

Confidential



**Defining the Role of
the Government in the
Transnationalisation Efforts
of the Indian SMEs in the
Auto Components Sector**

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List of Abbreviations

ACMA	Automotive Component Manufacturers Association of India
AFTA	ASEAN Free Trade Area
AICO	ASEAN Industrial Cooperation Scheme
AP	Approved Permit
APEC	Asia Pacific Economic Cooperation
ARAI	Automotive Research Association of India
ASEAN	Association of South East Asian Nations
ASEM	Asia-Europe Meeting
CAGR	Compound Annual Growth Rate
CBU	Completely Built Unit
CCAP	Certification Centre for Automotive Products
CECA	Comprehensive Economic Cooperation Agreement
CENVAT	Central Value Added Tax
CEPT	Common Effective Preferential Tariff
CKD	Completely Knocked Down
CV	Commercial Vehicle
EAF	East Asia Forum
EAVG	East Asia Vision Group
ECE	Economic Commission for Europe
EDIFACT	Electronic Data Interchange in Administration, Commerce and Trade
EPA	Economic Partnership Agreements
FBT	Fringe Benefit Tax
FDI	Foreign Direct Investment
FIPB	Foreign Investment Promotion Board
FTA	Free Trade Agreement
GAC	General Administration of Customs
GDP	Gross Domestic Product
IAP	Individual Action Plan
ICD	Inland Container Depot
IMF	International Monetary Fund
INR	Indian Rupee
IPR	Intellectual Property Rights
JV	Joint Venture
KAICA	Korea Auto Industries Cooperative Association
LCC	Low Cost Countries
LME	London Metal Exchange
MERCOSUR	Southern Common Market
MIDP	Motor Industry Development Programme
MNC	Multinational Company
MOCIE	Ministry of Commerce, Industry, and Energy
MOFAT	Ministry of Foreign Affairs and Trade
MUV	Multi Utility Vehicle
NAFTA	North American Free Trade Agreement

NAPF	National Automotive Trade Policy of Malaysia
NATRIP	National Automotive Testing and R&D Infrastructure Project
NCR	National Capital Region
OECD	Organization for Economic Cooperation and Development
OEM	Original Equipment Manufacturer
PLC	Public Limited Companies
PTA	Preferential Trade Agreements
QR	Quota Restrictions
QS-9000	Quality System Requirements 9000, automotive industry standards released in 1994 by OEMs
R&D	Research and Development
RBI	Reserve Bank of India
RFQ	Request for Quotation
SDRC	State Development and Reform Commission
SEZ	Special Economic Zone
SIAM	Society of Indian Automobile Manufacturers
SKD	Semi-Knocked Down
SME	Small and Medium Enterprises
TACO	Tata Auto Components System
TAPS	Tata Auto Plastic Component Systems
TPM	Total Productive Maintenance
TQM	Total Quality Management
TRIP	Trade-Related Aspects of Intellectual Property Rights
TS-16949	Technical Specification 16949, an ISO 9000 specification for design, production, installation and servicing of automotive related products, released in 2002.
USD	United States Dollar
UBS	United Bank of Switzerland
VAT	Value Added Tax
VRDE	Vehicle Research and Development Establishment
WITS	World Integrated Trade Solution
WTO	World Trade Organisation

Executive Summary

1. Market Overview

The Indian automotive component industry is small in size compared to the world market (INR 740,000 Crores). The industry has been experiencing a high growth rate of 27 percent over the period 2001-06 and is expected to grow at a rate of 13 percent over the period 2006-14. The quality of components made in India has improved significantly in the last decade and about 11 Indian auto component companies have won the Deming prize so far. India is estimated to have the potential to become one of the top five auto component economies by 2025.

2. Export Scenario

In 2006-07, automotive component exports from India were worth INR 11,200 Crores and are expected to reach INR 84,000 Crores in 2016. While growth rate of exports has been 38 percent during 2002-06, the export is expected to grow by 24.4 percent during 2006-15. India exports a vast range of automotive chassis and components. The major component categories that have shown a healthy growth in exports are vehicle components and accessories, transmission shaft and cranks, drive axles, starter motors, generators, and bumpers. The driving force behind India's growing automotive components exports in the past has been higher exports by Indian subsidiaries of global OEMs and tier-I manufacturers.

3. Key Product Categories and Segments for Exports

The engine components segment is technology and capital intensive and is likely to be dominated by the existing major firms in the short to medium term. Engine technology is expected to move towards superior design (for optimal fuel consumption and lesser emission), thus access to such technologies will be limited to the existing major firms. Among drive transmission and steering components, the steering systems are among the critical components of a four-wheeler. The capital and technology intensive nature of the segment acts as an entry barrier for companies in the unorganized segment.

4. Major Characteristics

The Indian auto component industry is a thrust sector for India. The direct employment generated by the medium and large firms in the organized sector is 2.5 lakhs. In terms of location, over 70 percent of the automotive components companies are situated in either the northern or western regions. Delhi, Pune, and Chennai have traditionally been the most important clusters for the automotive components segment in India. The industry has 500 medium and large key participants in auto components in the organized sector, along with 6,000 ancillary units. The unorganized sector predominantly caters to the aftermarket. Manufacturers in this sector operate independently with little investment and on a small scale. They generally produce components based on copied drawings and their quality is below average. Most components required by the Indian automobile industry are manufactured locally. Import dependence is estimated to the tune of 13.5 percent of the domestic demand.

5. Major Findings

The consultants held face to face discussions and telephonic interviews with SME auto component manufacturers to understand the major factors affecting the competitiveness of the Indian auto component manufacturers and exporters and to understand the challenges faced by the Indian SMEs in the auto component industry with respect to input cost, quality, delivery schedule, scaling up operations and government policies. Many of the top executive of the companies are increasingly buoyant about India's prospects for the next five years both in terms of exports and investments by Indian companies abroad.

Mailer-based survey followed by personal face-to-face or telephonic interview with select companies was adopted for the study. Five hundred companies were contacted with a response kit for collecting the data. The findings of the study are based on the facts and views shared by 82 SME auto component companies having a manufacturing base in India. Out of these 82 companies, 64 have already trans-nationalized through only exports (53), through exports & technology collaboration (5), through exports & Joint ventures (3) and through exports & contract manufacturing (3)". Also, 77 companies are interested either in Trans-nationalization or for further intensifying the Trans-nationalization through: setting up of Joint Ventures outside India (23), product exports (22), contract manufacturing (15), Technology collaboration (13) and Joint R&D (4).

Lower production efficiency and low-end technology in production systems lead to the inability to match the prices and quality standards with the competing suppliers. This is working against the transnationalisation of SME component manufacturers. Poor design capability, lack of R&D and testing facilities are adding to this scenario. Scale of operation and creation of SEZs do not provide the SME auto component manufacturers a level playing field. Lack of awareness about foreign markets and customers and vice-versa has also worked against the transnationalisation of Indian SMEs auto component manufacturers. Further, product liability in case of the consignment getting rejected and clause for arbitration in the partner company's home country has held back many companies from trans-nationalizing.

6. Challenges Faced and Role of the Government

The challenges faced and role of the Government in promoting transnationalisation of Indian auto component SMEs are summarized in the table below:

Challenges Faced	Role of the Government in Promoting Transnationalisation
<u>Brand India:</u>	
Brand India as a quality-manufacturing destination is weak.	Consulates of the Government of India should plan activities in key markets to create awareness about the prowess of Indian manufacturing industry including auto component sector. Industry associations may be roped in to provide the necessary inputs for the same.
<u>Raw Material Prices:</u>	
Some of the challenges faced on raw material prices include rising prices, fluctuating prices, discriminatory higher pricing by foreign vendors for Indian component manufacturers, custom free import of finished goods from ASEAN countries under FTA.	Government should take necessary steps to ensure that the prices of steel do not increase against the global price trends. Government needs to come up a slew of policies for containing steel prices through regulating export of steel, monitoring steel price, and lowering the import duty to enable import of cheap steel from outside India.
<u>Competitiveness:</u>	
The South East Asian companies are over taking Indian auto-component companies in competitiveness. Thailand and Korea apart from China are highly competitive. The major threat to India's export is expected to be from other Asian nations such as Thailand and Taiwan.	<p>In order to make Indian auto-component sector competitive vis-à-vis other Asian nations, India needs to review its policies in a holistic manner and take necessary steps to make the industry competitive.</p> <p>To make these enterprises gain strength in various aspects of business, a consortium needs to be formed. The consortium can provide support to the member companies similar to the support provided by the corporate office in large enterprises. Alternatively, the existing industry associations can take up the role of the consortium.</p>

<u>Inability to Have Dedicated R&D, Testing and Design Capability:</u>	
<p>In-house designing and testing capability is a pre-requisite for being selected as a direct supplier of the automotive companies and large tier-I suppliers. Indian auto component companies having designing capability are preferred by foreign companies looking for collaboration in India.</p> <p>There are a large number of small size companies who don't have capabilities to design the products end-to-end and test them. These companies do not have necessary infrastructure for doing R&D to match the requirements of their customers. Their financial strength and their size do not permit them to have a dedicated in-house designing and R&D facilities.</p> <p>Government has taken major initiatives under NATRIP and has big plans under this scheme to provide expensive infrastructure for developing capabilities of automotive industry. However, the non-availability of such facilities in each hub does not serve the requirements of SME auto component manufacturers.</p>	<p>Government shall facilitate and or incentivize the auto-component manufacturers for creation of shared infrastructure and capacity development for R&D and testing labs. Schemes run by institutions like National Manufacturing Competitiveness Council and some Ministries like Micro-Small and Medium Enterprises can be tapped to meet financial requirements of setting up such facilities. There seems to be a lack of awareness about such schemes in the industry. Government institutions interested in encouraging auto component sector shall take initiative of creating awareness about such schemes and should also facilitate the stakeholders' to avail of the benefits of such schemes.</p>
<u>Finance Related Issues:</u>	
<p>Availability of capital, high cost of capital for technology upgradation, working capital, and expansion of operations in India and abroad are the key challenges for auto component manufacturers in the SME sector.</p> <p>Availability of capital and cost of capital is a function of the technological sophistication and robustness of business model of individual companies. While the companies need to work towards improving their credit worthiness by leveraging on their strength. Financial institutions</p>	<p>The Government should create awareness among SMEs about the need for getting credit worthiness rating done. There is also a need for creating awareness among the SMEs about availability of low cost institutional equity capital and risk capital funds for expansion plans of SMEs.</p> <p>Some of the schemes of this category include SME Growth Fund of SIDBI Venture Capital Limited (SVCL) that can be tapped to meet the financial requirements for transnationalisation of auto-components' SMEs. Unlisted companies are the focus of this Growth Fund. The Risk</p>

have been reported to be giving preferential treatment to manufacturer of small and medium size in financing and offering credit at better rates subject to a better rating by SME Rating Agency of India Limited (SMERA).

Some other challenges are delay in duty drawback and incentives, currency fluctuation and frequent changes in DEPB rates.

Duty drawback and incentives:

Auto component exporters find duty drawback a cumbersome and time-consuming process due to multiplicity in processes and interfaces. Currently, it takes anywhere between 3 months to 6 months to get duty drawback amount.

Currency Fluctuations:

Currency fluctuation has impacted export earnings of automotive component manufacturers.

The currency fluctuation and the appreciation of the Indian Rupee in comparison to the Dollar have affected the profitability of Indian companies dependent on the U.S market. Since China is not having the floating rate currency system for the Industry, the Chinese industry is insulated from these fluctuations. This has impacted competitiveness of Indian auto-component manufacturers.

Capital Fund proposed in 2008-09 budget to be administered by SIDBI Venture Capital Limited can help Indian auto component industry in acquisition of high-end technology and manufacturing facilities outside India.

