exports markets, including Bangladesh, in the future.

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



Annual Report Card (2020-21)

S.No.	Deliverables	Measures	Owner	Stakeholders
1	Resolve tariff and non-tariff barriers in exports markets	1. Participated in Meeting of Government to resolve concerns in Philippines	Exports Group	Indian Government, Philippines Government & Members
		2. Participated in Meeting of Government to resolve concern in South Asia		Indian Government and Members
		3. Provided inputs for Bangladesh Auto Policy		Bangladesh Government and Members
2	Actions to Strategies Export Enhancement in Long-run	1. Connecting with Auto Association in Exports Markets		Members
		2. Identifying high potential exports market or trade agreements		Members
3	Reduce internal inefficiencies	1. Engaged with Government on the Scheme for Increasing Competitiveness of Indian Automotive Sector, with focus on exports		Government and Members
		2. Represented for continuation of the MEIS Scheme without Ceiling until December 2020		Government and Members
		3. Worked out the RoDTEP Rates for the Industry		Government and Members



Interactive Session between SIAM & CMTA Members

📅 28th July 2021 ⏰ 3:30 PM to 4:30 PM 🖥 Virtual Platform

Introduction



Mr Rajesh Menon - Director General, SIAM



Mr Yasendra Amerasinghe - Chairman, CMTA



Opening Address
Mr Rakesh Sharma - Chairman, SIAM Exports Group and Executive Director, Bajaj Auto



Presentation by CMTA on Industry Performance and Government Policy
Mr Virann De Zoya - Vice Chairman, CMTA and General Manager, Maruti Suzuki Sri Lanka



Presentation by SIAM on Industry Performance and Government Policy
Mr Rudrarup Maitra - Co-Chairman, SIAM Exports Group and Head International Business, TATA Motors

Open Forum for Q&A



Economic Research Group

Data and Research go hand-in-hand in providing the base for market analysis and forecasting. The Economic Research Group makes an endeavour to bring out the most important and relevant data and research for deeper understanding of the market, for analysis and forecasting.

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.

In an endeavour to understand the Contribution of Auto industry to Employment, a study was initiated by the group by onboarding NCAER. The report is currently in making and should provide deep insights on the employment supported by industry, along with the skills that would be required in the future in the auto sector.

While looking at the contribution of the Auto Industry to employment, industry also felt the need for a study to look at the impact of taxation on the market, with a comparison with other countries manufacturing vehicles. The study is in discussion and is likely to be awarded soon.

The annual event of the group, the Looking Ahead Conclave was organized in January 2021 with the theme “Automotive Industry: The Path from Recovery to Resurgence”.

The 15th edition of the event witnessed participation of Economists sharing the Economic outlook of World and Indian economy and other esteemed speakers talking about the performance and trends in the auto sector.

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

An Economy Report that brings forward the pulse of the



The image is a programme for the 15th Looking Ahead Conclave, held on 13th January 2021, Wednesday, from 9 AM to 2 PM. The theme is "Automotive Industry: The Path from Recovery to Resurgence". The programme includes the following sessions:

- Session 1 – Economic Recovery & Revival of Auto Sector** (09:10 AM – 10:20 AM):
 - SESSION MODERATOR: Dr Sackchidanand Shukla, Chief Economist, Mahindra & Mahindra
 - Mr D K Joshi, Chief Economist, CRISIL Research
 - Mr Ashim Sharma, Partner, PwC, Head of Business Performance Improvement Consulting (Auto, Engineering & Logistics), Nomura Research Institute
 - Mr Semireen Chakreberry, MD & Chief Economist, Citigroup Global Markets
 - Mr Yogesh Aggarwal, MD & Head of Research, India Equities, HSBC
- Session 2 – Forecast Presentations** (10:20 AM – 11:00 AM):
 - Mr Ajay Srinivasan, Director – Industry Research, CRISIL
 - Mr Kaushik Madhavan, VP – Mobility Practice South Asia, Frost & Sullivan
- Panel Discussion 1 – Commercial Vehicle Segment** (11:00 AM – 11:40 AM):
 - SESSION MODERATOR: Mr Shashi Verma, MD & Senior Partner, Boston Consulting Group
 - Mr Jalaj Gupta, Business Head – Commercial Vehicles, Mahindra & Mahindra
 - Mr B Srinivas, Sr VP – Strategy & Product Planning, VECV
 - Mr Rajesh Kaul, VP – Sales & Marketing Commercial Vehicles, TATA Motors
- Panel Discussion 2 – Three-Wheeler Segment** (11:40 AM – 12:20 PM):
 - SESSION MODERATOR: Mr Rohit Mishra, Partner, Kearney
 - Mr Mahesh Babu, CEO, Mahindra Electric Mobility
 - Mr Diego Graffi, Chairman and MD, Piaggio Vehicles
 - Mr Samarthan Subandhu, President, Intricity Business Unit, Bajaj Auto
- Panel Discussion 3 – Two-Wheeler Segment** (12:20 PM – 1:05 PM):
 - SESSION MODERATOR: Mr Kavan Mukhtyar, Partner & Leader – Automotive, PwC
 - Mr Anilendra Hukkeri, VP – Marketing (Commuter Motorcycles, Scooters and Corporate Brand), TVS Motor Company
 - Mr Yadavinder Singh Gularia, Director – Sales & Marketing, Honda Motorcycles & Scooter India
 - Mr Neeran Chiplan, Head – India Sales & Aftercare, Hero MotoCorp
- Panel Discussion 4 – Passenger Vehicle Segment** (1:05 PM – 1:50 PM):
 - SESSION MODERATOR: Mr Atul Malhotra, Auto Industry Expert
 - Mr Shashank Srivastava, Executive Director, Maruti Suzuki India
 - Mr Satinder Singh Bajwa, Sr VP Head – Sales & Customer Care, Mahindra & Mahindra
 - Mr Tarun Garg, Director – Sales & Marketing, Hyundai Motor India
 - Mr Vivek Srivastava, Head Marketing (Passenger Vehicles), TATA Motors
- CLOSING REMARKS**: Mr B Srinivas, Co-Chairman, SIAM Economic Research Group

Pre-registration is mandatory

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economy and the auto sector on a monthly basis was also introduced for members of the group.

2020-21 was a year that impacted demand and supply due to challenges of surging cases and resultant

lockdowns. ERG members continued their endeavour to understand the market and the situation on a real-time and continuous basis to make the right decisions for the industry.

Annual Report Card (2020-21)				
S.No.	Deliverables	Measures	Owner	Stakeholders
1	Generating Industry Forecast	1. Organized Looking Ahead Conclave in January 2021, where FY22 forecast was firmed up	Economic Research Group	Membership
2	Monitoring Economy	1. Initiated a Monthly Economy Report		Membership
3	Initiated Studies	1. Initiated a study on current employment of auto sector and skills required for the future 2. The proposal for study on Tax impact on Market being finalized		Membership and Government



Taxation Group

The SIAM Taxation Policy, Procedural and Direct tax group is spearheading all efforts to take forward challenges posed in taxation matters to the automobile industry, including tax rates, compliances, redundancies, interpretation issues, etc. to support Ease of Doing Business, reduce the Cost of Doing Business in India and to participate in Government's mission of Digital India.

The group met on multiple occasions during the year to deliberate on the hardships of the industry and made suitable submissions to the Government. As a key task, the Group deliberated on all taxation matters and submitted a Memorandum of Suggestions on Union Budget 2021-22 in October 2020. The key recommendations included the following:

- Reduction of GST rates on automobiles from 28% to 18%
- Depreciation rate for passenger vehicles and two-wheelers to be increased to 25%
- Budget Allocation for Procurement of Buses by STUs
- Introduction of an incentive-based vehicle scrappage scheme to induce removal of old and polluting vehicles from the road as well as support incremental demand generation.
- Reinstating NIL Customs Duty for import of lithium-ion cell for manufacturing of electric/hybrid vehicles
- Rationalization of Import duty on xEV parts to promote domestic manufacturing
- Allow import of xEV parts at concessional duty for after-market service obligations
- Non-applicability of Equalisation levy (EL), on transactions between International AE with its subsidiary in India for their business is not clear. Requesting CBDT circular and / or amendment in Law.

A very expansionary Union Budget was announced by the Government in February 2021, with an objective

to increase infrastructure building and giving a boost to economic activity in the country. Many recommendations of SIAM were a part of the Union Budget 2021-22 announcements. A few of which include the following:

- A new scheme of Rs 18,000 Crores to support augmentation of public bus transport services, facilitating PPP models to enable private sector to Finance, Acquire, Operate and Maintain over 20,000 buses.
- Announcement of introduction of a Voluntary Vehicle Scrapping Policy, to phase out old and unfit vehicles. Fitness tests required after 20 years for Personal Vehicles, and 15 years for Commercial Vehicles.
- PLI schemes for 13 sectors, including automobile sector. Government budget of Rs 1.97 lakh crores, over 5 years starting FY 2021-22.
- Rs 757 crore for Scheme for Faster Adoption and Manufacturing of (Hybrid and) Electric Vehicle in India - (FAME - India).
- Rs 2,823 crore allocated for Medium and Heavy Vehicle procurement by Defence.
- Reduction in customs duty to 7.5% on Semi, Flat and Long products of Non-alloy, Alloy and Stainless Steel, and revoking of Countervailing Duty and Anti-Dumping Duty on certain Steel products.
- Reduction in customs duty of precious metal viz. Palladium and Platinum from 12.5% to 10%.
- Expansion of City Gas distribution for Natural Gas to 100 more districts

In an endeavour to promote localization, the budget announcements also included a proposal to increase customs duty on Auto Components. However, it also led to cost pressure on auto companies that were importing such components.

One of the most critical concern raised in the Post Budget 2021-22 Memorandum of suggestions was the request for clarification on the amended definition of



'online sale of goods' and 'online provision of services' introduced in in Finance Act 2021 for purpose of Equalization levy, which had created an ambiguity with regards to levy of the said tax on intra group transactions between Indian subsidiary and its Parent company abroad.

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

- HSN Classification concerns arising out of the judgement of Supreme Court in the matter of Westinghouse Saxby
- Circular to clarify applicability of all the four conditions laid down for levy of higher GST Compensation Cess on SUVs as was in the excise regime to remove ambiguity in GST regime.
- Clarification that trade discounts by OEMs to dealerships would not be attracting service tax
- Levy on Cess / NCCD on Stocks lying in factory premises as on 30th June 2017
- Allowability of Tax Invoice in digital form on a device (no hardcopy) during movement of goods for transaction with already generated E-invoice and E-way bill.

- GST Exemption to EV Sub-Contractors under GCC Contracts of e-Bus Operations
- Taxability of transportation charges on supplies to Defence Customers
- Applicability of GST under RCM on remuneration paid to whole time directors
- Union Budget 2021 introduced new provision relating to TDS on purchase of goods under section 194Q. Simultaneously, a new provision was introduced to charge higher TDS rate for those persons who have not filed their Income-tax return for last 2 years. It would have been too cumbersome and error prone to manually ascertain ITR filing status, etc. Taxation group took up the issue strongly with CBDT to provide some online Utility for implementation. Same was release on time by CBDT, along with FAQs.

MoRTH had introduced a new regulation for India series registration ("IN") of vehicles. SIAM taxation group deliberated on the concerns with the draft notification and provided detailed submission to the Government.

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 to support the industry.

Annual Report Card (2020-21)

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 in the Union Budget on Scrappage policy, PLI, Bus fleet augmentation, reduction in customs duty on precious metals and steel products, FAME Scheme, etc		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



Finance, Leasing & Insurance Group

With a slowdown in economic activities and restricted mobility in the country, the consumers faced severe health and financial concerns. As vehicles sales took a hit, the credit availability for vehicle financing also decreased. Several challenges emerged on the front of various categories of vehicles, especially the Three Wheelers and Ambulances.

The Three-Wheeler financing faced headwinds since the beginning of the first wave of Covid-19 in 2020. With reduced economic activities, the income of three-wheeler customer was severely impacted resulting in NPAs and defaults by this consumer segment, making the Banking Institutions more risk-aversive towards offering credit to new three-wheeler customers. SIAM led deliberations with Indian Banks' Association and PSU Banks like - Punjab National Bank & State Bank of India requesting for their intervention for the necessary credit support. SIAM also made a representation to the Reserve Bank of India for according the status of Priority Sector Lending to the Three-Wheeler Segment.

Additionally, another critical vehicle segment for which the Priority sector lending status was requested by SIAM were the new vehicles to ply as Ambulances. Ambulance Financing also faced challenges in terms of credit availability as some Financial Institutions classified them as a negative category asset, thus making it difficult to purchase quality Ambulances, which are pivotal in meeting healthcare requirements.

On one hand where the sales were being impacted in the country due to challenges in vehicle financing, the vehicle insurance sector was also slowing down due to de-growth in all vehicle segments, owing to multiple lockdowns.

The issue of Long- Term Third Party Insurance that came into existence from 1st September 2018 making

the Third-Party Insurance cover significantly expensive, was again surfaced and discussed in several SIAM forums. It was decided to take this matter up with the relevant authorities and decision-making bodies with an objective to provide interim relief to the ailing sector. Additionally, SIAM also remained engaged with IRDAI for other vehicle insurance related matters. Like last few years, IRDAI maintained the status-quo on the Third-Party Insurance Rates for Motor Vehicles.

Vehicle Leasing on the other hand remained in the nascent stages of discussions while still seeking relevant policy support for the Leasing business to be identified as an established industry in the country. While corporate leasing has been met with some success rate in the country, retail leasing continued to face bottlenecks. SIAM members held discussions with the leading Vehicle Leasing companies in India like Leaseplan, ALD Automotive and Orix to understand the challenges of this industry and identify the possible support which can be offered.

Automobile Finance & Insurance Summit

The SIAM Group organised the 2nd Edition of the Automobile Finance & Insurance Summit. The theme of the Summit was - "Re-Connecting With Customers During Challenging Times" with an objective to bring together industry leaders at one platform to explore future trends, deliberate how Vehicle Finance & Insurance Businesses can be re-shaped during the challenging times and establish better connect with customers for the road ahead. The summit saw participation from senior officials from Financial Institutions, Regulatory Bodies, Insurance Companies and other related organisations.



Annual Report Card (2020-21)

S.No.	Deliverable	Measures	Owner	Stakeholders
1	To rationalise the impact of developments on the Vehicle Insurance & Vehicle Finance domain	1. SIAM made a representation to IRDAI to retain the Third-Party Rates for Motor Vehicles for FY 22. IRDAI maintained the status-quo for insurance premium rates.	Finance, Leasing & Insurance Group	Membership and Society
		2. SIAM submitted representations to RBI & Ministry of Finance on inclusion of financing of Three Wheeler and Ambulances under the Priority Sector Lending.		Membership and Society
		3. Organised 2 nd edition of SIAM Automobile Finance & Insurance Summit with a special focus on Liquidity crisis faced by Consumers and Dealers, and challenges on the vehicle insurance front. Several speakers from Banks, NBFCs, Insurance sector and Auto professionals shared their views in the event.		Membership and Society
		4. Organised an interaction between the SIAM group and Banking fraternity on the current Vehicle Financing scenario.		Membership and Society

SIAM
Society of Indian Automobile Manufacturers
Building the Nation, Responsibly

2ND SIAM AUTOMOBILE FINANCE & INSURANCE SUMMIT

RE-CONNECTING WITH CUSTOMERS DURING CHALLENGING TIMES

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22nd January 2021 2 PM to 5 PM

INAUGURAL SESSION

SESSION – 1
VEHICLE FINANCING SCENARIO

PRESENTATIONS

OVERVIEW OF VEHICLE FINANCING SCENARIO
MR SUDHANSU VERMA
HEAD - RETAIL, CHANNEL FINANCE & INSURANCE,
TATA MOTORS

ROLE OF FINTECH IN VEHICLE FINANCING
MR B L SHARMA
CEO, CARWALE

PANEL DISCUSSION

MODERATOR
MR ARUN MALHOTRA
AUTO INDUSTRY EXPERT AND FORMER MD, NISSAN

MR SUDHANSU VERMA
HEAD - RETAIL, CHANNEL FINANCE & INSURANCE,
TATA MOTORS

MR T T SRINIVASARAGHAVAN
MD, SUNDARAM FINANCE

MR RAKESH ARORA
SENIOR PRESIDENT, YES BANK

MR KAUSHIK SINHA
CHIEF GENERAL MANAGER – PBBU,
STATE BANK OF INDIA

MR B L SHARMA
CEO, CARWALE

SESSION – 2
VEHICLE INSURANCE SCENARIO

PRESENTATIONS

OVERVIEW OF VEHICLE INSURANCE SCENARIO
MR SURENDRA SRIVASTAVA
CO-CHAIRMAN, SIAM FL&I GROUP AND
CEO, MARUTI INSURANCE BROKING

INSURERS' PERSPECTIVE
MR PARTHANIL GHOSH
PRESIDENT - MOTOR BUSINESS, HDFC ERGO GIC

PANEL DISCUSSION

MODERATOR
MR SOM KAPOOR
PARTNER – AUTO PRACTICE, EY

MR TAPAN SINGH
MD & CEO, BAJAJ ALLIANZ GIC

MR M N SARMA
SECRETARY GENERAL,
GENERAL INSURANCE COUNCIL

MR RITESH KUMAR
MD & CEO, HDFC ERGO GIC

MR SURENDRA SRIVASTAVA
CO-CHAIRMAN, SIAM FL&I GROUP AND
CEO, MARUTI INSURANCE BROKING

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Logistics Group

The SIAM group remained engaged with the Railway Board on several issues related to transportation of Automobiles. Over the last few years, Railways has been quite supportive in making suitable policy changes for enhancing its modal share in automobile transportation like Increasing the number of NMG Rakes, Maintaining Freight Rates, Permitting Multi-Point Unloading, Modifying the AFTO policy, etc.

Automobile Manufacturers met Mr Piyush Goyal, Hon'ble Minister of Railways last year and discussed several key points to make Railways more user friendly, for vehicle transportation in the country.

During the meeting, it was proposed to reduce the Freight Rates of NMG and BCACBM rakes to make Railways economically viable and competitive to that of Road for distances less than 1,200 kms. Though Railways have not increased the Freight Rates of BCACBM rakes since May 2013 and for NMG rakes since May 2018, still they would be open to look at the freight rates of less than 1,200 kms. Railways requested SIAM to suggest a revenue neutral proposal, which can be considered by the railways and the same has been submitted recently.

Availability of Railways Sidings in Automobile plants is another request to Railways. This will help in avoiding

multiple handling and first mile connectivity. Railway Board requested for specific locations of automobile plants where Railway Siding is required, and informed that it will be suitably developed.

Design for loading SUVs in both decks of a rake was another area of discussion. Since SUVs is a growing segment in the country, it was requested if suitable design modifications could be done to accommodate them in both decks of auto rakes. Railways informed that RDSO is currently working on the designs to accommodate SUVs.

It was also requested if side-loading of Two-Wheelers in BCACBM Rakes could be permitted for convenient and faster loading / unloading of Two-Wheelers. Railways informed that RDSO is currently working on modifying the design for accommodating Two-Wheelers.

SIAM Members appreciated that transit times have improved significantly in the recent times. Railways committed that transit times will not be an issue anymore and time-tables will be prepared and adhered to, for running of rakes.

Railways has accepted our request for facilitating vehicle exports to Bangladesh and Nepal, a few pilot projects were successful conducted.

Annual Report Card (2020-21)				
S.No.	Deliverable	Measures	Owner	Stakeholders
1	To Enhance Efficiencies in Outboud Logistics in Automobile Sector	1. SIAM worked very closely with the Railway Board on several policy issues related to usage of Railways for Vehicle Transportation	Logistics Group	Membership and Government
		2. Submitted a proposal to utilise Railways for distances upto 1,200 Kms		Membership and Government
		3. Requested Railways for Design Modifications in Rakes for loading of Utility Vehicles and Two-Wheelers in Double-Deck format		Membership and Government
		4. As per SIAM recommendations, Railways commenced Exports of Vehicles to Bangladesh and Nepal		Membership and Government



Waiver of Stabling Charges was another issue taken up with Railways last year. Due to the second wave of the Covid pandemic, most of the Automobile Manufacturing plants were operational intermittently, as a result of this, rakes operating under the AFTO Policy were stabled across various railway terminals. Therefore, SIAM again requested Railway Board to waive of the Stabling Charges from April to September 2021, to provide some relief to Auto OEMs and Rake operators during the challenging times.

