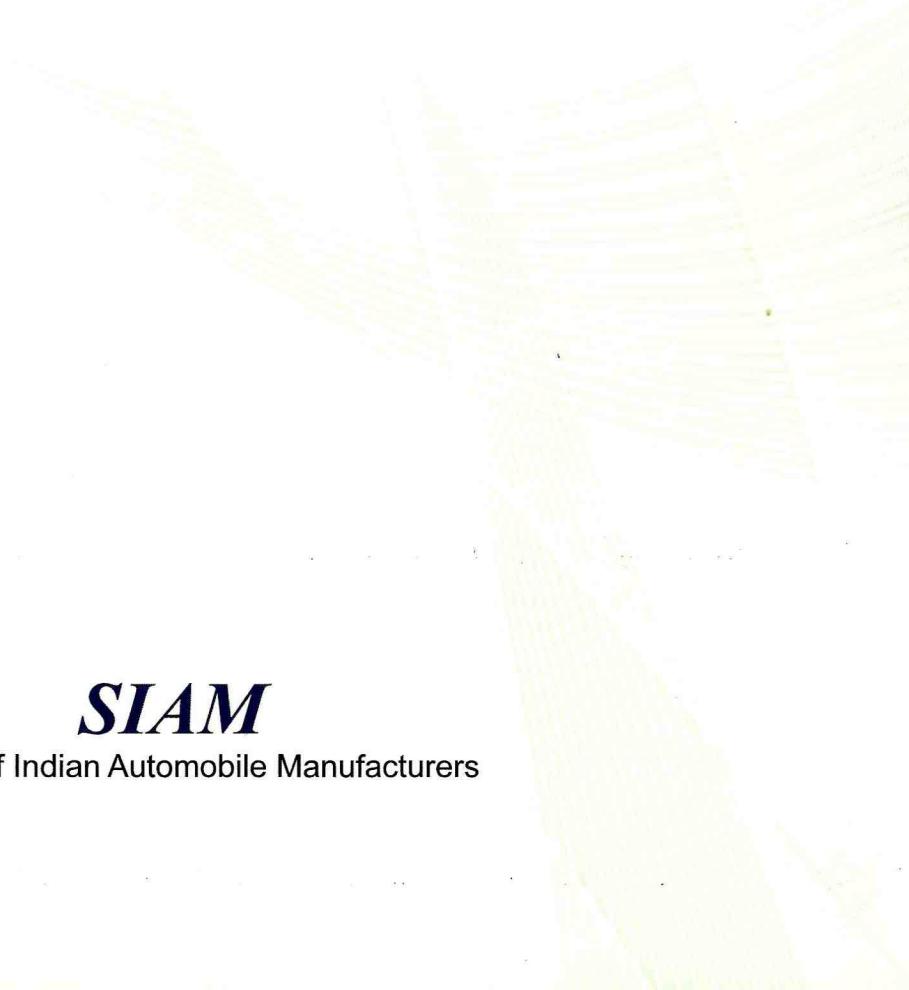




annual report 2008-2009

SIAM
Society of Indian Automobile Manufacturers



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PRESIDENT'S MESSAGE



Ravi Kant

It gives me immense pleasure to present the Annual Report of The Society of Indian Automobile Manufacturers for the year 2008-2009.

SIAM has entered its Golden Jubilee year which is a testimony to the unity of the automobile industry and the useful role it has played in furthering the interest of the industry in the last 50 years. The last decade has witnessed opening of the Indian market, which now has the presence of a large number of foreign players, and taking of initiatives by the Indian Manufacturers to go out of the country to manufacture, distribute, and/or sell their products. This enabled the industry to grow at over 10% in the last 10 years. This also required SIAM to both sharpen and broadbase its communication with the government and other agencies in defining policies for responsible growth. Automotive Mission Plan 2006-16 released by the Hon'ble Prime Minister is a

testimony to this joint effort. SIAM has also been interacting with various international organizations like JAMA, ACEA, VDA, KAMA, ATPC, TAIA, AFM, FOI, etc. as well as participating in deliberations at international levels to put forth Indian industry's position in the right perspective.

Although Indian auto industry, being cyclical like any other similar industry in the world, goes through periodic downturns, the events of last year were extremely severe. Global meltdown and collapse of the banking system, resulting in drying up of availability of finance either to run operations or financing for purchase of vehicles, had an extremely deleterious impact across the world which is yet to recover from it even now. In India, too, the withdrawal of funds by banks for both operations and vehicle financing had a severe impact especially in October – December '08. The government efforts intended to curb inflation affected growth and brought in recession. To offset this, the government did intervene and announced stimulus packages with a slew of measures, some of which were of benefit to the auto industry. However it was not sufficient to offset the negative influences as results show.

Production during the period April 08 – March 09 showed an increase of less than 3%. Looking further the increase in passenger vehicles was 3.5%, while two wheelers grew by 4.9% and in three wheelers increase was almost nil. Medium and HCV declined by 34.7% and LCV by 11.6%.

Domestic sales barely grew with an increase of 0.7%. Again, passenger vehicles grew by 0.1% and two wheelers by 2.6%. Medium and Heavy Commercial vehicles declined by 33.2% while LCV declined by 7.1% and three wheelers also declined by 4.1%.

It was really increase of 53.7% and 22.5% in passenger vehicle and two wheeler exports respectively that salvaged the position overall for exports, even though Commercial Vehicle Exports declined by over 27%.

If we were to take these figures by each quarter the situation becomes even more evident. The change in different quarters were:

Qtr I	Qtr II	Qtr III	QTR IV
+8.2%	+12%	-17%	+1.7%

Even the increases which have been seen in recent months are on the back of huge incentives given by manufacturers across all segments. This shows that the industry is not out of the woods and would need support and encouragement at least during the whole of this financial year.

In addition, over Rs 78,000 crores are being invested in the sector. This investment had been planned to meet the projected growth rates at a time when industry was growing rapidly. The current scenario has somewhat altered the projected returns and there is a need for continued government-industry partnership to ensure productivity of investments.

We do hope that this last one year would only be a blip in the strong robust future of the Auto Industry. The young population having greater disposable income, easy availability of credit, coupled with phenomenal explosion in communication connectivity, is bound to create a huge population of urbanization of mind across the country. The road connectivity will transform India into a very powerful consumer society and enable many dreams to be realized.

To bring greater focus and to streamline our actions for more effective and desired results, we had introduced, two years ago, a two tier structure – Councils and Groups to coordinate all SIAM activities. I am happy to inform that it has brought greater focus to specific areas and, has brought co-ordinated thinking to like subjects. As we go along some fine tuning will make the initiative even more productive and useful.

The Council on International business focused on trade related issues and coordinated activities of three groups. SIAM provided inputs for Foreign Trade Policy and, for the first time, some of the automotive items were covered under the Market-linked focused scheme. SIAM continued bilateral meetings with Counterpart Associations and also signed a MOU with The Indonesia Automotive Federation. SIAM participated in APEC Automotive Dialogue meetings in Korea and Singapore and continued representations at WTO and Regional Trade Agreements, including participating in WTO mini-ministerial meeting in Geneva in October 2008. SIAM has been playing an effective role in disseminating industry's stand to the government, which has been very supportive and encouraging of SIAM's views.

The Council on Demand Management coordinated the industry efforts on reviving the demand. The first regional show, Bus & Special Vehicles Expo was organized by SIAM in Bangalore in March this year. SIAM worked closely with FIDC, banks, Ministry of Finance, and Reserve Bank of India to address the issue of Repossession of Vehicles. As instructed by RBI, FIDC is now coming out with Code of Conduct for NBFCs, which should address the problem to a large extent. SIAM also worked very closely with the Railway Board to facilitate movement of vehicles by the railways. For the first time, two double-deck auto wagon trains were developed by Indian Railways and pressed into service. These trains have carried over 13,000 Cars till date. SIAM has also launched a pilot project on consolidation of road transport for movement of cars.

The role played by SIAM in the wake of the global meltdown and severe challenges faced by the auto industry last year has been noteworthy. It is only due to relentless efforts in meeting and communicating what needs to be done across various entities and across all levels in the government that the latter appreciated those challenges and announced several steps to mitigate them. These included lowering of excise duty, JNNURM Bus purchase scheme, removal of restriction of government purchase, increased commercial vehicle depreciation rate, increased refinancing for commercial vehicle loan, etc. SIAM, for the first time, conducted a compensation survey amongst members and benchmarked the compensations across levels. SIAM also developed a proposal for comprehensive automotive skills council – a body which should look after all issues related to human capital requirements of the industry.

The auto industry is conscious of the impact of the global warming and is contributing its share of efforts to alleviate the same. The Technical Council worked on several issues of importance during the year like finalizing fuel efficiencies roadmap and declaration of the fuel efficiency of vehicles.

The council is evolving a standard score and encouraging the use of alternative fuels. During the year, SIAM also finalized the Safety Roadmap beyond 2011 and provided inputs to CMVR-TSC while the alignment with international regulations continued. The Recycling Group visited the vehicle dismantling centre in

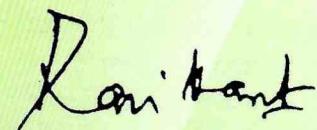
Shanghai and has finalized a demonstration project in Chennai. Interactions with UNECE WP-29, IMMA and OICA continued. Workshops on 'National Hybrid Propulsion Platform' and 'Propelling India in 2020' were organized. Styling and Design Conclave was organized in Mumbai and Automobile Design Challenge has been launched.

As part of the Public Policy Activities, the Society for Automotive Fitness and Environment (SAFE) undertook several initiatives reaching out to many stakeholders and impacting society at large. SAFE organized road safety activities in over 31 states and Union Territories covering 295 cities and 1600 dealerships. Approximately 75 refresher driver training workshops were organized in 7 major states of India and outreached to 5,00,000 people during the National Road Safety week in January, 2009.

On World Environment day, 5th June 2009, SAFE conducted the 'Free Pollution Check Campaign' all over the country at 2200 locations in 265 cities. After the successful completion of its pilot project, SIAM-SAFE has extended networking to all 545 PUC centers in Delhi.

Indian Auto Industry has shown a great deal of innovative thinking and action. The "Nano" has brought it a worldwide recognition. SIAM will continue to support the industry in all its future endeavours.

I thank the Executive Committee for its direction and guidance on matters brought before it. I thank the Chairmen and Co-Chairmen of the various Councils as well as the Heads and Co-Heads of different Groups which deliberated and debated on several important issues and came up with extremely well thought through recommendations for consideration of the Executive Committee. However, all this would not have been possible without the unstinted support, provision of data and ideas, as well as proactive efforts by the entire SIAM Management and staff. My heartiest compliments and thanks to all of them.



Ravi Kant

August 28, 2009

SIAM

Society of Indian Automobile Manufacturers, SIAM, a not-for-profit organization, is the apex national industry body representing all major vehicle and vehicular engine manufacturers in India. Members include manufacturers of Passenger vehicles, Commercial vehicles, Three wheelers, Two wheelers and Engines.

SIAM aims to promote sustainable development of the Indian automobile industry and enable India to become a global automotive hub. It endeavors to improve industry's competitiveness, create an environment to promote mobility, internationalize the industry and promote India as a global hub for Research & Development.

SIAM provides a window to the automobile industry in India. The Society works closely with all stakeholders in the formulation of the policies, regulations and rules related to the Indian automobile industry. It is a link between the industry and other bodies including the government. It works with various international bodies like OICA, IMMA, UNECE, etc. and counterpart associations like VDA, SMMT, JAMA, TAIA, AFM, ANFIA, etc.

SIAM works towards holistic development of the industry with its activities spanning over three broad areas – Economic & International Trade Policy, Technical Policy and activities related to Environment & Safety Awareness. Environment protection and safety are the key driving principles. Dissemination of information is an integral part of the Society's activities. It publishes monthly industry statistics, other reports and organizes various informative seminars/workshops.

Auto Expo, a biennial auto exhibition, is one of the major activities of the Society. It is planning other regional and segment shows across the country and abroad.

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

SIAM ANNUAL CONVENTION 2008



Panel on 'Small Cars' during the SIAM Annual Convention 2008. (L to R): Mr. Shohei Kimura, Managing Director, Nissan Motor India (JAMA), Mr. Fritz Henderson, President & COO, General Motors, USA, Dr. Joseph Kasputys, Chairman, Global Insight, Mr. Ratan Tata, Dr. Sergio Marchionne, Chief Executive Officer, Fiat Group and Fiat Group Automobiles, Italy and Mr. Shen Yang, President, SAIC-GM-Wuling Company, China

"India's Automotive Industry : Challenges for Leadership – 2016 and Beyond"

On 4th September 2008, several automotive industry majors from across the world shared their vision for the next decade at the 48th SIAM Annual Convention held at Hotel Ashok, New Delhi. Mr. Sontosh Mohan Dev, Hon'ble Union Minister of Heavy Industries and Public Enterprises, presided over the convention and said that the Ministry has decided to have

dialogue with various segments of the auto industry to crystallize the Automotive Mission Plan 2006-2016 in making India a global hub for automobiles and auto components. He said that Government will henceforth support companies which achieve substantial reduction in energy consumption and at the same time look for use of alternative fuels. He also unveiled

Mr. Sontosh Mohan Dev, Hon'ble Minister of Heavy Industries and Public Enterprises being received by President & Vice President, SIAM for inaugural function of SIAM Annual Convention 2008



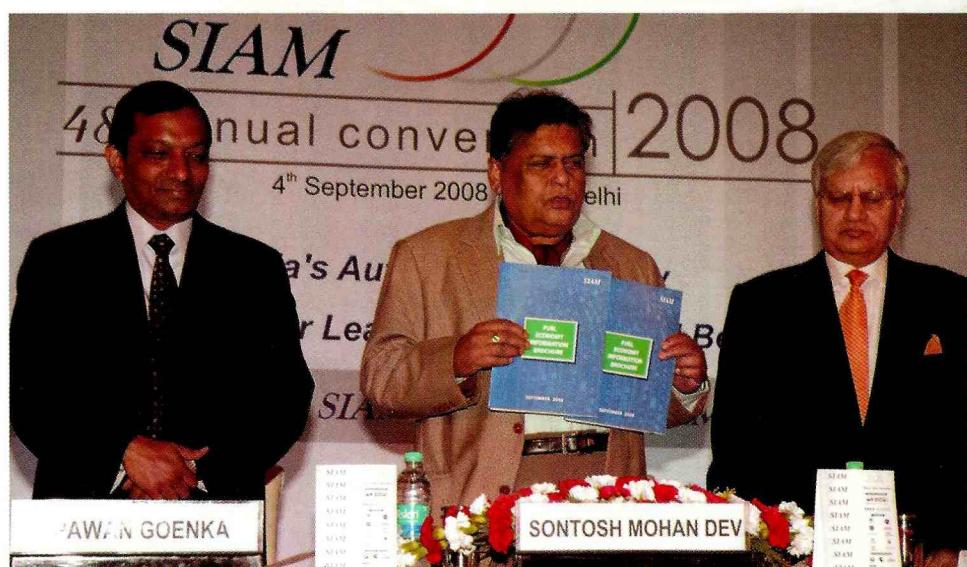
the Fuel Economy Consumer Information. The convention discussed strategies to help India evolve as a global leader in the small car sector and emphasized the growing need for more fuel-efficient and green vehicles. A Future Automotive Technology Exposition, with the objective of showcasing new developments in vehicle engineering for better safety and emission control was also held on the 3rd & 4th September 2008, and was inaugurated by Shri Raghunath Jha, Hon'ble Minister of State for Heavy Industries and Public Enterprises.

In his welcome address, Mr. Ravi Kant, President, SIAM, and Managing Director, Tata Motors, said that the year 2008 is a special year

for the industry, as exactly 60 years ago the Indian automobile industry began manufacturing automobiles. The Indian Automotive industry's journey can be classified into three phases – of protection, liberalization, and globalization. He said that the industry is exhibiting outstanding resilience after the last down cycle about a decade back. "The Indian automotive market with a healthy growth rate of 13% in the last seven years was a source of attraction to many foreign automobile companies. Increased competition, but also raised customer expectations and forced the industry to innovate," he said. He opined that NANO is an example of India's innovative leadership in automobile industry and other similar products



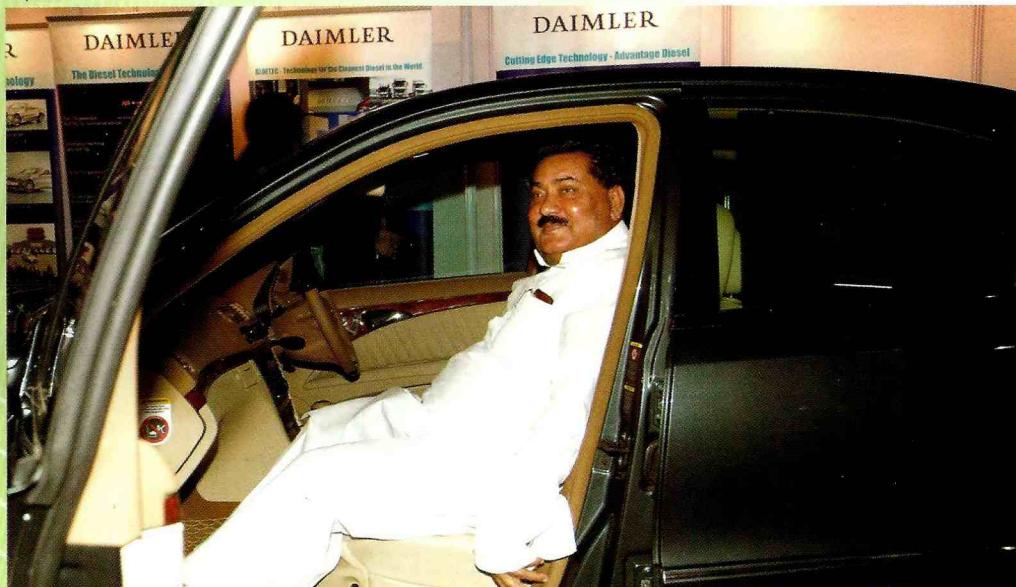
Hon'ble Minister unveiling the SIAM Fuel Economy Consumer Information



Hon'ble Minister unveiling the SIAM Fuel Economy Consumer Information and launching the SIAM Fuel Economy Information Brochure

have the potential to change the paradigm of the automotive industry worldwide.