Government may take steps to ensure that the assurance of Minister of Finance, Government of India that "SIDBI will reduce the guarantee fee from 1.5 per cent to 1 per cent and the annual service fee from 0.75 per cent to 0.5 per cent for loans up to Rs.5 Lakh", is implemented at the earliest. The EXIM bank also has several schemes for financing SMEs, firms, product export and overseas investments. There is a need for creating awareness among the SMEs about such schemes.

There is a need for reducing the time taken in providing duty drawback and other incentives. The relevant departments or the Government should find modalities for reducing the time taken in providing duty drawback and other incentives to at least a month.

India's commitment to market dynamics may not allow it to directly regulate currency prices or manage the incongruity arising from fixed rate of Chinese Yuan vis-à-vis floating rate of INR.

However, alternative methods need to be looked at to ensure global competitiveness of the export oriented Indian manufacturing industries including auto component sector. Government may consider creating awareness among the smaller companies about the need for building currency fluctuation clause in their medium and long-term contracts with the customers. The government may create awareness about the need to diversify the client base and the need for doing business in different and more stable currencies.

<p><u>Frequent changes in DEPB rates:</u> Exporters keep the available benefits from this duty in mind while negotiating the orders with the foreign customers and any change in it affects the profitability of the company. There is also a time lag between applying for and getting the benefit. For an SME, quite often the cost of agents and time cost nullifies its benefits.</p>	<p>There is a need to minimise the frequency of change of DEPB rates. The time lag between application and realization of DEPB rates related benefit needs to be reduced.</p>
<p><u>Law Related Issues:</u></p>	
<p><u>Trust in Indian Arbitration System:</u> At present, foreign partners of Indian companies insist on arbitration in their home country primarily due to lack of trust in Indian arbitration process. Among SMEs, this works as a deterrent for entering in to any business relationship with a foreign company.</p>	<p>Government should consider creating trust in Indian arbitration process so that foreign partners agree for arbitration in India in case of any dispute. It may consider setting up an independent arbitration center on the lines of Hong Kong International Arbitration Center (HKIAC). HKIAC is a dispute resolution body established by a group of the leading business and professional people in Hong Kong with a focus on Asia.</p>
<p><u>Documentation to meet the need of law of other countries:</u></p>	
<p>Small companies find it difficult to navigate through the legal documentation for any transnational business interaction. Such companies are not aware of legal experts who can address to their legal documentation requirements keeping the law of the land of the country where they want to do business.</p>	<p>The Government may either create a set-up or a system to address this concern or identify a pool of resources that can facilitate documentation and handhold SMEs in initial negotiations, deal maturing and liaising during their early efforts to transnationalise.</p>
<p><u>Market Exposure:</u></p>	
<p>Inspite of having improved the product quality standards closer to global standards, many of these companies in SME sector have not been able to bag substantial orders from OEMs abroad.</p>	<p>Some of the steps that could help these companies to reach out to buyers in many countries include information sharing by Indian consulates in the respective countries, creating opportunities for participation in trade shows at a discounted price and participation in buyer seller meets, events and gathering market intelligence.</p>

Creating awareness about product and services abroad:

The small and medium companies in auto component sector do not have enough resources to create awareness about their companies and products in even key markets.

Indian Consulates in the countries having export potential for auto components should facilitate marketing efforts by sharing information about Indian auto component manufacturing companies. Industry bodies may be roped in to further give a fillip to this exercise.

Buyer-seller meets and events:

Small players in auto-component manufacturers neither have the information about buyer seller meets and events nor resources to attend such meets.

Government should create opportunities for interaction between Indian manufacturers with exporters, foreign raw material suppliers, buyers, and OEMs. The Government needs to arrange for these meets. The Government can also look at sending small businesses delegations for aftermarket business. Alternately, these industry exposure visits can be done through government/ private tie-ups and some concessions given to small players.

Exhibitions in foreign markets:

The fund provided by the Government for participating in foreign exhibitions is too meager and hence is not of much use.

The Government needs to move beyond direct financial support for participation in exhibitions. Negotiating with foreign exhibitors or relevant Government bodies to give discount on the floor rates to Indian companies will be useful. Government may reciprocate with the similar measures to such institutions in India.

Senior government officials opine that SME engineering exporters must do their research/ homework properly to fully benefit from participation in any international event.

Since many of the small companies may not be able to do their research in-house, Government should consider empanelling some consultants having relevant experience and capability to undertake research on their behalf. Alternatively, the Government may encourage Industry association to take up this role.

Market intelligence:

The small players in the industry find it difficult to get market information about global markets, customers and potential collaborators. While

Though some institutions like EXIM bank provides consultancy to SMEs in exploring markets and exporting products, etc. The

<p>some companies have difficulty in identifying potential partners for transnationalisation by joint R&D and joint venture, some have difficulty even in finding customers. Many auto component manufacturers have limited knowledge of the input suppliers outside India who sell steel at a price lower than Indian suppliers.</p>	<p>awareness on these services seems to be low. Government shall make available the benchmarking data and the quality assessment in the importing country. Government shall create awareness about the products, which have marketability in the global market, changing needs and product requirement in the global market.</p>
<p><u>Upgrade Component Manufacturers' Facilities:</u></p>	
<p>A number of SME sector auto component companies have not been able to upgrade technology due to various reasons. In the highly competitive markets, this has started impacting their business adversely and becoming a hindrance to their transnationalisation.</p>	<p>Governments shall take necessary initiative to encourage automotive industry and industry association to collaborate with Indian auto component manufacturers for upgrading their manufacturing capabilities. ACMA has taken the initiative of sharing the experience and guidance of professionals from better-managed companies among the component manufacturers in SME sector.</p> <p>The government shall also encourage Automobile companies to work with the SME auto component manufacturers (as a part of their commitment to the industry) in upgrading their capabilities.</p>

Manpower/ Human Resource Related Issues:

Availability of trained manpower and productivity:

Due to emerging employment opportunities in new manufacturing units and service industry, retention of skilled manpower is proving to be a challenge for auto component manufacturers in SME sector. If companies do not plan ahead, there may be disruptions in production. The quality requirements from the industry are changing with the global requirements and achieving skill development for a new set of employees on a regular basis is a challenge.

Excessive job security has vitiated the work culture at lower levels.

Training for specific skills suited for the specific work is needs to be imparted to help India emerge as a global player. Industry is increasingly feeling the need for skill development and attitudinal training of work force for improving productivity. The Government should encourage and support schools and universities to collaborate with the industry to come up with short and industry relevant courses. This will help the industry meet the requirements of technically qualified and trained manpower needed for its ambitious growth and realization of the potential of the sector.

Sensitization of workforce for attitudinal change is needed. This will help improve productivity. The Government shall support setting up of facilities for attitudinal training of manpower in different auto hubs.

Rising wage cost:

Minimum wages in several states has gone up by over thirty percent in the last six months. This has severe implications on the profitability of the companies employing low wage earning workers. The implications are equally relevant for automated manufacturing systems because of the cascading effect of minimum wages among the middle level and senior level employees.

The Governments shall assess the implications of wage rise at a lower level and take the industry in to confidence before coming up with regulations that may impact global competitiveness and profitability of the companies.

Labour laws:

SMEs in auto-component sector feel that the current labour laws have resulted in excessive job security, poor work attitude and poor productivity.

The industry expects Government to enact industry friendly labour laws. The general feeling is that Chapter 5B of the industrial dispute act should be done away with. Under provisions of this act, companies cannot retrench more than

	<p>100 workers with out prior permission from the Government even if a company does not have enough work for them. The Government of India is already working on a policy to mitigate the situation.</p>
<p><u>Other Challenges:</u></p>	
<p><u>SEZ policy:</u></p> <p>The inability of existing SMEs to operate in SEZs where tax benefits are available will make small and medium enterprises in the auto component sector unviable. The SME component manufacturers are wary of benefits extended to companies located in these zones. The benefits to SEZ based manufactures are putting others at a competitive disadvantage. To have a level playing field, they are looking for similar benefits to them for their export component.</p>	<p>The Government should consider creation of virtual SEZs as well to minimize the impact of SEZ policy on existing small and medium auto component manufacturer.</p>
<p><u>Setting up Greenfield projects is expensive and time consuming:</u></p> <p>The acquisition of land for a Greenfield venture is perceived to be major problem with prohibitive rates and bureaucratic procedures. Land prices in most of the industrial hubs have become prohibitively high, creating barriers for expansion for the small and medium enterprises. Even the expansion procedures are cumbersome with clearances required from a number of bodies/boards.</p>	<p><u>Setting up Greenfield projects is expensive and time consuming:</u></p> <p>The industry expects the Government to develop industrial clusters and provide land at a reasonable price or create infrastructure on the lines of China. The manufacturers pointed to the fact that in China built-in premises are available on lease and the companies only need to bring in the machinery to start the production. The time lag for setting up new production line is much shorter in China. High cost of land and time required to develop infrastructure is impacting competitiveness of Indian companies.</p> <p>Creation of special auto component parks, as recommended in the Automotive Mission Plan could be an answer to this. This would take care of various concerns related to SEZ and competitiveness related issues emerging out of various bilateral and multi-lateral trade agreements.</p>

<p><u>Import regulations:</u></p> <p>The procedures for advance licenses for import are cumbersome, time consuming and difficult to implement. The license for duty free import is issued only in Delhi and the committee for this meets once in 6 months. The bond received from the import is given to customs and the bond redemption process is very cumbersome. It takes 1-3 months for the same.</p>	<p>Industry expects that the committee for advance licence for import should be formed in some more cities as well as and it should meet at least once a month.</p> <p>Industry expects simplification in bond redemption process.</p>
<p><u>Coordination with multiple offices:</u></p> <p>As opposed to the cumbersome process of submitting several documents at several places, the Government should facilitate single point interaction for submitting all types of documents. This will allow the component manufacturers to focus on the business.</p>	<p>There is a need for improved ESI and Labour laws and single window clearance for taxes, duty drawbacks etc. This will also reduce the non-tariff cost (unofficial cost) of doing business.</p>
<p><u>Basic Infrastructure:</u></p>	
<p>Issues related to poor basic infrastructure like power, port facilities and transport/ logistics are one of the major worries for the small and medium enterprises located across the country. The component manufacturers in remote locations face the challenge of instilling confidence of their prospective joint venture or exports partner in the overall conditions prevailing in the industrial area (sewage, roads, power supply, etc). Poor infrastructure also leads to higher manufacturing cost, apart from erosion of confidence amongst the customers.</p>	
<p><u>Power:</u></p> <p>Power shortage is a major concern for many companies located in several industrial belts across the country. Lack of adequate power supply leads to the usage of gensets, thereby increasing the operational cost, and finally the cost of the end product, leading to lowering of competitiveness in global market. The companies need to pay a minimum amount for sanctioned load; power supply for shorter duration pushes up the actual cost of electricity.</p>	<p>The companies feel that the power tariff for the auto component industry should be in line with the Chinese Government's support for the auto component industry. The Government shall ensure regular supply of quality power at a reasonable rate. Considering the investment in development of power generation infrastructure, the industry should not have difficulty in meeting the power requirements by the year 2010-2011.</p>

Logistics/ transport:

Poor logistics/ transport infrastructure and seemingly cartelization of transporters are also the areas of concern. This increases the overall logistics cost, which adds to the final delivery price to the customers, making them less competitive in global market. The cost of logistics amounts to a significant portion of the overall transportation cost. This is also a major factor affecting the exports and the competitiveness of the Indian products in the global market.

Government is already developing expressways and dedicated corridors for enhancing the efficiency of transport. Government may enhance its focus on removing the bottlenecks coming up in timely development of the expressways and dedicated corridors.

Port facilities:

The prominent ports in India are congested and as a result there are delays in shipment of consignments. The non-availability of ports leads to longer lead-time for export causing delay in delivery of consignments. These delays in turn lead to delay in receiving payments.

The infrastructure at the ports also needs to be upgraded. Government is serious about upgradation of port facilities. Timely upgradation of the ports would be able to address to the concerns of the manufacturers.