SIAM Logistics Group organised the 7th edition of

Automotive Logistics Conclave on 7th April 2021, through a digital platform. The theme of the conclave was -“Automotive Logistics: Exploring New Frontiers”. Mr P K Agarwal, Special Secretary (Logistics), Ministry of Commerce & Industry was the keynote speaker. Several other Speakers, from diverse backgrounds, shared their views on the theme of the conclave and engaged with the audience.

SIAM group will continue to work closely with Railways to develop it as an additional mode of transportation and to enhance its operational efficiencies.

7th SIAM Automotive Logistics Conclave

SIAM
Society of Indian Automobile Manufacturers
Building the Nation, Responsibly

Automotive Logistics: Exploring New Frontiers
7th APRIL 2021 2:00 PM - 5:00 PM Virtual

OPENING SESSION

WELCOME ADDRESS

Mr Rajesh Menon
Director General, SIAM

SETTING THE CONTEXT

Mr Vikas Jain
Chairman, SIAM Logistics Group & VP, Hyundai Motor India

KEYNOTE ADDRESS

Mr P K Agarwal
Special Secretary (Logistics),
Ministry of Commerce & Industry

PANEL DISCUSSION - ROAD TRANSPORTATION

MODERATOR

Mr Arun Malhotra
Auto Industry Veteran

Mr Achal Paliwal
CEO, TML Distribution

Mr Sumit Lahiri
Head, Logistics & Distribution, Bajaj Auto

Mr Jasjit Sethi
President & CEO, TCI SCS

PANEL DISCUSSION - ROLE OF DIGITALISATION AND DATA ANALYTICS

MODERATOR

Mr Pratik Shah
Director, EY

Mr Jagmeet Singh
CEO, Axestrack

Ms Sapna Ahuja
COO, MapmyIndia

Mr Arjun Nagarajan
Co-Founder & CEO, Syook

PANEL DISCUSSION - RAILWAYS

MODERATOR

Mr R S Kapoor
Senior Advisor, Maruti Suzuki

Mr M C Shekhar
Divisional Head, Logistics, HMSI

Mr Mudit Chandra
Executive Director (Freight Marketing),
Railway Board, Ministry of Railways

Mr Ved Prakash
General Manager, Dedicated Freight
Corridor Corporation of India

Mr Umesh Bhanot
Regional Head, South Asia,
APL Logistics

CLOSING REMARKS
Mr Rakesh Sen
Co-Chairman, SIAM Logistics Group & Senior General Manager, Mahindra & Mahindra

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Aatmanirbhar Bharat – Sourcing Group

Automotive industry is committed to promote Manufacturing of vehicles and components in the country by enhancing Localization of parts, reducing cost of vehicles, increasing productivity and achieving global standards of quality. In line with this objective, SIAM Aatmanirbhar Bharat - Sourcing group continued to remain engaged with several stakeholders with an aim to support the “Make in India” and “Aatmanirbhar Bharat” initiatives of the Government of India.

In order to have a holistic understanding of the nature of imports and the current localisation levels, SIAM and ACMA jointly commissioned a Study to prepare the Localisation Roadmap for the Indian Automotive Sector, covering all components and raw materials used in the Auto sector. 7 Cross Functional Teams were formed with members from SIAM, ACMA and other Industry bodies like ATMA, TAGMA etc.

SIAM Aatmanirbhar Bharat - Sourcing group and ACMA Secretariat took lead and organised several rounds of interactions, with their member companies, to deliberate on specific product categories.

Top-12 product categories were identified for detailed study. Joint Meeting of CFTs was done with SIAM & ACMA members on various categories like Drive Transmission & Steering, Engine, Electronics, Electrical, Steel, Rubber and Tyres, Tool Dies & Moulds, Chassis & Body parts etc. Deep Dive was done on each of the 12 categories with regard to Key Trends in that product category and their impact on the imports. Identification of key reasons for import and possible mitigation actions were prepared.

Subsequently, Localization Potential for the category was identified and thereby Localization Roadmap was made for that category. The roadmap was prepared for 0-2 years and for 2-5 years highlighting the % reduction in Imports to be targeted, for every category, thereby, highlighting the business potential available for domestic component suppliers. Also specific actions required by the Industry and support required for the Government was also identified for each of the category in meeting the import reduction target.

Finally the sum total of target Import reduction of each of the categories became the overall Localization target for the Industry.

OEMs would be driving the Localization for both Direct Import and Indirect Import through supplier considering their Technology roadmap, Volume projections, new vehicle launch and testing plans.

SIAM & ACMA would also take up with various government agencies for the enablers for enhancing localization along with other Industry associations like ATMA, TAGMA, and Indian Steel Association etc. Review of the progress on Localization would be done periodically.

SIAM sourcing group has also been actively involved on various issues related to procurement of Raw Material and Components. The group dealt with several supply side challenges arising due to the second wave of Covid, uncertain business environment, etc.

Apart from Health and safety related challenges due to the Pandemic, automotive industry has been facing various other challenges during last one year - Global semiconductor shortages, Steel Supply issue, Container shortages, Shipment delays. Whilst economies and Industry supply chains across the globe witnessed severe disruptions, it is remarkable to note on how automotive value chain in India collaborated to keep its head above water and ensure business continuity balancing between lives and livelihoods.

The most significant of all is the shortage of Semiconductors which is impacting the production at various manufacturers. As a result of the economic recovery post first wave of Covid-19, there was an unprecedented demand from every consumer sector that requires Semiconductors as an input material like Electronics, White Goods, Mobile, Automotive etc.

Semiconductors are required in several critical applications in an automobile, such as Engine Electronic Control Unit (ECU), Anti-Lock Braking System (ABS), Electronic Brakes System (EBS), Infotainment Systems, Passive Keyless Entry Module, Sensors, etc. Indian Automotive industry procures Semiconductor



Components / Assemblies from several Global suppliers from Europe, USA, Japan, Taiwan, Malaysia etc.

As a result of the shortage of Semiconductors, the production schedules of several vehicle manufacturers were affected due to its limited availability for their Tier-1 and Tier-2 suppliers. This has led to high waiting period for vehicle deliveries.

The semiconductor shortages have recently aggravated due to natural disasters/accidents like winter storm in Texas in Feb'21, Fire in Renesas Naka plant in Mar'21 and now lockdown in Malaysia due to rising covid cases.

In order to promote domestic manufacturing, Ministry of Electronics and Information Technology, Government of India, recently issued an Expression of Interest (EOI) for companies to set-up Semiconductor Fabrication units in the country and SIAM sourcing Group is also engaging with them periodically and apprising its members of the developments.

During the last one year, the industry also faced severe Shortage of Containers for global trade leading to several challenges in timely deliveries of finished vehicles and components. The issue was raised to the Ministry of Shipping for their intervention and a few meetings were also organised by the Directorate General of Shipping.

Also, due to the rising Covid cases in various countries and lockdowns by different governments the uncertainties still continue and Industry is facing various issues in managing the logistics. There is uncertainty on getting space in a vessel and timely delivery of consignments. Shipping Freight Rates have also been increasing since July last year.

Availability of Steel and its frequent Price Hike was another major challenge encountered by the Auto sector. Post first wave of Covid-19, there was a sudden increase in overall demand of finished Steel from several sectors, such as white goods, home appliances, infrastructure, etc. due to which the inventory levels in the system had dried up. Further, the domestic steel companies also focussed on exports, making Steel unavailable for domestic consumption, in the desired quantity. Additionally, domestic steel mills demanded frequent price hikes from automobile manufacturers, thereby, increasing the input cost for vehicle manufacturing. In the last one year, Auto sector has already offered price

hike four times to Steel makers. SIAM had submitted various representations to the Ministry of Steel and Commerce on this issue and had several joint meetings with Steel companies.

DPIIT through a Notification brought Pressing Tools and Punches under the ambit of Quality Control Order in November 2020 that impacted the Automotive sector also since Punches are used in several applications. SIAM Sourcing group submitted several representations to DPIIT, Ministry of Commerce requesting them for Deferment of the Implementation of QCO by 12 to 18 months. A few meetings were also organised with senior officials of DPIIT to explain our concerns with regards to implementation of the QCO. SIAM would continue to pursue the same with DPIIT.

Ministry of Finance, through a notification, implemented Customs guidelines that enable customs to verify Rules of Origin under the Trade Agreements and this came into effect from 21st September 2020 onwards (Administration of Rules of Origin under Trade Agreements).

Aligning with this, faceless assessment was also introduced by CBIC, Ministry of Finance. This will help in streamlining the custom clearance procedure and timely evaluation of documents that typically used to be a time-consuming affair.

SIAM is a member of MTD-4 and MTD-16 committees of BIS on standards formulation. In the last one year, SIAM attended several meetings of MTD 16 in BIS and helped in formulation of various Steel Standards, basis the inputs received from its members.

SIAM is a member of the Inter-Ministerial Committee (IMC) on Tyres and Tubes that examines the Tyre sizes to be included and excluded from the Exemption List of Pneumatic Tyres and Tubes Quality Control Order of 2009. SIAM collected data from its members related to Tyre sizes to be Added and Retained in the Exemption List. SIAM also coordinated with senior officials of DPIIT on this to get the Tyre sizes included in the revised Exemption List.

SIAM sourcing group would continue to work towards supporting sustainable development of the Indian Automobile Industry by working closely with all stakeholders.



Annual Report Card (2020-21)

S.No.	Deliverable	Measures	Owner	Stakeholders
1	To Mitigate Challenges in Automotive Supply-Chain	1. SIAM and ACMA worked together and prepared a Localisation Roadmap for Indian Automotive Sector for next 2 and 5 years respectively	Aatmanirbhar Bharat - Sourcing Group	Membership and Government
		2. Interacted with DPIIT on Deferement of QCO for Pressing Tools and Punches		Membership and Government
		3. SIAM submitted several representations to Ministry of External Affairs and Ministry of Road Transport & Highways related to Shortage of Semiconductor and Non-Availability of ABS for Two-Wheelers		Membership and Government
		4. SIAM interacted with Miistry of Shipping and DG (Shipping) on Container Shortage in the industry and increase in its Freight Structure		Membership and Government
		5. Interacted with Ministry of Steel and Commerce on issue related to Shortage of Steel and its frequent price hike		Membership and Government



Vehicle Classification, Sales Reporting & Analysis Group

The Indian auto sector has grown by leaps and bounds through its manufacturing prowess, and thus achieving optimum quality and technological advancements. The vehicles being produced in the country follow high-level of regulations and standards through its entire lifecycle, from the production phase up till the vehicle delivery. Over the years, the vehicle models, segments, features, quality, and pricing along with other specifications have also been evolving vis-a-vis the dynamic market conditions and customer preferences.

With a robust data collection and dissemination mechanism established by SIAM over the years for Wholesale data reporting, various discussions were held for further extending the industry data to report Retail sales data as well. Several rounds of discussions for Retail Sales reporting were also held in the SIAM Council on Market under the Chairmanship of Mr Anuj Kathuria, COO Ashok Leyland Ltd, and Co-Chairmanship of Mr Veejay Nakra, CEO Auto Division Mahindra & Mahindra Ltd. Implementation of Retail sales reporting would enable enhanced data driven insights regarding the auto industry's performance providing for an additional level of data point over and above the Wholesale numbers.

Along with this, the SIAM Vehicle Classification, Sales Reporting and Analysis group is also working towards preparing a framework to understand the Used Vehicle Business in the country and tracking the Pre-Owned vehicle market on a regular basis. This comes in the backdrop of economic slowdown due to COVID, which led to dwindling purchasing power, yet meeting

the affordable personal mobility requirements of the masses.

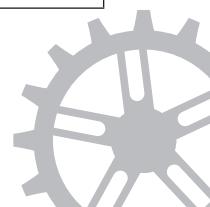
One of the crucial sales channels for the Auto Industry is the Canteen Stores Department (CSD) through which the industry is able to serve the Indian Armed Forces' vehicle requirements. During the last year, CSD introduced an Indemnity Bond clause, posing sales hurdles for passenger vehicles and two-wheelers. While the submission of the bond has been deferred until the end of 2021, the industry remains engaged to achieve a common ground with CSD.

The group also worked to finalise and report the Mild Hybrid Vehicles in SIAM Statistical Reports after taking into consideration views from all Passenger Vehicle members. 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.

Since VAHAN 4 portal has been rolled out in the country for online registration of vehicles, SIAM has been receiving requests from several State Transport Departments regarding uploading of Ex-Showroom Price of Motor Vehicles by automobile manufacturers. This is required for accurate collection of Road Taxes from new vehicle customers and to ensure there are no losses to the state exchequer. During the last one year, SIAM remained engaged with various State Transport Departments on this topic and apprised members of the developments.

Annual Report Card (2020-21)

S.No.	Deliverable	Measures	Owner	Stakeholders
1	To review the Vehicle Classification on a regular basis for accurate publishing of Statistical Reports	1. SIAM made submissions to various State Transport Departments requesting for allowing Online Registration of Vehicles in the state.	Vehicle Classification, Sales Reporting & Analysis Group	Membership, Government and Society
		2. SIAM facilitated Uploading of Ex Showroom Prices of Vehicles on Vahan portal in coordination with its member OEMs.		Membership, Government and Society
		3. SIAM worked towards reporting of retail sales with its member OEMs.		Membership and Society
		4. SIAM made submissions to Canteen Stores Department (CSD) for extension of timeline for the submission of Indemnity Bond.		Membership and Society



Styling & Design Group

The SIAM Group has also been promoting capability building in the area of Automotive Styling & Design, by fostering the culture of creative thinking amongst Design Students, to make them industry ready. SIAM Styling & Design 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 the Faculty and Students of several Indian Design Institutes and has helped a few of them in setting-up their curriculum / lab facilities and also support young talent by conducting interactive workshops.

“Influence of the new Normal on the Future of Automotive Design” - the 15th edition of Styling & Design Conclave and 13th edition of the Automotive Design Challenge (ADC) was organised on 19th February 2021, through a digital platform. Several eminent speakers from India and abroad participated in the event and shared their views and engaged with the audience.

The theme of the ADC 2020 was - “Shared Mobility for Gen Glass” and its final evaluation round took place on day of the conclave. There was enthusiastic participation from all major design colleges across country and more than 50 students submitted their entries.

Following are top -3 winners of ADC 2020:

- First prize: Mr Harmeet Singh from National Institute of Design
- Second prize: Mr Rugved Atulkumar Patil from World University of Design (WUD)
- Third prize: Mr Ganesh Bhagwan Borse from National Institute of Design

SIAM group is planning to better engage with the Automotive Design community in the coming year, for organising joint events and for sharing of ideas.

Annual Report Card (2020-21)

S.No.	Deliverable	Measures	Owner	Stakeholders
1	To promote Automotive Styling & Design domain in the country	1. SIAM organised 15 th edition of Styling & Design Conclave where several International Speakers shared their perspective on latest design concepts and technologies	Styling & Design Group	Membership and Society
		2. Automotive Design Competition (ADC) was also organised for existing design students. More than 50 students submitted their entries and top-3 were awarded		Membership and Society

SIAM
Society of Indian Automobile Manufacturers
Building the Nation, Responsibly

15th Styling & Design Conclave
Theme: Influence of the new Normal on the Future of Automotive Design

Welcome Address
Mr Rajesh Menon
Director General, SIAM

Setting the Context
Mr Malo Le Masson
Chairman, SIAM Styling & Design Group
and Head, Strategy, Hero MotoCorp, India

Keynote Address
Mr John Antony Sahs
Head, Design,
Nissan Latin America, Brazil

Session – 1
Presentations on the theme

Session – 2
Presentations by shortlisted ADC Students
ADC Award Ceremony

Closing Remarks
Mr Sathiyaseelan G
VP, Design, Ashok Leyland, India

19th February 2021 2 PM onwards Virtually



Human Capital Group

SIAM Human Capital Group is Chaired by Mr. R Anandakrishnan, Executive Vice President (HR & IT) – TVS Motor Co. and Co-Chaired by Mr. Stephen Sudhakar, Sr. Vice President- People Strategy & Business Support, Hyundai Motor India.

The Group works on various issues related to HR, IR, Labour, Benchmarking, Rewards & Performance, etc.

The Group interacts with Automotive Skills Development Council (ASDC) to look into their activities, guides them on policy directions and also support few activities. Some of the members of HCG represent SIAM in the Governing Council of ASDC.

A Rewards and Performance Study has been conducted every year within SIAM Members since 2008. This year, SIAM partnered with Deloitte India to conduct the

Annual Performance and Rewards Study. The objective of the study is to assess the rewards competitiveness of Members and helps them to take data backed increment and rewards decisions. Over 25 Auto OEMs participated in the survey. Besides compensation trends the survey gives additional value add in terms of industry performance outlook, performance management practices, productivity studies, etc.

The members share their benchmarking data on various policies, as and when required. This benchmarking facilitates help members in reviewing different policies of their company. During the past one year, benchmarking on the leave policy including special leave during Covid-19, annual appraisals, etc. were conducted.

Annual Report Card (2020-21)

S.No.	Deliverable	Measures	Owner	Stakeholder
1	To work on HR and IR Related issues	<ol style="list-style-type: none">1. Annual Performance and Rewards Study was conducted by Deloitte India, facilitated by SIAM. The following modules were included in the study: Compensation Benchmarking, Benefits Benchmarking Performance Management Benchmarking, R&D Study, Sales & Service Study, Employee Preference Study, Workforce & Increment Trends, Campus Hiring Trends2. Benchmarking have been conducted on Annual appraisals, Leave policy for non-factory offices,3. An overview of the new labour codes for the Auto Industry was presented to members by Deloitte India. The focus was on wages and workforce categorization and the way forward.4. An experience sharing session was conducted on 2nd wave of COVID 19 effect on workforce management. Few members had shared their experience on adaption on new practice, change in workforce mix, rehabilitation plan, preparation for 3rd wave. A presentation was made by Deloitte India on possible changes in future from a human capital perspective	Human Capital Group	Membership



CSR Group

The Society of Indian Automobile Manufacturers (SIAM) organised the 5th annual SIAM CSR Conclave on 24th March 2021 on a Virtual Platform to highlight the contributions of the auto industry in the fight against COVID-19. The theme of the event was Re-building the Nation with Social Responsibility, and provided insights into how CSR activities were helping society during the pandemic.

The Guest of Honour at the Conclave, Mr Amit Vardhan, Joint Secretary, Ministry of Road Transport and Highways, Government of India, inaugurated the CSR Conclave. He said that automobile industry

during the lockdown period extended a spontaneous helping hand to people in distress by distributing food and dry ration kits. Industry helped frontline warriors in healthcare institutions and the Police by distributing Sanitizers, Masks, PPE Kits and also provided ventilators and beds at COVID care facilities. SIAM members also showcased best practices and experiences in the fight against COVID-19.

The event concluded with the presentation of 3rd SIAM CSR Awards presented to the NGOs working with SIAM members on various CSR activities.

Annual Report Card (2020-21)

S.No.	Deliverables	Measures	Owner	Stakeholders
1	SIAM CSR Compendium 2019	1. Organised 5 th edition of annual SIAM CSR Conclave – Re-building the Nation with Social Responsibility	CSR Group	Membership, Government and Society
		2. Best practices shared by members on fight against COVID 19		Membership, Government, Society and Media
2	SIAM CSR Awards	3. Organised 3 rd SIAM CSR Awards for NGOs working with Member companies		Membership and Society
3	Document on SIAM Against COVID 19 (2 nd Wave)	4. Collation of data from Members on their efforts on fight against COVID 19 - second wave, especially Augmenting Oxygen supply for Medical use, Strengthening Healthcare Infrastructure and Society Welfare		Membership





5th SIAM CSR CONCLAVE

SIAM CSR AWARDS 2020
GLOBAL HIMALAYAN EXPEDITION HAS BEEN
RECOGNISED AS THE WINNER UNDER THE
ENVIRONMENTAL REJUVENATION CATEGORY

MEMBER COMPANY: EICHER MOTORS (VECV)



5th SIAM CSR CONCLAVE

SIAM CSR AWARDS 2020
DHARTI CHARITABLE TRUST HAS BEEN
RECOGNISED AS THE WINNER UNDER THE
HEALTH & SANITATION CATEGORY

MEMBER COMPANY: TATA MOTORS



5th SIAM CSR CONCLAVE

SIAM CSR AWARDS 2020

BAIF INSTITUTE FOR SUSTAINABLE
LIVELIHOODS & DEVELOPMENT HAS BEEN
RECOGNISED AS THE WINNER UNDER THE
SKILLS & EDUCATION CATEGORY

MEMBER COMPANY: MAHINDRA & MAHINDRA



5th SIAM CSR CONCLAVE

SIAM CSR AWARDS 2020

MANAV SEVA EDUCATION & CHARITABLE TRUST
HAS BEEN RECOGNISED AS THE WINNER UNDER
THE SPECIAL MENTION COVID-19 CATEGORY

MEMBER COMPANY: TATA MOTORS



Engagement & Communication Group

A need was felt to present the facts and figures of Indian Automobile Industry in a comprehensive manner to the Government, Media and Civil Society. President opined to enhance SIAM communication and engagement with the stakeholders. To meet this goal, an Engagement & Communication Group was formed last year.