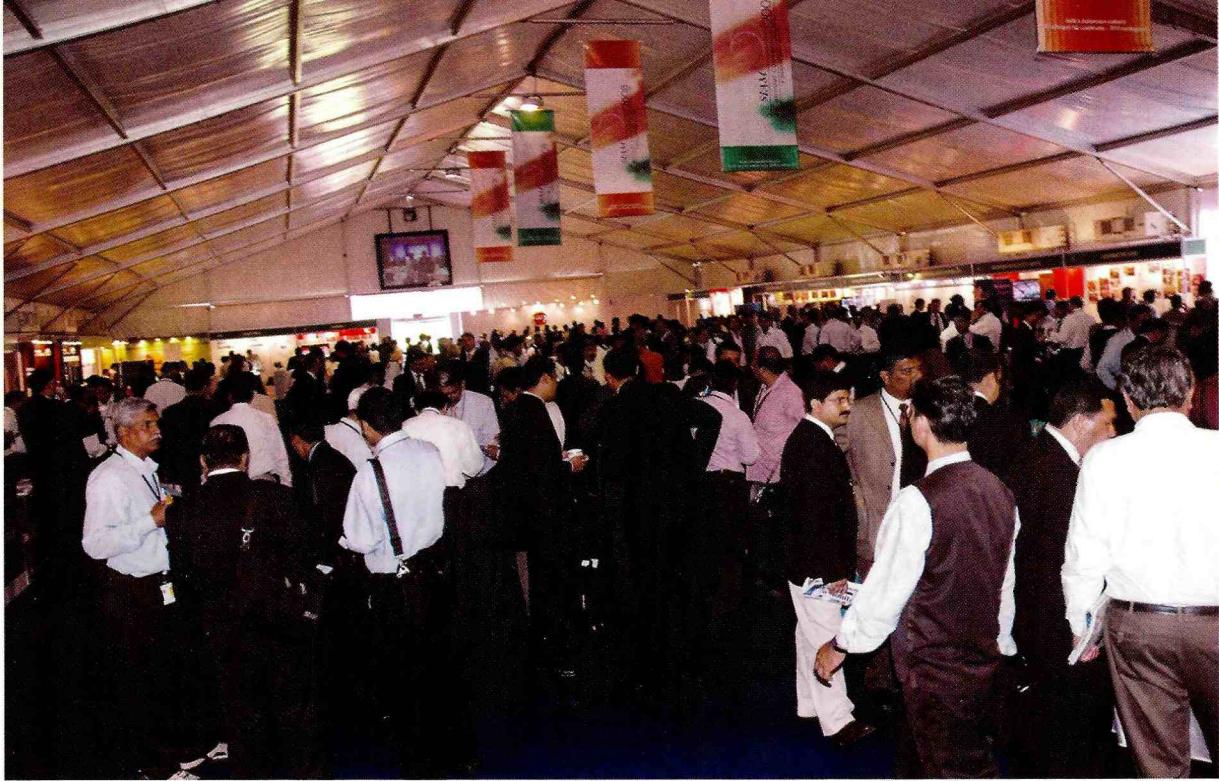
Mr. Fritz Henderson, President & Chief Operating Officer, General Motors, USA, spoke on "Driving the Auto Industry into the Future" with trends towards growing market demands from Asia, especially from India and China, and the need to move away from petroleum as fuel. Mr. Rainer Schmueckle, Chief Operating Officer, Mercedes-Benz, Germany, spoke on "Challenges & Solutions in Automotive Industry: A perspective from Mercedes-Benz on the Indian as well as Global Market Place" and emphasized the role of the government in building better infrastructure of transportation and communication to



Mr. Raghunath Jha, Hon'ble Minister of State for Heavy Industries and Public Enterprises in Mercedes Car after inauguration of "Future Automotive Technology" Exposition held on 3rd & 4th September 2008



Mr. Ratan Tata unveiling 'Sintesi' concept car designed by Pininfarina Italy. Mr. Paolo Pininfarina, Chairman, Pininfarina Designs receiving Mr. Tata at the exposition



A section of the participating delegates at the SIAM Annual Convention 2008

promote manufacturers. He also announced that Mercedes-Benz will launch both its first hybrid and electric vehicles in Europe in 2010. This will be followed by the launch of fuel cell-powered cars in 2012.

Dr. Pawan Goenka, Vice President, SIAM, and President (Automotive), Mahindra & Mahindra introduced the panelists for the first panel discussion on "What would it take for India to become a key player of innovation in Automotive Industry?" and registered the

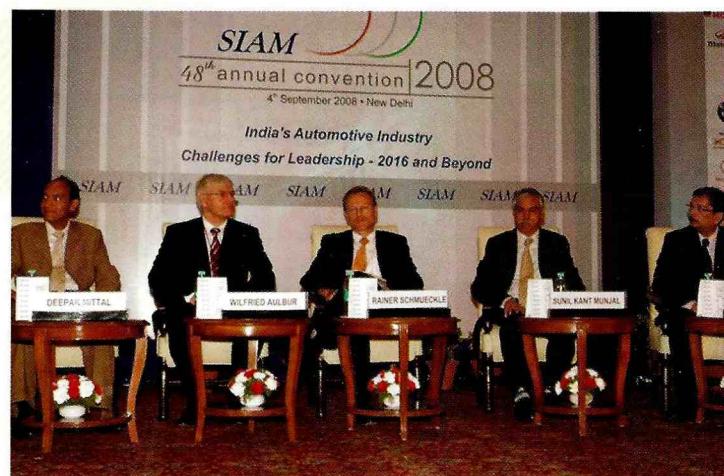
Indian Automobile Industry's appreciation to Mr. Paolo Pininfarina, Chairman, Pininfarina, Italy, for participating at the SIAM Annual Convention in lieu of Mr. Andrea Pininfarina, President and CEO, Pininfarina, on account of the latter's sudden demise on 7th August 2008. Dr. R. Chidambaram, Principal Scientific Advisor, urged the automotive industry to enhance industry-academic partnership, encouraging more youngsters to take up automotive research as a lucrative career option. Mr. Rajiv Bajaj, Managing Director, Bajaj Auto, emphasized

(L to R): Mr. Vikram Kirloskar, Vice Chairman, Toyota Kirloskar, Mr. Karl Slym, President and CEO, GM India, Mr. Fritz Henderson, President & COO, General Motors, USA (Keynote Speaker), Mr. R. C. Bhargava, Chairman, Maruti Suzuki India and Dr. Surojit Mohan Gupta, Deputy Director, SIAM at the first keynote address





A section of the participating delegates at the SIAM Annual Convention 2008



Mr. Deepak Mittal, MD, International Cars & Motors, Dr. Wilfried Aulbur, MD and CEO, Mercedes-Benz, Mr. Rainer Schmueckle, Chief Operating Officer, Mercedes-Benz, Germany (Keynote Speaker), Mr. Sunil Kant Munjal, Chairman, Hero Corporate Service and Mr. Sugato Sen, Senior Director, SIAM at the second keynote address



Mr. Rajiv Bajaj, MD, Bajaj Auto sharing his perspective during the first panel discussion on Innovation. (L to R): Mr. Christoph M. Eisenhardt, Exe.VP, Continental, Germany, Dr. Stefan Pischinger, President & CEO, FEV Group, Germany, Dr. R. Chidambaram, Principal Scientific Advisor, Govt. of India and Mr. Paolo Pininfarina, Chairman, Pininfarina, Italy



Mr. Ravi Chopra, MD, Piaggio Vehicles presenting a memento to Dr. R. Chidambaram



Guest of Honour, Dr. Surajit Mitra, Additional Secretary, MoH&PE delivering his address at the first plenary session. (L to R) Mr. Steven Veldhoen, CEO Asia – Pacific, Booz & Co, Mr. Anant Talaulicar, MD, Cummins India, Mr. Karsten Bogun, MD, SkodaAuto India, Mr. Lowie Vermeersch, Design Director, Pininfarina and Mr. K. K. Gandhi, Executive Director (Technical) SIAM



Dr. Surajit Mitra in discussion with Mr. Ravi Kant, President, SIAM

the need to correlate innovation with business performance. He appreciated the government regulations and quality controls set in place for the industry as they helped the manufacturers to produce better products and develop better credibility in the global market. Mr. Christoph M. Eisenhardt, Executive Vice President, Continental Technologies, said India has the advantage of best cost innovation and should focus on the same to become a major global player.

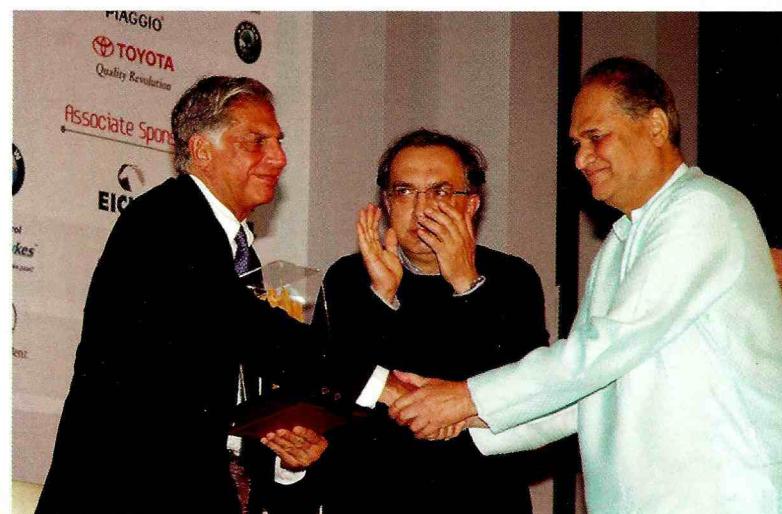
During the first Plenary Session, Guest of Honour, Dr. Surajit Mitra, Additional Secretary, Ministry of Heavy Industries & Public Enterprises, stated that the Industry has already created a footprint in the local market as quality manufacturer and the fast growth of the industry in recent years is like a 'silent revolution.'

Mr. Lowie Vermeersch, Design Director, Pininfarina, Italy, spoke on "India and the Possibility of a New Mobility" and said the car manufacturers need to consider their product as a vehicle that is linked to both people and environment as car manufacturing is a social responsibility and should not be treated as a mere profit generating object. Mr. Steven Veldhoen, CEO Asia – Pacific, Booz & Co, elaborated on the topic of "Small Cars – India's chance to take the leadership." He urged the automotive industry to seize the opportunity the global market offers to India.

The second Panel Session deliberated on "Will the small car segment bring new dynamics in Auto Industry?" Chairman Tata Motors, Mr. Ratan Tata, reinforced his company's commitment to make low cost small cars for Indian consumers. He was of the opinion that in developing markets, small cars will be the first car for the consumer, although market for bigger cars will continue. Dr. Sergio Marchionne, Chief Executive Officer, Fiat Group and Fiat Group Automobiles, Italy, said that manufacturers worldwide faced physical constraints to produce big cars. European industry has managed its mobility issue by concentrating on small cars and the onus is on manufacturers to bring the highest level of technology to the small car



Mr. Ratan Tata sharing his perspective on the future of Small Cars. Also seen in the picture: Dr. Joseph Kasputys, Chairman, Global Insight and Dr. Sergio Marchionne, Chief Executive Officer, Fiat Group & Fiat Group Automobiles, Italy



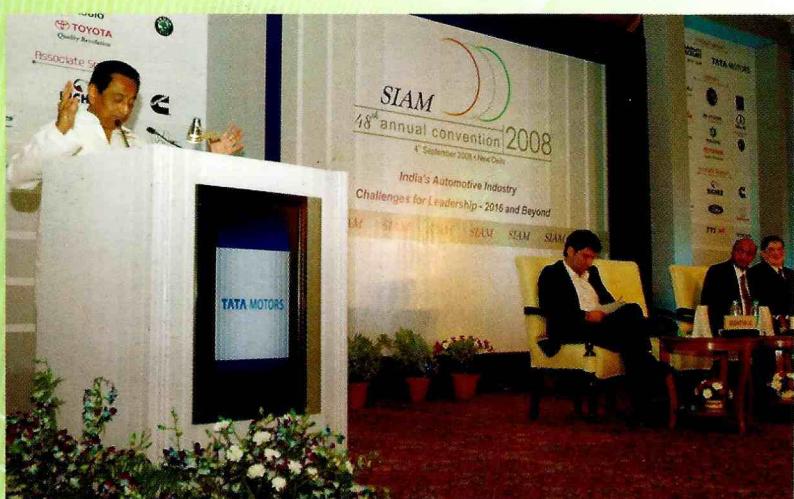
Mr. Rahul Bajaj, Chairman, Bajaj Auto presenting a memento to Mr. Ratan Tata as Dr. Marchionne looks on



Dr. S. N. Dash, Secretary, MoH&PE delivering his address at the second plenary session



SIAM members receiving Mr. Kamal Nath, Hon'ble Minister of Commerce at the SIAM Annual Convention 2008



Mr. Kamal Nath delivering his keynote address. (L to R): Mr. Siddhartha Lal, MD, Eicher Motors, Mr. Madhur Bajaj, Vice Chairman, Bajaj Auto and Mr. Dilip Chenoy, Director General, SIAM

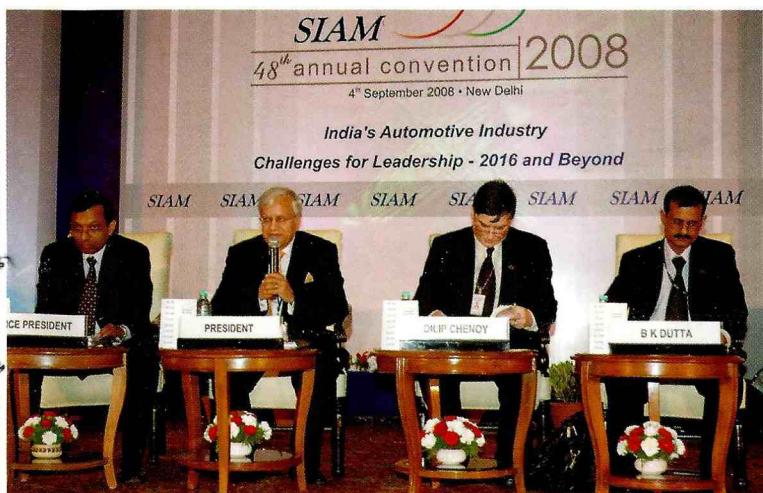


Mr. Brijmohan Lall, Chairman, Hero Honda Motors felicitating Mr. Kamal Nath as Mr. Madhur Bajaj (Centre) looks on

segment. Mr. Fritz Henderson, President & COO, General Motors, USA, said that he saw growth in different segments of the small car industry. He was confident that small cars will not only be in demand but may also offer large profit margins. Mr. Shen Yang, President, SAIC-GM-Wuling Company, China, said that the small car industry has shown the fastest rate of growth rate in China and the demand for small or mini cars is only increasing. By 2017, small cars in China are estimated to grow to 3.3 million compared to 1.2 million in 2008. During the discussion it emerged that the small cars are here to stay and India promises to play a big role in the small car industry sector.

During the second Plenary Session, Dr. Satyanarayan Dash, Secretary, Ministry of Heavy Industries & Public Enterprises, Mr. Xiao Guopu, Vice President, Shanghai Automobile Industry Corporation (SAIC), and Mr. Sanjay Rishi, Vice President & Global Automotive Industry Leader, IBM Global Business Services, deliberated further on the Chinese Automobile Industry and tried to provide a vision beyond the year 2020, which was based on a study conducted by IBM.