1.0 Introduction

1.1. Background

The Indian auto component industry is balanced in its contribution at components level like engine parts (31%), drive transmission and steering parts (19%), body and chassis (12%), suspension and braking parts (12%), equipments (10%), electrical parts (9%) and other components (7%). The auto component industry is capable of producing high quality products at low cost. The industry's initiative in setting up world class shop floor practices and quality practices have helped them to be recognized as a force to reckon with in the auto component suppliers' league. Major automobile companies all over the world are sourcing products from Indian auto component manufacturers. The Indian auto component manufacturers have made their presence felt in all product categories.

Pro-industry policies like manufacturing and imports free from licensing and approvals, 100% FDI in auto sector and no local content regulation of the Government has helped the auto component sector to grow in the past. In order to give further fillip to the sector and move to next phase of rapid growth, timely policy decisions and support from the Government is required. It was felt by DSIR that any policy change for the industry must evolve from the understanding of the challenges faced by the potential stakeholders. In order to achieve this objective, the DSIR commissioned this research study titled Defining the role of the Government in the transnationalisation efforts of Indian SMEs in the auto components sector.

Transnationalisation, in this study, implies all or any one of the following:

- a. Exports of auto components by Indian companies
- b. Outsourcing by organizations abroad (to Indian companies), for manufacture of auto components as per their specifications
- c. International R&D and technology collaboration between Indian and overseas organizations
- d. Indian companies setting up joint ventures and wholly owned subsidiaries abroad
- e. Mergers and acquisitions by Indian companies
- f. Transfer of know-how, design and drawings by Indian companies to an overseas organization

1.2 Research Objective

The objectives of the study include understanding major factors affecting the competitiveness of Indian auto component manufacturers and exporters in the light of domestic challenges, and the policies of the Government of India and some low-cost countries having a large concentration of auto

component companies. The study intends to identify the areas needing attention of the Government in order to give fillip to the auto component sector.

1.3 Definition of SMEs and Target Companies

Small enterprises are those companies who have an investment in plant and machinery of up to INR 5 Crores. Medium enterprises are the ones who have an investment between INR 5 Crores to INR 10 Crores in plant and machinery. In the absence of data on investment in plant and machinery by the companies, the latest published turnover was taken as a surrogate variable for categorizing SMEs in the auto component sector. Companies having a turnover of up to INR 50 Crores were considered as small company and companies with turnover in the range of Rs. 50 to 250 Crores were considered as medium companies. These companies, irrespective of their product range, legal status, or share of export in total turnover or location were contacted for getting their response.

1.4 Methodology

Both secondary and primary research methods were employed in this study. The secondary sources of information included relevant published documents of the Ministry of Heavy Industries and Public Enterprises, Government of India, Industry Associations like ACMA, SIAM, and other documents available in public domain secondary sources. Primary research included a survey among SME auto component manufacturers and discussion with top executives and managers in these companies, besides the views of industry associations and experts.

1.4.1 Data collection

A mixed method was adopted to collect data from target companies. This involved sending the questionnaire by courier and then following up with the companies on phone for responding to the questions. Simultaneously, face-to-face and telephonic discussions were held with the top-management of the companies.

For this study, a research instrument kit was developed. The kit consisted of i) a letter from the research agency, ii) a letter of introduction from DSIR, iii) a semi-structured questionnaire and iv) a stamped response envelope. The kit was sent through courier to all the target companies. Telephonic follow-up was done to find out whether they have received the research kit or needed any further information before they could respond to the questionnaire. A soft copy of the research kit excluding the response envelope was sent by e-mail to the companies who could not locate the kit. The companies were also contacted for a face-to-face or telephonic discussion with the senior management of the company. These follow up activities lasted for nearly a month. Face-to-face discussions and telephonic interviews were conducted to understand the major factors affecting the

competitiveness of the Indian auto component manufacturers and exporters and to understand the challenges faced the Indian SMEs in the auto component industry with respect to input cost, quality, delivery schedule, scaling up operations, Government policies besides other challenges that concerned them.

1.4.2 Sample size

The sample kit was sent to 500 companies listed in the ACMA's buyers' guide and our internal database. Each company was followed up for sharing the response at least twice on phone. The follow-ups resulted in response from 82 companies. Quantitative data was analyzed and the same is presented in this report.

1.5 SME auto components manufacturers' profile in this study

The responses were received from all over India covering all major auto component clusters. This report captures the views, perceptions and challenges faced by the companies representing all key clusters in the country.

Table: 1.1 Achieved Sample Size by Location

City	Achieved Sample Size	
	Number	Percent
Chennai	11	14
Pune	11	14
NCR/ Faridabad	10	11
NCR/ Gurgaon	7	9
NCR/ Delhi	6	6
Mumbai	9	11
Bangalore	5	6
Ludhiana	3	4
Nashik	3	4
Aurangabad	2	2
Chandigarh	2	2
Coimbatore	2	2
Other locations# (11 in No.)	11	15
Grand Total	82	100
# Other locations include Ahmedabad, Bhavnagar, Bhiwadi, Dewas, Hubli, Jalandhar, Jamshedpur, Kanpur, Nagpur, Sriperambadur and Vijaywada		

The findings of the study are based on the facts and views shared by 82 SME auto component companies having their manufacturing base in India. Many of these companies are already transnationalized through exports and some of them have foreign collaboration. The mix of companies selected for the study included Indian-origin companies, which represent the old and new economies ranging from being in business for 6 years to 66 years. While majority of the companies (53%) were private limited companies, the other types of companies have their fair representation.

Table 1.2 Company Type Selected for the Study

Legal status	No. of companies	Percent
Public Limited	26	32
Private Limited	44	53
Partnership firm	5	6
Others	7	9
Total	82	100

The size of companies selected for the study comprised of different size in terms of employees ranging from less than 100 employees to 2500 employees. The responses received have fair representation of companies manufacturing different kinds of products. The views in this report are a reflection of companies manufacturing engine components, drive transmission, body and chassis components and electrical components (No. of companies manufacturing these components are given in Table 1.3).

Table 1.3 No. of Companies with Different Product Portfolio and Their Percentage Share to Total Turnover

Product Category % Share of Turnover	Engine components	Drive Transmission & Steering components	Suspension & Braking components	Body & Chassis components	Equipments	Electrical components	Other products
Up to 10%	8	6	3	1	1	0	4
>10 to 20%	6	5	5	2	2	4	2
>20 to 30%	3	2	5	2	1	2	2
>30 to 40%	2	5	1	3	0	0	0
>40 to 60%	2	1	1	2	0	2	3
>60 to 80%	1	2	1	3	0	1	1
>80 to 90%	1	1	0	1	0	0	1
>80 to 100%	9	7	4	6	2	8	9
Total	32	29	20	20	6	17	22
Row Percent	22	20	14	14	4	12	15

Note: Total number of companies in this table is more than 82 because many of the companies manufacture more than one product

1.6 Report Structure

This report gives a detailed analysis of the Indian auto component market and defines the role of the Government in the transnationalisation efforts of the SME s in the auto components sector.

This report is based on both secondary and primary research (through mail survey and face-to-face interviews) with the auto component manufacturers based in different clusters in India.

The report structure is as follows:

Chapter- I: Introduction

This chapter introduces the report through background, objectives, methodologies, profile of the companies who views are represented in the report and report structure.

Chapter - II: Auto component industry in India: An overview

This chapter outlines the total Indian automotive-component market, the industry structure, various automotive clusters, characteristics of the market, distribution structure, the export scenario, key exporters and major acquisitions by Indian auto component companies in the global market.

Chapter-III: Policy Environment for Auto Component Industry in India and Other Countries

This chapter outlines the Indian policy environment for auto component industry and policies of other countries such as China, Korea, Malaysia, Thailand, Vietnam, and MERCOSUR among others.

Chapter - IV: Study Findings

This chapter outlines the major findings of the study and illustrates the transnationalisation efforts in the Indian auto component industry and the factors driving transnationalisation and the retarding factors.

Chapter - V: Challenges faced by Indian SME Auto Component Industry in Transnationalisation and Recommendations

This chapter outlines the various challenges faced by the auto component industry in transnationalisation in terms of currency fluctuations, raw material prices, infrastructure, threat from china, government policy, etc.

Chapter - VI: Case Studies of Some Successful SME Auto Component Manufacturers

The chapter outlines strategies followed by some of the small and medium auto component companies.

2.0 Auto Component Industry in India: An Overview

2.1 Introduction

The Indian automotive components industry has emerged as one of India's fastest growing manufacturing sectors and a globally competitive one. The total global auto components trade was worth INR 740,000 Crores in 2006-2007 and is expected to grow to INR 7,000,000 Crores in 2015. The auto component sector in India generated sales of about INR 60,000 Crores in 2006-07.

The ACMA-McKinsey Vision 2015 document estimates the potential for the Indian auto component industry to be INR 160,000 Crores to INR 180,000 Crores by 2016. In 2006-07 automotive component exports were worth INR 11,200 Crores and expected to reach INR 72,000 Crores in 2015.

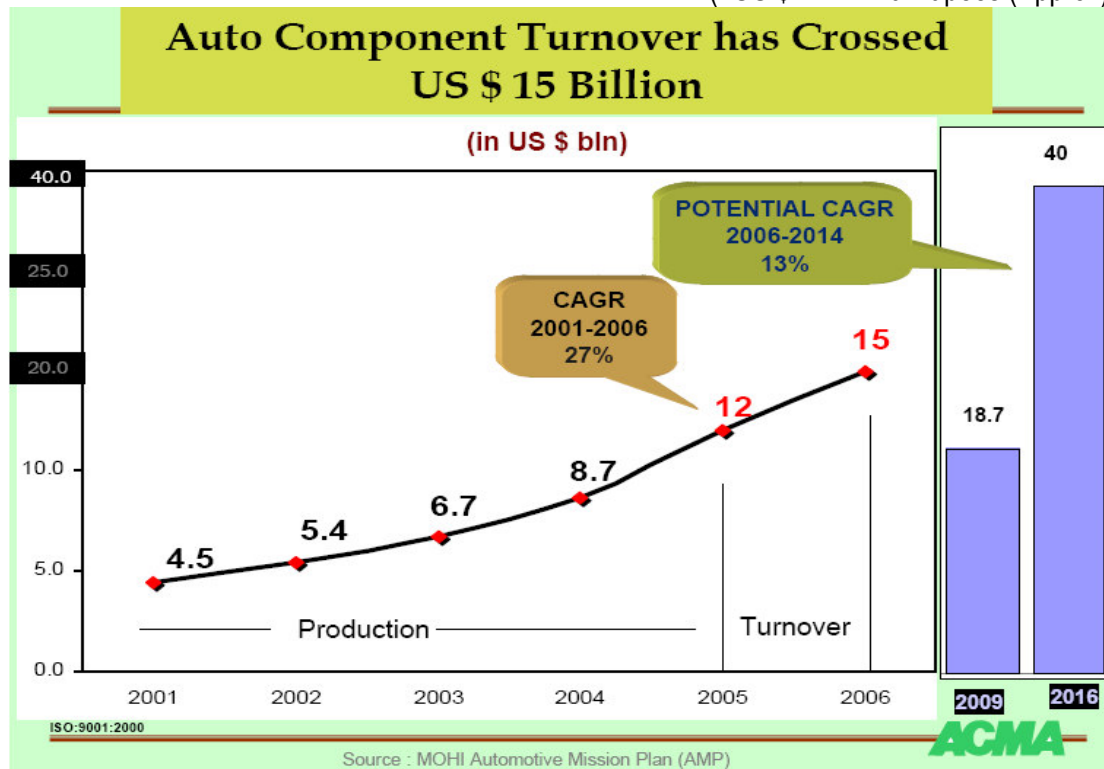
The industry has been experiencing a high growth rate of 27 percent over the period 2001-06 and is expected to grow at a rate of 13 percent over the period 2006-14. Similarly, while growth rate of exports has been 38 percent during 2002-06, the exports are expected to grow by 24.4 percent during 2006-15. The quality of components made in India has improved significantly in the last decade and 11 Indian auto components' companies have won the Deming prize so far. India is estimated to have the potential to become one of the top five auto component economies by 2025.