Throughout the year various new communication strategies were devised and implemented. These initiatives have been successful in getting the right messaging through and have created a more realistic perspective of auto industry among the stakeholders.

For example, soon after the COVID 1st wave, when industry was fulfilling pent-up demand in the market, many journalists started reporting that automobile industry was showing a sharp recovery and high growth rate. Contrary to this perception being created, industry was actually pushed back by many years because of COVID. In fact, even before COVID, Auto Industry has been witnessing a deep structural slowdown. This was effectively communicated with segment-wise historical sales data and CAGR.

Another key initiative taken by the Engagement & Communication Group was to highlight the challenges and concerns of the industry to the Government, Bureaucrats, and Policy Makers. To this end, many

virtual and physical meetings were planned including,

- Meeting with Revenue Secretary, Mr Tarun Bajaj
- Meeting with CEO NITI Aayog, Mr Amitabh Kant

One of the positive outcomes was the acknowledgement of the fact that higher taxes adversely impact the growth of the industry.

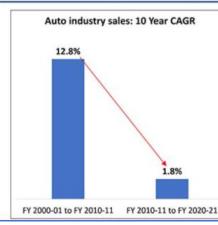
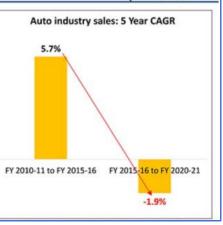
In the time of crisis, Indian auto industry has always stood by the nation. CSR efforts undertaken by members to augment the supply of medical oxygen, support health care infrastructure and help local communities, were suitably highlighted.

Under the theme of “Sound Development of the Industry” shared by the President, the Engagement & Communication Group shall continue to engage with Ministers, Bureaucrats, Policy Makers, Media, and other stakeholders on key issues, challenges and concerns of the Indian Automobile Industry. The Group shall ensure the best way of communicating our concerns to the right people with the right messaging.

With an aim to show the employment generation by the industry, depth of investments and its contribution to the society, the Engagement & Communication Group plans to invite key stakeholders to our members' locations, R&D centres, CSR projects, and so on.



Annual Report Card (2020-21)

GOI's Acknowledgement that Higher Taxes Impact Auto Sector	
SIAM's Communication	Impact
<p>ET THE ECONOMIC TIMES “Lower tax rates, steps to boost sales crucial for auto cos”: Kenichi Ayukawa, President, SIAM</p> 	<p>NDTV “Higher Taxes Impact Auto Sector, Need To Lower GST Rates”: Tarun Bajaj, Revenue Secretary</p> 
‘New Format’ for SIAM Sales Data Release	
Old Format (Media Reporting)	New Format
<p>ET THE ECONOMIC TIMES Passenger vehicle market swings to V-shaped recovery</p> <p>By Ketan Thakkar & Ashutosh R Shyam, ET Bureau • Last Updated: Mar 08, 2021, 10:11 AM IST</p> <p>BusinessLine Auto sales stay on fast lane in February; tractor firms post double-digit growth</p> <p>Our Bureau New Delhi Updated on March 01, 2021</p> <p>BusinessToday.In Automobile sales brush aside COVID blues, post record growth in February</p> <p>Market leader Maruti Suzuki saw a 8.3 per cent growth at 144,761 units while Hyundai witnessed a 29 per cent jump at 51,600 units</p> <p>Suman Banerji Mar 01, 2021, Updated Mar 01, 2021, 6:23 PM IST</p> <p>Highlights</p> <ul style="list-style-type: none"> Passenger vehicle segment posts strong 23 per cent growth to log highest ever sales for the month of February. <p>mint Auto sales enter the fast lane</p> <p>1 min read . Updated: 02 Mar 2021, 12:05 AM IST</p> <p>Malyaban Ghosh</p> <ul style="list-style-type: none"> Commercial vehicles too posted better sales in line with a pickup in manufacturing and infrastructure activity, according to sales data 	<p>SIAM Press Release</p> <p>Domestic Sales: April 2020 – March 2021 – Comparison with Past Years (Numbers in '000)</p>  <p>Indian Auto Industry growth slowing</p> <p>Auto industry sales: 10 Year CAGR</p>  <p>Auto industry sales: 5 Year CAGR</p>  <p>ET THE ECONOMIC TIMES Indian auto industry saw slowest ever growth in last five years: SIAM</p> <p><i>The massive decline in the automobile industry is neither sudden nor surprising. While the slowdown had been persistent down the decades since 1989-90 owing to several factors in the economic system, the past five years have been particularly hard on the passenger vehicle (PV) segment. Its decline was steeper.</i></p> <p>Shalini Priya • ETAuto • Updated: January 29, 2021, 12:09 IST</p>



TECHNICAL AFFAIRS

Two-Wheeler Group

The Indian Two-Wheeler industry has successfully and in shortest possible time migrated from BS IV on 1st April 2017 to BS VI emission norms with effect from 1st April 2020. Indian two wheelers will now be safer as they will have global requirements for Stands, Footrests and External Projections from 1st January 2022. However, the Indian two-wheeler industry was not immune from the impact of the COVID-19 pandemic. The industry was already reeling under a slowdown in FY 2019-20 which was worsened by the impact of the COVID-19 outbreak. The two-wheeler sales numbers for the current year have dipped to FY 2013-14 levels, which is a very worrying scenario given that industry has made significant investments in BS VI technology and is expected to upgrade the vehicles to BS VI OBD-II levels by April 2023. Owing to the disruption due to COVID-19, industry also sought relief from MoRTH in the form of 1 year deferment of phase wise implementation of OBD-II norms to April

2024 and April 2026, from the SCOE decision of April 2023 and April 2025.

The Group has also undertaken an industry wide study on Catcon Market Survey with ICAT to understand the catcon deterioration and catcon tampering scenario in India for BS VI two-wheelers. As per the study carried out by EMISIA in Europe, Japan and China, catcon monitoring has very high net social loss, therefore, Indian two-wheeler industry has decided to generate India specific data and study the same to arrive at the net social benefit or index. While Indian two-wheelers dominate the global fuel efficiency level, the group is formulating a proposal for an expected regulation on the same, under the aegis of Bureau of Energy Efficiency (BEE).

The Group is also working with other stakeholders to cater to special kind of vehicles, such as fire responders and working towards developing regulation for protective device.

Annual Report Card (2020-21)

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 FootrestsFormulation of fuel efficiency norms for two wheelersCatcon Monitoring Market Survey with ICATThe group worked to develop a holistic approach for high penetration and increased demand of 2W in the Indian market in the coming years.India has taken over the chairmanship of the Brake Harmonization Group (BWG) at International Motorcycle Manufacturers Association (IMMA) for 2021-2024.	Two Wheeler Group	Society and Membership



SIAM LECTURES 2020

TRI-LECTURE SERIES ON ACTIVE & PASSIVE VEHICULAR SAFETY STANDARDS

Technology & Safety Features of Two & Three-Wheelers

11th December 2020 10:30 AM TO 1:00 PM

#SIAMLECTURES2020



WELCOME ADDRESS BY
Mr Prashant K Banerjee
Executive Director, SIAM



SESSION MODERATOR
Mr Arpit Mahendra
Editor, Express Drives, Financial Express



INDIAN TWO-WHEELER SAFETY FEATURES AND STANDARDS
Mr V Pattabiraman
Chairman, SIAM Three-Wheeler Group and Associate Vice President, TVS Motor Company



LOWER-MIDDLE-INCOME COUNTRIES: DEMAND OF TWO AND THREE-WHEELER AND ITS STANDARDS
Mr Soumya Das
Head International Marketing and Business Development, Bajaj Auto



GLOBAL TWO-WHEELER SAFETY STANDARDS
Mr Edwin Bastiaensen
Secretary General, International Motorcycle Manufacturers Association (IMMA)



TWO-WHEELER SAFETY TRAINING
Mr Harpreet Singh
Head – Safety, Honda Motorcycle & Scooter India



UNDERSTANDING TWO-WHEELER SAFETY ON ROAD THROUGH ACCIDENT DATA ANALYSIS
Mr Ravishankar Rajaraman
Technical Director, Chairman RASSI Technical Steering Committee,
J P Research India

MEDIA PARTNERS
MOTORINDIA
Professional



Electric Mobility Group

There were 10 million electric cars globally on roads at the end of 2020, following a decade of rapid growth. Electric Car registrations increased by 41% in 2020, despite the pandemic-related worldwide downturn of around 16% in global car sales, which clearly demonstrates increasing popularity of Electric Cars.

Around 3 million Electric Cars were sold globally (a 4.6% sales share), and Europe overtook China as the world's largest Electric Vehicle (EV) market for the first time. Electric Bus and Truck registrations also expanded in major markets, reaching global stocks of 600,000 and 31,000, respectively.

India automobile sector is at the cusp of mass electrification with many segments and applications are gearing up for this transition. India is fast catching up with strong push by Government (both central and states) with various measures in place including monetary support to hand hold the EV industry in the beginning years. From 2015, India has progressed considerably with electrification gaining a foot hold. Various vehicle manufacturers in the country have lined up EV models as well as creating manufacturing eco-system including major critical components like battery, motor and chargers.

This decade would prove to be the decider. In this endeavor, SIAM along with industry has been tirelessly working with Government and various stakeholders to bring a transition that is practical and sustainable. Despite a niche market, industry is also committed

to localize xEV components for a sustainable shift to electrification. These efforts have started bearing fruits.

Recently, SIAM made various recommendations to Central Government and various State Governments for effective implementation of various policies, rules and regulations relating to electrification. Some of the notable recommendations which were considered suitably by Govt. are as follows:

- Extension of FAME Phase-II beyond 31st March 2022
- Removal of permit requirements for Electric 3Ws
- Import duty on battery pack has not been increased until cell manufacturing takes place
- Validity of FAME certification based on model wise date of certification

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 consultations. 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 CII, has communicated several recommendations to DPIIT to promote local EV manufacturing and looking at strategic interventions by Government around sourcing of raw material and implementing export-oriented measures.

Annual Report Card (2020-21)

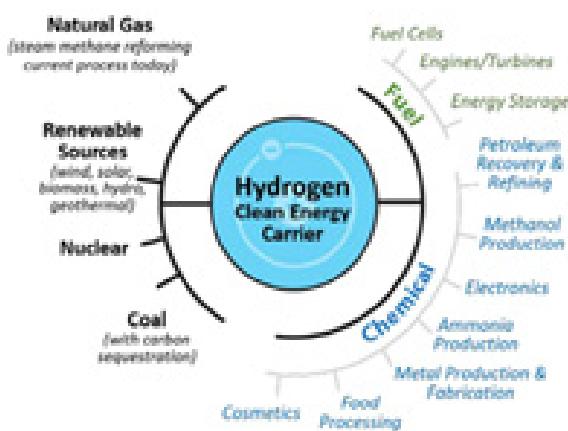
S.No.	Deliverables	Measures	Owner	Stakeholders
1	To ensure smooth implementation of Government policies and regulations relating to electric mobility	1. Made submissions on various technical and administrative issues including extension of FAME Phase-2, Battery Swapping for 2/3 Wheelers, Deferment of PMP timelines due to Covid, etc.	Electric Mobility Group	Membership and Government
		2. Supporting BIS in formulation of standards for traction batteries, traction motors, and EV charging stations		Membership and Government
		3. SIAM along with CII organized the Future of Mobility Summit in Feb 2021		Membership and Government
		4. SIAM pursued various industry recommendations to DPIIT to achieve xEV component localization		Membership and Government



The time has come when the various policy measures get implemented and their effects are showcased on the ground. In this context, SIAM took its campaign, 'walk the talk' towards electrification in the country, forward by organizing a twin online lecture series to drill down into Indian Conditions, Consumer Behavior & Needs and thereby Technology Adoption, Testing, Development and Homologation of Hybrid and Electric Vehicles.

- Hybrid and Electric Vehicles in India: Development, Testing & Homologation
- Electric Vehicles in India: On-Road Safety & Maintenance

The objective of the Indian auto industry to provide cleaner transportation through electrification need to be communicated for a balanced discourse, through a continuous dialogue with stakeholders. In this context, SIAM in collaboration with CII organized the Future Mobility Summit with a theme C.L.E.A.N that stands for Connected Mobility, Lean Mobility, Electrified Mobility, Alternate Mobility and Novel.



Going forward, SIAM would look forward to pursue with Government its on-going efforts around standard formulations for key xEV components and charging infrastructure and battery reuse and recycling as well as new initiatives including new measures announced in the FAME Scheme. Further, this decade is also going to be exciting with Hydrogen Fuel cell Electric Vehicles gaining significant push across the globe and in India. SIAM is going to be deeply engaged with concerned stakeholders in pushing the electrification roadmap further.

In its mission to build the nation responsibly, SIAM's endeavour would be to also encourage innovation, cross-sharing of ideas and foster technology development in the area of mobility. In this connection, SIAM would engage with upcoming Start-ups in India in the field of new technology areas and mobility solutions, particularly in the area of electrification.



Supported by

Ministry of Commerce and Industry
Department of Commerce
Ministry of Housing and Urban Affairs
Ministry of Power
Ministry of Road Transport and Highways
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FUTURE OF MOBILITY SHOW 2021
25 Feb - 3 Mar 2021, CII Virtual Platform
DIGITAL EXHIBITION AND CONFERENCE

LEAN MOBILITY

1445 – 1615 hrs | Friday 26 February | Digital Platform

Mr R B Santosh Kumar **Mr Goldie Srivastava** **Mr Pavan Vaish** **Mr Sudhendu Jyoti Sinha** **Dr Pawan Goenka** **Mr Amit Gupta** **Mr Karthik Ganeshan** **Moderator**
VP & Head – Government Engagement, S-Asia, MasterCard Co-Founder & CEO Smart E Head-Central Ops, S-Asia / India, Uber Advisor, Niti Aayog MD, Mahindra & Mahindra Co-Founder & CEO, Yulu VP & Bus Head – E Mobility, Ashok Leyland Mr Sumantra Barooah Executive Editor, Haymarket SAC Publishing

Theme: C.L.E.A.N -Connected, Lean, Electrified, Alternate, Novel



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.

After the COVID-19 outbreak in February 2020 and the first wave reaching its peak in September 2020, at a time when Industry was expecting to speed up and focus on the development for next stage of regulations. Issues of lockdown in the country and in many other parts of the world had a significant impact on this development work. Employees could not join office for work related to R&D development, work related to setting-up of Production trial facilities and in many cases for setting-up R&D test facilities, for scaling up capacity and capability. Although some employees could work from home, but most of the physical testing of engines & vehicles, etc., production of prototypes making (Parts, Engines and Vehicles) and logistics, got hampered for a significant duration. Development work, specifically pertaining to Quality Control Orders that required auditing and licensing of overseas suppliers by BIS officials was at an absolute halt that made QCO compliance unachievable for overseas suppliers. Overall development efficiency dropped to around 50%.

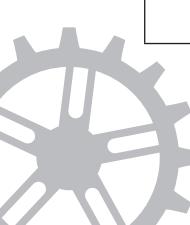
However, the country battled a more brutal and deadly

second wave in March 2021. A very large number of employees and their families were affected with COVID, and grave loss of lives was witnessed. A lot of focus was also paid on employee health and well-being. Under these extenuated circumstances, industry sought deferment for crucial regulations, such as Quality Control Orders for Safety Glass and Wheel Rims, as domestic facilities were not operating on full strength and overseas travel restriction did not permit grant of licenses for those suppliers, and more than a 100 applications per QCO were pending. Understanding the present Industry situation, Department for Promotion of Industry and Internal Trade (DPIIT) granted additional one year lead time to obtain compliance to QCOs, while Department of Heavy Industry (DHI) granted industry six months additional time for compliance to wheel rims QCO, providing the much-needed relief. In view of the development time lost in the second wave, industry also sought some relaxation for co-driver airbag mandate. We are hopeful that the Government would grant industry some relief in the form of additional time to achieve compliance to the regulation applicable from 31st December 2021.

SIAM has also taken upon the task to identify AIS standards that are yet to be converted to IS standards. Each AIS standard is being thoroughly checked by industry for the purpose of alignment and likewise is being put up for adoption in BIS committees.

Annual Report Card (2020-21)

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. Upon SIAM representation to DPIIT, extension of safety glass QCO implementation timelines by 6 months i.e., 1st April 2022 was granted, with added CBU exemptions.2. Extension of wheel rims QCO by 6-months by DHI, owing to travel restrictions.3. Omission of Feracrylum 1% gel from First Aid Kit provided in vehicles.4. Obtained 18 month lead time for WVSCOP compliance.5. Actively involved in harmonization of AIS standards with IS standards6. Pursuing additional 3 months for co-driver airbag in final gazette, as obtained in draft.7. Supporting in developing the Vehicle Recall Portal under the aegis of MoRTH, in collaboration with SIAM Service & IMC Group.	CMVR & Safety Group	Membership



SIAM LECTURES 2020

TRI-LECTURE SERIES ON ACTIVE & PASSIVE VEHICULAR SAFETY STANDARD

Safety Features of Passenger Vehicles

4th December 2020 10:30 AM TO 1:00 PM

#SIAMLECTURES2020



WELCOME ADDRESS BY
Mr Prashant K Banerjee
Executive Director, SIAM



SESSION MODERATOR
Mr Deepangshu Dev Sarma
Editor (B2B), CarWale



GLOBAL SAFETY REGULATIONS: HARMONISATION IN INDIAN CONTEXT
Dr Tapan Sahoo
Chairman, SIAM International Harmonisation Group
& Executive Vice President, Maruti Suzuki India



ROAD SAFETY THROUGH TECHNOLOGY & REGULATIONS - PUT FIRST THING FIRST
Mr Ramashankar Pandey
Managing Director, Hell India Lighting



INDIAN PASSENGER VEHICLES: PASSIVE SAFETY PRIORITIES
Mr Anil Kumar
Co Chairman, SIAM International Harmonisation Group
& Senior General Manager - Body & Trim Cars, TATA Motors



INDIAN PASSENGER VEHICLES: ACTIVE SAFETY PRIORITIES
Dr Sitarameswara Sarma Akella
Vice President, Mahindra & Mahindra



IMPLEMENTATION OF AIS 140
Mr Kartikeya Joshi
CEO, Minda iConnect



Gas Based Mobility Group

Government of India has laid down the vision for a Gas Based Economy by increasing the share of Natural Gas from 6% to 15% by 2030 in India's energy mix. It is in this context that Executive Committee of SIAM in September 2020 decided to create a focused group, consisting of all manufacturers, representing all segments, to push Gas Based Mobility (GBM). The key objective of the group is to collaborate with all stakeholders, including Government, Gas companies, Component makers, etc. to facilitate higher adoption of Natural Gas Vehicles (CNG and LNG) in India.

Following are some examples of the defined agenda of the GBM Group:

- To focus on all aspects that leads to increase of CNG/LNG stations across the country.
- To collaborate and support Gas industry / City Gas Distribution (CGD) industry in Infrastructure expansion across the country.
- To focus on all aspects that lead to increase in CNG/LNG vehicle sales of SIAM members and Faster development of CNG/LNG models.
- Identify policy interventions required to increase the localization of CNG and LNG components, in

line with Government's vision of Aatmanirbhar Bharat.

- Focused interface with all related stakeholders like MoPNG, State Governments, FPI, Gas Companies, PNGRB, etc. to synergize efforts towards the objectives of Gas Based Mobility.
- To deliberate and discuss all techno-commercial aspects (primarily commercial) with respect to CNG, LNG and HCNG.
- To streamline technical regulations for seamless adaption of Gas based vehicle technologies.
- Keep SIAM Members informed about updates in CNG and LNG both on the infrastructure side and on the policy side.
- Engagement with the stakeholders for uniformity of GST for the Gaseous Fuels.