Mr. Kamal Nath, Hon'ble Minister of Commerce & Industry spoke on "Making India a Global Automotive Export Hub," and extended complete support of the government to the automobile sector which he considered as the new 'Sunrise' industry of India. He emphasized the need to form a partnership between the industry and the government to materialize the dream of making India the hub of the world automotive industry. He assured that the government will provide the "enabling policy framework" to the industry.



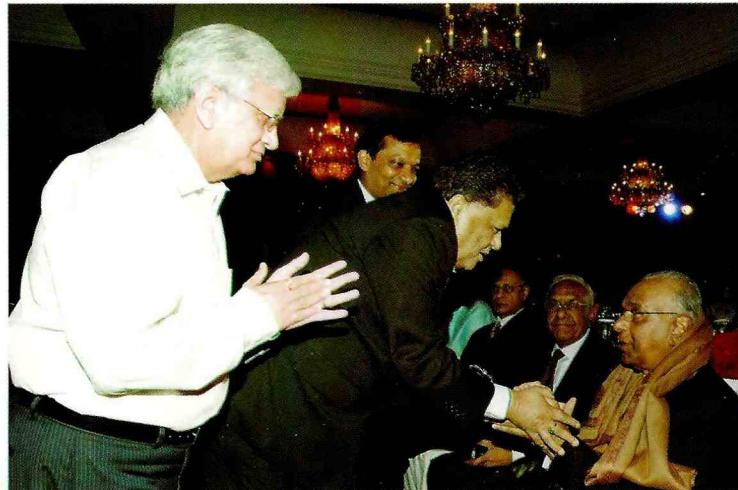
(L to R): Dr. Pawan Goenka, Vice President, SIAM, Mr. Ravi Kant, President, SIAM, Mr. Dilip Chenoy & Mr. B. K. Dutta, Deputy Director, SIAM during the SIAM AGM



Mrs. Labroo, daughter of Mr. Keshub Mahindra, receiving the Award from Hon'ble Minister Santosh Mohan Dev on behalf of her father. Also present Mr. Ravi Kant, President SIAM, and Dr. Pawan Goenka, Vice President SIAM



Mr. R. J. Shahaney, Past President, SIAM being felicitated by the Hon'ble Minister



Mr. Sontosh Mohan Dev, Hon'ble Minister of Heavy Industries & Public Enterprises felicitating Mr. A. Sivasailam, Past President, SIAM during the celebration of 60 years of Indian Automobile Manufacturing



Mr. Rahul Bajaj addressing during the celebration of 60 years of Indian Automobile Manufacturing



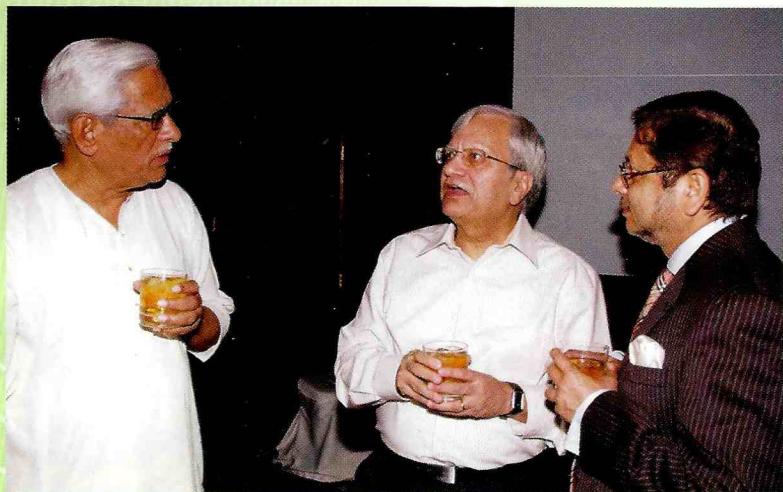
Mr. C. V. Karthik Narayanan addressing during the celebration of 60 years of Indian Automobile Manufacturing



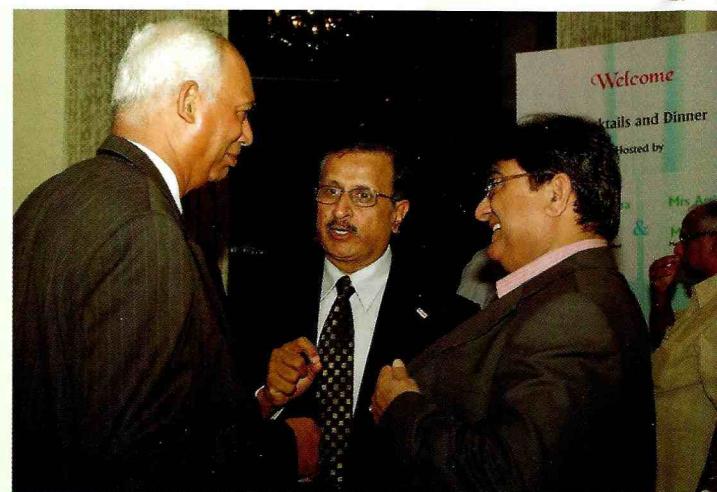
(L to R): Hon'ble Minister, Mr. S. R. Marathe, Director, ARAI, handing over the Type Approval Certificate of Tata Nano to Mr. Clive Hickman, Tata Motors. Mr. R. Ravishankar, Sr. GM, Tata Motors on the right



Mr. Ravi Kant, President SIAM, greeting Mr. Raghunath Jha, Hon'ble Minister of State for Heavy Industries and Public Enterprises



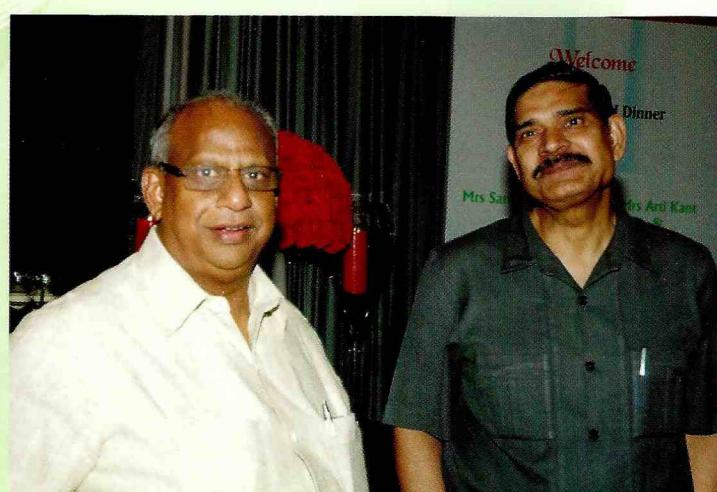
Mr. Subodh Bhargava, Past President, SIAM with Mr. Ravi Kant and Dr. Surajit Mitra at the SIAM-ACMA Annual Dinner



Mr. P. M. Telang, President CVBU, Tata Motors with guests at the SIAM-ACMA Annual Dinner



Mrs. & Mr. J. S. Chopra, President, ACMA greeting Mr. Rajiv Bajaj on 4th September 2008 at the SIAM – ACMA Annual Dinner at Hotel Taj Mahal, New Delhi



Mr. Satyanarayan Dash, Secretary, MoH&PE at the SIAM-ACMA Annual Dinner

TECHNICAL AGENDA

Following groups continued to consider various aspects pertaining to the Technical issues facing the Industry and address the same with a focused approach:

1. Emissions and Conservation.
2. CMVR and Safety Regulations.
3. Two Wheeler.
4. Three Wheeler.
5. International Harmonization.
6. Styling and Design.
7. Automotive Infotronics.
8. Frontier Technology.
9. Service Head Forum.
10. Diesel Image.
11. Recycling.

BS IV EMISSION REGULATIONS

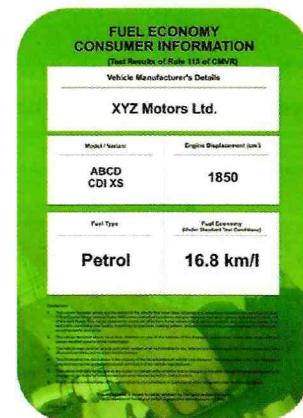
Ministry of Road Transport and Highways has finalized and released the notification for BS IV emission norms from 1st April 2010 in 11 cities and BS III Emission norms in the rest of the country. Two and Three-Wheeler manufacturers will also upgrade themselves to meet the next stage of emission norms. SIAM members have also worked in finalizing the detail document on Type Approval Procedure (TAP). Following the issue of this notification, vehicle manufacturers are now in a position to apply for their vehicle approvals at notified Test Agencies. SIAM has also taken up the issue of non availability of compliant Fuels in select areas, catered by the refineries, situated in the North Eastern part of India.

FUEL ECONOMY REGULATIONS

During the SIAM Annual Convention on 4th September 2008, Mr. Ravi Kant, President, SIAM had announced that all Cars and Two-Wheeler Manufacturers of SIAM membership will declare the Fuel Economy values of their vehicles at the point of sale to enable the consumers make an informed choice before deciding on

buying a vehicle. This is now being done by all manufacturers. During the year SIAM had also submitted its detailed proposal to the committee of Government of India on a comprehensive scheme for Fuel Economy regulation in India. Discussions are underway amongst various Ministries and Government Departments.

BLENDING 10% ETHANOL WITH GASOLINE



SIAM has undertaken a study to review the impact of blending of 10% ethanol with gasoline on vehicles, in partnership with ARAI and Indian Oil Corporation (R&D). The study is being supported by Ministry of Heavy Industries and Public Enterprises.



SIAM Members during the visit to Aonla Depot (Bareilly) to witness Ethanol Blend

CMVR & SAFETY REGULATIONS

SIAM CMVR & Safety Regulations Group, under the Chairmanship of Mr. S. Ravishankar, Tata Motors Ltd. is working on various safety issues and several representations have been made by SIAM to MoRTH, ARAI and other agencies during the year. Some of the important subjects covered by this group are Auto Slack Adjuster, Antilock Braking System, Testing procedures of three wheelers, formulation of crash standards, constitution of national and zonal accreditation board, BIS marking of tyres and tubes, EMC, notification of AIS 037, hybrid electric vehicle, child restraint systems, pedestrian protection, standard on school bus and Safety Roadmap.

SAFETY ROADMAP

The Safety Roadmap has been proposed taking into consideration the availability of test facilities. The notifications are to be released to allow time to the industry to carry out design modifications etc. The costs benefit analysis of implementation of some of the regulations, e.g. ABS, is under discussion.

BIS MARKING ON TYRE AND TUBES

Department of Consumer Affairs has prepared the draft quality control order for pneumatic tyres and tubes and has invited comments from all stakeholders (Department of Industrial Policy and Promotion, SIAM, BIS, ATMA, Department of Road Transport and Highway, etc.). Ministry of Road Transport and Highway has provided comments in consultation with all its stakeholders and stated that the proposed quality control order should comply with Central Motor Vehicle Rule, 1989. SIAM is agreeable to the quality control order.

AUTO SLACK ADJUSTER AND ANTILOCK BRAKING SYSTEM

The matter of field feedback (excessive wear of brake liners due to ASA fitted vehicles) was jointly examined by SIAM and ACMA representatives recently. ACMA and SIAM are working together to overcome the problems. Stakeholders are of the viewpoint that fitment of ASA and ABS are independent requirements and the functioning of one system has no bearing on the other.

HYBRID VEHICLES

The group, after finalizing the standard for vehicles upto 3.5 tons GVW, is working on formulation of provisional standard for vehicles above 3.5 tons GVW. The provisional standard would have safety regulations in line with sub 3.5 tons and emission as for current fossil fuels.

ELECTRO MAGNETIC COMPATIBILITY

Automotive manufacturers have a huge workload for Electromagnetic Compatibility (EMC) / Electromagnetic Interference (EMI) testing and are currently unable to go in line with the implementation schedule of the standard as per the notification released by Department of Road Transport. All stakeholders are working together to determine actual testing time required to complete the workload of the industry.

REVIEW OF REGULATIONS

SIAM has felt that the time has come to take stock of existing regulations and evaluate them for effectiveness, so that those which are not of use can be dropped. The concept has been taken up by SIAM with Secretary, MoSRT&H. As a result, the same is under consideration and the group is working together to ascertain the priority.

BUS-BODY CODE IMPLEMENTATION

The Bus Body Code has been notified and its implementation is being actively pursued through the system of Accreditation of Bus Body Builders. For this purpose Boards have been set up at national and regional levels. SIAM is on the National Board.

OVERLOADING

The issue of overloading has been there for quite some time now. This is being actively pursued by SIAM with the appropriate authorities to arrive at a solution.

BIS/AIS in CMVR

MoRT&H is working on the legal issues involved in solving the tangle in notifying AIS in the CMVR.

TWO-WHEELER GROUP

Some of the issues on which this Group has been working are Fuel Economy regulations, Evaporative emissions, Spray suppression systems, angle of exhaust silencers and next stage of emission norms. The Group actively participated in meetings of International

Motorcycle Manufacturers Association (IMMA) to support Industry's position on proposing emission limits for World-wide Motorcycle Driving Cycle for driving patterns prevalent in countries like India. Members of the Group also presented India's view point with regard to the formulation of new regulation for Noise and a study programme on Behavioral conspicuity for motorcycles.

THREE-WHEELER GROUP

The group has been actively pursuing, with Ministry of Road Transport & Highways (MoRT&H), the issue of Emission testing of Diesel Three-wheeler. Series of meetings have been held with Secretary, MoRT&H, and other officials of the Ministry for resolving the testing procedure.



Members of IMMA at the General Assembly

INTERNATIONAL HARMONIZATION GROUP

This group is actively working and participating in the activities pertaining to international harmonization of vehicle regulations. Members have been deliberating on several issues in the UNECE WP.29 and supporting the official Indian delegations in the relevant meetings. SIAM is also providing active support to the MoHI in organizing the upcoming international Conference on Environmentally Friendly Vehicles which is under the auspices of WP.29. The group members also participate in the international manufacturers' forum like IMMA and International Automobile Manufacturers

Association (OICA). Active interaction is also taking place with the counterpart association in other countries like Japan, Europe and USA.

Some of the issues currently under active discussion are Global Technical Regulations (GTR) on Tyres, World-wide Driving cycles for Motorcycles, Light Duty Vehicles and Heavy Duty Vehicles, Tyre Pressure Monitoring Systems, etc. SIAM has also apprised the MoRTH and MoHI regarding the members' views on India acceding to the 1958 Agreement.

AUTOMOTIVE INFOTRONICS

The project proposal on Large Event Mobility Management, developed by the group under the European Union Seventh Framework Programme, has been accepted. The project is titled – Smart Transport Applications Designed for large events with impact on Urban Mobility (STADIUM). The objectives of this programme are to develop, implement, test and execute the Intelligent Transport System (ITS) applications of the Para Transit planning, real time management and informobility on mobile devices according to the test plan elaborated in WP4 and combining the results to achieve an adequate assessment of potential long term benefits of STADIUM services. The project partners are THETIS, ATAC, SIAM, Ashok Leyland Telematics, etc. In addition some important activities are the approval of SIMBA Two projects, to execute the ITS projects in coordination with ERTICO on Integrated Telematics Platform/OBU and Road User Charging and Public Transport management.



Mr. Brahm Dutt, Secretary, MoSRT&H (Right) with Mr. Vikram Gulati, Director, MoHI&PE (Centre) at the Geneva Motor Show



Members of the Indian Delegation at the June Session of WP.29 meeting at Geneva

FRONTIER TECHNOLOGY

SIAM organized the workshop "Propelling India in 2020" at Chennai. The agenda of the workshop was to discuss and understand the main drivers that would affect our automotive market in 2020 with increasing challenges, proactive consumer demands, technology development and innovation, globalization, integration and collaboration, and showcased their future roadmap for India in 2020.

For taking forward the National Hybrid Propulsion Program (NHPP) team leaders are to be nominated in four key technology areas



Mr. K. K. Gandhi, Executive Director (Tech), SIAM, Mr. Philip Jose, Tata Motors, Dr. Arun Jaura, Mahindra & Mahindra Ltd., Mr. S. J. Dhinagar, TVS Motors at the opening session of Workshop on National Hybrid Propulsion Platform, 24-25 November 2008, Mumbai



Dr. V. Sumantran, Executive Vice Chairman, Hinduja Automotive Ltd., addressing the inaugural session of Propelling India in 2020 at Chennai



(L to R): Dr. Rao Chalasani, General Motors India, Mr. R. Devarajan, Ashok Leyland Ltd., Mr. Dilip Chenoy, SIAM, Dr. Arun Jaura, Eaton Corporation, Mr. Abdul Majeed, PWC, Mr. S. Govindrajan, Tata Motors Ltd. at the concluding session

and representation was made to Department of Heavy Industries and Department of Science and Technology for supporting the programme.

SIAM, in association with Indian Oil Corporation Ltd (IOCL), Indian Institute of Technology, Delhi (IIT-D) and Institute of Technology, Varanasi (IT-BHU) is hosting World Hydrogen Technologies Convention (WHTC) from 26th to 28th August 2009 at New Delhi. The WHTC 2009 Convention is aimed at bringing together Energy and Automotive Industry, Researchers, Policy Makers, Investors and Consumers to align their efforts and knowledge relating to Hydrogen production, usage, handling and safety aspects for promoting it as a potential fuel of the future.