2.2 Total Automotive Component Market in India

Indian automotive components are now part of many major markets in North America and Europe. Around 70 percent of these are exported auto components bought by global majors such as General Motors, Ford Motor and Daimler (formerly DaimlerChrysler), among others. India has a strong auto component base for various mechanical, electrical and electronic components. Many auto component companies are home grown and have a strong background. When Maruti Udyog started operations, many Japanese companies formed joint ventures with companies in India and also set up world class manufacturing facilities in India. Many Indian companies through their association with Maruti upgraded all facets of their business including productivity, quality, and delivery systems, among others. Entry of many multi-national vehicle manufacturers from Korea, Europe and US in India from 1995 onwards enabled global component suppliers to enter India in a big way.

Figure 2.1 Auto Component Turnover in India, 2006

(1US \$ = INR 40 Rupees (Approx))



Source: ACMA

2.2.1 Market overview

India's component industry has achieved the capability to manufacture the entire range of auto components, such as engine components, drive and transmission components, suspension and braking components, electrical components, and body and chassis components. Engine components make up nearly a third of all exports of auto components from India.

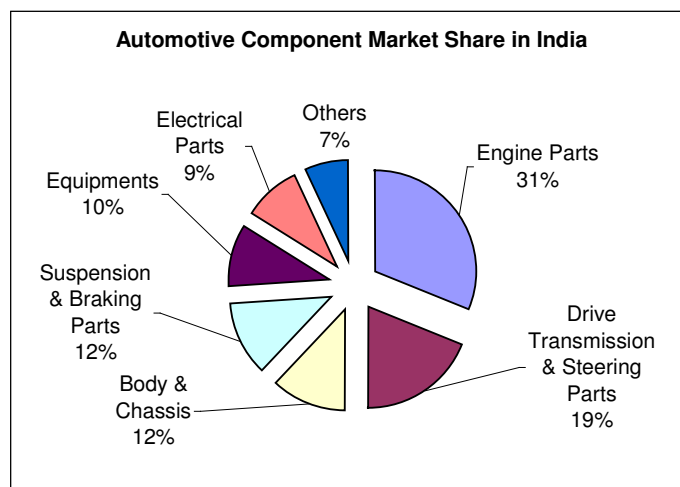
The automotive component industry caters to three broad categories of the market:

- 1) Original equipment manufacturers (OEM) or vehicle manufacturers comprise 25 percent total demand
- 2) Replacement market that comprises 65 percent of the total demand
- 3) Export market that comprises primarily of international tier-I suppliers and constitutes 10 percent of total demand

The key segments of the Indian automotive-component market include:

- **Engine components (31 percent):** Engine components fall into three broad categories—core engine components, fuel delivery system and others. This also includes products such as pistons, piston rings, engine valves, carburetors, and diesel-based fuel delivery systems. This is the most critical component and requires high involvement from the supplier.
- **Drive transmission and steering components (19 percent):** Gears, wheels, steering systems, axles and clutches are the important components in this category.
- **Body and chassis (12 percent)**
- **Suspension and braking components (12 percent)** - These include brakes, leaf springs, shock absorbers
- **Equipment (10 percent)** - This includes headlights, dashboard instruments
- **Electrical components (9 percent)** - The main products in this category include starter motors, generators, spark plugs and distributors.
- **Others (7 percent)** - Sheet metal components and plastic molded components are two of the major components in this category.

Figure 2.2 Automotive Component Market Share in India



Source: ACMA

2.2.2 Characteristics of the Indian Automotive Components Industry

Thrust sector of India

The Indian auto component industry is a thrust sector in India. The direct employment generated by the medium and large firms in the organized sector is 250,000 man-years.

Geographical spread of the industry

In terms of location, over 70 percent of the automotive components companies are situated in either the northern or western regions. NCR/ Delhi, Pune, and Chennai-Bangalore have traditionally been the most important clusters for the automotive components segment in India. With Tata setting up its manufacturing unit in Singur, West Bengal and its existing manufacturing base in Jharkhand, eastern regions is likely to emerge as an equally important cluster.

Low volume and fragmented industry

There are over 500 small, medium and large players in auto components in the organized sector along with 6,000 ancillary units. Most of these companies in India are family-owned businesses. The unorganized sector predominantly caters to the aftermarket. Manufacturers in this sector operate independently with little investment and on a small scale.

Low import dependence

Most components required by the Indian automobile industry are manufactured locally. Import dependence was estimated to the tune of 13.5 percent of the domestic demand for the year 2007. Imported automotive components include special steels and materials or high precision engineering components, such as gearboxes.

2.3 Competitive Structure

Leading manufacturers from across the globe have initiated steps for developing a vendor base in India by inviting their suppliers to set up manufacturing companies here. Leading automotive component companies such as Lear Corporation, Delphi, Visteon, Mando, ZF Steering, and Denso have a strong presence in India and cater to the OEM and the aftermarket. Some of the major domestic automotive components manufacturing groups in India include the TVS, Rane, Amalgamations, Kalyani, Sona, Rico, Minda, Amtek, among others. The two-wheeler market is the largest volume segment in India and automotive component companies in this segment have well-developed technology and quality systems in place. Many auto component companies apart from catering to the domestic demand also have strong export operations. It is estimated that 15 to 25 percent of the turnover of many large-sized Indian auto component manufacturer is accounted for by

exports. A significant trend in the last 2-3 years is the interest shown by vehicle manufacturers and global tier-I companies in procuring components from India.

The SME players in the auto components sector are formally organized under the auto component manufacturers association (ACMA). Many companies present in India, as in-house vendors of vehicle manufacturers, are not part of ACMA and are estimated at nearly 125 in number. A large number of auto component companies cater exclusively to the aftermarket and are unorganized in nature and these are estimated at 375.

The engine and transmission components account for about 50 percent of the component output in India. The engine components account for 31 percent of the total automotive component production output and transmission and steering components account for 19 percent of the output. All engine and transmission components like engine block, piston, valves, camshaft, crankshaft, gears, and casings are manufactured locally. Companies in India possess well-established foundries for forged and cast components and are globally competitive.

The quality consciousness of the industry matches the global standards. This is corroborated by the fact that eleven Indian companies in the automotive industry have received the coveted Deming Prize, which is the largest number outside Japan. The auto component suppliers are also embracing modern shop floor practices like 5-S, 7-W, Kaizen, Total Quality Management, 6-Sigma and Lean Manufacturing, as they graduate to match with world-class industry. A large number of firms in this industry are also recipients of quality certificates like ISO-9000, TS-16949, QS-9000, ISO-14001 and OHSAS-18001.

2.4 Automotive Clusters in India

Mumbai-Pune, Chennai-Bangalore, Delhi-National Capital Region (NCR) are the major automotive clusters in India and majority of the automotive component manufacturers are located in these clusters.

Table 2.1 Estimated Number of Major Supplier Manufacturing Units

Location	Major manufacturing units
Mumbai-Pune	185
Chennai-Bangalore	120
Delhi-NCR	250

Source: ACMA

As the presence of the major OEMs is in these major clusters, Indian automotive-component suppliers have mostly been based in three major clusters. The three clusters—around Delhi,

Mumbai-Pune and Bangalore-Chennai—are areas that have received high automotive investments in the past and where the prominent OE manufacturers are located. Infrastructure problems such as poor roads, connectivity and communication issues resulted in the formation of automotive clusters. There is an ongoing expansion in these regions, as the existing OEMs have increased production capacities and attracted new suppliers and their product mix and technology requirements have widened. Government has been proactive with plans to establish vehicle test facilities in each of these automotive clusters to quicken the homologation procedure.

Mumbai-Pune is the oldest and largest cluster with the presence of large OEMs such as Tata Motors, Fiat, General Motors India, Mahindra, and DaimlerChrysler in passenger cars; Tata Motors and Force Motors in commercial vehicles and Bajaj Auto and Kinetic in two-wheelers. To support these OEMs in the region, there are a number of large suppliers including Tata AutoComp, Bharat Forge, Bosch, Lear and a whole lot of smaller component manufacturers.

The cluster around the National Capital Region (NCR) of Delhi originated with Maruti establishing its base in Gurgaon and the Suzuki-owned company was subsequently instrumental in establishing a supplier base for its cars. With most of the OE companies being Japanese manufacturers or their collaborations, a high percentage of suppliers in the NCR cluster have Japanese origins, equity or technical inputs. The leading suppliers in this area are mostly Maruti affiliates like Asahi Glass, Krishna Maruti, Sona Koyo, Jai Bharat Maruti (JBM), Omaxe and Bharat Seats. Maruti's new investment plans have increased the investment in the region as existent as well as new suppliers have announced plans to expand and enter the region. Honda SIEL Motors, based near Delhi also draws from the suppliers' cluster in the region. While the NCR region is at a disadvantage because of its large distance from ports, the Government has responded well by setting up an Inland Container Depot (ICD) at Tughlakhabad to facilitate exports.

Ashok Leyland in the commercial vehicles space and a small Hindustan Motors facility in the passenger car sector primarily drove the auto component cluster in the Bangalore-Chennai sector. However, the early 1990s saw manufacturers like Ford, Hyundai and Toyota setting up manufacturing facilities there and a resultant inflow of suppliers into the area. Visteon, Delphi, and Bosch are some of the important suppliers in the cluster. The proximity to the Chennai port facilitates exports for the suppliers in the cluster. Toyota has established a supplier park in the Bidadi region near Bangalore. This also has its own transmission components unit under Toyota Kirloskar Auto components. Bangalore is also the Indian headquarters of India's largest automotive supplier Mico Bosch.

The last decade has seen increased investment in the automotive sector in new geographical areas. For example, the General Motors plant near Vadodara (Gujarat) and Sonalika Group's Car division in the Una district (Himachal Pradesh) has the potential to attract a number of automotive component suppliers in that region. Tata's Nano car manufacturing facility at Singur in West Bengal is likely to attract substantial investment for the auto component industry in the state.

2.5 Distribution Structure

2.5.1 Indian Auto Component Supply Chain Structure

The supply chain of the auto industry has completely changed over the years. Major OEM players are increasingly focusing on basic design and assembly operations as well as servicing the after-sales market and they prefer to deal with a smaller number of large suppliers. Consequently, the supply chain is morphing into sub-system integrators, component makers, and commodity players. The segregation is increasingly defined by “risk sharing,” which was earlier defined by only cost pressure. Tier-I suppliers (concentrating on system supply, module assembly and sub-supplier management) are taking increasing risk from major players, shifting the cost pressure to tier-II suppliers who concentrate only on the production of sub-components.

In the Asia-Pacific region, the growth of component manufacturers has taken a different route. Most of the Japanese producers follow a tight relationship with their suppliers (Independent or quasi-independent). The existence of the keiretsu system (business affiliation) in Japan greatly facilitated such an arrangement. But other manufacturers like Korean, Chinese and Indians give a lot of importance to price and quality while buying from a number of trusted suppliers. As a result of this, indigenous auto- component sectors are thriving in many Asian countries.

Figure 2.3 Indian Auto Component Supply Chain Structure

	Past	Present
OEM	R&D Purchasing Assembly	System Integration Testing Assembly Supplier Management
Tier-I Supplier	Component Manufacturing	System Supply R&D on system Module Assembly Sub Supplier Management
Tier-II Supplier		Sub Component Manufacturing

Source: SIAM

2.6 Current State of Transnationalisation

Out of the 500 companies who were sent the questionnaire for the study, 326 (65%) are exporters of auto components. Also, 192 companies (38%) have entered in to foreign collaboration. This indicates a high level of transnationalisation. However, the width and depth of transnationalisation may not be high in majority of the organizations.