Report of the group meetings held between September 2020 to July 2021 In line with the defined objective, some actionables included:

1. Eight group meetings in last ten months.
2. First ever roundtable between the Gas industry and the Auto industry with key aim to synergize actions to push gas based mobility.

Annual Report Card (2020-21)

S.No.	Deliverable	Measures	Owner	Stakeholder
1	To increase the share of natural gas from 6 % to 15 % by 2030 in India's energy mix.	<ol style="list-style-type: none">1. Engagement of the group to collaborate with all stakeholders, including Government, Gas companies, component makers etc to facilitate higher adoption of natural gas vehicles (CNG and LNG) in India2. Organising seminar with the stakeholder discussing advantages of the Gas based mobility.		
2	Prioritization for Infra expansion – Identification of Priority cities for CNG expansion. Identification of Priority areas/ highways/ routes for LNG expansion.	<ol style="list-style-type: none">1. Engaging with the stakeholders at the state level for prioritizing the 100 cities for expansion of Gas based mobility.	Gas based Mobility Group	Membership
3	Uniformity of the GST for Gaseous fuels across states.	<ol style="list-style-type: none">1. Requested the state government for uniformity of the GST for Gaseous fuels.		



3. First ever roundtable webinar to promote LNG infra and LNG vehicles with MoPNG.
4. Road Show with Haryana Government along with the Gas industry. More such road shows in pipeline.
5. SIAM submission to several State Government for promoting Gas based mobility.
6. Close association with FIPI and SIAM to jointly promote GBM activities.
7. Prioritization for Infra expansion – Identification of Priority Cities for CNG expansion. Identification of Priority Areas/ Highways/ routes for LNG expansion.
8. Estimation of future demand potential for Gas based Mobility; Opportunity for Auto industry and CGD industry.
9. Three Knowledge Sharing sessions by renowned Global Consultants/Firm (Nomura Research Institute, Boston Consulting Group & Shell Global).
10. Deliberation and identification of key actionable that can help country achieve National Vision on Gas Based Mobility. Group to keep pursuing the actionables with all associated stakeholders including Central Government, State Government, Gas Industry, Component industry, etc.

Shell Energy India

Presentation at SIAM
June 30, 2021

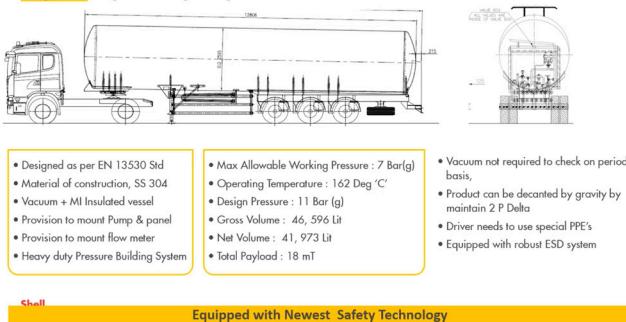
Shell ENERGY

Nakul Rajeja
Country Head, Shell Energy India

LNG Semi Trailer Engineering & Safety Technology Aspects

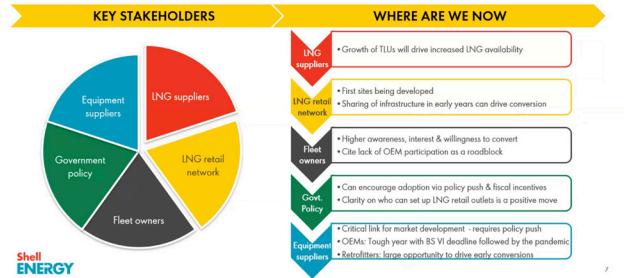


Engineering & Design aspects of LNG Trailer



Unlocking the potential for LNG in transport in India

Development of the industry requires a collaborative approach



Connected Vehicles Group

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.

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 formulated 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. This roadmap has been submitted to Bureau of Indian Standards as an India-wide recommendation for ADAS introduction. It is also important that a standard

framework for back-end (end-to-end) connectivity is developed. 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.

The Group also pursued de-licensing of radio frequencies for automotive purpose that would act as enablers for bringing in advanced V2X features such as collision avoidance, E-call, lane departure prevention, etc. Further, the group also tabled the proposal to conduct trials in India for V2V and V2I use cases using DSRC and C-V2X technologies. Department of Telecomm was also requested by SIAM that till such time frequencies are de-licensed, an SOP may be formulated comprising of test license requirements, parts import declaration, test setups permission, etc., which was favourably responded to by DDG (S-R-I), DoT. Request for inclusion of V2X in the scope of 5G testbeds planned by DOT was also put forward.

On the Machine-to-Machine (M2M) communication front, a detailed submission was made by SIAM

Annual Report Card (2020-21)

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">Released the ADAS White Paper; to be taken forward by TED28 under BISEstablished OEM authorised VLT suppliers on Vahan portal.Gained 6-month extension on CRO Phase V applicability.Obtained much-needed clarification from MeitY on CRO Phase V applicability on automotive parts.Regularly representing at TED, BIS Forums on Traffic Management, Cyber Security & Functional Safety, ADAS, Bus ITS, Role of ITS in Autonomous, VTS and TPMS.Linkages of M2M SIMs related parameters to vehicles over Vahan portal – ongoing.Under study – National Transportation PolicyConducted a Lecture Series - Navigating towards Connected Mobility	Connected Vehicles Group	Membership and Government



to Department of Telecommunication regarding registration process of M2M service providers and issues involved in the deployment of embedded SIM. Additionally, in order to bring out more awareness on M2M SIMs in cars and make the customer aware of the same, especially at a time of ownership transfer, SIAM is also pursuing the addition of M2M SIM related parameters on the Vahan portal and ensuring electronic linking of the same to the vehicle.

SIAM Connected Vehicle Group members also interacted with MeitY to understand the requirements of Compulsory Registration Order (CRO), Phase V that notified automotive components, such as camera, microphone and speaker. Upon concerns raised by

SIAM on applicability of CRO on automotive parts, that automotive speakers are not Bluetooth / Smart Speakers and Microphones are not wireless, all these components are used after wired connect. MeitY clarified that such components are not part of CRO; they also issued a clarification giving some relief to the applicability of CRO on cameras.

A lecture series on “Navigating towards Connected Mobility” in January 2021 was also organised for the industry and stakeholders alike, that saw participation from subject matter experts from European Association of Motorcycle Manufacturers (ACEM), Volkswagen AG, IIT Bombay and Accenture.

SIAM LECTURES 2021

NAVIGATING TOWARDS CONNECTED MOBILITY

22nd January 2021 **2:30 PM to 5:15 PM**

Welcome address
Mr Prashant K Banerjee
 Executive Director, SIAM

Setting the context and Theme Presentation
Mr Navid Talib
 Chairman, SIAM Connected Vehicle Group & Plant Operations Head, Honda Cars India

Navigating towards Connected Mobility
Mr Jan Lümann
 Regulatory Affairs Coordinator, Volkswagen AG

The Reality of Autonomous Driving
Mr Abhishek Gupta
 Global 'Automotive' and 'Mobility X' Research Lead (Accenture Research) Accenture Growth & Strategy, Accenture

ITS India – Challenges & Opportunities
Dr Nagendra R Velaga
 Associate Professor, Transportation systems Engineering Civil Engineering Department, IIT-Bombay

Common Service Layer for ITS
Mr Arnindam Bhattacharya
 Group Leader (IoT), C-DOT

Emerging Landscape of Connected Vehicles in Europe
Dr Veneta Vassileva
 Safety Manager, The European Association of Motorcycle Manufacturers

Emerging Landscape of Micro-mobility
Mr Antonio Perlet
 Secretary General, The European Association of Motorcycle Manufacturers

Q/A and Conclusion
Mr Randeep Khokar
 Co-Chairman, SIAM Connected Vehicle Group & Head, Electricals & Electronics, [PVBU] TATA Motors

#SIAMLectures2021



Frontier Technology & Innovation Group

The main objective of Frontier Technology & Innovation Group (FT&IG) is to keep Indian Automobile Industry abreast with the current and future trends in technologies in this sector and bring it at par with the industry 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 is involved in exploring new areas of technologies in different aspects of vehicles and automobile 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. On 22nd March 2021,

the Group engaged with Infineon Group to understand Future of Automotive Electronics and with M/s Anand and Anand to discuss about Role of IPR in safeguarding R&D and innovation work in Automotive Industry.

This Group will explore new technologies and innovations in the following areas of Automobility in FY 2021-22

- Hydrogen Fuel economy
- Power Electronics and Functional Safety as per ISO 26262
- Automotive Security
- Policies promoting research and research roadmap
- Institute collaboration, webinars and CSR

Annual Report Card (2020-21)

S.No.	Deliverable	Measures	Owner	Stakeholder
1	Keep Indian Automobile Industry abreast with the current and future trends in technologies in this sector and bring it at par with the industry in developed economies	<ol style="list-style-type: none">1. Engage with global and domestic experts active in future automotive technologies.2. Exploring the R&D expertise within the Indian Automotive for different technology domains.3. Indulge in knowledge sharing with other industry bodies like CII, ACMA, IEEMA etc.4. Initiate consultations and collaborations with renowned technology and solution providers like Infineon Group and M/s Anand and Anand	Frontier Technology and Innovation Group	Membership and Society



Recycling & Materials Group

Indian Automobile Industry is one of the most regulated industries in the country. While the regulations on emissions, safety standards, noise, etc. are already well established and are continuously calibrated to suit the dynamic needs of the automotive sector. The industry also actively supports formulation of new regulations on environment, social and business sustainability with the moto of "Building the Nation, Responsibly".

With the focus on sustainability and circular economy, the Government of India has announced the vehicle Scrappage Policy and issued a draft notification on Registered Vehicle Scrapping Facility (RVSF) and Draft Amendment 1 to AIS 129 standard for handling and management of ELV recycling in an environment friendly manner. The Government has also formulated an Action Plan for Circular Economy: End of Life Vehicles, which envisages responsibilities of key

stakeholders with timelines. SIAM's Recycling group is working in close coordination with the Ministry to provide necessary support on the initiative proactively, after due consultation with its members.

SIAM advocates the implementation of Shared Responsibility concept, as it brings together all stakeholders, with their share of clear roles and responsibilities, which is essential to achieving the goals of Circular Economy. The Shared Responsibility model is a successful EU model, which involves sharing of responsibilities by all economic operators (OEMs, Last Owner, Dismantlers & Shredders, Government) on a common strategy for ELV recycling.

The Group also made a submission on Draft Rules on RVSF, AIS 129 amendment and an Action Plan document for effective implementation of the aforementioned Action Plan.

Annual Report Card (2020-21)

S.No.	Deliverable	Measures	Owner	Stakeholder
1	Represent SIAM in forums responsible for vehicle recycling regulations and provide inputs for effective implementation	<ol style="list-style-type: none">1. Organised webinars on Policy, Regulations, & Economic Impact of ELV Recycling, Environmentally Sound Management of ELVs in India.2. 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.3. 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.	Recycling & Materials Group	Membership and Society



SIAM LECTURES 2021

LECTURE #16 ON

INDIAN VEHICLE SCRAPPAGE POLICY 2021: FEATURES AND IMPLEMENTATION PLANNING

18th August 2021 10:30 AM to 1 PM Virtual

Inaugural Session

Welcome Address
Mr Prashant K Banerjee
Executive Director, SIAM

Address by Chief Guest
Mr Amit Varadan
Joint Secretary, Ministry of Road Transport & Highways

Theme Presentation
Mr Shrikant Deshmukh
Chairman, SIAM Recycling & Materials Group and GM, Mercedes-Benz India

Overview & Salient features of Draft Registered Vehicle Scrapping Facility (Scrappage Policy) 2021
Mr Paresh Goel
Director, Ministry of Road Transport & Highways

Vote of Thanks
Mr M S Anand Kumar
Co-Chairman, SIAM Recycling & Material Group and GM, TVS Motor Company

SIAM LECTURES 2021

LECTURE #16 ON

INDIAN VEHICLE SCRAPPAGE POLICY 2021: FEATURES AND IMPLEMENTATION PLANNING

18th August 2021 10:30 AM to 1 PM Virtual

Thematic Session and Panel Discussion

Moderator
Mr Shrikant Deshmukh
Chairman, SIAM Recycling & Materials Group and GM, Mercedes-Benz India

Moderator
Mr Shovik Banerjee
Principal, Kearney

Progress with V-VMP Implementation and Pending Issue
Mr Masaru Akashi
MD, Maruti Suzuki Toyotsu India

Scrapage Policy – Mobility Road map in Circular Economy
Mr Som Kapoor
Partner – Automotive Sector, Ernst & Young

Critical Analysis of the Draft Registered Vehicle Scrapping Facility (Scrappage Policy) 2021: A SWOT Analysis
Mr M S Anand Kumar
Co-Chairman, SIAM Recycling & Material Group and GM, TVS Motor Company

Advantages & Challenges of Re-use and Non-Re-usable parts
Mr Meenakshi Sundaram
CTO, Amalgamations Components Group

Learnings from Implementation EPR Regime under Various Waste Management Rules Notified by MoF&CC
Mr Anand Kumar
Additional Director, CPCB

Mr Sanjay Mehta
President, MRAI

SIAM LECTURES 2021

Imperatives of ELV Recycling: Indian ELVs Guidelines & Basel Ban Amendment 2019

5th March 2021 2:30 PM to 5:15 PM

Welcome Address
Dr Rashid Hasan
Advisor, SIAM

Moderator
Mr V S Kannan
Head, Project House Electrification, Bosch

Theme presentation Basel Ban Amendment 2019: Imperatives of ELV recycling & circular economy
Mr Piyush Mohapatra
Program Coordinator (Chemical & Health Program), Toxic Link

Material recycling and scrappage policy support in India and way forward
Mr Sanjay Mehta
President, Material Recycling Association of India (MRAI) & Director, MTC Group

Status on: Implementation of ELV guidelines 2019 by CPCB
Mr Bharat Sharma
Additional Director, Central Pollution Control Board

Automotive sector: National experiences and challenges of ELV recycling in India
Mr SK Gupta
Sr Advisor, Maruti Suzuki India

ELV recycling: Challenges & learnings in India
Dr Suneel Pandey
Senior Fellow, The Energy and Resources Institute (TERI)

EU perspective: ELV recycling; Impact of Basel Ban Amendment 2019
Ms Rachna Arora
Sr Technical Advisor, GIZ, New Delhi

US experiences and status of ELV recycling vis-à-vis circular economy
Ms Sue Schauls
Executive Director, Iowa Automotive Recyclers, USA



International Harmonization Group

SIAM is a regular participant at the GR group meetings, WP 29 and OICA meetings as a part of the India delegation and contributes to various technical forums from time-to-time.

However, it is important that implementation of a new regulation should be preceded by development of adequate infrastructure and 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 that 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 manufacturing of technology at optimal cost and help in the Aatmanirbhar Bharat 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.

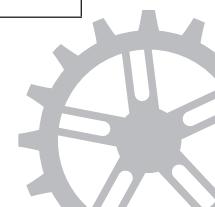
During the SIAM Annual Convention held on 4th September 2020, Hon'ble Minister for Road Transport and Highways, and Minister of Micro, Small and Medium Enterprises Shri Nitin Gadkari suggested that there is a need for developing a long-term regulatory roadmap for the automobile industry in India. This is to ensure that we can make mobility safer, cleaner and at the same time increase the contribution of the industry towards GDP growth and employment generation. Considering the importance of Regulatory Roadmap for sustainable development of auto industry, in other forums as well it

has been recognised that a fresh regulatory roadmap is required to be developed. Accordingly, SIAM initiated an assessment of introduction of future regulations and awarded the work to Nomura Research Institute. While proposing the roadmap, alignment with international regulations of developed economies, identification of India-unique category specific requirements, emphasis on import reduction and promotion of Make in India initiatives to be the major considerations in defining the regulatory timelines and feasibility. It is also recognised that an all-inclusive roadmap would necessitate wider global benchmarking, industry peer review and important stakeholder consultations including Ministry of Road Transport & Highways, Ministry of Heavy Industries & Public Enterprises, NITI Aayog and Test Agencies to make a comprehensive roadmap for India.

We are pleased to share that on 21st April 2020, Mr Rakesh Sharma (Executive Director, Bajaj Auto) took over as the 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 the United Nations, affecting the motorcycle industry and by advancing inclusive policies for motorcycling.

Annual Report Card (2020-21)

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">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 WP29.Commissioned a study to develop a 10-year regulatory roadmap for the industry across all sectors.	International Harmonization Group	Membership and Government



Sustainable Mobility Group

The former Clean Fuel Technology Group was envisioned and renamed as Sustainable Mobility Group in a meeting held on 6th May 2019 with a view to broadening its scope and to make it more inclusive. While speaking in the said meeting, the Chairman of the Group had stated that the Indian automotive sector is undergoing transition rapidly into a new paradigm of cleaner and sustainable mobility. Therefore, the Chairman with the consensus of the members rechristened the Group as Sustainable Mobility Group. Accordingly, the mandate of Group is focussed on the key priority area of automotive sector viz. advanced engine technology, cleaner fuels, emission treatment technologies material eco-efficiency, restricting the use of hazardous substances and green manufacturing, recycling, and circular economy. Therefore, the Sustainable Mobility group is an overarching Group fostering 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 below:

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

Sukh Da Saah (SDS-1): SIAM has been implemented the SDS-1 project since 2018 in the larger interest of social cause adopting best agricultural practices and improving air quality. The project showcased environment friendly in-situ technology in 9 villages of Patiala District on 7400 acres of agricultural land under 3 farmers co-operatives in Jasso Majra. The SDS-1 project has been immensely successful in achieving 71% reduction in stubble burning in 2018 and 81% in 2019. In culminating year 2020, the stubble burning reduction was outstanding 95% despite the pandemic.

The objectives of the on-going 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. The report of SDS-1 of 2020 has been finalized and will be circulated in due course.

SDS-2: The proposal of expansion of the SDS project in 7 additional villages in Jasso Majra, Nabha and in vicinity was approved by the group in 2020 for employing in-situ technology. The number of farmers covered under the expansion project are 1100 covering 4900 acres of farmland in adopted villages. The total cost of the project is Rs. 29,67,300 lakhs which is shared with CII on 50:50 sharing basis. Till date, 80% of SIAM share is released to CII for 2020-21. The outcome of the implementation of SDS-2 during 2020 reported impressive 90% reduction in the stubble burning in these additional 7 villages. A report on SDS-2 for 2020 is being finalized for dissemination amongst the stakeholders including the Government.

Key to Success of SDS-1 & SDS-2 Projects: Both SDS-1 and SDS-2 projects have achieved the outstanding results due to well thought out strategies and enablers like helping farmers with 46 equipment and several technical trainings and workshops were organized for farmers with agriculture scientists, experts, government officers 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. The handholding of farmers on regular basis has been the key element for the stupendous achievements under the project.

2. PPCB proposal on Microbial Digester-Phase II:

SIAM partnered with the Punjab State Pollution Control Board (PPCB) for application of microbial digested on 350 acres of farmland in Punjab. The total cost of the project was Rs. 7.50 lakh out of which Rs. 1.50 lakh was contributed by the PPCB and Rs. 1.00 lakh the IPS Foundation, New Delhi. SIAM contributed Rs. 3.00 lakh. The project implemented during 2020- 2021.



The draft report is being finalized by the PPCB. As per the preliminary data analysis, the results indicate that the microbial consortia- 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. The final report is awaited from PPCB.

3. Mass-media Blitz Campaign for Promotion of in-situ Crop Residue Management:

With the intensive and comprehensive multi-media campaign, SIAM as well as Sukh Da Saah project are household name in rural Punjab. The education and awareness campaign launched in 2018, 2019 and continued in 2020 through the PTC News and PTC Punjabi, the most popular TV channels in Punjab through video spots and TV debates to promote in-situ technology. During 2020, there were total 259 video spots spread out in a span from 30th October to 11th November 2020. Out of these spots, 101 spots were with the appeal by CEOs of prominent OEMs to farmers for not burning the stubbles in the fields.

The TV campaign launched by SIAM continuously for 3 years, generated much needed awareness and positive impact on the masses particularly on the farmers of the region. In fact, the campaign for prevention of stubble burning every year was a huge success and the annual campaign was watched by at least by 60 lakh people in Punjab, Haryana, and NCR.