RECYCLING

SIAM Proposal on Demo Dismantling Unit, submitted to MoH&PE, has been approved. The Demo unit would be a part of NATRIP Chennai facility. To study some existing dismantling centres in China, a team from SIAM and NATRIP visited an operational dismantling center in Shanghai and met Shanghai Society of Automotive Engineers for understanding the dismantling procedures and processes in China. Work is also under progress for developing dismantling guidelines.

SERVICE HEADS FORUM

SIAM has submitted a proposal on Inspection & Certification of Private In-use vehicles to Transport Commissioner, Delhi. The salient features of the proposal include focus on Private In-Use Vehicles of more than 15 years age reporting for re-registration to be tested in the first stage followed by periodic testing of private two and four wheelers in phases. MoSRT&H has formed a task force under the chairmanship of the Joint Secretary to look into the introduction of audit systems for PUC nationally. To take the same forward, it was decided that task forces would be formed in four zones to understand the present system in the States and then standardize it for better audit and collation of data.

SIAM organized visit of a delegation comprised of Transport Minister and Senior Transport officials of Government of Andhra Pradesh to Inspection and Maintenance/Certification Centres in Europe to understand the practices adopted for in use-vehicle maintenance. The delegation visited six countries – Germany, Italy, Greece, France, The Netherlands and Belgium.

DIESEL IMAGE

Diesel Image Group has finalized the Media Pack. Members of the group contributed articles for publishing in Urjavaran, a bimonthly magazine of the Bureau of Energy Efficiency (BEE). The group has been able to propagate the positive image of Diesel Technology. Members of the Group also represented SIAM in Director General of Foreign Trade (DGFT) and Ministry of Chemicals and Fertilizers to allow import of Aqueous Urea Solution (AUS 32) for use in vehicles fitted with Selective Catalytic Reduction (SCR) Technologies for emission reduction.

INDIA ADVANCED ENGINEERING MISSION

SIAM participated in the UK Trade & Investment India Advanced Engineering Inward Mission held at Oxford, United Kingdom, along with a score of other organizations from India, from 2nd to 6th February 2009 as a part of the 15 member Indian Delegation. Discussions highlighted different drivers in the UK and Indian automotive markets. India's focus was on getting product to market quickly and it was agreed that potential discussion should take place on how Indian companies could collaborate with UK companies in introducing products to the market more quickly. Also deliberated were common roadmaps to guide companies working in the sector and, in particular, to assist in areas such as Homologation process for H₂ powered vehicles and Research & Development which should focus on strategic consortium building. A Conference on Low Carbon Vehicles was also organized where SIAM made a presentation on "Low Carbon Potentials for Road Transport in India."

First annual meeting on Asian Biofuel Roundtable was held in Kuala Lumpur, Malaysia, from 23rd to 25th March 2009 wherein trends within the global biofuels industry, policy and progress in Asia's biofuels industry, sustainability of biofuels in Asia, and issues affecting feedstock supplies, challenges and opportunities for second and third generation



Mr. Dilip Chenoy, DG, SIAM and Mr. S. R. Marathe, Director, ARAI, with Professor Julia King, Vice Chancellor, Aston University (Centre)



(L to R): Mr. Khoo Hock Aun, CEO, Cosmo Biofuels Group, Mr. Pankaj Kumar Karn, SIAM, and Mr. Roland Yap, Vice President, Asia & Middle East, Methanol Institute, Australia

biofuels were discussed. The three-day programme included a visit to SIME DARBY biodiesel plant, Kuala Lumpur, and discussions and deliberations under session chairmen.

The roundtable identified some important areas to be worked upon, together with all stakeholders, e.g., cultivation of new energy crops like algae, sweet sorghum, development of new technologies (gas to liquid), and emerging technologies (biomass to liquid).

It was felt that there was a need to formulate a standard to bind international regulation for sustainability, enforcement and, employing WTO and UNEP standards, managing sustainability and sustainability criteria for audit. Analysis of sustainability options, life cycle of biofuels development, distribution, and use carbon payback is required. Some other areas were found such as Infinergy, a newly developed smart expelling technology to extract up to 10% more oil than all other technologies, importance of upstream-downstream integration, and development of a pricing model. Strategy towards a sustainable Jatropha business such as GIS mapping, test sites, Jatropha awareness program, document good agricultural practices, applied research and development, develop sustainable win-win contracts with out-growers.

INITIATIVES IN THE AREA OF STYLING & DESIGN

SIAM Styling & Design Group had remained very active during the year. The group organized the 3rd SIAM Styling & Design Conclave in January 2009 in Mumbai. The conclave, which is the flagship event of the group, has always been very popular with the fraternity. More than 300 delegates participated in the event.

The Group also participated at first India Design Festival in 8th February 2009 at Pune. It organized special sessions on "Career in Automotive Design" in partnership with Pune Design Foundation. The Group has also initiated a Design Contest for students in 2009 which would culminate at the 10th AutoExpo in Delhi. The contest is known as 'Automotive Design Challenge'.

A delegation went to France to build linkages between styling and design community in India and France and to exchange information of common interest. The delegation visited Design Colleges to study the design capabilities and their syllabus. They also visited Renault Design and Estach Design Studio, apart from the Paris Motor Show.

SIAM organized workshops at IDC IIT Bombay, IDDC IIT Delhi, and also seminars at CPDM IISc Bangalore, and Symbiosis, Pune. The Group has met head of the departments at School of Planning & Architecture, Delhi College of



SIAM Styling & Design delegation led by Mr. Elias Abraham, Head of Design, TVS Motors, in Paris

Engineering and IDDC IIT Delhi and explained SIAM initiatives in the area.

The 4th SIAM Styling & Design Conclave is being held on 7th January 2010 at India Habitat Centre, Delhi. Also, the Group is planning an Auto Design Night in Delhi at the time of New Delhi Auto Expo on 6th January 2010.



Dr. Pawan Goenka Vice President, SIAM & President (Automotive) Mahindra & Mahindra Ltd. addressing the Styling & Design Conclave



National and International speakers at the 3rd SIAM Styling & Design Conclave

SAFETY OF CNG BUSES

SIAM is working closely with Transport Department, Government of NCT of Delhi and Environmental Pollution (Prevention & Control) Authority, EPCA for safety of CNG Buses operating in Delhi. SIAM was a member of the Audit team which audited all the CNG Leakage test centers in Delhi. Based on the audit report, a training programme was organized along with Transport Department for all the OEMs.



CNG Leakage Training

ECONOMIC AGENDA

INTERACTIVE SESSION ON 'MEETING THE CHALLENGES OF GLOBAL ECONOMIC CRISIS'

SIAM organized an interactive session on "Meeting the Challenges of Global Economic Crisis" on 20th November 2008 in New Delhi. The Session aimed at looking at the future of the automobile industry in the light of recent economic developments and developing the industry's suggestions for policy interventions.

Experts from the industry, dealers, banking & finance companies, consultants, economists, etc. participated in the Session where discussions were held on the current economic scenario and the factors impacting the industry.

It was felt that while the current recession is systemic with industry and services sectors getting impacted, the auto industry has been one of the most affected industries. The auto industry has been witnessing slowing down since 2007-08, with the decline being felt more sharply in the current fiscal year.

While external environment is impacting exports, measures taken to control inflation are impacting the domestic market. Specific factors like poor risk appetite of financiers, severe liquidity crunch faced by NBFCs, restriction on repossession of vehicles, stringent credit norms, high interest rates, inventory build-up and worsening freight demand across sectors are affecting the industry.

Inadequate availability of finance emerged as the key concern area. Factors like general sentiment, strict norms for repossession of vehicles, etc are affecting the industry.

Certain useful and pragmatic recommendations emerged from the discussions which included the following:

- Improving the risk appetite of finance companies
- Guidelines for repossession of vehicles



(L to R): Mr. D. D. Goyal, Chairman, SIAM Taxation Procedural Group, Mr. P. Balendran, Chairman, SIAM Insurance Group, Mr. Ketan Doshi, Chairman, SIAM Economic Research Group, Mr. S. Sandilya, Treasurer, SIAM, Mr. Vineet Agarwal, Executive Director, Transport Corporation of India Ltd. & Mr. K. Sridharan, Chairman, SIAM Finance & Leasing Group at the Interactive Session on 'Meeting the Challenges of Global Economic Crisis'



Participants at the Interactive Session on 'Meeting the Challenges of Global Economic Crisis'

- Code of conduct for all stake holders – OEMs, Dealers and Financiers
- Funding/refinancing for NBFCs
- Strengthening of relation between finance companies and auto makers, especially for channel financing
- Enforcing of law prohibiting overloading
- Encouraging scrappage of vehicles
- Rationalizing tax structure
- Enhancing rate of depreciation for motor vehicles
- Increasing expenditure on road building activity

INTERACTIONS WITH GOVERNMENT OF INDIA

During the year, SIAM held several meetings with Government officials of various departments, especially during the months of November and December 2008 and briefed them about the current status of the industry and urged them to initiate policy actions to revive the industry. Meetings were held with various officials including the following: Mr. T. K. Nair, Secretary to Prime Minister, Dr. Satyanarayana Dash, Secretary, Ministry of Heavy Industries & Public Enterprises, Mr. G. K. Pillai, Commerce Secretary, Ministry of Commerce & Industry, Mr. Ajay Shankar, Secretary, DIPP, Ministry of Commerce & Industry and Mr. P. V. Bhide, Revenue Secretary, Ministry of Finance.

SIAM organized an interactive session on "Meeting the Challenges of Global Economic

Crisis" on 20th November 2008 in New Delhi. The Session aimed at looking at the future of the automobile industry in the light of recent economic developments and developing the industry's suggestions for policy interventions.

SIAM made suggestions relating to:

- Measures that will stimulate demand
- Measures that ease flow of finances
- Measures that result in reduction of vehicles
- Measures to promote exports
- Industry actions to improve efficiency

ECONOMIC STIMULUS PACKAGES

The Government of India announced a series of measures to stimulate the economy and demand for manufactured products. Some of these measures would help in kick-starting the revival of the Indian automotive sector.

- Across-the-board cut of 4% in the ad valorem Cenvat rate.
- Government departments to be allowed to take up replacement of government vehicles within the allowed budget, in relaxation of extant economy instructions.
- Additional funds of Rs 1100 crore to be provided to ensure full refund of Terminal Excise duty/CST.
- An arrangement to be worked out with leading Public Sector Banks to provide a line of credit to NBFCs specifically for purchase of commercial vehicles.

- States, as a one time measure up to 30.06.2009, to be provided assistance under the JNNURM for the purchase of buses for their urban transport systems. A scheme towards this end to be announced shortly.
- Accelerated depreciation of 50% for commercial vehicles to be purchased on or after 1.1.2009.
- DEPB rates to be restored to those prevailing prior to November 2008 and the Scheme extended till 31.12.2009.
- Credit targets of Public Sector Banks are being revised upward to reflect the needs of the economy in the present difficult situation. Government to monitor the provision of sectoral credit by public sector banks.

LOOKING AHEAD CONCLAVE

SIAM organized the third Looking Ahead Conclave on 3rd & 4th February 2009 in New Delhi. The two-day Conclave comprised of an Inaugural Session where discussions were held about the current state of economy and impact on consumer behaviour and four focused sessions on each vehicle segment, viz., Two Wheelers, Passenger Vehicles, Commercial Vehicles and Three Wheelers.

The participants deliberated to foresee the future for the Indian automobile industry. The Conclave saw participation from experts



(L to R): Mr. Ashok Khanna, Executive VP & Business Head - Two Wheelers & A Loans, HDFC Bank, Mr. Anil Dua, Sr. VP, Hero Honda Motors & Mr. Sugato Sen, Senior Director, SIAM at the Two Wheeler Session of "Looking Ahead" Conclave



(L to R): Mr. Jnaneswar Sen, Senior VP, Honda Siel Cars India, Mr. Mayank Pareek, Executive Officer, Maruti Suzuki India, Mr. Rajiv Dube, President (PCBU), T Motors & Mr. Arvind K. Saxena, Sr. VP, Hyundai Motor India at the Passenger Vehicle Session of "Looking Ahead" Conclave



(L to R): Mr. Pradeep Saxena, Senior Vice President, TNS Automotive, Mr. Ketan Doshi, Chairman, SIAM Economic Research Group, Dr. Subir Gokarn, Chief Economist, Standard & Poor, Dr. Laveesh Bhandari, Chief Economist, Indicus Analytics & Mr. Sugato Sen, Senior Director, SIAM, at the Inaugural Session of "Looking Ahead" Conclave



(L to R): Mr. G. V. Rao, Sr. VP Strategic Planning, VE Commercial Vehicles, Ravi Pisharody, President (CVBU), Tata Motors, Mr. S. Sandilya, Chairman, Ei Group, Mr. Sudhir Mehta, MD, MAN Force Trucks & Mr. Sugato Sen, Sr. Director, SIAM at the Commercial Vehicle Session of "Looking Ahead" Conclave



(L to R): Mr. Hyder Khan, Product Manager (Three Wheelers), Mahindra & Mahindra, Mr. Ashutosh Khosla, Director Sales & Marketing, Piaggio Vehicles, Mr. Sukanta Sahu, Head Special Business Strategy & New Products Initiative, Piaggio Vehicles & Mr. Sugato Sen, Sr. Director, SIAM at the Three Wheeler Session of "Looking Ahead" Conclave

from various quarters including Economists, Consultants, Finance/Leasing Companies, Tyre Manufacturers, etc.

FORECASTING

A small team of SIAM members have started working on annual and quarterly forecasting. This is a joint industry effort and, once the report gets stabilized, it will be made available to others.

MEETING WITH FINANCE COMPANIES ON REPOSSESSION GUIDELINES

SIAM had series of meetings with Finance companies including Finance Industry Development Council (FIDC) to work out the detailed guidelines on Repossession of vehicles by NBFCs. Ministry of Finance, Department of Banking & Financial Services, convened several meetings to discuss about SIAM submissions regarding need for guidelines on repossession of vehicles.

SIAM highlighted the issues facing the automobile industry and how lack of guidelines on repossession of vehicles is affecting vehicle financing. Reserve Bank of India (RBI) officials

acknowledged the fact that the current guidelines on repossession of vehicles are not adequate and agreed that there is need for detailed guidelines.

DEVELOPMENT COUNCIL OF AUTOMOBILE & ALLIED INDUSTRIES

During the year, two meetings of Development Council of Automobile & Allied Industries (DCAAI) were held under the chairmanship of Dr. Satyanarayana Dash, Secretary, Ministry of Heavy Industries & Public Enterprises. Several other government departments, like Department of Commerce, Department of Road Transport & Highways, Planning Commission, etc., also participated in the meeting. The meetings reviewed progress made with respect to the Automotive Mission Plan 2006-2016 (AMP) targets and the issues currently impacting the industry.

INTER-MINISTERIAL GROUP (IMG) INITIATIVES

SIAM participated in meetings of the recently constituted Inter-Ministerial Groups (IMGs) on Taxation, Fiscal Policy & Trade, Emission, Fuel Efficiency & Testing and Infrastructure, Human Resources, Auto Design and AMP Related Issues, by the Ministry of Heavy Industries & Public Enterprises. These IMGs comprise of representatives from various government departments/ministries like Finance, Commerce, Labour, Planning Commission, and SIAM members, etc.

INTERACTION WITH MINISTRY OF URBAN DEVELOPMENT

SIAM participated in various meetings convened by Ministry of Urban Development (MoUD) under the Chairmanship of Mr. M. Ramachandran, Secretary, MoUD in July 2008 regarding airport connectivity in the following cities - Bangalore, Kolkata, Chennai and Hyderabad. Ten airports were identified by the Government for airport connectivity by road, public transport, intermediate public transport, rail, etc.

With the announcement of inclusion of buses under the JNNURM scheme, several interactions were held with Ministry of Urban Development to discuss the modalities of implementing the scheme. Ministry of Urban Development allocated buses to various cities considering the capacities of OEMs.

SOURCING OF RAW MATERIALS & COMPONENTS

During the year, SIAM Sourcing Group worked closely with various stakeholders to address issues relating to raw material price movement, safeguard duty/antidumping duty imposition, import restrictions, BIS certification requirement of GP/GC Sheets, etc.

Meetings were held with various steel companies like POSCO IDPC, Marubeni Itochu Steel India, etc., to discuss the recent restrictions imposed on imports of steel items.

SIAM had a meeting with ATMA to discuss the issue relating to the recent restrictions (licensing requirements) imposed on imports of radial bus/truck tyres. ATMA agreed that OEMs should be exempt from condition of licensing for radial bus/truck tyres and bias tyres (if it comes in future).

Two international sourcing delegations were taken during the year - International Suppliers Fair (Wolfsburg, Germany, in October 2008) and China International Auto Parts Expo (Beijing, China, in November 2008).