2.7 Growth Drivers for the Auto Component Sector

The growth of the auto component industry is directly linked to the growth of the automobile industry since more than 50 percent sales are to the OEMs. However, in recent years, component export is becoming an important growth driver and it is expected to assume greater importance in future.

2.8 Export Scenario in the Auto Component Market

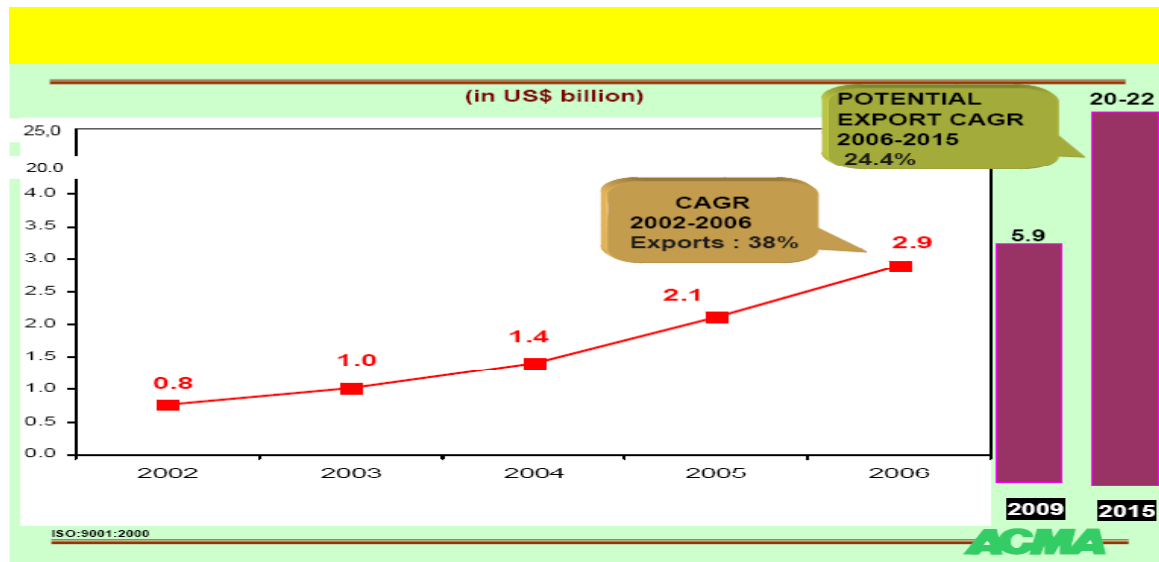
India exports a vast range of automotive chassis and components. The major component categories that have shown a healthy growth in exports are vehicle components and accessories, transmission shaft and cranks, drive axles, starter motors and generators, and bumpers and components.

The driving force behind India's growing automotive components exports in the past has been higher exports by Indian subsidiaries of global OEMs and tier-I manufacturers. Prominent among them is Ford India, which has made India its global hub for manufacturing Ikon kits. The company has also started procuring components and assemblies from China. Similarly, Hyundai Motor India has decided to make India its sourcing hub for its small car Santro. In line with this development, exports of replacement and service components have increased. Initially, a majority of component exports were to South Korea but with increasing exports of Santro, the share of components exports to Indonesia, Sri Lanka, and Turkey have also increased as the company has already started exporting its cars to countries such as Algeria, Sri Lanka, and Indonesia. Among tier- I companies, Delphi Automotive India, Visteon Automotive Systems and Visteon Powertrain Control Systems, FAG Bearings, Timken India, Keihin Fie, and Meritor HVS India have all increased their export revenues from their Indian operations.

Exports growth has outpaced the growth in production over the last 5-year period. Exports grew by a compound annual growth rate (CAGR) of 38 percent over the period 2002-06 and the potential is estimated to grow at a CAGR of 24.4 percent during the period 2006 to 2015. Of the total production of INR 48,000 Crores in 2005 approximately INR 6,000 Crores worth of components were embedded in vehicles that have been exported, reflecting the true potential of exports. Emerging trend of global companies procuring components from India is expected to drive the exports growth over the long term.

Figure 2.4 Auto Component Industry – Exports

(1US \$=INR 40 Rupees (Approx))



Source: ACMA

North America and Europe account for over 60 percent of the exports of auto components from India

The key destinations for components exports from India in 2005-06 were North America and Europe, which individually accounted for 31.1 percent and 30.3 percent. Asia and Africa accounted for 18.3 percent and 10.7 percent of exports respectively from India. It is expected that growth of exports to markets in Asia would grow at a faster pace as many companies are looking towards India as the manufacturing hub for auto components for the South Asia and South-east Asian markets.

2.8.1 Export Mechanism and Key Product Categories and Segments for Exports

The engine components segment is technology and capital intensive and is likely to be dominated by the existing major firms in the short to medium term. Engine technology is expected to move towards superior design (for optimal fuel consumption and lesser emission), thus access to such technologies will be limited to existing major firms. On the other hand, this is the most labour-intensive segment and holds promise for growth of exports. Starter and generator manufacturers form a major part of the electrical components segment. Given the engine's criticality in vehicle performance, these products are assembled mostly by the vehicle manufacturers. Besides the increasing popularity of electronic ignition systems, the increasing electronic content per vehicle has provided growth opportunities for companies in this segment. Many multinational companies are strengthening their position here, because of the opportunity to introduce new technology.

Among drive transmission and steering components, the steering systems are among the critical components of a four-wheeler. The capital and technology intensive nature of the segment acts as an entry barrier for companies in the unorganized segment. As power steering systems reduce driving effort considerably, these are being increasingly preferred by OEMs, which in turn is prompting manufacturers to shift their product mix towards such steering systems. Access to technology and localization of production for power steering components impacts the ability of local companies to withstand increasing competition and cost pressures from OEMs.

The demand for gearboxes is primarily linked to the demand for passenger cars. The gearbox segment is currently witnessing a tierization of the supply base. Since gearboxes require high precision engineering, and the establishment of a manufacturing unit calls for significant capital investments, quite a few companies in the passenger car segment rely on imports of knock down assemblies of gearboxes. In the clutch segment a few players, with technology, and ability to supply complete assemblies, being critically important, dominate the OEM market.

Axles are critical components of a vehicle, and the capability to design and offer products to meet exact engine specifications is a key success factor. Also, high capital requirements and technical know-how may act as an entry barrier in this segment, thus leading to the likely concentration of market among a few players. Although some of the OEMs procure complete assemblies, a large number of them still procure individual components, like housings, shafts and differentials from various vendors. However, over time, it is expected that OEMs will procure complete axle assemblies from one or two vendors rather than individual components like housing, shafts and differentials from various vendors.

The brake system has a high replacement value and is not very technology intensive. As a result, the companies in this segment continue to maintain a diversified customer base in both the replacement and OEM segments (apart from exports). In addition, in this segment, there is the threat of further tierization as the present tier-I suppliers (brake assembly suppliers) could be relegated to the tier-II position. Currently, brake assembly suppliers provide to and deal with the vehicle manufacturers directly. However, in the emerging structure, companies like Delphi have started outsourcing brake assemblies from their tier-I suppliers, integrating them with front-end suspension components, and then supplying whole units directly to OEMs.

In the equipment segment, the head light segment is perhaps the only one that is not directly related to automotive technology. Leading companies in this segment have initiated innovative measures to improve their responsiveness to OEM customers. The existing market leaders are expanding and upgrading their facilities to meet the needs of the new car manufacturers. The headlight segment also has considerable export potential. Currently, exports account for about a fifth of the total demand for headlights. For the replacement market, companies are likely to focus on distribution network, brand image, product portfolio and pricing policy.

2.8.2 Potential for exports in various categories

In 2006-07, automotive component exports were worth INR 11,200 Crores and the exports are expected to reach INR 84000 Crores in 2016. India is perceived to be very competitive in engine components and other related hard components. Components that can be exported from India are mainly engine and transmission products.

Auto component companies in India primarily supply various components and sub-systems to vehicle manufacturers abroad. Vehicle manufacturers take the responsibility for design and manufacture of engine and transmission systems. Indian auto component companies' work based on the drawings provided by the vehicle manufacturers and have acquired necessary skills for re-engineered products, processes and tools.

Auto component companies in India can export component sub systems of tier-II companies or components that are used directly in the production of these sub systems. India has the expertise in components that require skilled manpower to create the final product. Some of the products that fall under this category include machined gears, crankshaft, camshaft, and casing among others. India has a competitive edge in forging and casting. Foundries in India can process various metals like grey iron, steel, and aluminum. Seats, belts and other rubber products also offer potential for exports and India is on par with other low cost countries. Components that have a clear cost advantage in India compared to other countries are machined crankshaft, camshaft, gears, engine valves, piston and piston rings. Transmission components include clutch lever, clutch plates, syncro assembly that have significant machining needs can be exported from India. Small stamping components and other low volume products manufactured in India also have good market abroad.

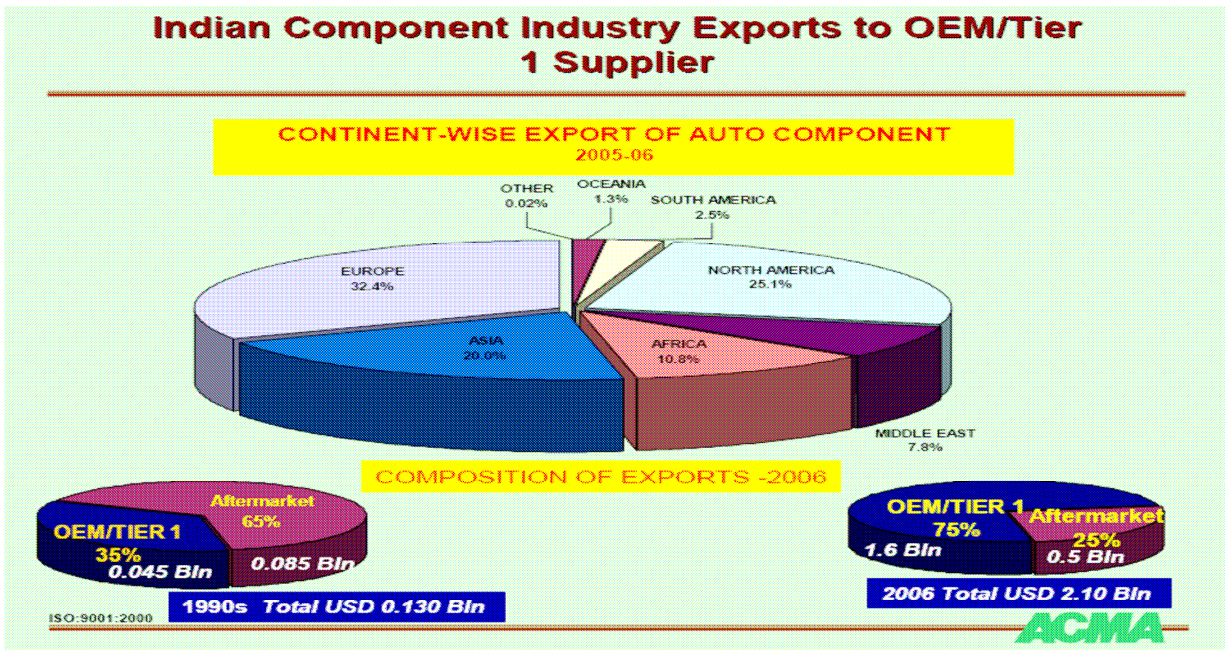
India is known for its software prowess and has considerable skill base in engineering services, which include legacy conversion, CAD drawings, embedded systems, chip design, value engineering among others. Software development includes creating programs for new product simulation and testing, end of life vehicle initiatives, automotive electronics and infotainment among others. Many MNCs such as Robert Bosch, and Delphi have started development centers in India to meet global demand for design, and research as well as domestic demand in India.