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

SIAM has worked on strengthening the advocacy through the various platforms for sharing knowledge and best practices in automotive sector to curb environmental pollution based on life cycle concept and to attain sustainability and circular economy. In this regard, SIAM has consistently nurtured its collaborative approaches viz. (i) Government on policy making, (ii) national & international organizations to promote stricter, and enforceable regulations, (iii) organization of national and international events, (iv) launching SIAM lecture series and many such platforms are at the conceptualization. Through these platforms SIAM is establishing itself as an agent of positive change for supporting its motto of building the nation, responsibly. Further, to strengthen the

collaboration and communication, SIAM is deepening 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.

The key highlight of the year 2020 was the SIAM Lecture Series which have been organized since August 2020 and as on date 15 lecture series on identified thematic areas have been successfully organized. Thus, the SIAM has implemented the principles of 'Message Triangle' in letter and spirit – A success mantra for sustainable mobility. The following are SIAM strategies adopted for integrating and implementing the 'Message Triangle' successfully and in a meaningful manner:

- Promoting SIAM as a platform through 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.

5. SIAM Virtual Environment Lecture Series:

The Society of Indian Automobile Manufacturers (SIAM) has embarked upon a unique Environment Lecture Series launched on World Environment Day 2020 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, 15 lecture series have been organized so far. The list of organized lecture series is outlined hereunder:

- (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
- (iii) 3rd Lecture series: 'Indian Auto Industry's BS-VI milestone: Experience & Learnings' on 9th October 2020,
- (iv) 4th Lecture Series: 'Global Experience on Vehicular Emission Norms' on 16th October 2020,
- (v) 5th Lecture Series: 'Ambient Air Quality Improvement in Indian cities ' on 30th October 2020.
- (vi) 6th Lecture: Safety features of Buses / Commercial Vehicles - 27th November 2020,
- (vii) 7th Lecture: Safety Features of Passenger Vehicles - 4th December 2020,
- (viii) 8th Lecture: Technology and Safety Features of Two & Three Wheelers - 11th December 2020,
- (ix) 10th Lecture Imperatives of ELV recycling: Indian ELVs Guidelines & Basel Ban Amendment 2019
- (x) 5th March 2021,
- (xi) 11th Lecture Management of Hazardous Chemicals in Automotive Sector: National & International Regime 26th March 2021
- (xii) 12th Lecture of SIAM Lecture Series 2021 Hybrid & Electric Vehicles in India: Development, Testing & Homologation Date: 26th April 2021
- (xiii) 13th Lecture on: Electric Vehicles in India: On-Road Safety & Maintenance Venue: Online Date: 21st May 2021

- (xiv) 14th Lecture on the eve of World Environment Day 2021 "Ecosystem Restoration: Initiatives by Indian Auto Industry" on 05 June 2021
- (xv) 15th Lecture on "Digital Innovation and Smart Manufacturing: Industry 4.0 and Beyond" 19th July 2021
- (xvi) 16th Lecture on Draft Indian Vehicle Scrappage Policy 2021: Features and Implementation Planning 18th August 2021

The objective of the lecture series is to disseminate domain knowledge, latest innovations, technological advancements, sharing national and international experiences in key thematic areas in sustainable mobility to the stakeholders including Government, creating awareness on policy/regulatory landscape of emissions, cleaner fuels, electric mobility, road & vehicle safety, 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.

6. Report on SIAM 1st to 5th Lecture Series organized during August-October 2021:

Lecture Series was conceptualized by Society of Indian Automobile Manufacturers (SIAM) with an intent to create a suitable platform to disseminate knowledge and exchange thoughts amongst stakeholders on technological advancement in Green Manufacturing and Sustainable mobility. Based on the first five lecture series, a report focusing the outcome was prepared. The report highlights the key issues and solutions of sustainable mobility for to disseminate and exchange thoughts amongst stakeholders. The report envisages policy and regulatory landscape, imparting circularity of materials and focusing on Life-Cycle- Assessment model eliminating waste via recycling and reuse of end-of-life vehicles. In addition, the report underlines on issues like vehicular emission standards, engine technology, post-treatment technology, fuel quality, alternative fuels, ambient air quality, air quality standards and overall environmental sustainability. The report is ready for dissemination amongst all stakeholders.



7. Transport Committee of Maharashtra Pollution Control Board

The Maharashtra Pollution Control Board (MPCB) has constituted a committee for identification of effective and feasible policy measures for reduction of transport emissions within Mumbai Metropolitan Region (MMR). This multi-stakeholder Committee was constituted on November 25, 2020, under the Chairmanship of Mr. Satish Sahasrabudhe (Retd. Addl. Commissioner of Transport, Govt. of Maharashtra). SIAM was represented by Mr. Prashant K. Banerjee, Executive Director, SIAM as one of members of the Committee. In addition, the other Committee members are from MMRDA, Police Department (Traffic) Mumbai, Transport Department, Jt. Director (APC) - MPCB, NEERI, ARAI, IIT- Bombay, and MPCB was also convener of the Committee. The Committee held 10 formal meetings and submitted a report of the committee for identification of policy measures for reduction in road transport emissions within MMR to arrive at the recommendations on following thematic areas:

- (i) Vehicle Emissions Monitoring
- (ii) Motor Vehicle Technology
- (iii) Traffic Congestion Management
- (iv) Fleet Management
- (v) Infrastructural Strategies
- (vi) Other Recommendations

There are in all 46 recommendations made in the above 6 thematic area in short, medium, and long term for prevention and control of vehicular pollution in the MMR. The report has been submitted to the MPCB, Government of Maharashtra for consideration and implementations of the recommendations envisaged therein.

8. White Paper on Diesel prepared by Sub-group on Diesel:

The Sub-group on Diesel was constituted by the chairman of SM Group Mr Ashwath Ram, Managing Director, Tata Cummins Pvt Ltd and Cummins India in the meeting held on 27 November 2020. The Sub-group was advised to create a 'White Paper' to capture tributes of Diesel as compared to Gasoline and other fuels, highlighting its importance and advantages to

meet FE norms, convergence of emissions post BS-VI implementation from Diesel and Gasoline vehicles, to dispel the general perception about Diesel as being toxic and high on emissions. The Sub-group is headed by Mr Chandan Kardile, TML with 20 members representing various OEMs and auto-component makers. The Sub-group so far held 3 meetings and constituted a 2-member drafting committee to prepare the graft white paper showcasing the attributes of diesel in terms of fuel efficiency, power, drivability, benefits of CO2 emissions etc in comparison with other fuels and fuel blends.

Present status of the white paper: The draft white paper is ready and being given final shape and accordingly, it is proposed to place before the members of the Sub-group for finalization. The main outcome and conclusion of the white paper will be shared once the white paper is released officially.

9. Sustainability Report of Indian Automobile Sector:

The report on sustainability synthesized by SIAM from the learnings and best practices being implemented by the 27 member companies of SIAM. The objective behind this synthesis report is to propagate and disseminate the knowledge on sustainability practiced by Indian automotive industries so that learnings from each other's accomplishments build a repository or a knowledge bank for not only for automotive sector but also other stakeholders striving to achieve sustainability in their businesses.

The sustainability in Indian Automotive sector is being built on the three strong verticals of environment, social and economic to perpetually sustain the developmental activities and economic growth. The sustainable growth is being supported and fostered by adopting the principles of material light weighting, circularity of material, eco-efficiency, low carbon fuels, emissions, conservation of energy, water and raw material backed up by scientific and R&D efforts for sustainable manufacturing and product development.

Presently, apart from the industry, investors are also conscious of environmental, social, and governance (ESG) criteria which are a set of standards for a company's operations and making investment decisions. Hence, the corporate world ought to have



ESG policy envisaging the three central elements (environmental, social, and governance) in ensuring the sustainability. Accordingly, this sustainability report ensures integration of all above mentioned aspects of sustainable imperatives like environmental, social, and governance; agreements reached at UNFCCC, CoP-21 at Paris in 2015; global compact 2000, and sustainable development goals 2030.

Present Status of the Sustainability Report: The sustainability report has been published and its digitized version is available at the official website of SIAM and will also be circulated to all stakeholders including Government for dissemination of best practices being implemented by the OEMs in their manufacturing and other operations.

10. The World Environment Day 2021

The Indian Automotive sector has been highly conscious of its responsibilities towards environment and is active partner in ameliorating the environmental quality in close coordination with the Government. On the World Environment Day 2021, celebrated by organizing a programme on 'Ecosystem Restoration: Initiatives by Indian Auto Industry' re-emphasizes on environment and pledging for a cleaner, safer, and low carbon mobility with targeting the goal sustainable

development. Environmentally friendly cars will soon cease to be an option - they will become a necessity.

The World Environment Day 2021, celebration was attended by the high-level panel of speakers from the Government, automotive sector, national and international organizations. The keynote address was delivered by Mr Suresh Prabhu, India's Sherpa to G20 & G7 and Member of the Parliament.

The presentations made by the panelists were highly impressive and informative, in addition, the panelists have shared their rich experiences and recent advancements in respective thematic areas falling under the umbrella of sustainable mobility. The outcome of this thematic session will facilitate in attaining the eco-system sustainability with minimal adverse impact on environment and ecology that sustain all forms of life- ecosystems of the World Environment Day.

Launch of the Sustainability Report: On the occasion of WED 2021, SIAM launched the sustainability report, which was painstakingly compiled by SIAM and its digitized after version is available at the official website of SIAM and will also be circulated to all stakeholders for dissemination of best practices, implemented by SIAM members.



Annual Report Card (2020-21)

S.No.	Deliverables	Measures	Owner	Stakeholders
1	Sukh Da Saah (SDS-1) project	<ul style="list-style-type: none"> SDS-1 Project commenced in 2018 by deploying in-situ technology on 7400 acres in 9 villages in Jasso Majra. In the 1st year (2018-19) of implementation of SDS-1 achieved 71% reduction in stubble burning. In the 2nd year (2019-20) of project-implementation has achieved 81% reduction in stubble burning, During the 3rd year (2020-21)-the culminating year of the project achieved 95% reduction in stubble burning despite pandemic, A cumulative Report of SDS-1 project for 2018, 2019 & 2020 was is being finalized for dissemination to all stakeholders. 		Government, State Government Farmers, Industry, Agricultural Institutes, Universities etc.
2	Sukh Da Saah (SDS-2) project	<ul style="list-style-type: none"> The proposal of SDS-2 project in 7 additional villages in Jasso Majra, Nabha was approved by the group in 2020 for using in-situ technology, The number of farmers covered under SDS-2 project are 1100 covering 4900 acres of farmland in adopted villages, The total cost of the project is Rs. 29,67,300 lakhs which is shared with CII on 50:50 sharing basis, The implementation of SDS-2 during 2020 reported 87% reduction in the stubble burning in these additional 7 villages. A report of SDS-2 project for 2020 is being finalized for dissemination amongst the stakeholders including the Government. 		Government, State Government Farmers, Industry, Agricultural Institutes, Universities etc.
3	Implementation of Microbial Project (phase-II)	<ul style="list-style-type: none"> Re-life, a microbial consortium was applied on the 350 acres of lands by SIAM and its partners like PPCB and IPSF in Punjab, The total cost of the project is Rs. 7.50 lakh out of which Rs. 1.50 lakh was contributed by the PPCB and Rs. 1.00 lakh the IPS Foundation, The project 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 report of microbial project (phase-II) is being finalized by PPCB. 	Sustainable Mobility Group	Government, State Government Farmers, Industry, Agricultural Institutes, Universities etc.
4	Multi-Media Publicity Campaign	<ul style="list-style-type: none"> The multimedia campaign was first launched in 2018-19 through the most popular channels of Punjab viz. PTC Punjabi & PTC News was continued this year 2020-21 too, During 2020, there were total 259 video spots spread out in a span 30th October-11th November 2020, Out of these spots, 101 spots were with the appeal by CEOs of prominent OEMs to farmers for not burning the stubbles in the fields, The campaign for prevention of stubble burning every year was a huge success and it was watched by at least by 60 lakh people in Punjab, Haryana, and NCR. 		Government, State Government Farmers, Industry, Agricultural Institutes, Universities etc.
5	Sustainable Mobility through Message Triangle	<ul style="list-style-type: none"> SIAM is continuously engaged for further strengthening its advocacy through the leading platforms for sharing knowledge and best practices in automotive sector, To curb environmental pollution, socially acceptable & affordable solutions based on life cycle concept and to attain sustainability and circular economy, SIAM has consistently nurtured its collaborative approaches viz. (i) Government, (ii) national & international organizations to promote stricter, and enforceable regulations, (iii) organization of national and international events, TV debates etc. (iv) launching of many such platforms are at the conceptualization, The key highlight of the year 2020 is the SIAM lecture series organized since August 2020 and as on date 15 lecture series on various thematic areas have been successfully organized. 		Government, State Government Industry, R&D Institutes, Universities, IITs etc.



Annual Report Card (2020-21)

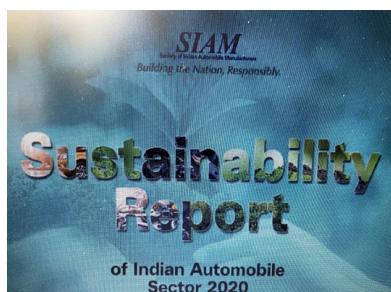
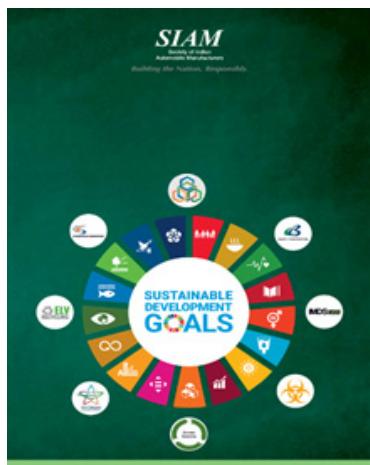
S.No.	Deliverables	Measures	Owner	Stakeholders
6	SIAM Virtual Environment Lecture Series	<ul style="list-style-type: none"> SIAM has embarked upon a unique Lecture Series for integrating and mainstreaming the environmental imperatives for attaining business sustainability in automotive sector. The objective of the lecture series is to disseminate domain knowledge, latest development, and technological advancements. SIAM Lecture series are 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 promoting the economics of recycling, technology in designing material and developing recycling infrastructure in the country. Since August 2020, 15 lecture series on different thematic areas have been successfully organized. 		Government, State Government Industry, R&D Institutes, Universities, IITs etc.
7	Report on SIAM 1 st to 5 th Lecture Series organized during August-October 2021	<ul style="list-style-type: none"> The report highlights the outcome of first five lecture series to create a suitable platform to disseminate knowledge and exchange thoughts amongst stakeholders, The report highlights policy and regulatory landscape, imparting circularity of materials and focusing on Life-Cycle- Assessment model eliminating waste via recycling and reuse of end-of-life vehicles. In addition, the report focuses on issues like vehicular emission standards, engine technology, post-treatment technology, fuel quality, alternative fuels, ambient air quality, air quality standards and overall environmental sustainability Report envisages outcome of the SIAM Environment Lecture Series for dissemination of issues deliberated and their outcome, A report on 1st to 5th Lecture series has been prepared for dissemination amongst the stakeholders including Government. 	Sustainable Mobility Group	Government, State Government Industry, R&D Institutes, Universities, IITs etc.
8	Transport Committee of Maharashtra PCB on Vehicular Pollution	<ul style="list-style-type: none"> SIAM represented on the Committee as members Participated in all 10 official meeting organized Provided written inputs to deliberations and in report writing There are in all 46 recommendations made in the above 6 thematic area in short, medium, and long term for prevention and control of vehicular pollution in the MMR, The report has been submitted to the MPCB, Government of Maharashtra for consideration and implementations of the recommendations envisaged therein. 		Government, State Government Industry, R&D Institutes, Universities, IITs etc.
9	White Paper on Diesel prepared by Sub-group on Diesel	<ul style="list-style-type: none"> The Chairman of SM Group constituted the Sub-group on Diesel to study its attributes in comparison with gasoline and other fuels in vogue Sub-group was instituted under the Chairmanship Mr. Chandan Kardile, TML with 20 members from OEMS, ACMA and SIAM, Sub-group held 3 meetings and prepared a draft white paper which being deliberated for finalization, The main outcome and conclusion of the white paper will be shared once the white paper is released officially. 		Government, State Government Industry, R&D Institutes, Universities, IITs etc.



Annual Report Card (2020-21)

S.No.	Deliverables	Measures	Owner	Stakeholders
10	Sustainability Report of Indian Automobile Sector	<ul style="list-style-type: none"> The report on sustainability synthesized by SIAM from the learnings and best practices being implemented by the 27 member companies of SIAM, The objective behind this synthesis report is to propagate and disseminate the knowledge on sustainability practiced by Indian automotive industries so that learnings from each other's accomplishments, Building a repository or a knowledge bank for not only for automotive sector but also other stakeholders striving to achieve sustainability in their businesses, Strengthening environmental, social, and governance (ESG) for making investment decisions, sustainability report ensures integration of all above mentioned aspects of sustainable imperatives including agreements reached at UNFCCC, CoP-21 at Paris in 2015; global compact 2000, and sustainable development goals 2030, Report will be circulated to all stakeholders including Government for dissemination of sustainable best practices. 	Sustainable Mobility Group	Government, State Government Industry, R&D Institutes, Universities, IITs etc.
11	World Environment Day 2021	<ul style="list-style-type: none"> On 5th June, the World Environment Day 2021, celebrated by SIAM on 'Ecosystem Restoration: Initiatives by Indian Auto Industry' re-emphasizes on a cleaner, safer, and low carbon mobility and sustainable development. The World Environment Day 2021, celebration was attended by the high-level panel of speakers from the Government, automotive sector, national and international organizations. The keynote address was delivered by Mr Suresh Prabhu, India's Sherpa to G20 & G7 and Member of the Parliament. SIAM launched the sustainability report which was painstakingly compiled by SIAM and its digitized after version is available at the official website of SIAM and will also be circulated to all stakeholders for dissemination of best practices, implemented by SIAM members. 		Government, State Government Industry, R&D Institutes, Universities, IITs etc.





Photographs relating to Sukh Da Saah Project, Microbial Project, Publicity Campaign, and Lecture Series and Sustainability Report.



Indian Automobile Industry Commemorates

WORLD ENVIRONMENT DAY 2021

5th June 2021 10:30 AM to 1:30 PM Virtual



INAUGURAL SESSION

LAUNCH OF SIAM REPORT ON ENVIRONMENTAL SUSTAINABILITY

BY INDIAN AUTOMOBILE MANUFACTURERS

Welcome Address & Moderator
Mr Rajesh Menon
 Director General, SIAM

Special Address
Mr Vikram Kirloskar
 Vice Chairman, Toyota Kirloskar Motor

Keynote Address
Mr Suresh Prabhu
 India's Sherpa to G20 & G7 &
 Member of the Parliament 6 times
 MP (4 in Lok Sabha, 2 in Rajya Sabha); Held 10 Cabinet Positions

Remarks
Mr Ashwath Ram
 Chairman, SIAM Sustainable Mobility Group and MD, TATA Cummins and Cummins India

Vote of Thanks
Mr Rajendra Petkar
 Co-Chair, Sustainable Mobility Group and President & CTO, TATA Motors



SIAM Re-Building the Nation, Responsibly

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Emissions and Conservation Group

With implementation of BS VI norms in April 2020, India has set up a one of its kind milestone by leapfrogging from BS IV norms. To achieve this milestone, automobile industry has made heavy investments, allocated all the resources and carefully detailed out the plan for launch of BS VI compatible products. Government of India has also notified CAFÉ Phase II and second stage of BS VI norms to be implemented in 2022 and 2023 respectively. However, due to the global pandemic of COVID-19 all the work related to R&D development have been impacted. Setting-up of R&D Test facilities & production trial facilities, for scaling up capacity and capability & production of prototype making (Parts, Engines and Vehicles) have been impacted. More importantly reduction in employee strength have derailed the overall development. The Industry has also been impacted due to reduced volumes in the last two years. A delegation of CEOs of SIAM Member companies led by Mr Kenichi Ayukawa, President, SIAM approached Mr Nitin Gadkari, Hon'ble Minister, MoRTH to request postponement of CAFÉ II and BS VI II norms by one year to 2023 and 2024 respectively.

EnC group worked with ICAT to prepare a detailed impact of CAFÉ II regulation and cost scenarios and effort to meet the same. Detailed justification was

prepared for discussions with Minister MoRTH as well for discussions with BEE.