SIAM DELEGATION TO INTERNATIONAL SUPPLIERS FAIR (IZB), WOLFSBURG

A SIAM delegation, comprising of members of the SIAM Sourcing Group, participated in International Suppliers Fair (IZB) from 29th to 31st October 2008 at Wolfsburg in Germany. The fair is the second most important auto component exhibition in Europe with participation from almost all major automotive suppliers. This year India was the partner country in this exhibition.

On 31st October 2008, 'India Forum' programme was organized where India's Ambassador to Germany also participated. The delegation also visited 'The Autostadt' which is an exhibition of the definitive car classics, built by the Volkswagen Group, as a communications



'India Forum' at International Suppliers Fair (IZB), Wolfsburg



Mr. Dilip Chenoy, Director General, SIAM at 'India Forum' at International Suppliers Fair (IZB), Wolfsburg



SIAM Delegation at International Suppliers Fair (IZB), Wolfsburg

platform and interface between customer and global company.

SIAM DELEGATION TO CIAPE, BEIJING

A 13 member delegation from SIAM visited CIAPE – China International Auto Parts Expo which was organized jointly by the Ministry of Commerce, People's Republic of China, and Genertec International Advertising and Exhibition Co Ltd.

The delegations' interactions started with a Summit Forum at The Great Hall of the People on 11th November 2008 in the heart of the Beijing City. The delegation participated in the Inaugural of the Exhibition. Delegation participated in the Taizhou Auto Industry Match-making Meeting also.



Some of the delegates to the expo

NATIONAL SKILLS DEVELOPMENT CORPORATION (NSDC)

SIAM has acquired equity stake in National Skill Development Corporation (NSDC) which is a company floated by Ministry of Finance. Mr. Dilip Chenoy, Director General, SIAM, along with several other associations like CII, FICCI, ASSOCHAM, CITI, GJEPC, etc., is also a Director of the Company.

NSDC is a public-private initiative in the area of skills development. The Prime Minister's National Council on Skill Development guides all activities in the area of skills development with the actual activities and initiatives coordinated by the Planning Commission. It coordinates skills development in both Public and Private Sectors. While Public Sector activities are carried out by host of Ministries and Departments, Private Sector activities are being consolidated under NSDC.

HUMAN CAPITAL RELATED INITIATIVES

SIAM Human Capital Group took several new initiatives. A compensation survey was carried out for the first time. Several other projects to develop human resource have been undertaken and the group is also working with the Government to develop an institution focusing on developing skills for the auto-sector.

INTERACTION WITH INSURANCE COMPANIES

SIAM is working on issues relating to: De-tarification of the Motor Insurance, New/Renewal of Insurance Policies, practices being followed, Basis for Premium rating, Claims and Theft related issues, Public liability insurance act, International practices on vehicle insurance, etc.

Interactions were held with General Insurance Council to address issues relating to Tracking of Stolen Vehicles, Creating/hosting and access to engine number/chassis number masters of automobile manufacturers, and Definition of metal/plastic parts in case of substitution.

ANTI-COUNTERFEITING

SIAM organized a Workshop on Anti-Counterfeiting in the Automotive Sector on 20th February 2009 at India Habitat Center, New Delhi. The aim of the workshop was to spread awareness amongst the enforcement agencies and other stakeholders about the menace of counterfeiting. The workshop witnessed active participation from Crime Branch, Delhi Police, Registrar of Trademarks, Automotive Industry.



Mr. S. B. K. Singh, Additional Commissioner of Police, EOW-Crime Branch, Delhi Police addressing the Workshop on Anti-Counterfeiting

SIAM INITIATIVES IN LOGISTICS AREA

SIAM Logistics Group met several Railway Board officials during the year, including Member Mechanical and Member Traffic of Railway Board to speed up the process of transporting vehicles through railways. Discussions were held with Railway on issues like - strategy to improve rail share of automobile traffic, efficient wagon design option, funding scheme for new wagons, assured and timely supply of wagons, infrastructural issues, etc. Railways are looking forward to working with the automobile industry and in providing logistics solution to the industry.

Also, DB Schenker, a German Railway Company, made a presentation on their recently concluded study on the potential of logistics operations in the automobile industry in India and their interest in exploring and investing in automotive logistics operations.

SIAM Logistics Group took a special initiative this year by launching a pilot project aimed at consolidating operations among OEMs and transporters for optimizing and improving efficiency. The Group identified the transporters who would be part of this project, routes to be covered by them, and parameters to be monitored during the pilot phase.



A meeting of SIAM Logistics Group in progress

BILATERAL TRADE NEGOTIATIONS

Several meetings were held during the year to discuss the modalities relating to India-Japan CEPA. SIAM submitted its position regarding inclusion of Completely Built Units (CBUs) and engines in India's Negative list. SIAM also raised the issue of Rules of Origin. The importance of twin criteria of Value addition and Change in Tariff Heading in preventing trade deflection was also explained. Also, it was pointed out that if one has to adopt a single criterion (which is being requested for by the Japanese side), it could be Value addition based on Transaction Value Build-up method and roll up criteria should not be included.

SIAM was also invited to participate in the ninth meeting of India-Japan Joint Task Force for CEPA negotiations by Ministry of Commerce & Industry. Mr. Dinesh Sharma, Joint Secretary, Ministry of Commerce & Industry, represented the Indian side. A joint meeting of automotive experts from both countries (including respective Government and Industry) was also held in September 2008 to discuss issues pertaining to the automotive sector under India-Japan CEPA negotiations.

Negotiations were also held during the year for India-Korea CEPA and India-ASEAN FTA.

MULTILATERAL TRADE NEGOTIATIONS

PARTICIPATION IN WTO MINI-MINISTERIAL, GENEVA, JULY 2008

SIAM was present in Geneva during the mini-Ministerial meeting of World Trade Organization (WTO) that took place from 21st to 27th July 2008

While negotiations could not be concluded, yet dialogue in several areas progressed significantly. It was heartening to note that the Government of India acknowledged the importance of the automotive industry and, keeping the sensitivity in view, ensured that the issues like anti-concentration, remanufacturing, auto sectorals, etc. do not harm the Indian auto industry despite severe pressure from European Union (both their Government and industry).

SIAM, along with CII and ACMA, issued a joint statement with respective industry associations from South Africa and Argentina on the mini-Ministerial meet of the World Trade Organisation (WTO) expressing discontent with NAMA Talks on 25th July 2008.

Also, a revised Non-Agricultural Market Access Text (NAMA) was released in December 2008. The automobile industry in India was concerned about the following:

- Formula & Value of coefficients
- Anti-concentration clause



SIAM participation at WTO Mini-Ministerial in Geneva

- Proposal on Remanufactured Goods
- Sectorals
- Proposal on Non Tariff Barriers (NTBs) in the Automotive Sector

SIAM PARTICIPATION IN APEC AUTOMOTIVE DIALOGUE

10TH APEC AUTOMOTIVE DIALOGUE, SEPTEMBER 2008, SINGAPORE

The 10th meeting of the Automotive Dialogue (AD) was held in Singapore from 9th to 12th September 2008. The meeting was attended by government and industry representatives from



SIAM participation in APEC Automotive Dialogue

Australia, Chinese Taipei, Indonesia, Japan, Korea, Malaysia, Philippines, Thailand and the United States of America.

SIAM participated in the meeting as guests and made three presentations:

- SIAM presented the Indian automobile industry's viewpoint that a desirable FTA should have benefits that accrue to all parties, should not create market distortions, and eliminate high local taxes and NTBs.
- SIAM made a presentation on the work of the GAID and explained that a broad range of NTBs had already been identified.
- SIAM shared information on recent automotive technology developments in India, including direction of the technology strategy for alternative fuels.

11TH APEC AUTOMOTIVE DIALOGUE, APRIL 2009, KOREA

The 11th meeting of the Automotive Dialogue (AD) was held in Seoul, Korea, from 30th March to 2nd April 2009. The meeting was attended by government and industry representatives from Australia, Canada, Indonesia, Japan, Korea, Malaysia, Philippines, Singapore, Chinese Taipei, Thailand, the United States of America and Vietnam. Representatives of the Society of Indian Automobile Manufacturers (SIAM) participated in the meeting as guests. SIAM was represented by Mr. A. S. Puri, Chairman, SIAM International Relations Group and Sr. GM, Tata Motors, Mr. Dilip Chenoy, Director General, SIAM and Mr. Sugato Sen, Sr. Director, SIAM.

Mr. Dilip Chenoy, SIAM made a short presentation on the forthcoming Environment Friendly Vehicles (EFV) Conference to be held in New Delhi in November 2009 and invited participation from APEC economies. There was brief discussion of policy measures being implemented by some governments to support their automotive industries and to stimulate additional sales and production. Several industry members expressed support for additional policy measures to be considered by governments.

It was agreed that where governments determine that further policy measures to support the automotive industry are warranted, these should ideally be consumer-oriented and should be WTO-consistent, avoiding the imposition of new restrictions on trade or investment.

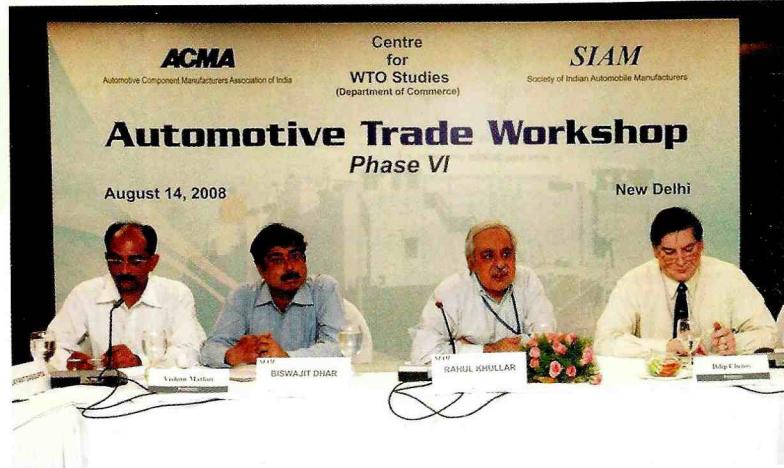
AUTOMOTIVE TRADE WORKSHOP – PHASE VI

SIAM, jointly with Centre for WTO Studies, IIFT and ACMA, organized the 'Automotive Trade Workshop – Phase VI' on 14th August 2008 in New Delhi. Officials from Department of Commerce briefed on the current status and the latest developments in WTO negotiations and bilateral/regional trade agreements.

The following officials from Ministry of Commerce & Industry participated in the Trade Workshop:

- Mr. G. K. Pillai, Commerce Secretary, Department of Commerce
- Dr. Rahul Khullar, Additional Secretary, Department of Commerce
- Mr. Amarendra Khatua, Joint Secretary, Department of Commerce
- Mr. Dinesh Sharma, Joint Secretary, Department of Commerce
- Mr. Jayant Dasgupta, Joint Secretary, Department of Commerce
- Mr. P. K. Dash, Joint Secretary, Department of Commerce

Officials from Ministry of Commerce & Industry briefed the industry about the latest developments in WTO and various bilateral trade negotiations.



(L to R): Mr. Vishnu Mathur, Executive Director, ACMA, Dr. Biswajit Dhar, then Head-Centre for WTO Studies, IIFT, Dr. Rahul Khullar, then Additional Secretary, Ministry of Commerce & Industry, Mr. Dilip Chenoy, DG, SIAM



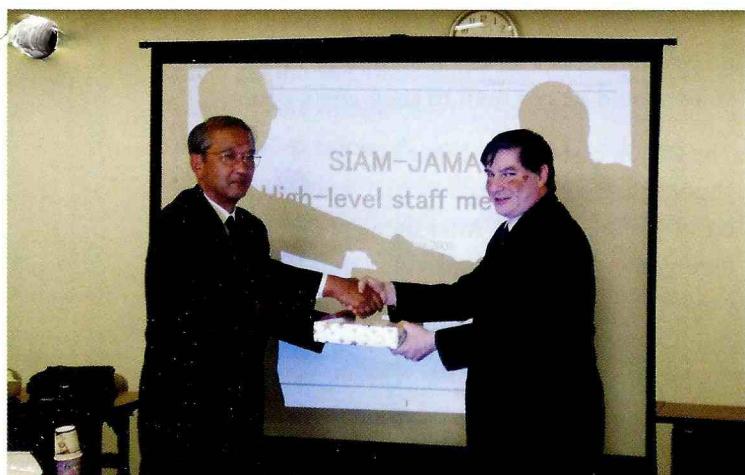
(L to R): Mr. Vishnu Mathur, Executive Director, ACMA, Dr. Biswajit Dhar, then Head-Centre for WTO Studies, IIFT, Mr. G. K. Pillai, Commerce Secretary, Mr. S. Sandilya, Treasurer, SIAM & Mr. Dilip Chenoy, DG, SIAM



(L to R): Mr. Vishnu Mathur, Executive Director, ACMA, Dr. Biswajit Dhar, then Head-Centre for WTO Studies, IIFT, Mr. Dinesh Sharma, Joint Secretary, Department of Commerce, Mr. P. K. Dash, Joint Secretary, Department of Commerce, Mr. Dilip Chenoy, DG, SIAM & Mr. Jayant Dasgupta, Joint Secretary, Department of Commerce

MEETING WITH JAMA, JAPAN AUTOMOBILE MANUFACTURERS ASSOCIATION

The first High-level Secretariat Meeting between SIAM and Japan Automobile Manufacturers Association (JAMA) was held in October 2008 in Tokyo. JAMA team was led by Mr. Yoshiyasu Nao, President, JAMA, and Mr. Dilip Chenoy, Director General, SIAM, led the SIAM team. Both sides exchanged information about each other's organization's functioning. Discussions were also held on specific issues relating to automobile taxation, fuel efficiency regulations, etc. It was decided that such meetings would now be held on a regular basis with annual periodicity.



Mr. Yoshiyasu Nao, Vice Chairman & President, JAMA & Mr. Dilip Chenoy, Director General, SIAM at the 1st SIAM-JAMA High-level Meeting



Participants of JAMA at the 1st SIAM-JAMA High-level Meeting

INTERACTION WITH VDA, THE GERMAN ASSOCIATION OF THE AUTOMOTIVE INDUSTRY

On the sidelines of the Commercial Vehicle Show in Hanover, SIAM and ACMA had an informal meeting with VDA and representatives of German Government regarding possible issues that could be taken up for discussion under Indo-German Working Group. Mr. Ravi Kant, President, SIAM, and Mr. J. S. Chopra, President, ACMA, led the discussion on 25th September 2008 in Hanover.

Three areas are being taken up under the Indo-German Joint Working Group:

- Technology Improvement: Hybrid Technology, Electric Vehicle Technology – including battery technology & management, Hydrogen, Clutch/break & Clean Diesel
- Safety: Passenger Safety and Road Users Safety
- Skills Development



Mr. Ravi Kant, President, SIAM at Commercial Vehicle Show in Hanover

MEETING OF INDIA-BRAZIL TRADE MONITORING MECHANISM

SIAM participated in the first meeting of the newly established India – Brazil constituted Trade Monitoring Mechanism. While the Indian side was headed by Mr. G. K. Pillai, Commerce Secretary, the Brazilian delegation was led by Mr. Ivan Ramalho, Executive Secretary of the Ministry of Industry, Development and Foreign Trade, Government of Brazil. The meeting attempted to identify issues and concerns of the industry related to Brazil. SIAM had submitted that certain customs procedures in Brazil are complicated and time consuming and affecting members who are exporting to Brazil.

FOREIGN TRADE POLICY CONSULTATION

SIAM was invited to participate in a consultation meeting organized by Directorate General of Foreign Trade (DGFT) on recent export performance in November 2008.

SIAM briefed the Director General about the recent industry performance and requested for policy interventions to prevent any reduction in export. SIAM submitted its Memorandum of Suggestions which was prepared by the SIAM Exports Group.

Earlier, Market Linked Focus Product scheme was extended to cover specified automobiles and

auto parts. As per the notices, the benefits (viz. duty credit scrip equivalent to 1.25% of FOB value of exports) are entitled on exports w.e.f 1.4.2008.

AUTO EXPO

SIAM Trade Fairs Group Meeting was held on 12th March 2009 at BIEC, Bangalore, under the Chairmanship of Mr. Sudhir Mehta, Director, Force Motors, wherein details of the forthcoming 10th AutoExpo were discussed. The format of the 10th AutoExpo was discussed. Members felt that keeping in mind the industry downturn, lower participation costs should be targeted. It was informed that ITPO had already increased the rentals by more than 20%, which will have an overall impact on the cost and as such other steps would be required to keep costs down.

The Group also decided that 10th AutoExpo should start on 5th January 2010 and conclude on 11th January 2010. After detailed discussion among members, it was decided that that exhibitors who had participated in the earlier AutoExpo(s) should be given some time to retain the locations allotted to them previously. As in the past, four sub-committees were identified: Publicity Task Force, Marketing Task Force, Visitor Promotion Task Force and Facilities Task Force to make Auto Expo successful.