2.8.3 Key auto component export destinations from India

More than 60 percent of the exports of auto components are to USA and Europe, which constitute high AQL (Accepted Quality Level) countries. The global focus of the Indian auto component sector is expected to gain further momentum with a shift in the focus of Indian component companies from the replacement market to the OE (original equipment) market. The structure of the customer base in the global markets has also undergone a major change. In the last decade, the aftermarket share of

exports has come down from 65 percent to 25 percent in 2007. The share of the component exports to OEMs and tier-I suppliers is increasing gradually, ensuring long-term relationships and repeat orders on a regular basis. Geographically, there has been a shift in the markets with the more developed markets of USA and Europe accounting for a majority of exports. Of the total auto component exports to OEMs and tier-I Suppliers, America and Europe together accounts for 57.5 percent, Asia accounts for 20 percent and Africa accounts for 10.8 percent of the export earnings and other regions such as Oceania, etc. constitute the rest. The share of Asia in the global pie is gradually on the rise. This signifies that the Indian component industry has now reached a high degree of maturity in terms of quality and productivity and has also developed capabilities in the area of design and engineering, which are critical requirements for being a part of the global supply chain. The total exports to OEMs and tier-I suppliers in 2006 amounted to INR 8,400 Crores and the rest were supplied to tier-II/ tier-III suppliers.

Figure 2.5 Indian Component Industry Exports to OEM/ Tier-I Supplier



Source: ACMA

Table 2.2 Key Markets for Export of Auto Components from India

Continent	Major Countries	Product Segment					
		Engine Components	Drive Transmission & Steering Components	Suspension & Braking Components	Body Chassis Components	Electrical Components	Others
North-America	U.S.A, Mexico, Canada	Pistons, piston rings, engine valves, carburetors, diesel-based fuel delivery systems, engine components, regulators, oil coolers, cylinder liners, propeller shaft and components, air duct bellows, engine mounts, camshaft, valve tappet, silent block bush, investment castings, steel forgings, primary piston, freewheels, stud flange, exhaust components, water pumps, oil pumps, intake manifold and exhaust	Gears, wheels, steering systems, axles and clutches, transmission valves, transmission and gears, gear axle shaft, torsion bar, clutch shaft	Brakes, leaf springs, shock absorbers, break and clutch pedals	Headlights, dashboard instruments, door latches, off-road headlights	Starter motors, generators, spark plugs and distributors, electrical equipment, electronic components, instruments and gauges, electrical and machined components, alternator components	Plastic molded parts, sheet metal components, steel and brass bearing cages, rubber hoses and components
Europe	Italy, Germany, U.K, Denmark, Spain, Holland, Croatia, Serbia, Turkey, France, Uzbekistan, Sweden, Ireland, Slovenia, Russia, Austria, Poland	Piston rings and pins, cylinder heads, engine components, instrument clusters, oil coolers, cylinder liners, air duct bellows, horns, fuel filter neck, air springs, bumper, bracket, gusset plate, retainer kits, retinue plates, corner arms, off-road, water pumps, oil pumps, intake manifold and exhaust flanges	Open gears and gear boxes, transmission and differential gears, wheel balancing components, clutch, ring gears, clutch shaft, rims, gaskets, connecting rods, TV dampers, gaskets	Break and clutch pedals, shackle, propeller shaft and components, gear axle shaft, torsion bar, camshaft, valve tappet	Door latches, door hinges, headlights, dash panel	Electrical and machined components, alternator components, regulators, connectors, instruments and gauges	Rubber molded components, rubber hoses and components, steel and brass bearing cages, machined forgings, investment castings, steel forgings
Asia-Pacific	Middle-East, ASEAN, SAARC, UAE, Israel, Iran, Singapore, China, Taiwan	Piston rings and pins	Ring gears, clutch, open gears and gearboxes. brake drums, transmission and differential gears, and gaskets			Electrical and machined components switches, propeller shafts, and batteries	Seat components

Source: IDC analysis

A few examples of companies who are focused on exports

I M Gears

I M Gears, based in Chennai, started operations in 1995 has proactively followed an export policy, successfully marketing its products abroad. Exports constituted one-third of the total turnover of the company in 2007. The company exports majority of the products manufactured, namely electrical and machinery components to France, Poland, Italy, Mexico and China. The company spends close to 5% of the turnover on process R&D to meet global standards for its products and has ISO 14001 and TS 16049 compliances in place.

Electromags (Electromags Automotive Products Pvt. Ltd (EAPL))

Electromags, based in Chennai, was established in 1980 and was recently taken over by Bombay Burmah Trading Corporation Ltd, belonging to the Nusli Wadia Group. The company is trying to consolidate its market globally and is trying to align with leading global partners. The company is exporting its products such as alternator components in the aftermarket in the U.S and auto electrical components to OEMs and in the aftermarket in Europe. The company spends more than 5% of the turnover on R&D to meet global quality standards. The company follows the ISO 9000 and TS 16949 standards.

It is evident that the increased quality focus of companies tends to increase R&D expenditure by companies that in turn results in product acceptability in the global market.

2.9 Emergence of Indian Suppliers in the Global Market

Indian auto component manufacturing is gradually expanding capacities and automation levels in-line with the requirements of end users and introduction of new models and variants. This offers vehicle and component manufacturers various challenges to the manufacturing capabilities and economies of scale forcing the industry to maintain lean and efficient manufacturing systems. The Indian auto component manufacturers have made a mark in the domestic market and are establishing their presence in the global arena for increased growth. The Indian auto component industry is targeting a bigger share of the export market and is in the process of ramping up its manufacturing capabilities to meet the capacity and quality requirements. The sector is increasingly drawing global attention and is using a combination of global expansion, domestic consolidation and quality management to gain acceptance both at home and abroad.

The impressive growth of auto component exports is an example of the positive spin-offs of Foreign Direct Investment (FDI). The entry of major auto component firms has resulted in the domestic

industry upgrading its quality levels to international standards. The entry of Maruti changed the environment for the better, as Indian auto component makers were exposed to Japanese methods of production and some companies forged tie-ups with Japanese counter components. Margins remained high as many vendors to Maruti like Sona Steering Systems and Motherson Sumi enjoyed near monopoly in OE supplies. Economic liberalization has changed the entire scenario and the entry of global auto majors into India has forced Indian suppliers to invest in quality and improve quality standards. They embraced Japanese concepts such as Six Sigma, Total Quality Management (TQM), Total Productive Maintenance (TPM) and Toyota Production Systems in their operations. Today, a number of them have also secured various quality certifications and even the coveted Deming Awards and the Japan Quality Medal. Today, the quality movement in India's auto component sector has made it easier for Indian companies to penetrate the overseas markets. Also, by investing in quality, local component manufacturers have become part of the global sourcing systems of some of the international automotive companies who have put up manufacturing facilities in India.

2.10 India's Potential to become Epicenter of High-end R&D

The increasing use of High-end software in automobile design and R&D has made Indian auto majors leverage the country's software prowess and gain an edge over their European and American competitors.

Most are expanding their research and design services either organically or by acquisitions, which will enable them to launch newer models in the market quickly and efficiently in the coming years.

By June 2009, the \$6 billion Mahindra & Mahindra group (M&M) will open its new \$116 million (nearly 460 Crores) automobile design and development facility called Mahindra Research Valley (MRV) spread over 150 acres in Mahindra World City in Chennai. Primarily this R&D facility will cater to M&M's design needs and later may consider doing similar high-end work for other OEMs.

Tata Motors has six R&D Centres that span India, South Korea, Spain and the UK. In 2006, the Tatas acquired INCAT- now an arm of Tata Technologies- that conducts specialized R&D work for the Tata Group and others. Recently, Tata Motors bought a minority stake in an Italian design firm, Pininfarina, which has designed some landmark Ferraris.

Currently, India enjoys a reputation as provider of low-end research work that revolves around small cars. The current challenge is to change that perception. The country has had a reputation for low-end design work. Setting up of the Mahindra Research Valley will demonstrate India's capability to become the epicenter of engineering design and development for high-end work also.

3.0 Policy Environment for Auto Component Industry in India and Other Countries

3.1 Indian Policy Environment

Since the early 1990s, economic reforms have brought a radical change in the business environment in the country, making the economy more liberal and conducive to FDI and trade. Though the liberalization has been slow, it has been steady. India has drawn significant investments in areas such as the automotive sector. FDI up to 100% is allowed under the automatic route in all activities/sectors except in a few cases that require government approval from the Foreign Investment Promotion Board (FIPB). The FIPB also grants composite approvals involving foreign investment/foreign technical collaboration.

FDI is permitted under automatic route for setting up facilities under Special Economic Zones (SEZ) that qualify for approval through automatic route subject to sectoral norms and for setting up 100% export-oriented units. Acquisition of foreign technology is encouraged through foreign technology collaboration agreements. The induction of know-how through such agreements is allowed either through the automatic route or with prior approval from the Government. The terms of payment under foreign technology collaboration, which are eligible through the automatic route and by the government approval route, includes technical know how fees, payment for design and drawing, payment for engineering service and royalty. Payments for hiring of foreign technicians, deputation of Indian technicians abroad, and testing of indigenous raw material, products, indigenously developed technology in foreign countries are governed by separate Reserve Bank of India (RBI) regulations and are not covered by the foreign technology collaboration approval. Similarly, payments for imports of plant and machinery and raw material are also not covered by the foreign technology collaboration approval. For any of these, the RBI has to be contacted.

The Government has delegated powers to the RBI to allow payment for foreign technology collaboration by Indian companies under automatic route subject to the following limits:

1. Lump sum payments must not exceed US\$ 2 million (approx. INR 8 Crores)
2. Royalty payable must be limited to 5 percent for domestic sales and 8 percent for exports, without any restriction on the duration of the royalty payments. The royalty limits are net of taxes and are calculated according to standard conditions. Terms of payment qualifying for automatic route is irrespective of the extent of foreign equity in the Indian company

A foreign company planning to set up business operations in India has the following options:

- a) By incorporating a company under the Companies Act, 1956 through joint-ventures or wholly-owned subsidiaries

Foreign equity in such Indian companies can be up to 100 percent, depending on the requirements of the investor, subject to equity caps in respect of the area of activities under the FDI policy.

- b) As a foreign company through a liaison office/ representative office, project office or branch office.

Such offices can undertake activities permitted under the Foreign Exchange Management Regulations, 2000. For registration and incorporation, an application has to be filed with the Registrar of Companies. Once a company has been duly registered and incorporated as an Indian company, it is subject to Indian laws and regulations as applicable to other domestic Indian companies.

3.1.1 Tax Structure

India's tax structure includes income tax, customs duties, central value added tax (CENVAT), which has replaced excise duty, and service tax. Since April 1 2005, 22 states and 4 union territories have introduced value added tax (VAT) and more are expected to adopt this. Those that are yet to implement VAT continue with the sales tax regime. Businesses in these states have to contend with dealing with the coexistence of VAT and the sales tax and its consequences on their operations. Those states following VAT also levy entry tax and octroi. A customs tariff (basic rate) of 7.5 to 10 percent is currently levied on imports of auto components into the country.

3.1.2 Custom Duties Over The Years

Table 3.1 Custom Duties Over The Years

Year	Customs Tariff on Auto Components (%)
2001	35
2002	30
2003	25
2004	20
2005	15
2006	12.5
2007	7.5 to 10.0

Source: Ministry of Commerce and Trade

Comparatively, customs duty on raw materials is high, ranging from 5 to 35 percent. There was a lowering of the excise duty from 16 percent to 12 percent in the annual budget 2008.

3.1.3 Trade Policies

Since reforms began in the early 1990s, India has slowly and steadily opened its markets to foreign companies aligning itself closer to the World Trade Organisation (WTO) norms. Imports and exports are mostly decontrolled and foreign exchange is no longer limited to a paltry amount. The Government has been aggressively pursuing bilateral agreements with several countries, especially its neighbours, in the form of free trade agreements (FTAs), preferential trade agreements (PTAs) and comprehensive economic cooperation agreements (CECAs). For instance, it has signed a PTA with the Southern Common Market (MERCOSUR), Association of South East Asian Nations (ASEAN) and Afghanistan, and is negotiating one with Chile. It has signed a framework agreement for CECA with ASEAN.