Various Bio Fuels are in discussion for implementation by Government of India. EnC worked with MoPNG and Niti Aayog to draw a roadmap for shifting to higher blends of Ethanol. SIAM committed to timelines for launch of vehicles fully compatible to 20% Ethanol blended Gasoline by 2025 while introducing E20 material compliant vehicles as per MoPNG plan of launch of E20 from 2023 as well. Group also worked on the Ethanol flex fuel white paper with proposal to enhance the utilisation of Ethanol in the country. The same was submitted to Minister MoRTH.

The EnC group has engaged in several other activities like formulation of HDPE and LMDPE targets along with Government of India, development of framework for WLTP test cycle, real driving emissions, in-service conformity norms, emission and retro-fitment norms for CNG vehicles, fuel quality issues and DEF/AUS32 to name a few. The subject experts from the group also supported in preparation of Indian Standards and Automotive Industry Standards along with BIS, ARAI and ICAT for different fuels, emission tests and equipment like remote sensing device, etc.

Annual Report Card (2020-21)

S.No.	Deliverables	Measures	Owner	Stakeholders
1	Deliberations and submissions for smooth transition towards BS VI Stage II and CAFÉ Phase II norms	1. Building of consensus amongst members for seeking the deferment of 1 year for implementation	Emissions and Conservation Group	Membership and Government
		2. Deliberation with Minister, Secretary, Joint Secretary of MoRTH, MoP, DHI and other stakeholders for deferment of CAFÉ II and BS VI-II		Membership and Government
		3. Study with ICAT to ascertain impact of BS VI norms on achieving CAFÉ II norms and assess Price escalation of vehicles with respect to current models considering CO2 improvement required to meet 2022 targets		Membership and Government
		4. Prepared industry position on Flex Fuel Vehicles and submitted SIAM White Paper on Flex Fuel Vehicles.		Membership and Government
		5. Deliberations with PCRA, MoP and MoRTH for deferment of LMDPE and HDPE norms		Membership and Government



Annual Report Card (2020-21)

S.No.	Deliverables	Measures	Owner	Stakeholders
2	Preparation of Roadmap for Ethanol Blends	1. Support in preparing Roadmap for ethanol blending in Petrol with MoPNG in Nov 2020	Emissions and Conservation Group	Membership and Government
		2. Support in preparing Roadmap for Ethanol Blending in India 2020-25 for NITI Aayog - June 2021		Membership and Government
		3. Support in preparing GSR 439 for inclusion of E12 and E15 in CMVR with MoRTH and ARAI		Membership and Government
		4. Support in preparing GSR 156 for inclusion of E20 in CMVR with MoRTH and ARAI		Membership and Government
		5. Deliberations with MoPNG and OMCs for implementation of RON95 base gasoline fuel		Membership and Government
		6. Deliberations with NITI Aayog, MoPNG, MoRTH, DHI, Test agencies, BIS and OMCs for implementation of E10, E20 and higher ethanol blends with timelines and clarity for automobile industry		Membership and Government
		7. Deliberations with MoPNG, MoRTH, DHI, Test agencies, BIS and OMCs for implementation of RON95 base gasoline fuel		Membership and Government
		8. Conducting study on impact of E20 fuel on existing vehicles with ARAI and IOCL		Membership and Government
3	Preparation of IS and AIS Standards for Ethanol Blends	1. Preparation of specifications for E20 reference fuel	Emissions and Conservation Group	Membership and Government
		2. Support in preparing IS 15464: 2004 Anhydrous Ethanol for use in Automotive Fuel - Specifications		Membership and Government
		3. Support in preparing IS 16634 : 2017 E85 Fuel (Blend of Anhydrous Ethanol and Gasoline) - Specification		Membership and Government
		4. Support in preparing draft IS on A20 fuel (Methanol 15% & Ethanol 5%)		Membership and Government
		5. Support in preparing IS 17586 : 2021 E12 and E15 Fuel – Admixture of Anhydrous Ethanol and Motor Gasoline - For Positive Ignition Engine Powered Vehicles – Specification		Membership and Government
		6. Support in preparing draft IS on Fuel ethanol specification - For use in Positive ignition engine powered vehicles (E93)		Membership and Government
		7. Preparation of AIS 171 on Safety Requirements for Type Approval of Vehicles operated using Anhydrous Ethanol & Higher Ethanol Blended Motor Gasoline (EBMG) (for Blends above 20 %)		Membership and Government
4	International Engagement for knowledge sharing	1. Engagement with Brazilian Embassy and UNICA for understanding the ethanol scenario in Brazil in 2020-21	Emissions and Conservation Group	Membership and Government
		2. Engagement with US Grains Council for understanding the ethanol scenario in US in 2020-21		Membership and Government
		3. Engagement with JAMA for understanding the emissions and fuel scenario in Japan in Nov 2020		Membership and Government
		4. Engagement with International experts during World Future Fuel Summit on 16-17 Feb 2021		Membership and Government
5	Development of Emission Testing Procedures and Fuel, DEF Quality Testing Methodology	1. Forming Committee recommendations for expansion of scope of SFPL, Noida for testing fuel pan India	Emissions and Conservation Group	Membership and Government
		2. Deliberations with test agencies for formation of procedures for RDE, WLTP, ISC and COP(for ethanol compatible vehicles)		Membership and Government
		3. Deliberations with SCOE for seeking exemption of THC emission measurement for vehicles less than 3.5T (for less than 3.5T SIAM submission is being prepared)		Membership and Government



Service & Inspection, Maintenance & Certification Group

Government of India through a notification officially mandated Vehicle Recall resulting from any manufacturing defect that poses a risk of safety and environment. These rules released by MoRTH came into effect from 1st April 2021. SIAM Service & IMC Group has been working very closely and leading the deliberations on the Vehicle Recall Portal with MoRTH, ICAT and NIC. During the formulation of the portal, the small group under MoRTH worked towards creating the master list of defects under which recall could be identified and developed FAQs to make it easy for vehicle owners on queries related to the circumstances under which a vehicle would be recalled. Moreover, the Group is closely working on digitalization of Forms A and B that provide the vehicle recall related information and update on ongoing recalls, respectively. The phase

1, i.e. enabling vehicle user to upload a recall related complaint of the Vehicle Recall Portal Activity was made live in May 2021.

The Group holds regular interactions to discuss the on-ground execution of regulations e.g. resolving bottlenecks on issues, such as HSRP/FasTag implementation, proposing ideas to create awareness about fire hazards due to use of non-approved fitments in automobiles and compliance of service workshops to environmental norms.

The efforts and contribution of the group were also greatly recognized and appreciated during lockdown due to extended COVID-19 pandemic, for aiding in the services for vehicles required for transportation of essential goods and medical purposes.

Annual Report Card (2020-21)				
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">1. Actively contributing in development of the Vehicle Recall Portal under the aegis of MoRTH2. As a proactive step, SIAM engaged in dialogue with its members to educate their customers on safe vehicle usage and maintenance practices.3. Group took proactive measures for providing service to vehicles involved in essential services during COVID-19 lockdown.4. Actively monitors various guidelines issued for Service Centres to carry out operations in environmentally friendly manner.	Service & Inspection, Maintenance & Certification Group	<p>Society, Government and Membership</p> <p>Society</p>



Three Wheeler Group

The Indian three-wheeler industry has undertaken 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. 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.

However, the Indian three-wheeler industry has been facing one of the biggest, unprecedented downturns since last two decades, and its impact has been more severe for the segment, which has been de-growing in the last couple of years. In the recent times, the three-wheeler market fell sharply by -9% in FY 2019-20 and then again by-66% in FY 2020-21. The average Three-Wheeler volume sold in the country in the months of April 2021 and May 2021 has been just 7,490 units per month. Owing to the disruption due to COVID-19, SIAM Three-Wheeler Group also sought relief from

MoRTH in the form of 1 year deferment of phase wise implementation of OBD-II norms to April 2024 and April 2026, from the SCOE decision of April 2023 and 2025.

Further, SIAM Three-Wheeler Group also urged various state governments to relax the current permit regime and move to an open permit regime. In the past, the abolition of permit regime in states like Maharashtra and Gujarat provided a boost for Three-Wheeler volumes. Currently, issuance of permits for Three-Wheeler Passenger Carriers is restricted in states like Delhi, SIAM has requested for opening-up of permits in the state to establish a similar momentum in terms of volumes like observed in other states. For faster proliferation of Electric Vehicles, SIAM also requested to waive-off the applicability of Registration Charges on Electric Three-Wheelers to incentivise this segment by boosting the demand with a limited period waiver of registration fees. It is expected that such support would go a long way in providing employment and increasing the economic activity.

Annual Report Card (2020-21)

S.No.	Deliverable	Measures	Owner	Stakeholder
1	To ensure the growth of Three Wheeler industry in India in a sustainable manner and navigate the industry through regulation formulation.	<ol style="list-style-type: none">Group is currently evaluating and undertaking internal studies to decide the next phase of emission norms for Three Wheelers, moving on from the Indian Driving Cycle.Inclusion of Indian Three Wheelers kept at abeyance in Amd 5 of GTR2, due to SIAM efforts, as it was successfully established that Indian Three Wheelers are low PMR and low speed vehicles.	Three Wheeler Group	Government and Membership



Aftermarket Parts Group

The main objective of the SIAM Aftermarket Parts Group is to actively spread awareness on use of genuine parts. The four main pillars through which this group aims to work effectively viz Consumer Awareness, Quality Standards, Enforcement and Common Digital Platform. Industry is plagued by menace of counterfeit/sub-standard parts being sold in aftermarket. The Quality Control Orders (QCO) a welcome step in the Group's endeavour to promote genuine parts. However, at the same time, our endeavour 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. Considering the nation's emerging emphasis on Quality, Aatmanirbharta and Digitalization, the group also organized first-of-its-kind Webinar on Indian Automotive Aftermarket to bring about a 360o degree evaluation of needs, challenges and possibilities towards achieving the ultimate objective of customer service – the 'Consumer Delight'. The webinar covered aspects affecting the aftermarket parts business viz, Quintessential Quality, Curb Counterfeit, Vocal for Local, Simplify Supply-Chain, Amplify Access, Evaluate E-Commerce.

Annual Report Card (2020-21)				
S.No.	Deliverable	Measures	Owner	Stakeholder
1	To Promote Use of Genuine Parts	Continuous engagements on Lead OEM aftermarket business expansion augmented by positioning of genuine parts during and after end of product life cycle at the best price within reach of every individual customer supporting 'Made in India' campaign within horizon of government policies.	Aftermarket Parts Group	Membership and Government



Manufacturing, Industry 4.0 and Ease of Doing Business - Manufacturing Group

SIAM's Council, in the past have been created to focus on the Automobile and vehicle related dimension. However, looking at the contribution to the manufacturing GDP from the automobile manufacturing and innovation in manufacturing, it was decided to constitute one specific group related to Manufacturing activity, viz, Manufacturing, Industry 4.0 and Ease of Doing Business (EODB)-manufacturing. This technical group was constituted with a focus on Sustainable Manufacturing, Industry 4.0 used cases and Ease of Doing Business.

Manufacturing, being core to automobile manufacturing is one of the most important pillars to look for sustainable manufacturing and mobility and therefore, there was a need to have a focused discussion on enhancing the manufacturing capabilities by adopting digital technologies to improve productivity and global competitiveness. The objective of this group is harnessing the industry 4.0 initiatives and removing bottlenecks on the manufacturing eco-system with an especial focus on the ease of doing business .

Sustainability is the core issue of manufacturing and there is a need to identify the variances in the procedure and approaches between MNC and Indian Companies.

- Build carbon-neutral mobility, a key to sustainability, and ensure industry participation.
- Identify the need for new technology chains and the benefits that would accrue to OEMs.
- Identify common issues related to manufacturing and digitization and learn from each other.
- Ensure integration with various missions of the Government viz. localization, integration, and Aatmanirbhar Bharat.

The Group felt that there is a need to appraise the Central and State Governments/Authorities about the condition of the infrastructure of the industrial cluster,

such as roads, local law conditions, etc. After due deliberations, the following issues were summarized to be taken up with the authorities collectively:

- Availability of Trained Manpower
- Simplification of Custom Duty.
- Industrial Infrastructure
- Industrial Connectivity
- Simplification of Applicable Laws and Regulations
- Ease of Clearances/Licenses.

The Group further modified the objectives to identify the best practices of manufacturing and to share the new norms of technology among the members:

- Organization Strategy
- Smart Manufacturing
- Drive for Smart Technologies.
- Value Innovation.

As part of this engagement, a lecture focusing on “Digital Innovation and Smart Manufacturing: Industry 4.0 and Beyond” was conducted on 19th July 2021 with the support of global experts of industry and academia to increase the awareness of digital innovation benefits for manufacturing SMEs as well as for manufacturing industries and value networks.

Subsequently, SIAM together with industry, academia, and civil society can take suitable policy actions to close potential gaps related to their readiness for the future of production. This Group can play a big role to leverage the business potential from digital innovation in manufacturing with a special focus on SMEs and increase their competitiveness and sustainable growth.

The rapidly emerging technologies are spurring the development of new production techniques and business models that will fundamentally transform global production. These technologies are also driving



new, more distributed, and connected value chains. Both the speed and scope of change add a layer of complexity to the already challenging task of developing and implementing industrial strategies that promote productivity and inclusive growth. This collaboration will be critical to catalysing multi-stakeholder dialogue and action to transition to future production realities for ushering in new production paradigms.

Further, to boost the above discussions and CREATE something special, COLLABORATE to ascertain an unrelenting focus on these imperatives and INSPIRE implementation of Industry 4.0, and Ease of Doing Business (EODB) in the manufacturing ecosystem, the group shall meet continuously to work in these areas to move forward.

Annual Report Card (2020-21)				
S.No.	Deliverable	Measures	Owner	Stakeholder
1	<ol style="list-style-type: none"> To provide guidance to industry with implementation and convergence of technologies envisaged in industry 4.0 To transform manufacturing and all its related industrial operations from design to logistics to end-of-product-lifecycle into a more efficient and innovative customer-responsive manufacturing. Use the industry 4.0 tools to enhance interoperability across the supply chain and sharing data seamlessly and enhance productivity, safety and environmental compatibility. To engage with policy makers for incentivizing the digitalized manufacturing and ease of doing business with interventions. 	<ol style="list-style-type: none"> Identified the current trends on digitization technology and brought to the attention of the members. Current challenges faced by the members in doing business were identified and suggested to take them with the government collectively. Tools to be used for learning on Industry 4.0 identified and suggested to bring international knowledge dimension for the members. Organised the workshop to create awareness on the learnings for digitised manufacturing. To Engage with SMEs and tier I/II companies to learn on the tools for enhanced experience on digitalised manufacturing. To create platform for learning by sharing for industry best practices. 	Manufacturing, Industry 4.0 and Ease of Doing Business -Manufacturing Group	Membership



Lecture #15 on

DIGITAL INNOVATION AND SMART MANUFACTURING: INDUSTRY 4.0 & BEYOND

19th July 2021 2 PM to 5 PM Virtual



Welcome Address
Mr. Prashant K. Banerjee
Executive Director, SIAM



Opening Remarks
Mr. Satyakam Arya
Chairman, SIAM Manufacturing, Industry 4.0 & EODB Group and CEO & MD, Daimler India Commercial Vehicles



Theme Presentation & Moderator
Mr. Mahesh Kalikini
Co-Chairman, SIAM Manufacturing, Industry 4.0 & EODB Group and Chief of Quality, Hero MotoCorp

Session on: Digital Manufacturing Transformation



Digital Transformation Roadmap of Automotive Industry in India - An Overview
Mr. Brijesh Gubbi Suresh
Head (New Business Strategy), Hyundai Motor India



Digital Innovation Strategy and Transformation
Dr. Eva Diederichs
Sr Consultant, A. T. Kearney



Smart Manufacturing Roadmap for Industry Cluster
Prof. Min-Ren Yan
Vice President (R&D) & Faculty Director (MBA Programme), Chinese Culture University and Visiting Professor, Cornell University & Northwestern University (NU), USA



Automotive Industry Readiness and Global Benchmarking on Digital Innovation
Mr. Karsten Mueller
Head (Manufacturing), Bosch India



Growth Strategies for Smart Manufacturing in a Digital World of Manufacturing
Dr. Jagannadha Pawan Tamvada
Associate Professor, University of Southampton, UK



Drivers for Smart Technology
Dr. Vishal Talwar
Dean (School of Management), BML Munjal University



Machines with Mind

Applications enabled by Digital Technologies

The convergence and application of continuously emerging digital technologies characterize Industry 4.0.

Industry	Technology
Manufacturing	• Additive manufacturing
Manufacturing	• Advanced Process Control
Manufacturing	• Big Data
Manufacturing	• Cloud Computing
Manufacturing	• Cyber-Physical Systems
Manufacturing	• Data Analytics
Manufacturing	• Internet of Things
Manufacturing	• Machine Learning
Manufacturing	• Mobile Computing
Manufacturing	• Multi-Component Assembly
Manufacturing	• Nanotechnology
Manufacturing	• Robotics
Manufacturing	• Augmented Reality
Manufacturing	• 3D Printing

Main features of I 4.0

Main features of I 4.0 according to the European Parliament

- **Interoperability**: Interoperable systems (machines, sensors, inventory systems and products) allow different industrial vehicles to interact and communicate with each other
- **Flexibility**: A key goal of Smart Factories is to classify by 3D printing service data with value
- **Decentralization**: Ability of industrial systems to make decisions on their own and to produce locally without techniques such as Cloudizing
- **Autonomy**: The capacity to collect and analyze data and provide the data insights
- **Modularity**: Flexible adaptation of a system to a variety of changing requirements by reprogrammable manufacturing facilities
- **Global Orientation**: Ability to share data and information with other users, increasing access to those needs are addressed

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Industry 4.0 : What is Changing ?

Industry 4.0 is a paradigm shift from centralized to decentralized smart manufacturing and production

From "Designing for manufacturing" to...	From mass production to...	From global supply chains to...
• Designing for manufacturing	• Multi-Component Assembly	• Global Supply Chains
• Design for assembly	• Additive manufacturing	• Multi-Component Assembly
• Design for re-use	• 3D printing	• Multi-Component Assembly
• Design for recycling	• Internet of Things	• Multi-Component Assembly
• Design for repair	• Big Data	• Multi-Component Assembly
• Design for re-use	• Cloud Computing	• Multi-Component Assembly
• Design for recycling	• Machine Learning	• Multi-Component Assembly
• Design for repair	• Internet of Things	• Multi-Component Assembly
• Design for re-use	• Big Data	• Multi-Component Assembly
• Design for recycling	• Cloud Computing	• Multi-Component Assembly
• Design for repair	• Machine Learning	• Multi-Component Assembly

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The effect of Industry 4.0

I4.0 will have an effect on all countries, societies, organizations and people

How can we make the most of Industry 4.0?

How can we make the most of Industry 4.0?

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Overview on effects of Industry 4.0 at different levels

Level	Country	Organization	Society	Individual
Business	• Globalization	• Multi-Component Assembly	• Interoperability	• Personalized products
Process	• Multi-Component Assembly	• Multi-Component Assembly	• Interoperability	• Personalized products
Product	• Multi-Component Assembly	• Multi-Component Assembly	• Interoperability	• Personalized products
Facilities	• Multi-Component Assembly	• Multi-Component Assembly	• Interoperability	• Personalized products
People	• Multi-Component Assembly	• Multi-Component Assembly	• Interoperability	• Personalized products

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Industry 4.0 Value Drivers

Digital Value	Business continuity	Quality connected processes	Flexibility	Lightweight manufacturing
• Business continuity	• Quality connected processes	• Flexibility	• Lightweight manufacturing	• Light weight
• Quality connected processes	• Flexibility	• Lightweight manufacturing	• Light weight	• Light weight
• Flexibility	• Lightweight manufacturing	• Light weight	• Light weight	• Light weight
• Light weight				

Industry 4.0 technologies deployment in value chain

Digital Manufacturing Strategy: Six Core Concepts

Industries, committed to **open innovation** on the fundamental values, will apply **lean management** methods and utilize **new generation smart technologies** to facilitate the **productivity improvement** process.



Two-Wheeler CEOs Council

The domestic sales for the Two-Wheelers in India stood at 15.1 million units in 2020-21, which was lowest in the last 7 years. This was due to the sever impact of the first phase of Covid-19. The 2nd wave of Covid-19 again impacted the two-wheeler segment as sales in April to July 2021 was even lower than the level of 2010-11.