Trade Fair Group Meeting

**FIRST BUS & SPECIAL VEHICLES EXPO
(BSVE) 2009, 11TH TO 14TH MARCH 2009,
INTERNATIONAL EXHIBITION CENTRE,
BENGALURU**

SIAM joined hands with ACMA and CII and for the first time organized Bus & Special Vehicles Exposition in Bangalore in March 2009. The 6000 square meters fair was inaugurated by Mr. Bhaskar Rao, Commissioner (Transport), Government of Kerala, on 12th March 2009.

30 exhibitors including the major Bus Manufacturers like Ashok Leyland Ltd, Mercedes - Benz India Private Limited, Swaraj Mazda Ltd, Tata Motors Limited, and Volvo Buses India Private Limited participated in the fair. The exhibition received delegations from Israel, France, Turkey, Dominican Republic, and Brunei. The exhibits covered School Buses, City Buses, Intercity Buses, Luxury Coaches, Mini Buses, Ultra mobile Fire Control vehicles, Ambulances, Coach Designers & Components & Accessories for Buses.

More than 3500 visitors, including people from Airports, State Road Transport Undertakings, Home Ministry, State Governments, Ministry of Defense, Police Departments, Department of Fire & Safety, Hospitals, Business Houses, Tours & Travel Agencies, Schools/Universities, IT, Hotels, etc., visited.



First Bus and Special Vehicles Expo 2009

FOREIGN VISITORS

VISIT BY MIZUHO CORPORATE BANK

Ms. Joyce Sim, Vice President, Credit Research Team (Singapore), Mizuho Corporate Bank, visited SIAM in July 2008. The purpose of the visit was to gain insight into the latest developments taking place in the Indian auto industry and to understand the impact of the current macro economic developments on the Indian auto industry. SIAM made a detailed presentation on the Indian automobile industry.

VISIT BY AUTOMOTIVE TESTING & RESEARCH CENTRE, TAIWAN

A team from Automotive Testing & Research Centre (ARTC) of Taiwan visited SIAM in August 2008. Mr. Jerry Wang and Ms. Sandy Chen from ARTC visited SIAM. The purpose of the visit was to know about the Indian automobile market and the role of SIAM in promoting the industry, as well as to introduce Taiwan's automotive industry and ARTC capabilities.

VISIT BY JAPANESE GOVERNMENT DELEGATION

Japan's Ministry of Economy, Trade & Industry (METI), its implementation agency, the Organization for Small & Medium Enterprises & Regional Innovation (SMRI), which is working on a project on automotive market within India, visited SIAM in September 2008. The purpose



Mr. Bhaskar Rao, Transport Commissioner, Govt. of Karnataka, along with senior industry officials inaugurating the First Bus and Special Vehicles Expo 2009

of the visit was to understand the general landscape of the automotive market within India.

VISIT BY FRENCH DELEGATION

A Senior Business Delegation from France visited SIAM in November 2008. The main objective of this delegation was to see the business opportunities available in the automotive sector in India. SIAM made a detailed presentation on the Indian automotive industry.

INDO-FRENCH AUTOMOTIVE BUSINESS TRIP

SIAM was invited to participate in the Indo-French Automotive Business Trip organized by the Consulate General of France in February 2009 in New Delhi. Seven French Automotive Component Manufacturers (Tier-1 and 2 suppliers) participated in this programme. SIAM made a presentation to the delegation on the current status of the Indian automobile industry and recent developments. SIAM also informed them about the investment planned and opportunities for international auto component manufacturing companies in India

VISIT BY BEIQI FOTON (CHINA)

A team from Beiqi Foton, China, visited SIAM in March 2009 to understand about the Indian automobile industry. SIAM briefed them about

the current industry status and developments. Beiqi Foton representatives expressed desire to set up manufacturing base in India in the future.

MEMORANDUM OF UNDERSTANDING BETWEEN SIAM & THE INDONESIA AUTOMOTIVE FEDERATION (FOI)

A Memorandum of Understanding (MoU) was signed between SIAM & The Indonesia Automotive Federation (FOI) on 23rd July 2009 in Jakarta, Indonesia. The Indonesia Automotive Federation (FOI) represents the Indonesian automotive industry.

SIAM and FOI have been working closely for several years. Through this MoU, both the associations formalized their relationship and a Joint Working Group was formed for cooperation in following areas:

- Technical collaboration;
- Training, education and exchange of personnel;
- Exchange of market information;
- Participation in Exhibitions, Seminars and Exchange Visits;
- Development of Automotive technology.



Mr. Bambang Trisulo, Chairman, GAIKINDO and Mr. Dilip Chenoy, Director General, SIAM at the MoU signing ceremony. Also seen in the picture: Dr. Sri Mulyani Indrawati, Coordinating Minister for Economic Affairs concurrently Minister of Finance, The Republic of Indonesia and Mr. A. S. Puri, Chairman, SIAM International Relations Group.

SOCIETY AND SIAM - SAFE

SAFE: Society for Automotive Fitness & Environment, SAFE, a SIAM initiative, took several initiatives during the year 2008-2009. SAFE organized a number of programmes to raise awareness in the area of road safety and better environment with extensive support from Automobile Manufacturers, Traffic Police, Transport and Environment Departments of the respective states.

Though the initiative has been truly national, there has been a huge international interest as well in the activities of SAFE. During the past year, SAFE was invited to participate in international forums, such as IMMA, FISITA and BAQ 2008, among others.

Children constitute vulnerable road users along with the elderly and the infirm. It has been

estimated that Children are involved in 10 to 15 percent of road fatalities in the country, as most of the children learn road safety sense on their own in the absence of any formal road safety training. Therefore efforts need to be made to organize various road safety activities in a sustained manner to bring about attitudinal change in them, much before they start using the road as riders and drivers. They can also work as highly effective change agents to amend the rash road behaviors of their parents.

Each year SAFE organizes various programmes for school children, and these programmes are furthered by automobile manufacturers with the assistance of their dealer network. Many member companies are organizing safety programmes at schools in different parts of our country.



Dr. Montek Singh Ahluwalia, Deputy Chairman, Planning Commission, Government of India, releasing the report on "Road Safety in India: Challenges and Opportunities" in the presence of (L to R): Mr. R. C. Bhargava, Chairman, Maruti Suzuki India Ltd, Mr. S. N. Shrivastava, Joint Commissioner of Police - Traffic, New Delhi, and Professor Dinesh Mohan, Coordinator TRIPP



Mr. S. Sandilya, Chairman, Eicher Group, addressing the gathering at the report release function of Planning Commission, New Delhi

Mercedes-Benz has taken a great initiative to inculcate safe traffic sense in young minds. SAFE, along with Mercedes-Benz India, selects a state every year and organizes the Mercedes-Benz Mobile Kids' Programme. In the year 2008, this drive was organized at Kolkata in West Bengal. In this programme a road safety workshop and inter school quiz and painting competitions were held across 9 schools in which over 1200 children participated.

Another significant step was taken by SAFE during the National Road Safety Week in January 2009. A "Don't Drink & Drive" programme, organized with support from Delhi Traffic Police,

was specifically aimed at curbing irresponsible driving and yielded very positive results.

Road Safety activities were organized in over 31 States and Union Territories covering 295 cities at 1600 dealers. Approximately 75 refresher driver training workshops were organized in 7 major states of India and SAFE reached out to and touched 500000 people during the National Road Safety Week in January 2009.

During the year, SAFE continued Road Safety Awareness Campaigns for three wheeler drivers, wherein the best drivers were awarded cash prizes as well as certificates in recognition of



Mr. S. M. Kadlaskar, Director, Mercedes-Benz India, presenting award to the winner of Mercedes-Benz Mobile Kids Programme at Kolkata



Road Safety rallies by school students during National Road Safety Week, January 2009



Road Safety rallies by school students during National Road Safety Week, January 2009



Road Safety Workshop for School Students at Delhi Traffic Police Pavillion at Pragati Maidan, New Delhi supported by Castrol India



Driver Training Programme conducted at Volvo Bangalore during National Road Safety Week in January 2009



Road Safety Awareness Drive for Drivers at RTO, Pune



Mr. Ramesh Khaushik, ACP, Delhi Traffic Police presenting welcome address at the workshop on Road Safety and Intelligent Transport System in January 2009



Road Safety Rolling Trophy to the Best School working the area of Road Safety presented by Commissioner of Police, New Delhi



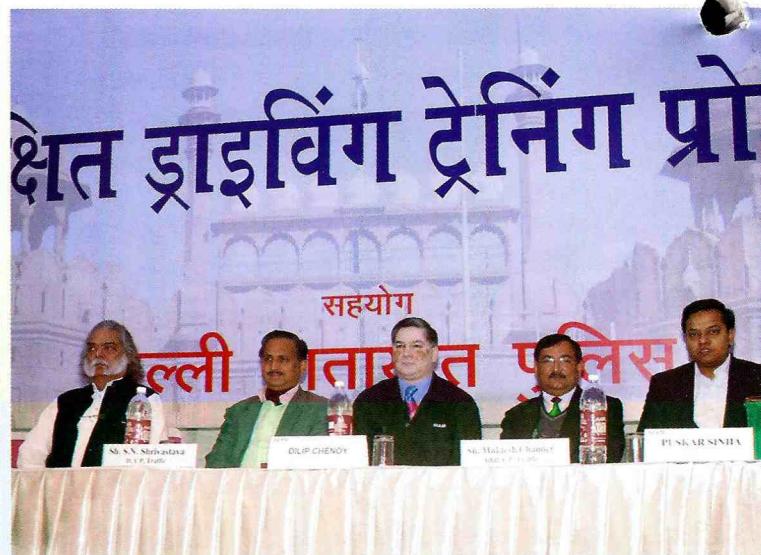
Defensive Driving training programme for DTC drivers



Road Safety Awareness Drive for drivers at Haryana during National Road Safety Week in January 2009



Road Safety Awareness Drive for drivers at Haryana during National Road Safety Week in January 2009



Mr. S. N. Shrivastava, Joint Commissioner of Police - Traffic, New Delhi at the inaugural function of Three Wheeler Driver Training Programme at New Delhi



Defensive Driver Training Programme for DRDO Drivers



Roundtable discussion on Driver Training Programme for State Transport Undertaking drivers for handling New Generation Buses on 13th March 2009 at Bangalore



World Environment Day 2009

their accident and challan-free driving records. The focus of the Safety Awareness Camps remained the inculcation of soft skills, along with other driving tips and general advice on fuel efficiency and vehicle maintenance. On the sidelines, general health check-up camps were also conducted.

SAFE continued with organizing World Environment Drive on 5th June 2009, wherein

free computerized pollution check camps were organized at 2200 locations in 265 cities all over India with the help of member companies' dealers.

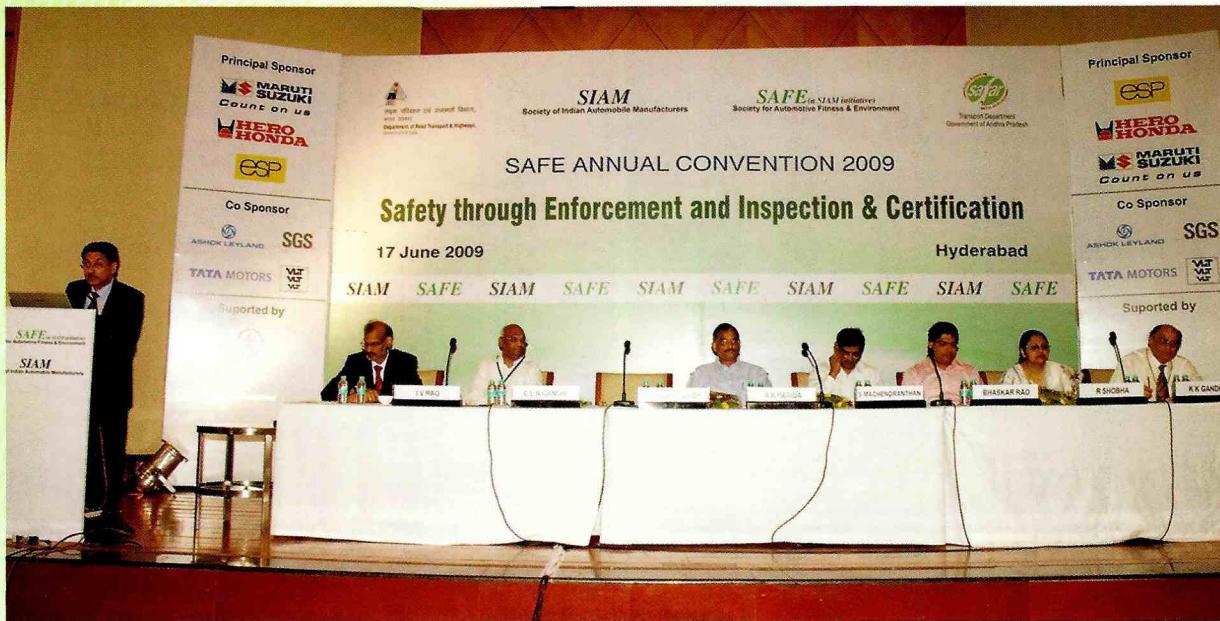
After the successful completion of its pilot project, SAFE-SIAM has extended networking to all 545 PUC Centres in Delhi. The benefits that will accrue to the residents of Delhi on account of this are immeasurable. At the same time huge amount of computerized data available will help strategize future actions effectively.

SAFE organized its Annual Convention 2009 at Hyderabad on 17th June 2009 with a theme of Safety through Enforcement and Inspection & Certification in association with Ministry of Road Transport & Highways, Government of India and Transport Department, Government of Andhra Pradesh and supported by CAI Asia.

On the occasion of its 10th anniversary, SAFE introduced a special award of recognition for individuals committed to Road Safety in our country. This year Mr. A. Nandkumar, Head, Customer Service, Eicher Motors, was honoured with this award for his contribution



Mr. A. Nandkumar, Eicher Motors Ltd. felicitated with Recognition Award as a SAFE Resourceful Person and for promoting Road Safety



Mr. Harjeet Singh, President, SAFE delivering the welcome address at SAFE Annual Convention 2009. (L to R): Mr. I. V. Rao, Vice President, SAFE, Mr. C. L. N. Gandhi, Additional Transport Commissioner, Mr. A. K. Parida, Principal Secretary, Govt. of Andhra Pradesh, Mr. S. Machandranthan, Transport Commissioner, Govt. of Tamil Nadu, Mr. Bhaskar Rao, Transport Commissioner, Govt. of Karnataka, Ms. R. Shobha, Special Secretary, Andhra Pradesh Pollution Control Board, Mr. K. K. Gandhi, Executive Director - Technical, SIAM

to road safety and organizing driver training programmes.

During the Annual Convention the following was also organized:

- A visit on 16th June 2009 to Model Driving Licensing System as well as at a model test track developed by Transport Department, Government of Andhra Pradesh.
- Exhibition of National and International I & C Equipment Manufacturers and display of simulators

The programme was inaugurated by the Principal Secretary, Government of Andhra Pradesh in the presence of Transport Commissioners of Karnataka and Tamil Nadu. The programme was attended by 300 participants. At the SAFE Annual Convention there were a host of international speakers from countries such as Japan, Germany, The Netherlands, Switzerland and the Philippines.



Panel discussion on Adoption of Best Practices: Enforcement and I&C System



Session on Best Practices: Inspection and Certification

OVERVIEW OF AUTOMOBILE INDUSTRY

INDUSTRY PERFORMANCE IN 2008-2009

The cumulative production data for April 2008 – March 2009 shows a growth of 2.96 percent over April 2007 – March 2008. Overall production in March 2009 grew by 5.17 percent over the same month last year.

In 2008-09, production of Passenger Vehicles segment and Two Wheelers segment recorded single digit growth with the growth rates being 3.44 percent and 4.88 percent respectively. Three Wheelers segment registered marginal growth in production at 0.07 percent. However, production of Commercial Vehicles fell drastically at (-) 24.02 percent.

DOMESTIC SALES

Passenger Vehicles segment registered growth with 0.13 percent growth during 2008-09 over 2007-08. Passenger Cars and Multi Purpose Vehicles grew by 1.31 percent and 5.69 percent respectively during this period. However, sales of Utility Vehicles fell by (-) 7.94 percent. The sales in March 2009 for passenger vehicles declined at (-) 1.15 percent over March 2008.

The sales of Commercial Vehicles declined by (-) 21.69 percent during 2008-09 over same period last year. Medium & Heavy Commercial Vehicles declined by (-) 33.16 percent and Light Commercial Vehicles recorded de-growth at (-) 7.10 percent. In March 2009, Commercial vehicles sales fell by 26.22 percent compared to March 2008. M&HCV fell by 43.40 percent and LCV fell by 0.17 percent. Also, buses (M&HCV) grew marginally at 0.57 percent and smaller buses declined by 6.72 percent.