India has also signed a framework agreement for a Free Trade Area with Thailand. Countries such as China, Philippines, Malaysia, Indonesia and even Taiwan are using Sri Lanka and Thailand, with whom India has trade agreements, as a conduit to dump products into India. This justifies the need to fool proof rules of origin mechanism while negotiating trade agreements with several countries, according to concerns expressed by Indian industrialists and bureaucrats.

From January 1 2006, the South Asian Free Trade Agreement became operational. Formed amongst Bangladesh, Bhutan, India, Maldives, Nepal, Pakistan and Sri Lanka, this agreement will give an opportunity to make large-scale investments in the region as well as improve the volume of trade. All the countries are deregulating tariff and tax structures to be in line with the ASEAN Free Trade Area (AFTA) Implementation. Under the AICO scheme, components manufactured in any ASEAN country are subject to a tariff ceiling of five percent if traded within ASEAN. Within the ASEAN bloc zero percent duties are expected in the auto sector by 2010 (Thailand, Indonesia, Philippines and Malaysia). China and Korea finalized partial auto deals with ASEAN. In addition, Australia, New Zealand, India, Japan and European Union (EU) are expected to finalise bilateral trade agreements with ASEAN markets before 2010.

3.1.4 Automotive Mission Plan

Background

This document draws an action plan to take the turnover of the automotive industry in India to INR 580,000 Crores by 2016 accounting for more than 10.0 percent of Gross Domestic Product (GDP) and providing additional employment to 2.50 Crore people by 2016. A special emphasis is laid on the small cars, Multi Utility Vehicles (MUVs) and Auto components. Measures suggested include setting up of a national auto institute, streamlining government/ educational research institutions to the needs of the industry, upgrading infrastructure, considering changes in duty structure, fiscal incentives for R&D, among others.

The necessity of this Mission Plan arises against the background of a newfound strength and resurgence in the Indian manufacturing sector. For most of the decade of the 1990s, post the economic deregulation in 1991, growth in the Indian economy has been led by growth in the service sector, a growth that has overshadowed that of the manufacturing sector. In the past few years, several industries in the Indian manufacturing sector have become internationally competitive and have acquired a new energy to grow. Several industries, including the automotive industry, genuinely believe that they can become world-beaters.

In developing a mission plan for India's automotive sector, answers to the following questions has been sought:

- (i) Where is the automotive sector in India today? What linkages does the automotive sector have with other facets of the India's economy?
- (ii) What do we want the automotive sector of India to look like in 2016? In other words, what is the potential of the automotive sector to grow along all segments of its value chain, and what can be the maximum positive impact on the stakeholders?
- (iii) How do we attain the vision? What policy interventions will facilitate the attainment of this potential?

Vision for the Future:

The opportunity landscape for the Indian auto industry would encompass the manufacture of vehicles and components for domestic sales, manufacture for exports (both vehicles and components), and the export of services in areas such as design, engineering, and back office operations. It is estimated that the total turnover of the automotive industry in India would be in the order of INR 4,88,000-5,16,000 Crores in 2016 (a substantial increase from the size of INR 136,000 Crores in 2006).

It is expected that in real terms, India would continue to enjoy its eminent position of being the largest tractor and three wheeler manufacturers and the second largest two wheeler manufacturer in the world. By 2016, India would emerge as the world's seventh largest car producer (as compared to the eleventh largest currently) and retain fourth largest position in the world truck-manufacturing sector. Further, by 2016, the automotive sector would double its contribution to the country's GDP from current levels of 5 percent to 10 percent. Its contribution to the manufacturing sector would rise to 30-35 percent from the current level of 17 percent. This is because the share of manufacturing in GDP is expected to go up to around 35 percent from current level of 17 percent by 2016.

Implementing AMP 2006-2016 would need an incremental investment in the order of INR 140,000 Crores to INR 160,000 Crores to come into the Indian auto industry over the next ten years (2006-2016). It is anticipated that the bulk of this investment will come from expansion of capacities by

existing manufacturers operating in India and remaining from global multinational corporations (MNCs) seeking to make India their manufacturing base. Competition for attracting investments in India would come from countries such as China and Thailand.

Currently the automotive industry employs 200,000 persons in vehicle manufacturing, 250,000 in component companies and 10 million at different levels of the value chain through backward and forward linkages. The expected growth in investments and output of India's automotive sector during the next 10 years will create further employment opportunities in the country. An additional 2.5 Crore jobs are likely to be created by way of both direct and indirect employment in automotive companies and in other components of the vehicle value chain such as servicing, repairs, sales and distribution chains.

Vision Statement:

Based on the above scenario, the Vision Statement for India's automotive sector will be as follows:

"To emerge as the destination of choice in Asia for the design and manufacture of automobiles and automotive components. The output of India's automotive sector will be INR 5,80,000 Crores, contributing to more than 10% of India's Gross Domestic Product and providing employment to 2.5 Crore persons additionally by 2016".

The Way Forward:

The future challenges for the Indian automobile industry in achieving the targets defined in the Automotive Mission Plan would primarily consist of developing a supply base in terms of technical and human capabilities, achieving economies of scale and lowering manufacturing costs, overcoming infrastructural bottlenecks, while at the same time stimulating domestic demand and exploiting export and international business opportunities.

Interventions envisaged are required at two levels—industry and the Government. The Automotive Mission Plan expects that the Government would play a key enabling role in facilitating infrastructure creation, promote the country's capabilities, create a favourable and predictable business environment, attract investments and promote R&D. The role of industry will primarily be in designing and manufacturing products of world-class quality standards, cost competitiveness, improving productivity of both labour and capital, achieving scale and R&D capabilities and showcasing India's products in potential markets. Attaining Vision 2016 for the automotive sector in India is a goal worth striving for the Government as well as the industry.

The implementation of the Vision 2016 calls for some decisive action on part of state and central Governments. The challenges for industry essentially call for a matching vision and action to attain global standards in operational efficiency. Given the commitment of the Government of India, and the fundamental competitiveness of the Indian automotive industry, achieving the targets defined in the Mission Plan is a double challenge and would be rewarding for all stakeholders.

3.1.5 Recent initiatives from the Government of India

The Finance Bill 2006 has given a tremendous boost to the automotive industry by reduction of the excise duty on the small motor vehicles, the reduction in the duty for raw material, which is now between 5 to 7.5 percent as compared to the previous level of 10 percent, and the thrust on infrastructure development.

(i) As a result of constant persuasion by the Department of Heavy Industry, some of the objectives like imposition of excise duty on body building activity of commercial vehicles, lower excise duty on small cars, extension of 150 percent weighted deduction on R&D expenditure to the automotive sector, increased budgetary allocation for R&D activities in the sector and moving towards a lower duty regime have been achieved and steps are being taken to further strengthen the capability of the sector. The list of select proposals in Union Budget 2008-2009 relevant for auto component industry is as below:

- ✓ Reduction in excise duty from 16% to 12% for transportation vehicles, chassis, small cars, two and three wheelers.
- ✓ Reduction in excise duty for hybrid cars from 24% to 14%.
- ✓ Removal of excise duty (from 8% to nil) for electric cars and specified parts of electric cars (from 16% to nil) on end use basis.
- ✓ Reduction of excise duty on tyres from 16% to 14%.
- ✓ Customs duty reduced from 10% to 5% on specified raw materials for tyre industry.
- ✓ 125% weighted deduction for outsourced R&D.

(ii) National Automotive Testing and R&D Infrastructure Project (NATRIP): The most critical intervention of the Government thus far in the automotive sector has come in the form of an ambitious project on setting up world-class automotive testing and R&D infrastructure in the country to deepen manufacturing, encourage localized R&D, boost exports, converge India's unparalleled strengths in IT and electronics with automotive engineering sectors to firmly place India in global automotive business. NATRIP aims at facilitating introduction of world-class automotive safety, emission and performance standards in India and also to ensure seamless integration of Indian automotive industry with the global industry. The project aims at addressing one of the most critical handicaps in the overall growth of automotive industry today, i.e. major shortfall of testing and pre-competitive common R&D infrastructure. National Automotive Testing and the R&D Infrastructure Project envisage setting up of the following facilities: -

- (a) A full-fledged testing, certification and homologation centre within the northern hub of automotive industry at Manesar in the State of Haryana,
- (b) A full-fledged testing, certification and homologation centre within the southern hub of automotive industry at a location near Chennai in the State of Tamil Nadu;

- (c) Up-gradation of existing testing, certification and homologation facilities at Automotive Research Association of India (ARAI), Pune and at Vehicle Research and Development Establishment (VRDE), Ahmednagar;
- (d) World-class proving grounds or testing tracks on around 4,000 acres of land at Pithampur in Madhya Pradesh;
- (e) National Centre for Testing of Tractors and Off-Road Vehicles together with national facility for accident data analysis and specialized driving training at Rae Bareilly in the State of Uttar Pradesh; and National Specialized Hill Area Driving Training Centre as also Regional In-Use Vehicle Management Centre at Dholchora (Silchar) in the State of Assam.

3.2 Government initiatives in select countries

THE ASEAN FREE TRADE AREA (AFTA)

Most of the South East Asian region is now a free trade area. Accounting for over 96 percent of all ASEAN trade, the first six signatories of the Common Effective Preferential Tariff scheme for the ASEAN Free Trade Area have reduced their tariffs on intra-regional trade to no more than five percent for almost all products in the Inclusion List or removed them altogether. The ASEAN Free Trade Area was established in January 1992 to eliminate tariff barriers among the South East Asian countries with a view to integrating the ASEAN economies into a single production base and creating a regional market of 50 Crore people. The agreement on the Common Effective Preferential Tariff (CEPT) Scheme for the ASEAN Free Trade Area requires that tariff rates levied on a wide range of products traded within the region is reduced to no more than five percent. Quantitative restrictions and other non-tariff barriers are to be eliminated.

3.2.1 Indonesia

The regional economic crisis of 1997 and 1998 forced Indonesia to liberalize its domestic market based on the International Monetary Fund (IMF) led restructuring and reforms program. The automotive policy in Indonesia was modified and revised during the process of liberalization of domestic market. The revised automotive policy of 1999 consists of the following:

- Withdrawal of incentives for local content usage
- Lower import tariffs for completely knocked down (CKD) and completely built unit (CBU) vehicle units
- Removal of restrictions on importing CBU vehicles

The policy liberalization changed the automotive industry and permitted local assemblers to import components from competitive suppliers outside the country. This enabled automotive components

suppliers to become efficient and competitive. The revised policy brought in competition from the imported vehicle segment creating a more competitive vehicle industry in Indonesia.

AFTA

Indonesia implemented the AFTA in 2002. Implementation of AFTA had a high impact on the Indonesian automobile industry. Manufacturers have been able to bring down their costs through the ASEAN Industrial Cooperation Scheme (AICO) scheme, in which traded automotive components within ASEAN are subjected to a maximum tax of 5.0 percent. The AICO was a prelude to the formation of the AFTA. The trading countries however, need to have at least 30 percent local interest or equity. Participating companies must also fulfill 40 percent local content requirement. Tariff rates for components have been reduced to 0-5 percent under the Common Effective Preferential Tariff (CEPT) agreement, an AFTA mechanism. Both these arrangements reduced the cost of production and have led to lower vehicle prices in Indonesia.

Import duties and luxury taxes

Based on the new automotive policy formulated in accordance with the WTO and the AFTA regulations, there are no restrictions on importing new automobiles and their components to Indonesia. Used automobiles and components are however, prohibited from being imported to the country.

Indonesia was one of the first ASEAN countries to liberalize its automotive components market. It had introduced the automotive policy in 1999 and implemented the ASEAN Free Trade Area (AFTA) in 2002. Market liberalization is expected to create a stronger automotive industry apart from increasing growth in the automotive component market. The 1999 policy deregulation had abolished incentives granted to vehicle assemblers for using locally manufactured components. No tax concessions are available for use of imported components based on the degree of local content achieved. Import tariffs have been reduced across the board for the completely knocked down (CKD) kits and other components.