SIAM Two-Wheelers CEOs Council had several rounds of discussions and developed Industry consensus on important proposals for future regulations in pipeline. Recommendations were discussed for revised timelines for implementation of OBD II for BS 6 Two-Wheelers, which is presently scheduled from April 2023. SIAM has recommended that OBD II for Two-Wheelers should be implemented in two phases with suitable lead time between the two phases. Detailed deliberations were also held on finalizing the SIAM position for CAFÉ regulations for Two-Wheelers in India. It was proposed that Engine cc should be the Utility Parameter for determining the limits. Further, it was also agreed by members that there should be separate limit lines for manual transmission and automatic transmission

two-wheelers. Further, Two-Wheeler members agreed to introduce vehicles complying to higher blends of Ethanol with the road map proposed by MoPNG and also agreed in principle to develop one Ethanol Flex Fuel model per OEM, which would run on any blends between E20 to E85.

Members also discussed measures for effectively implement Scrappage Policy, for creating demand in the industry. During the year, Two-Wheeler industry faced disruptions in supplies of ABS from the component suppliers for +125cc two wheelers, which is mandatorily required in India, due to shortages of Semi-conductors. Members also suggested that there is a need to address the high acquisition cost of Two-Wheelers due to up front five-year premium payment to be made for third party insurance, which has been mandated by the Hon'ble Supreme Court. Two-Wheeler members agreed to introduced vehicles complying to higher blends of Ethanol and develop Ethanol Flex Fuel models which would run on any blends between E20 to E85.



Three-Wheeler CEOs Council

Three-Wheelers are widely used in India as a short-to-medium distance public transportation and last mile connectivity for goods transportation. India is the world's foremost producer, consumer, and exporter of three-wheelers but has witnessed a major de-growth during pandemic times. The annual volumes of Three-Wheelers for FY 2021 have gone below lowest of more than that of the last two decades. Three-Wheelers CEOs council has been working on the revival measures and demand generation of Three-Wheelers. The group has already undertaken the task of identification of area which will help Three-Wheelers market grow in the current situation. The Major steps taken towards upliftment of 3W segment is on priority sector lending, ease of permits, registration fee waiver, removal of prohibition from using diesel Three-Wheelers in couple of states and state level uniformity for colour scheme for electric Three Wheeler.

On the behest of Three-Wheelers CEO's council, a few round of deliberations have happened with public sector banks. Representations have been done on Several concerns like rising MOUs, complex documentation, low loan to value, etc. to Punjab National Bank and State Bank of India. Council has also made submission to the RBI Governor requesting to accord priority sector status to Three-Wheelers segment and allocating 10 to 15% of the total loans being sanctioned under MSME towards Three-Wheelers funding. This step will certainly push down the credit to the Three-Wheelers buyers. In line with this, the Three-Wheelers CEOs council has also contacted various state governments to allow open permit regimes where the group has strategically identified important Three-Wheelers markets which have great potential for increasing Three-Wheelers penetration from various parts of India. Many state governments have been asked to waive-off electric Three-Wheelers registration charges owing to push towards green mobility to which electric vehicles look very promising in terms of last mile delivery and intra city travel.

Three-Wheelers CEO's council apprised the Hon'ble Minister for Road Transport and Highways, Shri Nitin Gadkari about the current unprecedented slowdown in this segment and the Minister showed genuine sensitivity towards the drop in the Three-Wheelers industry demand. Government is ready to support to revamp and re-boost the demand of Three-Wheelers in India & has invited Three-Wheelers CEO council to submit a proposal to MoRTH on the support required from GOI to increase the demand of Three-Wheelers in current situation. It has been viewed that the new upcoming emission and safety regulations shall be waived-off considering the current state of Three-Wheelers market and shall be deferred beyond 2025 and 2026. Also, Public sectors banks shall release some more finances and introduce targeted scheme to revive Three-Wheelers demand. The issue of demand generation through infrastructure development by the Government i.e. CNG, flex fuels and electric recharging support budget were identified as new focus areas by the council. Council has also identified the revised FAME 2 scheme has changed its incentive distribution and it is observed that two-wheeler have been benefitted through it whereas three-wheeler are left out. A strong representation to the ministry shall be made to make electric three-wheeler in parity with two-wheeler for better demand generation.

Three-Wheeler council is aligned to meet the Government's vision on the Scrappage Policy. While the Three-Wheeler council recognized the significance of sustainable need for the HRM & RRR targets, a suitable time frame shall be defined so that industry can line up with the requirement.

The council had met several times in the year and is working towards benefit of the Three-Wheeler industry with a view of providing a predictable playing field and helping reduce regulatory barriers and bottlenecks to innovation, economic development, and investment.



Annual Report Card (2020-21)

S.No.	Deliverable	Measures	Owner	Stakeholder
1	To review the industry performance and create actions for Demand creation.	<ul style="list-style-type: none"> a. Identified the measures for fuel specific roadmap under infrastructure spending. Developing Terms of reference for creating roadmap for alternate fuels like Ethanol etc. b. Support from MoRTH on the following issues <ul style="list-style-type: none"> • Opening of permits • No discrimination based on the fuel type i.e. diesel • Reduction in the road taxes, registration fee etc. • Deferment of regulations • Priority sector lending 		
2	Stop of Unauthorized / unregistered E- rikshaw operation	<ul style="list-style-type: none"> a. To make a formal representation to MoRTH to advise states to strictly enforce operations of only registered and authorised e-rickshaws. Any unauthorized vehicle sale in place of an authorized vehicle sale should be taken up strongly. Testing agencies may also be directed to explore stricter norms for Conformity of Production for these vehicles in the interest of passenger and vehicle safety. b. There should not be multiple standards for compliance by different entities, a level playing is necessary. 	Three-Wheelers CEOs Council	Membership
3	Maharashtra Transport Committee recommendation for electrification of 3W	<ol style="list-style-type: none"> 1. Retro fitment of 3W with electric motors 2. Battery swapping mechanism to be developed for making it financially viable to owners 3. Extension of registration to be considered for retrofitted 3W. 		
4	Provide improvement to the scrappage policy announced by the govt.	<ul style="list-style-type: none"> a. To take up matter suitably with the nodal ministry in identifying the challenges of compliance and reduction of incentive on part of the manufacturer to be economically rewarding for stakeholders. 		



Passenger Vehicle CEOs Council

The domestic sales for the Passenger Vehicles in India stood at 2.71 million units in 2020-21, which was lowest in the last 6 years. This was due to the severe impact of the first phase of Covid-19. The 2nd wave of Covid-19 again impacted the Passenger Vehicle segment as sales in April to July 2021 is still lower than the level of 2016-17.

SIAM Passenger Vehicle CEOs Council took up the issue of difficulties of OEMs to meet the timelines and requirements of Quality Control Orders (QCOs) for both Safety Glass and Wheel Rims, issued by Department for Promotion of Industry and Internal Trade and Minister of Heavy Industries, respectively. Council is continuing to pursue for exemption from QCOs for low volume models, for use of these components as spare parts during servicing and for models that would reach the end of production. The Council discussed the issue of limitations of audit of OEMs or Component manufacturers plants, due to travel restrictions making it difficult for the Industry to obtain necessary certification for QCO.

The Council also formed a Sub-Group on 'Low Volume High Value' (LVHV) vehicles to deliberate on specific issues impacting this segment.

The Council also discussed the need to for deferment of Phase 2 of CAFE Regulation that is scheduled to be implemented from 1st April 2022 and next Phase of BS

VI Regulations that would come into effect from 1st April 2023, since development and testing time was lost by the vehicle manufacturers due to the two phases of Covid-19. Discussions are continuing with Ministry of Road Transport and Highways and Bureau of Energy Efficiency for deferment of these regulations.

The Council also supported the Government of India's vision for enhancing the blends of Ethanol in Gasoline. In addition, Passenger vehicle manufacturers are also planning to introduce models of Flex Fuel Vehicles, which will be able to operate on wide range of Ethanol blends from E20 to E85.

Passenger Vehicle CEOs Council has initiated studies to estimate the contribution of the Industry to the direct and indirect employment by the Auto Industry and also look at the impact of rates of GST on the market demand. The Council will also pursue the need for ensuring that the vehicle registration process is made fully on-line by the State Governments, so that in the event of any future lockdowns, there is no disruptions in registration of vehicles.

On the Scrappage Policy, the PV CEOs Council recommended that fitness test for Private Passenger Vehicles should be commenced even before the vehicle attains the age of 15 years and necessary fitness test Centres should also be set up across the country for regular fitness test of vehicles.



Commercial Vehicle CEOs Council

Unprecedented slump in the Commercial Vehicle Industry necessitated the CV Council to identify demand creation measures on priority and provide momentum of growth to the commercial vehicle Industry. The CV industry has faced decline in sale continuously over the last 2 years rendering the annual volume to the lowest level in last 12 years. In this regard, the council recognised the budgetary announcement of the Government for allocation of Rs 18,000 Crores to augment public bus transport services, facilitating PPP models to 'Acquire, Operate and Maintain' over 20,000 buses. The Council also recognized the need to engage with the Government for utilization of the budget and bringing required priority and execution for strengthening the demand creation of the CV segment in STU business, municipal purchases under Swatch Bharat Abhiyan and augmentation of 'Defence spending'.

The multiple power train technologies are being discussed by the Ministry of Petroleum and Natural Gas further for streamlining and strengthening the growth of CV segment. The launch of the 50 LNG retail outlets across the golden quadrilateral, CNG stations across India in various territories, and Hydrogen mobility are the big investments for the CV industry. Also, the penetration of electrification in commercial vehicles under e-highway is being discussed. The council felt that the investment into multiple powertrain technologies shall be challenging and therefore desired an assessment of the powertrain technology and mapped out a consultation assignment "City and Fuel Specific roadmap under Infrastructure spending" as part of measures under Demand creation. The announcement of Government of India regarding new Multimodal Park based on the railways freight, led the council to engage with the ministry of commerce wherein SIAM shared its views on the impact of the CV industry at the national level trade. As a step forward,

CV CEO Council assured the ministry of its support and provided inputs to the National Logistic Policy. The council decided to carry out a Study on "Framework on MMLPs and Freight Corridors", which will identify the area of engagement for improvement of CV share in the overall national freight.

With the rollout of the Fuel Efficiency norms under the Energy Conservation Act, 2001 for Heavy and Light Duty Vehicles, a deferment has been requested to the Government due to on-going sluggish demand. As BS 6 has been rolled out only in 2020, the recovery of investment by the CV industry has been a challenge, which has been further aggravated by the pandemic. In addition, more stringent regulation and their implementation has been a financial burden on the industry and, therefore, CV CEOs Council suggested on need of a clear and long-term regulatory roadmap from the Government. Further, the development of Bharat VECTO tool to define the next stage of FE regulations requires engagement of the CV industry with the test agencies.

The CV CEOs council tried to bridge the impasse on ease of doing business and enhance safety with creation of a level playing field by the OEMs and the private bus body builders. A decision was made by the council that the legal recourse appropriately be initiated to this affect in line with the spirit of the regulation and to ensure safety of the passengers. The new Scrappage Policy is a welcome move by the Government of India, however, seeking rebate from CV manufacturers is challenging in the current format, and, therefore, may need further engagement with the Government.

The council had met several times in the year and has been working towards promoting the interest of CV industry by defining a clear roadmap of engagement and decisions to move forward.



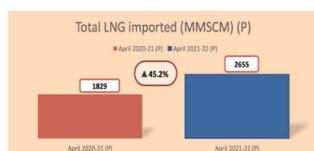
Annual Report Card (2020-21)

S.No.	Deliverable	Measures	Owner	Stakeholder
1	To review the Industry performance and create actions for Demand creation.	<ul style="list-style-type: none"> a. Identified the measures for City and fuel specific roadmap under infrastructure spending. Developed Terms of reference for creating roadmap for alternate fuels. b. To engage with the Ministry of Commerce for intervention required in the National logistic policy and Multi-Modal logistic park for increasing penetration of the commercial vehicle segment. 		
2	Measures taken to create a level playing field between OEM/Non-OEMs for compliance for buses.	<ul style="list-style-type: none"> a. Engage with Government to provide level playing regulations for every stakeholder, in line with the spirit of the regulation and to ensure safety of the passengers. 	Commercial Vehicles CEO Council.	Membership
3	Deferment of FE regulations	<ul style="list-style-type: none"> a. Engaging with the government for the deferment of regulations by 2 years. b. To work closely with the test agencies in developing of Bharat VECTO tool for future Fuel efficiency compliance. 		
4	Provide improvement to the scrappage policy announced by the government.	<ul style="list-style-type: none"> a. To take up matter suitably with the nodal ministry in identifying the challenges of compliance and reduction of incentive on part of the manufacturer to be economically rewarding for stakeholders. 		

Update on LNG



India has committed to achieve 15% share of natural gas in the primary energy mix by 2030 for a more sustainable energy use.



LNG : Sectorial consumption of LNG is still in the sectors other than transport at this moment by usage of R LNG.

- Liquefied-Compressed Natural Gas (LCNG) is an environment friendly fuel which lessens carbon emission by 50%, NOx emissions by 75% and RSPM emissions by 90% compared with other fossil fuels.
- Large imports due to environmental and price reasons.
- Limited usage in transport at this moment.

Current Update

On 8th June, Hon'ble MoPNG minister inaugurated the 201 CNG stations and mentioned

- 1000 LNG stations expected in few years.
- Work on 50 stations on the Golden quadrilateral in progress.
- Work on standard development of LNG as transport fuel in progress.
- Safety and Maintenance SoP are work in progress.

Update on CNG



CNG

Major Demand for CNG shall come from the transport sector as the gas mobility is getting more traction due to lower emissions.

- Mixing of Bio-gas with CNG, project started in Delhi.
- Transport ministry has allowed tractors, power tillers and other agricultural vehicles and equipment that run on diesel and petrol to be retrofitted with CNG, bio-CNG and LNG engines

Current Updates

On 8th June, Hon'ble MoPNG minister inaugurated the 201 CNG stations.

- Total CNG stations in the country: 3142 as of 8th June 2021.
- 2 MRU (Mobile running units inaugurated for refueling of CNG.
 - 1 each in Raigad (MGL) and New Delhi (IGL) with 1500 kg capacity.
 - Each MRU can fill upto 150-200 vehicles/day.
 - Each MRU cost about 15 lakhs.
 - 10000 stations expected in 7-8 years.



Trade Fair Council

SIAM Trade Fair Council works with an aim to increase the visibility of the Indian Automobile industry.

The Council 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).

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 Council also acts as organising committee of Indo - Bangla Automotive Show in Dhaka, Bangladesh with an aim to create 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 a Trade Fair Council meeting in October 2020 on a virtual platform under the Chairmanship of Mr Gurpratap Boparai, Chairman, SIAM Trade Fair Council and Managing Director, Skoda Auto Volkswagen India to discuss about venue booking for forthcoming Auto Expo – The Motor Show 2022 which was scheduled from 2-9 February 2022. Two venue options (1. India International Convention & Exhibition Centre, Dwarka, Delhi, 2. India Expo Mart, Greater Noida) with various pros and cons of each venue were presented to members. After a detailed deliberation it was decided to book India Expo Mart for Auto Expo – The Motor Show 2022. Later in the SIAM Executive committee considering the inherent risks in organising the show due to the on-going Covid-19 Pandemic and the apprehensions of a possible 3rd wave, it was decided to postpone Auto Expo – The Motor Show 2022 for now. The exact date of Auto Expo – The Motor Show shall be finalised later this year keeping in view the Covid situation and in alignment with the OICA Calendar of global Auto shows.

Annual Report Card (2020-21)

S.No.	Deliverable	Measures	Owner	Stakeholders
1	SIAM Trade Fair Council works with an aim to increase the visibility of the Automobile industry.	1. Organise Auto Expo – The Motor Show	Trade Fair Council	Membership, Government and Society
		2. Providing a platform for member companies: <ul style="list-style-type: none">• To showcase their latest offerings and technologies.• Showcasing future concept vehicles & technologies• To Engage and interact with this generation and future generation B2C customers to get fresh ideas, exploring collaborations, partnerships ventures		Membership, Government and Society
		3. Focused media coverage		Membership, Government and Society
		4. Providing all mobility ecosystem, entertainers, games, automobile art etc. under one roof for the visitors		Membership, Government and Society
				Membership, Government and Society
2	Organise Domestic & International Automotive Exhibitions			



Initiatives of SIAM – SAFE

COVID-19, pollution, road accidents and related fatalities have a common unfortunate characteristic – they hit the most vulnerable people the hardest, and they impact public health. Road crashes, for instance, have a direct impact on human capital. Apart from the enormous human toll, road safety has a major economic impact, with annual crash-related costs estimated at 2 percent to 5 percent of national GDP. It is a painful reality that in India, 4,37,396 road accidents were recorded in 2019, resulting in the death of 1,54,732 people and injuries to another 4,39,262. This needs urgent redressal. In this regard, SIAM and its members are committed towards fostering mobility that is safe, affordable, and sustainable.

Activities & Accomplishments of SAFE to minimize accidents and fatalities:

SAFE & SIAM are making concerted efforts along with stakeholders viz. OEMs, transport department, the traffic police, NGOs, educational institutions, drivers, and others to increase awareness using different forums, including training and seminars among school children and other road users. SIAM and SAFE have also been focussing on active and passive in vehicles.

- During the pandemic, SAFE quickly provided disaster relief, leveraging existing partnerships and network, and helped Delhi Police by providing vehicles which were used for transporting patients and caregivers.
- In addition, SAFE worked on the two pillars of clean air and safe motoring, with key stakeholders. During the year 2020-21, SIAM – SAFE worked extensively with students including advocating reduced speeds, checking drunken-driving and distracted driving among youngsters.
- During the National Road Safety Month 2021, Mr Rajnath Singh, Hon'ble Minister of Defence of India and Mr Nitin Gadkari, Hon'ble Minister of Road Transport & Highways launched the SIAM's virtual road safety educational gallery which attracted several visitors throughout the month. The gallery had a large volume of road safety materials,
- including presentations and videos, on various road safety topics posted by SIAM members and others.
- In one month, SIAM along with its members successfully reached to approximately one million citizens, propagating the message of 'Sadak Suraksha, Jeevan Raksha'.
- A series of road safety awareness and training activities were organized by SIAM for drivers of truck, bus and three-wheeler, school and college students, women drivers and others. Seminars on Implementation of Vehicle Location Tracking Devices for Enhancement of Safety on Road and Emerging Technologies for Safer Mobility, and workshops were organised with the support of Ministry of Road Transport & Highways
- SIAM along with ASRTU organized road safety awareness virtual workshops for STU drivers across the nation and trained more than 11,000 drivers.
- Road Safety & Defensive Driving refresher training was imparted to make drivers aware about defensive driving, fuel-efficiency, and vehicle safety. SIAM and its members organised eye check-up and health check-up camps in over more than 25 locations for drivers.
- SIAM along with Delhi Traffic Police organized various awareness building campaigns like Pedestrian Walk and women two-wheeler rally where 100 women riders from different walks of life participated and spread the message of road safety.
- Additionally, awareness drives for general public were conducted at 119 accident-prone road intersections in the capital city, with an objective to reduce accidents, fatalities, and related injuries on roads. Nearly 80 hours of virtual sessions were organised in one month.
- SIAM -SAFE and its members held free pollution check drive on World Environment Day,



Annual Report Card (2020-21)

S.No.	Deliverable	Measures	Owner	Stakeholder
1	Safety on road and fatality reduction (Policy intervention, awareness, training and education, accident data analysis and I, M & C)	1. SIAM continued its interaction with State Governments on automobile technology.	Initiatives of SIAM – SAFE	Society, Government, Media & Membership
		2. Environment protection campaign across the nation along with SIAM members and their dealer network was organized on 5 th June 2021, World Environment Day and a Webinar on “Ecosystem Restoration: Initiatives by Indian Auto Industry” was also organized. 15 nos. virtual of Environment Lectures were organized from 2020-2021.		
		3. SIAM worked with IMMA's members to showcase best practices adopted world wide in the area of two-wheeler safety.		
		4. SIAM- SAFE with the support of M&M, Skoda Auto Volkswagen India & Toyota Kirloskar Motors assisted Delhi Police by providing vehicles to be operated as ambulances during this pandemic time.		
		5. SIAM -SAFE observed National Road Safety Month January – February 2021. SIAM-SAFE organized a wide range of activities including training, eye checkup and health fitness camps, across the nation. Reached more than a million people. Organized approximately 80 hours of virtual sessions.		
		6. Along with Delhi Traffic Police, SIAM organized Road Safety School Virtual Outreach Programs, which included various competitions on road safety, for about 1,500 schools. Prizes were given to students and Rolling Trophy to the best school was given by Commissioner of Police, Delhi.		
		7. SIAM along with Delhi Traffic Police organized Road Safety awareness rallies, at 119 intersections, and distributed helmets, etc		
		8. Two Seminars on Safety & Vehicular Technologies were organized with the support of MoRTH and Delhi Traffic Police		
		9. SIAM with the support of MoRTH launched a virtual road safety educational gallery, which was a point of attraction throughout the National Road Safety month. Road Safety Education gallery spread awareness On variety of road safety related topics		
		10. SIAM with ASRTU organized road safety awareness virtual workshops for STU drivers across the nation and trained more than 11,000 drivers.		