Three Wheelers sales registered a decline of (-) 4.13 percent in 2008-09. While Passenger Carriers grew by 14.36 percent during 2008-09, Goods Carriers declined at (-) 37.52 percent. In March 2009, three wheelers sales grew by 11.40 percent over same month last year.

Two Wheelers registered marginal growth of 2.60 percent during 2008-09. Mopeds and Scooters grew by 4.22 percent and 9.11 percent. Motorcycles also grew marginally at 1.16 percent. Electric two wheelers segment grew by 49.48 percent. Two Wheelers sales grew at a growth rate of 3.65 percent in March 2009 over same month last year.

EXPORTS

The year 2008-09 saw automobile exports registering a growth of 23.61 percent with all segments except Commercial Vehicles, registering positive growth.

Passenger Vehicles and Two Wheelers segment grew by 53.73 percent and 22.50 percent respectively. Three Wheelers exports grew by 4.85 percent. However, exports of Commercial Vehicles declined at (-) 27.67 percent during this period.

INDUSTRY PERFORMANCE: FIRST QUARTER OF 2009-2010

The cumulative production data for First Quarter of Financial Year 2009-10 shows production growth of 9.46 percent over same period last year. In June 2009, overall production grew by 11.84% over the same month last year.

However, Commercial Vehicle production during the first quarter of current Financial Year is (-) 19.18%. Even in June 2009 the Commercial Vehicles sector decelerated and the Growth rate over same month last year was (-) 10.68%.

DOMESTIC SALES

Cumulative sales of Commercial Vehicles Segment continued to register de-growth. The segment grew at (-) 12.87 percent during April-June 2009 as compared to the same period last year. While Medium & Heavy Commercial Vehicles registered de-growth at (-) 36.44 percent, Light Commercial Vehicles grew at 15.97 percent. In June 2009, commercial vehicles sales fell by (-) 12.51 percent compared to June 2008. M&HCV fell by 31.03 percent and LCV grew by 10.02 percent.

Passenger Vehicles segment during April-June 2009 grew marginally at 3.81 percent over same period last year. Passenger Cars grew by 4.75 percent, Utility Vehicles fell by (-) 6.90 percent and Multi Purpose Vehicles grew by 19.05 percent in this period. In June 2009, Passenger vehicles sales recorded a growth rate of 8.29 percent over June 2008.

Three Wheelers sales recorded a growth rate of 6.90 percent in April-June 2009. While Passenger Carriers grew by 16.64 percent during April-June 2009, Goods Carriers declined at (-) 18.95 percent. In June 2009, three wheelers sales grew at 13.17 percent.

Two Wheelers registered a growth of 14.48 percent during April-June 2009. Mopeds, Scooters and Motorcycles grew by 21.88 percent, 18.33 percent and 13.50 percent respectively. Electric two wheelers segment registered a growth rate of (-) 57.64 percent.

In the month of June 2009, two wheelers sales registered a growth of 17.44 percent.

Exports

The first quarter of Financial Year 2009-10 saw automobile exports registering marginal growth with growth rate being 1.32 percent with all segments except Passenger vehicles registering de-growth.

Commercial Vehicles, Three Wheelers and Two Wheelers segments recorded growth of (-) 42.36 percent, (-) 8.61 percent and (-) 6.98 percent respectively during April-June 2009. Passenger Vehicles segment, however, grew by 44.56 percent in this period. In June 2009, overall exports grew by 8.65 percent with only Passenger Vehicles registering positive growth at 58.93 percent.

Automobile Production Trends

CATEGORY	NUMBER OF VEHICLES				
	2004-05	2005-06	2006-07	2007-08	2008-09
Passenger Cars	960,487	1,046,133	1,238,021	1,426,212	1,516,791
Utility Vehicles	182,018	196,506	222,495	246,038	218,228
MPVs	67,371	66,661	84,707	105,333	103,678
Total Passenger Vehicles	1,209,876	1,309,300	1,545,223	1,777,583	1,838,697
M&HCVs	214,807	219,295	294,258	294,957	192,537
LCVs	138,896	171,788	225,724	254,049	224,589
Total Commercial Vehicles	353,703	391,083	519,982	549,006	417,126
Three Wheelers	374,445	434,423	556,126	500,660	501,030
Scooters	987,498	1,021,013	943,944	1,074,933	115,7432
Motorcycles	5,193,894	6,207,690	7,112,281	6,503,532	680,1964
Mopeds	348,437	379,994	379,987	430,827	435,513
Electric Two Wheelers	-	-	30,454	17,389	23,717
Total Two Wheelers	6,529,829	7,608,697	8,466,666	8,026,681	8,418,626
Grand Total	8,467,853	9,743,503	11,087,997	10,853,930	11,175,479

Automobile Domestic Sales Trends

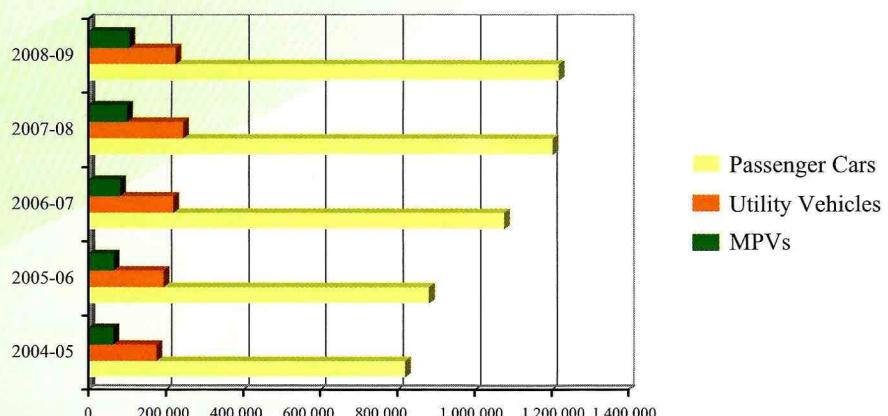
CATEGORY	NUMBER OF VEHICLES				
	2004-05	2005-06	2006-07	2007-08	2008-09
Passenger Cars	820,179	882,208	1,076,582	1,203,733	1,219,473
Utility Vehicles	176,360	194,502	220,306	245,284	225,800
MPVs	65,033	66,366	83,091	100,865	106,607
Total Passenger Vehicles	1,061,572	1,143,076	1,379,979	1,549,882	1,551,880
M&HCVs	198,506	207,472	275,556	274,582	183,541
LCVs	119,924	143,569	192,209	215,912	200,581
Total Commercial Vehicles	318,430	351,041	467,765	490,494	384,122
Three Wheelers	307,862	359,920	403,910	364,781	349,719
Scooters	922,428	909,051	940,617	1,050,109	1,145,798
Motorcycles	4,964,753	5,810,599	6,547,195	5,768,342	5,835,145
Mopeds	322,584	332,741	354,760	413,759	431,214
Electric Two Wheelers	-	-	29,762	17,068	25,513
Total Two Wheelers	6,209,765	7,052,391	7,872,334	7,249,278	7,437,670
Grand Total	7,897,629	8,906,428	10,123,988	9,654,435	9,723,391

Automobile Exports Trends

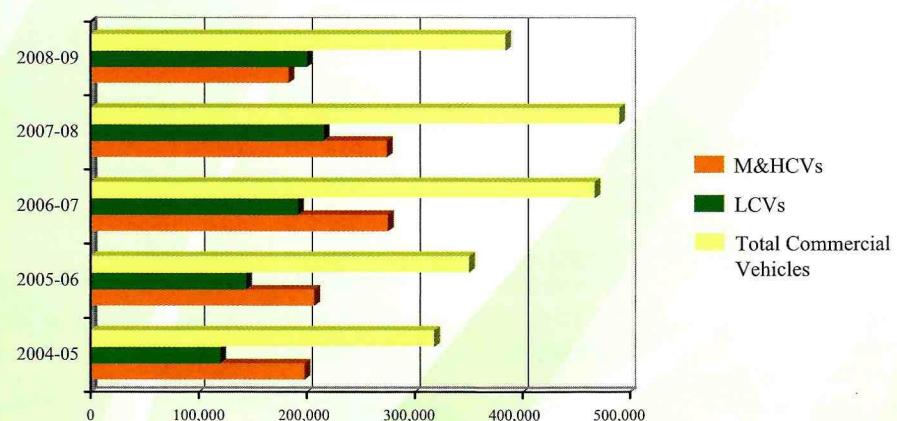
CATEGORY	NUMBER OF VEHICLES				
	2004-05	2005-06	2006-07	2007-08	2008-09
Passenger Cars	160,670	169,990	192,723	211,112	331,539
Utility Vehicles	4,505	4,489	4,399	6,283	3,040
MPVs	1,227	1,093	1,330	1,006	1,160
Total Passenger Vehicles	166,402	175,572	198,452	218,401	335,739
M&HCVs	13,474	14,078	18,610	22,093	16,865
LCVs	16,466	26,522	30,927	36,901	25,808
Total Commercial Vehicles	29,940	40,600	49,537	58,994	42,673
Three Wheelers	66,795	76,881	143,896	141,225	148,074
Scooters	60,699	83,934	35,397	25,482	25,865
Motorcycles	277,123	386,054	545,592	776,007	970,969
Mopeds	28,585	43,181	38,655	18,224	7,300
Electric Two Wheelers	-	-	-	-	40
Total Two Wheelers	366,407	513,169	619,644	819,713	1,004,174
Grand Total	629,544	806,222	1,011,529	1,238,333	1,530,660

Automobile Domestic Trends

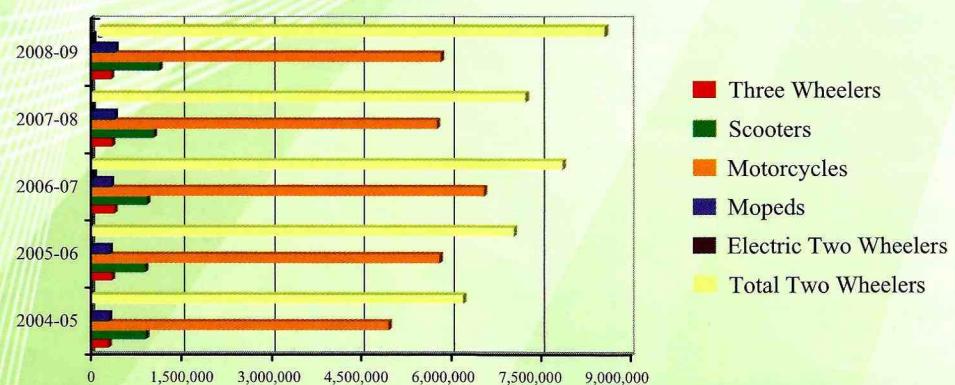
Passenger Vehicles



Commercial Vehicles

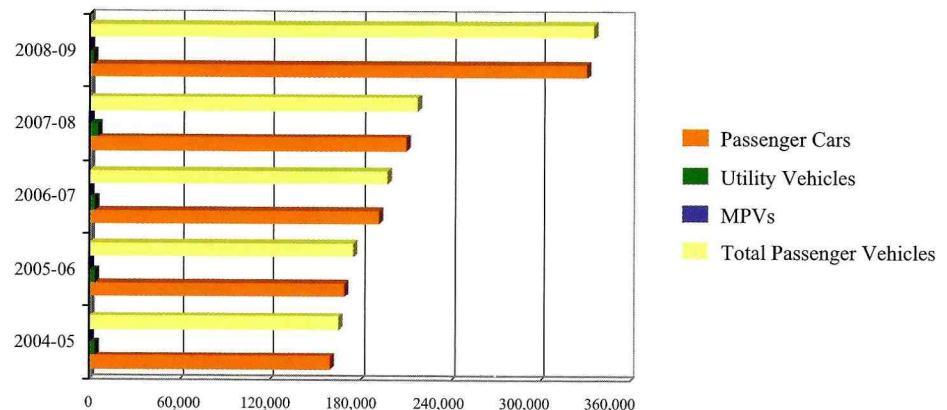


Two & Three Wheelers

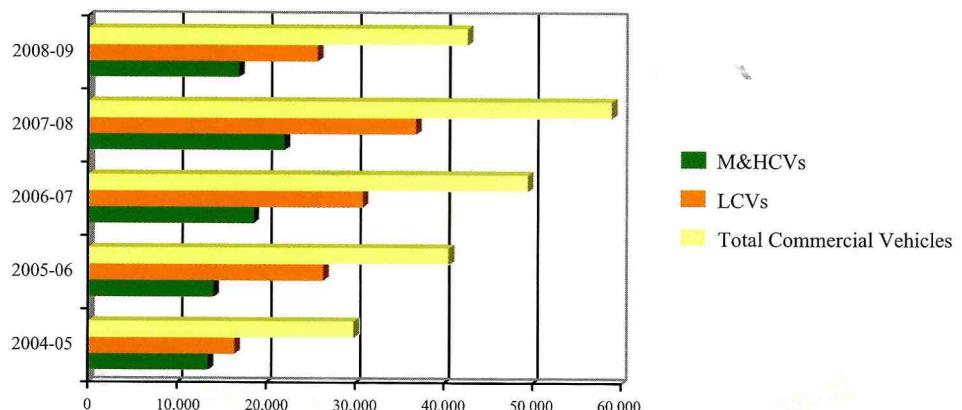


Automobile Export Trends

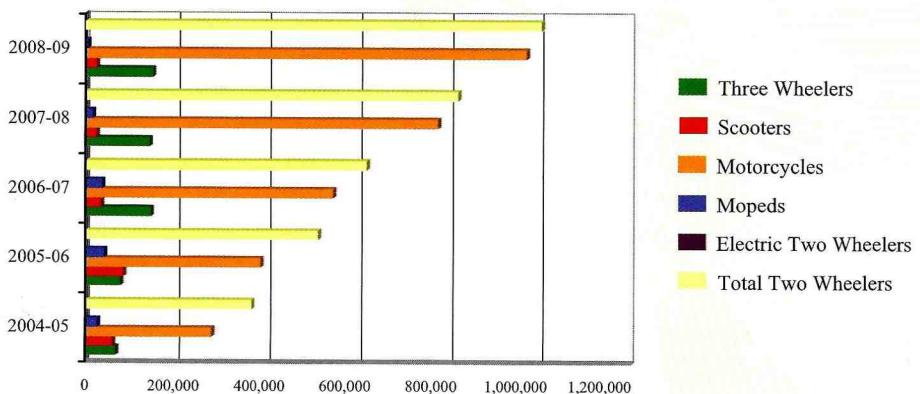
Passenger Vehicles



Commercial Vehicles



Two & Three Wheelers



SIAM OFFICE BEARERS

SIAM Executive Committee 2008-2009

COMPANY	MEMBERS	ALTERNATE MEMBERS
Tata Motors Ltd.	Mr. Ravi Kant President	Mr. Prakash M. Telang
Mahindra & Mahindra Ltd.	Dr. Pawan Goenka Vice President	Mr. Ketan Doshi
Eicher Motors Ltd.	Mr. S. Sandilya Treasurer	Mr. A. Ramasubramanian
Ashok Leyland Ltd.	Mr. R. Seshasayee	Mr. R. Devarajan
Bajaj Auto Ltd.	Mr. Madhur Bajaj	
Bajaj Auto Ltd.	Mr. Rajiv Bajaj	Mr. Pradeep Srivastava
Cummins India Ltd.	Mr. Anant J. Talaulicar	Mr. Arun Ramachandran
Ford India Pvt. Ltd.	Mr. Michael Boneham	
General Motors India Pvt. Ltd.	Mr. Karl Slym	Mr. P. Balendran
Hero Honda Motors Ltd.	Mr. Pawan Munjal	
Hyundai Motor India Ltd.	Mr. H. S. Lheem	Mr. Arvind Kumar Saxena
Maruti Suzuki India Ltd.	Mr. S. Nakanishi	Mr. I. V. Rao
Mercedes-Benz India	Dr. Wilfried Aulbur	Mr. S. M. Kadlaskar
Piaggio Vehicles Pvt. Ltd.	Mr. Ravi Chopra	
Royal Enfield	Mr. Siddhartha Lal	Mr. R. L. Ravichandran
Toyota Kirloskar Motor Pvt. Ltd.	Mr. Hiroshi Nakagawa	Mr. Shekar Viswanathan
TVS Motor Company Ltd.	Mr. Venu Srinivasan	
TVS Motor Company Ltd.	Mr. K. N. Radhakrishnan	
Volkswagen India Pvt. Ltd.	Mr. Joerg Mueller	Mr. K. K. Swamy

COUNCILS & GROUPS

A. Council on International Business



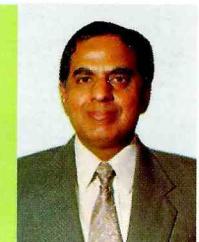
Chairman: Mr. R. Seshasayee, Managing Director, Ashok Leyland Ltd.

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

1. Trade Policy Group

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

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



2. International Relations Group

Chairman: Mr. A. S. Puri, Senior General Manager (Govt Affairs & Collaborations), Tata Motors Ltd.

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

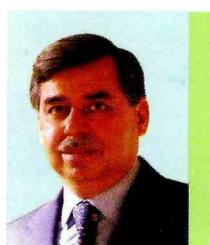
3. Exports Group

Chairman: Mr. Arvind Saxena, Senior Vice President – Marketing, Hyundai Motor India.

The Group aims to facilitate members get market access by helping members get export support from government. It provides inputs to the Government for the preparation of Foreign Trade Policy & Procedure. It also plans to participate in Road Shows & Auto Shows and in India Pavilions abroad.



B. Council on Economic Affairs



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

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



1. Economic Research

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

SIAM Economic Research Group has been constituted to spearhead industry research and provide inputs to the members. The Group is working on developing a forecasting report for the members. It also invites various experts for brainstorming sessions. The Group provides valuable inputs in organizing the annual SIAM 'Looking Ahead' Conclave.

2. Taxation Policy Group

Chairman: Mr. R. Sethuraman, Vice President – Finance, Hyundai Motor India

The Group worked on budget issues and other policy issues with the Government. Inputs were provided to the Government on a regular basis throughout the year.



3. Taxation Procedural Group

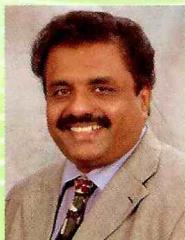
Chairman: Mr. D. D. Goyal, Chief General Manager, Maruti Suzuki India

SIAM Taxation Procedural Group, apart from preparation of Pre-Budget & Post-Budget Memorandum on Procedural issues, organized various knowledge sharing and mutual problem solving sessions. Several Group members made presentations. A number of experts were also invited to share their knowledge on specific issues.

4. Sourcing Group

Chairman: Mr. Sudam Maitra, Managing Executive Officer, Maruti Suzuki India

SIAM Sourcing Group has created a platform for bringing together the Sourcing Heads of various companies. The Group has initiated a monthly analysis of prices of various raw materials and is working with ACMA to develop appropriate course for imparting training to the suppliers. In the current environment, when the Safeguard Duty/ Antidumping duty imposition is being considered on various raw materials and components, the Group is engaged in close dialogue with relevant government bodies to preempt any such duty imposition.



5. Human Capital Group

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

SIAM Human Capital Group worked in the following areas - Learning & Development, Workforce Development/ITI, Compensation & Industrial Relations. The Group is working with various government departments to address all human resource related issues affecting the automotive industry.

6. Group on Anti Counterfeiting

Chairman: Mr. R. Bhurat, Chief Executive (SBU), Mahindra & Mahindra



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

7. IT Initiatives Group

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

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



C. Council on Demand Management



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

Co-Chairman: Mr. Joerg Mueller, President & Managing Director, Volkswagen India

The Demand Management Council was constituted keeping in view the growing ambition and targets of the industry. While the Council comprises of Groups focusing on each of the vehicle segments, it also covers areas that acquire importance with the growing size of the industry like finance availability, logistics & insurance facility, used vehicle business, participation in domestic trade fairs and vehicle categorization.

1. Passenger Car and MUVs CEOs Group

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

The Group on Passenger Car and MUVs was set up to look into the commercial issues related to the passenger car industry. Several issues were covered during the 'Looking Ahead' Conclave for Passenger vehicles.



2. Commercial Vehicles CEOs Group

Chairman: Mr. P. M. Telang, Managing Director, Tata Motors

The Group on Commercial Vehicles was set up to look into the commercial issues related to the passenger car industry. Several issues were covered during the 'Looking Ahead' Conclave for Commercial vehicles to the industry.



3. Two Wheelers CEOs Group

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

The Group on Two Wheelers was set up to look into the commercial issues related to Two Wheeler industry. In the "Looking Ahead" Conclave, a focused session on the Two wheelers segment was organized by the Group

4. Three Wheelers CEOs Group

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

The Group on Three-Wheelers was set up to look into the commercial issues related to Three-Wheeler industry. Some of the issues were discussed during the 'Looking Ahead' Conclave.



5. Finance & Leasing Group

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

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

SIAM Finance & Leasing Group, under the chairmanship of Mr. K Sridharan, Chief Financial Officer, Ashok Leyland, initiated a dialogue with the Finance companies to ensure greater transparency and risk grading in the credit delivery system. The Group worked with stakeholders to prepare guidelines on repossession.

6. Trade Fairs Group

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

The group organized a special show on Bus & Emergency Vehicles in Bangalore in March 2009. The group is acting as the organizing committee for the 10th AutoExpo and other shows.



7. Insurance Group

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

The Insurance Group aims to work on all the issues affecting the industry and is in the process of preparing reports on issues faced by different vehicle segments. It also interacts with the General Insurance Council (GIC).



8. Logistics Group

Chairman: Mr. M. M. Singh, Managing Executive Officer, Maruti Suzuki India

SIAM Logistics Group worked on three broad issues: Railways, Roads & Ports and Consolidation among members. The Group interacted with Railways to explore various technological options/solutions to address the issue of transportation of vehicles through railways. Apart from Railways initiative, the Group also explored opportunities of collaboration among the members. Many logistics experts and service providers shared their experiences with the Group.

9. Vehicle Classification Group

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

The Group continued work towards establishing SIAM as the most authentic source of data on the Indian Automobile Industry. It initiated work on collecting state-wise data and model-wise data for all vehicle segments.



10. Retail Group

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

Co-Chairman: Mr. Anil Dua, Senior Vice President-Sales & Marketing, Hero Honda Motors

The Group is working towards making Pre-owned/Used vehicle business attractive for players and is interacting with State Government at all levels to ensure that hurdles in retail business are minimized.

D. Technical Council



Chairman: Dr. Pawan Goenka, Vice President SIAM & President - Automotive, Mahindra & Mahindra

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

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



1. Group on Emissions & Conservation

Chairman: Mr. J. K. Deb, Vice-President, Fiat India Automobiles Pvt Ltd.

Group on Emission and Conservation deliberated and developed a SIAM consensus on Fuel Economy / CO₂ regulations. This group finalized its views on BS IV emission testing procedure. The Group also discussed the SIAM position and action point with respect to the introduction of E10 in India, Auto Fuel Policy Review, and Indian Clean Air Program.

2. Group on CMVR & Safety Regulations

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

The group focused on the safety related regulations. The Committee provided inputs on drafts standards, alignment of existing AIS & IS to advanced levels of ECE Regulations and EEC Directives.



3. Group on Two Wheelers (Technical)

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

Group on Two Wheelers represented SIAM position on various issues on regulation for Two Wheeler safety and emission. It also actively participated at IMMA deliberations.



4. Group on Three Wheelers (Technical)

Chairman: Mr. R. M. Kanitkar, Chief Engineer (R & D), Force Motors

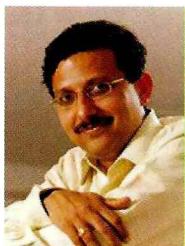
Group on Three-Wheelers discussed issues related to emission test procedure and other safety regulations.



5. Group on Styling & Design

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

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



6. Group on Automotive Infotronics

Chairman: Dr. Aravind Bharadwaj, CEO, Automotive Infotronics

The group aims to promote the use of Infotronics in India and facilitate public private partnership between different Government departments and private enterprises. The group has developed a high level operational blue print to establish a common roadmap for automotive infotronics in India. The group also organizes exhibitions, national/international conferences. It is also spearheading the SIMBA project.

7. Group on Frontier Technologies

Chairman: Mr. I. V. Rao, Managing Executive Officer-Engineering, Maruti Suzuki India Ltd

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



8. Group on Recycling

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

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

9. Group on International Harmonization

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

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

This group reviewed the new requirements of the harmonization process and submitted SIAM comments to international bodies from time to time. Several SIAM members participated in WP.29 meetings of GRPE, GRSP, GRSG, GRE, GRB and GRRF. Outcome of these meetings and SIAM participation in IMMA and OICA meetings were also discussed.





10. Service Head Forum

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

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

11. Group on Diesel Image

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

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



E. SAFE (Society for Automotive Fitness & Environment)



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

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

SAFE works to generate awareness among stakeholders on issues of cleaner and safer environment and aims to be a catalyst in the automobile industry's endeavour to fulfill its commitment. It supports and enhances the industry's role as a responsible corporate citizen in the country. SAFE organizes seminars with State Governments & other stakeholders and also organizes Road Safety awareness campaign for students, drivers and public at large.

SIAM PAST PRESIDENTS

Year	Name	Company
1960	Mr. Lalchand Hirachand*	Premier Automobiles Ltd.
1961	Sir L. P. Misra*	Hindustan Motors Ltd.
1962 & 1963	Mr. A. E. L. Collins*	Ashok Leyland Ltd.
1964	Mr. Keshub Mahindra	Mahindra & Mahindra Ltd.
1965 & 1966	Dr. M A Chidambaram*	Automobile Products of India Ltd.
1967 & 1968	Mr. K. V. Srinivasan*	Standard Motor Products of India Ltd.
1969	Mr. A. H. Tobaccowala	Tata Engineering. & Locomotive Co Ltd.
1970 & 1971	Mr. A. Sivasailam	Simpson & Co. Ltd.
1972 & 1973	Mr. N. K. Firodia*	Bajaj Tempo Ltd.
1974 & 1975	Mr. J. E. Talaulicar	Tata Engineering. & Locomotive Co Ltd.
1976 & 1977	Mr. Rahul Bajaj	Bajaj Auto Ltd.
1978 & 1979	Mr. P. V. Venkatesan	Premier Automobiles Ltd.
1980 & 1981	Mr. C. V. Karthik Narayanan	Standard Motor Product of India Ltd.
1982 & 1983	Mr. R. J. Shahaney	Ashok Leyland Ltd.
1984 & 1985	Mr. V. Krishnamurthy	Maruti Udyog Ltd.
1986 & 1987	Mr. S. L. Bhatter	Hindustan Motors Ltd.
1988/89 & 1989/90	Mr. B. De Souza	Mahindra & Mahindra Ltd.
1990/91 & 1991/92	Mr. Abhay Firodia	Bajaj Tempo Ltd.
1992-1993	Mr. Subodh Bhargava	Eicher Motors Ltd.
1993/94 & 1994/95	Mr. Vinod L. Doshi*	Premier Automobiles Ltd.
1995/96 & 1996/97	Mr. Brijmohan Lal	Hero Honda Motors Ltd.
1997/98 & 1998/99	Mr. V. M. Raval	Tata Engineering & Locomotive Co Ltd.
1999/00 & 2000/01	Mr. Venu Srinivasan	TVS Motor Company Ltd.
2001/02 & 2002/03	Mr. R. Seshasayee	Ashok Leyland Ltd.
2003/04 & 2004/05	Mr. Jagdish Khattar	Maruti Udyog Ltd.
2005/06 & 2006/07	Mr. Madhur Bajaj	Bajaj Auto Ltd.

* Since deceased

MEMBERS OF SIAM

1. Ashok Leyland Ltd.
2. Atul Auto Ltd.
3. Asia Motor Works Ltd.
4. Bajaj Auto Ltd.
5. BMW India Pvt. Ltd.
6. Cummins India Ltd.
7. Daimler Hero Commercial Vehicles Ltd.
8. Eicher Motors Ltd.
9. Electrotherm (India) Ltd.
10. Fiat India Automobiles Pvt. Ltd.
11. Force Motors Ltd.
12. Ford India Pvt. Ltd.
13. General Motors India Pvt. Ltd.
14. Greaves Cotton Ltd.
15. Hero Honda Motors Ltd.
16. Hindustan Motors Ltd.
17. Honda Siel Cars India Ltd.
18. Honda Motorcycle and Scooter India Pvt. Ltd.
19. Hyundai Motor India Ltd.
20. International Cars & Motors Ltd.
21. India Yamaha Motor Pvt. Ltd.
22. Kamaz Vectra Motors Ltd.
23. Kinetic Motor Company Ltd.
24. LML Ltd.
25. Mahindra & Mahindra Ltd.
26. Mahindra Renault Pvt. Ltd.
27. Mahindra Two Wheelers Ltd.
28. Maruti Suzuki India Ltd.
29. Mercedes-Benz India Pvt. Ltd.
30. Nissan Motor India Pvt. Ltd.
31. Piaggio Vehicles Pvt. Ltd.
32. Premier Ltd.
33. Renault India Pvt. Ltd.
34. Reva Electric Car Company Pvt. Ltd.
35. Royal-Enfield
36. Scooters India Ltd.
37. SkodaAuto India Pvt. Ltd.
38. Simpson & Co. Ltd.
39. Swaraj Mazda Ltd.
40. Suzuki Motorcycle India Pvt. Ltd.
41. Tata Motors Ltd.
42. Toyota Kirloskar Motor Pvt. Ltd.
43. TVS Motor Company Ltd.
44. Volkswagen India Pvt. Ltd.
45. Volvo India Pvt. Ltd.
46. Volvo Buses India Pvt. Ltd.

AFFILIATION WITH OTHER INSTITUTIONS

INDIA

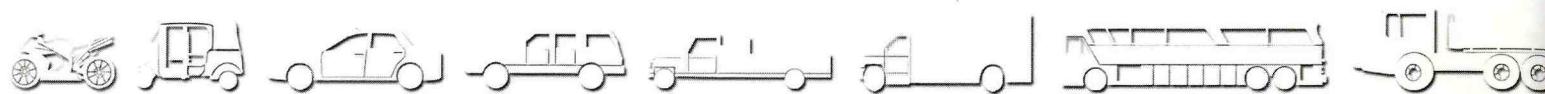
- All India Motor Transport Congress
- Alloy Steel Producers Association
- Aluminum Association of India
- Association of Indian Forging Industry
- Association of State Road Transport Undertakings
- Asian Development Bank
- Automotive Component Manufacturers Association of India
- Automotive Tyre Manufacturers Association
- Automotive Services Equipments Association
- Bureau of Indian Standards
- Centre for High Technology
- Central Institute of Road Transport
- Central Road Research Institute
- Confederation of Indian Industry
- Delhi Transport Corporation
- Federation of Automobile Dealers Association
- Indian Auto LPG Coalition
- Indian Diesel Engine Manufacturers Association
- Indian Institute of Petroleum
- Indian Machine Tool Manufacturers Association
- Indian Institute of Metals
- Indian Institute of Technology
- Indian Rubber Institute
- Indian Institute of Foreign Trade
- Insurance Regulatory and Development Authority
- International Centre for Automotive Technology
- Institute of Road Traffic Education
- National Institute of Design
- National Automotive Testing and R&D Infrastructure Project
- Petroleum Federation of India
- Research & Information Systems for Non-aligned and Other Developing Countries
- Technology Information Forecasting and Assessment Council
- Tractor Manufacturers Association
- The Automotive Research Association of India
- The Energy and Resources Institute

- United States Agency for International Development
- Vehicle Research & Development Establishment
- World Bank
- Western India Automobile Association

OVERSEAS

- ASEAN Automotive Federation (AAF)
- Asia Pacific Economic Cooperation Automotive Dialogue (APEC AD)
- Asian Motorcycle Union (UAM)
- Auto Trade Policy Council (ATPC), USA
- Automotive Federation of Malaysia (AFM), Malaysia
- Automotive Policy Planning, METI, Japan
- Automotive Research & Testing Centre, Taiwan
- Bangladesh Automobiles Assemblers and Manufacturers Association, Bangladesh
- Ceylon Motor Traders' Association (CMTA), Sri Lanka
- Comité des Constructeurs Français d'Automobiles (CCFA), France
- China Association of Automobile Manufacturers (CAAM), PRC
- Clean Air Initiatives of Asian Cities (CAI-Asia)
- European Automobile Manufacturers Association (ACEA), Europe
- Federal Chamber of Automotive Industry (FCAI), Australia
- Federation of Asia Motorcycle Industries (FAMI), Singapore
- Federation of Nepal Chamber of Commerce & Industry, Nepal
- Fuels and Lubes Asia (F&L Asia)
- Global Automotive Industry Dialogue (GAID)
- Indonesian Automotive Industry Association (GAIKINDO), Indonesia
- Indonesian Motorcycle Industry Association, Indonesia
- International Motorcycle Manufacturers Association (IMMA)
- International Organization of Motor Vehicle Manufacturers/Organisation Internationale des Constructeurs d'Automobiles (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
- Motorcycle Development Program Participants Association, Philippines
- National Alternative Fuel Training Consortium, USA
- National Association of Vehicle Manufacturers (ANFAVEA), Brazil
- 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 Ceylon Motor Traders' Association (CMTA), Sri Lanka
- The Indonesian Motorbike Assemblers' Association (PASMI) , Indonesia
- The Society of Motor Manufacturers and Traders (SMMT), UK
- The Thai Automotive Industry Association (TAIA), Thailand
- Transport Research Laboratory, UK
- US Department of Commerce, USA
- US Department of Energy, USA
- US Environment Protection Agency, USA
- Vietnam Register, Vietnam
- Verband der Automobilindustrie e.v. (VDA), Germany
- World Wide Fuel Charter



SIAM

Society of Indian Automobile Manufacturers

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