- 15 SIAM Lectures series on Environment Protection were organised round the year for sharing their best practices which can assist in formulating future strategies for protection of the environment.

Strategies & Approaches Adopted by SAFE

SIAM and SAFE have been advocating a holistic approach to road and vehicular safety. The same is in line with the main thrust of accident prevention and control across the world has been on 4 E's vis (i) Education; (ii) Enforcement; (iii) Engineering; and (iv) Environment and Emergency care of road accident victims.

SIAM and its members have been involved in initiatives taken by some States to strengthen road engineering and enforcement projects.

It is SAFE's vision to impart education on rules of the road and safe road user behaviour to each and every driver and road user and effective emergency medical services to bring down the number of death due to accidents substantially.

Meeting the national commitments with regard to Sustainable Development Goals:

We are still not out of the woods as far as the pandemic is concerned and as some say we would have to resume our lives with the virus continuing to be a threat. We, at SIAM-SAFE, resolve with even greater conviction to work for and work with people for a more resilient society.

SIAM and SAFE is playing critical role not just in terms of responsible consumption and production (SDG 12) or industry innovation and infrastructure (SDG 9), but also catalysing auto industry's participation for achieving a few other SDGs and their stated objectives, and these SDGs are SDG 1 (End Poverty), SDG-3 (Good Health and Well-being), SDG 4 (Gender Equality), SDG 6 (Clean water and sanitation), SDG 7 (Affordable and Clean Energy), SDG 8 (Economic Growth), SDG 11 (Sustainable Cities), SDG 13 (Climate Action), among others.

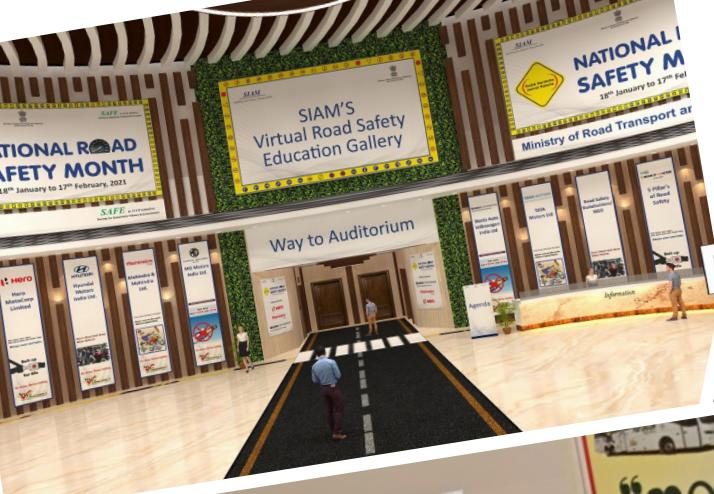
We, therefore, have miles to go, and we are up for the challenge.



DRIVING SAFETY MEASURES TO THE LAST MILE, NATIONWIDE.

SIAM's Initiatives during National Road Safety Month (18th Jan – 17th Feb 2021)







Implementation of Vehicle Location Tracking Devices for Enhancement of Safety on Road

9th February 2021 @ 10:30 AM to 1:15 PM

Inaugural Session

Technical Session

Panel Discussion on Next Steps for Harmonisation of standard AIS 140

Ministry of Road Transport and Highways

SAFE (a SIAM initiative)
Society for Automotive Fitness & Environment



NATIONAL ROAD SAFETY MONTH 2021

Forum for Prevention of Road Accidents
PRESENTS

Drink & DRIVE

LIVE WEBINAR ON PREVENTION ISSUES

STAY ALIVE, DON'T DRINK AND DRIVE



BISWA MOHAN JENA
MODERATOR



TIME 22ND
3:30PM JANUARY, 2021





Emerging Technologies for Safer Mobility

10th February 2021 10:30 AM to 1 PM

Inaugural Session



Moderator
Mr Rajesh Menon
Director General, SIAM



Welcome Address
Mr Gurpratap Boparai
Managing Director, Skoda Auto Volkswagen India



Address by Guest of Honour
Mr Taj Hassan
IPS, Special Commissioner of Police Traffic, Delhi*



Address by Chief Guest
Mr Kailash Chand Gupta
IAS Additional Secretary, MoRTH



Vote of Thanks
Mr Prashant K Banerjee
Executive Director, SIAM

Technical Session



Moderator
Mr Ashim Sharma
Partner & Group Head, Nomura Research Institute



Setting the context on
Vehicular Safety: Government
Perspective
Mr K C Sharma
Superintendent Engineer, MVL,
MoRTH



Global Vehicular Safety Standards:
Implementation in Indian Context
Mr Deepak Sawkar
Chairman, SIAM CMVR Group & Sr Advisor,
Maruti Suzuki India



Perspective of Automobile Component Manufacturers
on Safety
Mr P Kaniappan
Chairman (SubPillar on Regulation) ACMA and Managing
Director, WABCO



Vehicle Safety Testing
Infrastructure in India
Ms Sudesha Sen
Director (Finance &
Administration), NATRIP



Road Safety through IT Technology
Mr Kishore Balaji
Director, Intel



Role of Customer & Genuine parts in Road
Safety
Mr Yashpal Sachar
SIAM Chairman, After Market Parts Group and
General Manager, Honda Car India



Road Safety Awareness : CSR Commitment of Auto Industry
Mr L Seetharaman
Vice President, Maruti Suzuki India

SIAM COUNCILS & GROUPS 2020-21

A. COUNCIL ON INTERNATIONAL BUSINESS



Chairman: Mr S S Kim
Managing Director & CEO,
Hyundai Motor India Ltd.

1. INTERNATIONAL RELATIONS & TRADE POLICY GROUP



Chairman: Mr Rahul Bharti
Executive Director –
Corporate Affairs,
Maruti Suzuki India Ltd.



Co-Chairman: Mr Ritesh Agrawal
Senior General Manager,
Strategic Sourcing,
Mahindra & Mahindra 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 Anuj Kathuria
Chief Operating Officer,
Ashok Leyland Ltd.



Co-Chairman: Mr Veejay Nakra
CEO-Automotive Division,
Mahindra & Mahindra Ltd.

1. VEHICLE CLASSIFICATION, SALES REPORTING & ANALYSIS GROUP



Chairman: Mr R Ramakrishnan
Senior Vice President-
Customer Care, CVBU,
TATA Motors Ltd.



Co-Chairman: Mr Narender Kukreti
Deputy General Manager
(Corporate Affairs & Governance),
Toyota Kirloskar Motor Pvt. Ltd.

3. LOGISTICS GROUP



Chairman: Mr Vikas Jain
Vice President – Sales,
Hyundai Motor India Ltd.





Co-Chairman: Mr Rakesh Sen
Vice President,
Mahindra & Mahindra Ltd.

6. GAS BASED MOBILITY GROUP



Chairman: Mr Ashish Chutani
Head – Government & Policy Affairs,
Maruti Suzuki India Ltd.

4. CSR & COMMUNITY SERVICES GROUP



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



Co-Chairman: Mr D Balakrishnan
General Manager, Product Development,
Ashok Leyland Ltd.



Co-Chairman: Mr Pankaj Gupta
Vice President
(External Affairs & CSR)
SKODA Auto Volkswagen India Pvt. Ltd.

C. COUNCIL ON TRADE FAIRS



Chairman: Mr Gurpratap Boparai
Managing Director,
SKODA AUTO Volkswagen India Pvt. Ltd.

5. SERVICE & INSPECTION, MAINTENANCE AND CERTIFICATION GROUP



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



Co-Chairman: Mr Martin Peter Schwenk
Managing Director & CEO,
Mercedes-Benz India Pvt. Ltd.



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

D. COUNCIL ON ECONOMIC AFFAIRS



Chairman: Mr Shekar Viswanathan
Vice Chairman,
Toyota Kirloskar Motor Pvt. Ltd.



1. AATMANIRBHAR BHARAT SOURCING GROUP



Chairman: Mr Sunil Kakkar
Senior Executive Director - Sourcing,
Maruti Suzuki India Ltd.



Co-Chairman: Mr Veeraraghavan R
Head - Strategic Sourcing,
Mahindra & Mahindra Ltd.



Co-Chairman: Mr Sachin Kulkarni
Chief General Manager – Sourcing,
SKODA Auto Volkswagen India Pvt. 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 Financial Services India Ltd.



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

3. TAXATION POLICY GROUP



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



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

4. TAXATION PROCEDURAL GROUP



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



Co-Chairman: Mr Rajeev Goyal
Chief Financial Officer –
Auto & Farm Sector,
Mahindra & Mahindra 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.



6. FINANCE, LEASING & INSURANCE GROUP



Chairman: Mr Gopal Bansal

Chief Financial Officer,
SML Isuzu Ltd.
(Till 10th February, 2021)



Co-Chairman:

Mr Surendra Srivastava

Chief Executive Officer,
Maruti Insurance Broking Pvt. Ltd.

7 HUMAN CAPITAL GROUP



Chairman: Mr R Anandakrishnan

Executive Vice President (HR & IT),
TVS Motor Company Ltd.



Co-Chairman:

Mr Stephen Sudhakar J

Senior Vice President – HR&GS,
Hyundai Motor India Ltd.

8. AFTERMARKET PARTS GROUP



Chairman: Mr Yash Pal Sachar

General Manager,
Honda Car India Ltd.



Co-Chairman: Mr Anup Mohnani

Head – Spare Sales – Logistics,
PCA Motors Pvt. Ltd.

E. TECHNICAL COUNCIL



Chairman: Mr K N Radhakrishnan

Director & CEO,
TVS Motor Company Ltd.



Co-Chairman: Dr N Saravanan

Chief Technology Officer,
Ashok Leyland Ltd.

1. ELECTRIC MOBILITY GROUP



Chairman: Mr Mahesh Babu

MD & CEO – Mahindra Electric
Mahindra & Mahindra Ltd.



Co-Chairman: Dr S J Dhinagar

Vice President –
Advanced Engineering,
TVS Motor Company Ltd.



Co-Chairman: Mr Sushant Naik

Global Head, Government &
Public Affairs,
TATA Motors Ltd.





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

4. CONNECTED VEHICLES GROUP



Chairman: Mr N S Talib
Assistant Vice President
Honda Cars India Ltd.

2. RECYCLING AND MATERIAL GROUP



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



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



Co-Chairman: Mr M S Anandkumar
General Manager (R&D),
TVS Motor Company Ltd.

5. STYLING & DESIGN GROUP



Chairman: Mr Malo Le Masson
Head of Strategy,
Hero MotoCorp Ltd.

3. SUSTAINABLE MOBILITY GROUP



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

6. FRONTIER TECHNOLOGY & INNOVATION GROUP



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



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



Co-Chairman: Mr R Narasimhan
Head (Two-Wheeler Vehicle R&D),
Bajaj Auto Ltd.



7. MANUFACTURING, INDUSTRY 4.0 AND EODB-MFG



Chairman: Mr Satyakam Arya,
CEO & MD
Daimler India Commercial
Vehicles Ltd.



Co - Chairman: Mr Mahesh Kaikini
Chief of Quality,
Hero MotoCorp Ltd.

2. CMVR & SAFETY REGULATIONS GROUP



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



Co-Chairman: Dr Venkat Srinivas
Sr. VP- Product Development,
Mahindra & Mahindra Ltd.

F. NATIONAL & INTERNATIONAL REGULATIONS COUNCIL



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



Co-Chairman:
Mr Jyotindran Sastabhan
Sr. General Manager & Head-VATS,
ERC,
TATA Motors Ltd.

3. TWO WHEELERS GROUP



Chairman: Mr Harjeet Singh
Executive Advisor – Technical,
Hero MotoCorp 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 Suraj Agarwal
Vice President,
Honda Motorcycle & Scooter
India Pvt. Ltd.

4. THREE WHEELERS GROUP



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



Co-Chairman: Mr R Velusamy
Chief of Global Product
Development,
Mahindra & Mahindra Ltd.





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

I. TWO WHEELERS CEO'S COUNCIL



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

5. INTERNATIONAL HARMONIZATION GROUP



Chairman: Dr Tapan Sahoo
Executive Vice President (Engg),
Maruti Suzuki India Ltd.

J. PASSENGER VEHICLES CEO'S COUNCIL



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



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

K. SAFE – SOCIETY FOR AUTOMOTIVE FITNESS & ENVIRONMENT



Chairman: Mr Girish Wagh
Executive Director – CVBU,
TATA Motors Ltd.



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

H. THREE WHEELERS CEO'S COUNCIL



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



Vice President: Mr Pankaj Gupta
Vice President (External Affairs & CSR)
SKODA Auto Volkswagen India Pvt. Ltd.



SIAM EXECUTIVE COMMITTEE 2020-21

COMPANY	MEMBER	ALTERNATE MEMBER
Ashok Leyland Ltd	Mr Vipin Sondhi	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 Thimmaiyan
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	
Hindustan Motors Finance Corp Ltd	Mr Uttam Bose (Co-opted)	
Honda Cars India Ltd	Mr Gaku Nakanishi	Mr Praveen Paranjape
Hyundai Motor India Ltd	Mr S S Kim	Mr Puneet Anand
Honda Motorcycle & Scooter India Pvt Ltd	Mr Atsushi Ogata	Mr V Sridhar
India Yamaha Motor Pvt Ltd	Mr Motofumi Shitara (Co-Opted)	Mr Ravinder Singh
Mahindra & Mahindra Ltd	Mr Rajan Wadhera (Co-opted)	
Mahindra & Mahindra Ltd	Mr Rajesh Jejurikar	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
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 Vikram Kirloskar (Co-opted)	
Toyota Kirloskar Motor Pvt Ltd	Mr Masakazu Yoshimura	Mr Vikram Gulati
TVS Motor Company Ltd	Mr K N Radhakrishnan	Mr Sudarshan Venu
VE Commercial Vehicles Ltd	Mr Vinod Aggarwal	Mr B Srinivas
Volvo Group India Pvt Ltd	Mr Suresh Chettiar	

As on 01st August 2021



PAST PRESIDENTS

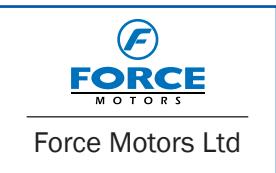
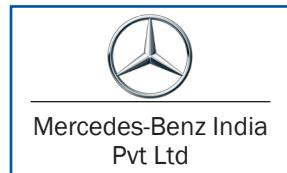
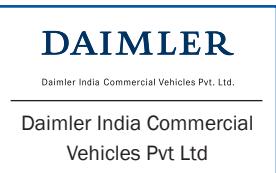
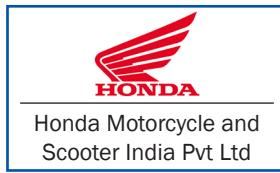
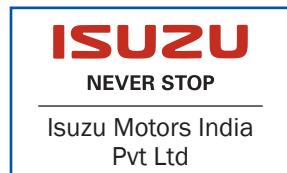
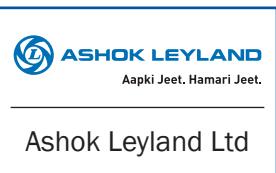
YEAR	NAME	COMPANY
1960	Mr Lalchand Hirachand*	Premier Automobiles Ltd
1961	Sir L P Misra*	Hindustan Motors Ltd
1962 & 1963	Mr A E L Collins*	Ashok Leyland Ltd
1964	Mr Keshub Mahindra	Mahindra & Mahindra Ltd
1965 & 1966	Dr M A Chidambaram*	Automobile Products of India Ltd
1967 & 1968	Mr K V Srinivasan*	Standard Motor Products India Ltd
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 Bhabra*	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
2020/21	Mr Kenichi Ayukawa	Maruti Suzuki India Ltd

* Since deceased

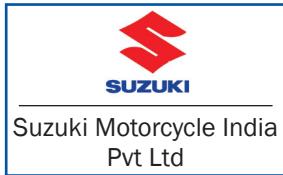
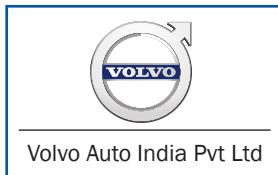
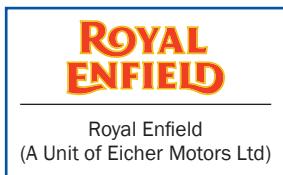
Note: The names of the Companies are as they were known then.



SIAM MEMBERS



SIAM MEMBERS



In alphabetical order
*Associate Member
As on 01st August, 2021



SIAM SECRETARIAT

Mr Amit Kumar	Mr P K Banerjee
Mr Arindom Ghatak	Mr Philip Skaria
Mr Arnab Chakraborti	Mr Prakhar Tyagi
Mr Atanu Ganguli	Ms Ragmani Shukla
Mr B K Dutta	Mr Rajesh Menon
Mr Bhisham Prasad Rai	Mr Raju Kamat
Mr Debasish Majumder	Mr Ramesh P Iyer
Mr Dikshant Negi	Dr Rashid Hasan
Mr Dinesh Patnaik	Ms Ritika Changia
Mr Diwit Prajapati	Ms Ruby Ganguly
Ms Jasleen Kaur	Mr Saurabh Rohilla
Mr Jitendra Rai	Dr Sandeep Garg
Mr Kartike Karwal	Mr Sundeep Sundli
Ms Manju Dhamija	Ms Supriya Sinha
Mr Manoj Mohapatra	Mr Tribhuvan Rai
Ms Meenakshi Kukreja	Mr V K Pandey
Ms Novika Sood	

In alphabetical order



LINKAGE WITH OTHER INSTITUTIONS IN INDIA

All India Motor Transport Congress (AIMTC)
Alloy Steel Producers Association
Aluminium Association of India
Asian Development Bank
Association of Indian Forging Industry (AIFI)
Association of State Road Transport Undertakings (ASRTU)
Automotive Component Manufacturers Association of India (ACMA)
Automotive Services Equipment's Association
Automotive Skills Development Council (ASDC)
Automotive Tyre Manufacturers Association (ATMA)
Bureau of Indian Standards (BIS)
Central Institute of Road Transport (CIRT)
Central Road Research Institute (CRRI)
Centre for High Technology
Confederation of Indian Industry (CII)
Delhi Transport Corporation (DTC)
Delhi Metro Rail Corporation (DMRC)
Federation of Automobile Dealers Association (FADA)
Indian Auto LPG Coalition
Indian Diesel Engine Manufacturers Association
Indian Institute of Foreign Trade (IIFT)
Indian Institute of Petroleum (IIP)
Indian Institute of Technology (IIT)
Indian Machine Tool Manufacturers Association (IMTMA)
Indian Rubber Institute
Insurance Regulatory and Development Authority of India (IRDAI)
Institute of Road Traffic Education (IRTE)
International Centre for Automotive Technology (ICAT)
National Automotive Testing and R&D Infrastructure Project (NATRIP)
National Council of Applied Economic Research, (NCAER)
National Institute of Design (NID)
National Skill Development Corporation (NSDC)
Petroleum Federation of India
Petroleum Planning & Analysis Cell (PRAC)
Research & Information Systems for Non-aligned and Other Developing Countries
Society for Automotive Fitness & Environment (SAFE)
Technology Information Forecasting and Assessment Council
The Automotive Research Association of India (ARAI)
The Energy and Resources Institute (TERI)
Tractor Manufacturers Association
Vehicle Research & Development Establishment
Western India Automobile Association

In alphabetical order



OVERSEAS LINKAGE

African Association of Automotive Manufacturers (AAAM)
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
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, Nepal
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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