The new tariffs for other components for vehicle assembly are a standard 15 percent. In addition to the 1999 policy, Indonesia is active in promoting trade among the ASEAN countries. It has been using the ASEAN Industrial Cooperation (AICO) scheme, in which traded automotive components within ASEAN are subjected to a tax ceiling of 5 percent. The trading countries however, need to have at least 30 percent local interest or equity. Indonesia advanced its AFTA compliance schedule from 2003 to 2002. Tariff rates for components imported from the ASEAN countries have been reduced to 0 to 5 percent under the Common Effective Preferential Tariff (CEPT) agreement, an AFTA mechanism.

Liberalization has increased competition in the OEM and aftermarket. Assemblers are not forced to use local content and are free to obtain cheaper components elsewhere. Accession of imported components from China, Taiwan, Thailand, and Malaysia is increasing and the aftermarket segment is becoming more attractive. The inefficient domestic manufacturers are facing attrition and a more competitive and efficient components industry is emerging in Indonesia.

3.2.2 Malaysia

The implementation of the AFTA in 2005 removed all non-tariff trade barriers in Malaysia. While high import duties remain, preferential treatment to national vehicle manufacturers has been withdrawn. In this scenario, international vehicle manufacturers will gain market share. These manufacturers have a higher percentage of imported components. As a result, the domestic component manufacturers will lose market share to imports. Increase in CBU imports will have a negative impact on component sales in Malaysia. Duties on imported components from the ASEAN region will be less than 5 percent. Consequently, the share of imported components in OE sales is expected to surge. Imports from Thailand are expected to grow substantially as a number of international companies have manufacturing facilities there. Due to the increased competition, national vehicle manufacturers may also import components internationally from more efficient suppliers. Already, the aftermarket is burdened with imported components from China.

In the wake of the market liberalization, automotive component manufacturers are diversifying into non-automotive related activities to reduce the impact of the intense competition expected. Automotive component manufacturers are taking the diversification path to reduce their exposure to the volatile automotive market. Increasing competition expected from market liberalization has encouraged components manufacturers to enter into other businesses. The automotive component manufacturers are also upgrading their technological capabilities to enhance their ability to compete with the global manufacturers. Malaysia has abolished its Mandatory Deleted List from January 1, 2004 to adhere to the AFTA and the WTO principles. Several component manufacturers have been aggressively pursuing other industries to avoid being negatively affected by the heightening competition from foreign imports and global manufacturers.

The earlier adoption of CEPT under AFTA obligation has brought import duty to between 0-5% for ASEAN made vehicles under the national auto policy.

National Automotive Trade Policy of Malaysia (NAPF)

To spur further growth of the Malaysian automotive sector NAPF has set six major objectives, as follows:

1. To promote a competitive and viable automotive sector, in particular national car manufacturers
2. To become a regional hub for manufacturing, assembly and distribution for automotive vehicles
3. To enhance value added and local capabilities in the automotive sector
4. To promote export-oriented Malaysian manufacturers as well as component and components vendors
5. To promote competitive and broad-based Bumiputera participation in vehicle manufacturing, distribution and importation as well as in component and components manufacturing

In order to support the objectives of the automotive sector, the following measures are being implemented

- ❑ Establishment of an Industrial Adjustment Fund
- ❑ Provision of incentives to component manufacturers
- ❑ Cooperation projects
- ❑ Support for the Global Supply Program
- ❑ Provision of training grants
- ❑ Provision of R&D grants
- ❑ Designating production centers for the automotive sector
- ❑ Ensuring standards conformity and technical compliance
- ❑ Extension of Technology Acquisition Fund
- ❑ Provision of market development grants
- ❑ Provision of customized incentives
- ❑ Amendments to Approved Permit (AP)
- ❑ To freeze issuance of franchise APs for import of new vehicle brands
- ❑ To discontinue franchise APs awarded for importation of 'tuned-up' vehicles, with effect from 1 January 2006
- ❑ To allow Bumiputera-controlled Public Limited Companies (PLCs) to apply directly for APs
- ❑ To limit the importation of used vehicles through Open APs to that between the ages of 1 to 5 years only

3.2.3 Thailand

The Thai Automotive Policy underlines the export expansion policy of the Thai automotive industry. In line with the export expansion plan, Thailand has signed FTAs with Australia, New Zealand and China in 2005, with India in 2006 and with Japan in 2007.

The Free Trade Area (FTA) agreement with Japan was perceived to be a threat for the automotive components industry in Thailand. Contrary to popular assessment that this agreement will reduce the demand for the locally manufactured components, it has enabled Thailand emerge as the manufacturing base for Japanese OEMs.

The automotive components market in Thailand has developed as a key competitor in the global automotive components industry. It now boasts of almost all global tier-I and tier-II component suppliers operating in its market. The Government support and vision to develop the automotive industry in Thailand as a regional manufacturing base seems to be paying off well. Thailand has complied with the WTO and the AFTA regulations by liberalizing its automotive market completely. In accordance to the WTO principles, the Government abolished the local content program in 2000, and has lowered its taxes and tariffs as per the AFTA requirements as early as 2002. The implementation of the AFTA opened up the Thai automotive components market to global participants, and this in turn led to the industry becoming more efficient and competitive. Many foreign multi-national automotive vehicles and components manufacturers have invested in the domestic market in Thailand and have transferred funds and technology into the industry. These factors have benefited the component manufacturing industry in Thailand in terms of having access to the latest manufacturing technology and the opportunity to supply to the global manufacturers.

Historically the development of Thai automotive industry has been based on import substitution policies. In the present scenario, the interest has shifted towards more liberalized policies to correspond with the current global trend. These include loosening tariff barriers, abolishing local content measures, promoting investments and exports, and also cooperating with international communities, such as ASEAN, APEC, and WTO. Trade liberalization through the agreements of AFTA (ASEAN Free Trade Area) has cut import tariffs to 0-5 percent since 2003 and as a result, been expanding the market for Thailand's car manufacturing industry.

Within the ASEAN region, Thailand remains the leading exporter of auto components to Japan, accounting for nearly half of all exports from ASEAN, followed by Indonesia and the Philippines, whose respective shares each account for almost a quarter of total exports.

India-Thailand FTA

India had signed a Framework Agreement for a Free Trade Area with Thailand and this has resulted in sizeable apprehensions as well as trade on both sides. Initially driven by an Early Harvest Scheme comprising 82 items, including a few automotive components such as lighting equipment, suspension and transmission components, these items have been moved on a tariff reduction in three blocks beginning March 1 2004 and ended on March 1 2006, ranging from 50 to 75 to 100% reduction in tariffs.

Under this agreement,

- ❑ Most of the components including engines are in the sensitive list
- ❑ Goods negotiation will continue for auto components
- ❑ Both sides are working on text agreement and plan to sign agreement in 2008.

AFTA/ CEPT Policy

- ❑ 80% import duty on goods to be eliminated by 2007
- ❑ All import duties to be eliminated by 2010
- ❑ Automotive products shall be eliminated in line with the framework

3.2.4 Vietnam

ASEAN Free Trade Area and Common Effective Preferential Tariff Impact

As a participant in the ASEAN Free Trade Area (AFTA) and Common Effective Preferential Tariff (CEPT) agreements, Vietnam can become a hub for auto components supply in the ASEAN region by utilizing its competitive advantages. Vietnam joined ASEAN in 1995 and has participated in AFTA since 1996. In 1998, it became a member of Asia-Pacific Economic Cooperation and gained WTO membership in 2007.

Vietnam currently provides 6 percent of the total auto components exports from ASEAN to Japan. Global Japanese components suppliers that have established low-cost operations for the purpose of exporting back to Japan produce most exported components. Consequently, local Vietnamese suppliers or state-owned enterprises are not currently exporting auto components to Japan.

Taxes

Taxes applicable to the automotive and auto components industry are designed to encourage exports and protect local production. This policy is supported by significant corporate tax incentives available to newly established companies, particularly to companies located in investment zones or operating in encouraged sectors. Automotive and auto components are not included in the list of encouraged investment sectors, but investment projects in the automotive industry may be entitled to tax incentives based on other criteria. Encouraged investment projects are also entitled to import

duty exemptions with regard to the import of fixed assets. Auto components imported from ASEAN countries into Vietnam or exported from Vietnam to other ASEAN countries are subject to an import duty of up to 5 percent if they satisfy ASEAN content requirements.

Import duty refunds are available for raw materials used for producing goods for export. An extension of import duty payment is also available to reduce working capital requirements. Beginning in 2007, import duties based on the CKD scheme have been completely removed. Import duties for disassembled components will apply.

Within seven years of accession to the WTO, import duties applicable to completely built units (CBUs) and components will be reduced. Import duties on CBUs could be reduced up to 50 percent. Under the WTO, incentives based on export ratios may be removed. New incentives based on other criteria would apply.

One of the positive impacts of Vietnam's WTO membership on foreign direct investment is:

Duty reductions: Import duties are considerably reduced for goods used as inputs for domestic production as well as private and Government consumption. In many cases, import tariff rates on inputs for producing exports and other goods such as machinery and equipment have been significantly reduced during the WTO negotiation process. Moreover, exporters are refunded import duties on inputs used for producing exports.

Vietnam is actually engaged in a multitude of trade covenants. Vietnam is a member of AFTA, the ASEAN-China Free Trade Association, and the ASEAN-Korea Free Trade Association and is in the process of negotiating free trade agreements with Japan, India, Australia and New Zealand.

3.2.5 Australia

The Australian automotive component market has already made inroads into the global arena. To continue the strong export performance requires the Government to support the development of new export markets. Currently, China is Australia's third largest trading partner and there is enormous potential for further growth. Merchandise exports to China doubled between 1999 and 2002, making it by far Australia's fastest growing major export market. The expected FTA between Australia and China is likely to further bind this relationship as improved access is secured through trade agreements.

The Chinese market presents a significant opportunity to Australia with its emergence as the third largest automotive vehicle market in the world and the pace of recent expansion is set to continue.

The Australian Automotive Industry in the Context of Trade Liberalisation

Global integration has led to rationalisation of production in Australia and increased trade and global mobility of production factors. The investment decisions have been based on increasing investment in growth markets and manufacturing of consumer driven products and investment in innovation. During the period 1988 to 2005, Australia has seen the abolition of quotas and local content requirements, termination of export assistance, passenger motor vehicle (PMV) tariff phased down to 10% and there was transitional assistance to facilitate adjustment to lower tariff. Since 2006 onwards, the PMV tariff has been reduced to 5% till 2010 and the structural adjustment assistance will be phased out by 2015.

Australia has the following Free Trade Agreements

- Australia has FTAs with New Zealand, Singapore, Thailand and the United States
- Currently FTA negotiations are on with China, ASEAN/ New Zealand and Malaysia
- Preliminary discussions are on with the Gulf Cooperation Council, Japan, Korea and Chile

3.2.6 Korea

Korea has signed the FTA with the U.S. and ASEAN in 2007. The FTA between the Republic of Korea and Singapore was signed in 2005. The FTA between the Republic of Korea and the member countries of the Association of the South East Asian Nations was signed in 2007. As a major auto and auto component exporter, Korea is on an all out offensive to negotiate FTAs and is now targeting Europe as well as ASEAN, South Africa and Australia.

SELECTED FEATURES OF SOUTH KOREA'S AUTOMOTIVE POLICY

WTO DDA (Doha Development Agenda) Negotiation

In case the WTO DDA comes to an agreement, significant tariff cut is expected for the automotive sector. For South Korea's auto industry, which is, export driven this will be a positive factor for future growth.

Remanufacturing Policy

Remanufacturing is defined as restoring the original function of a product that has been used through the process of dismantling, cleansing, repairing and reassembling.

This policy applies to automotive components, electric goods and appliances and related components, effective from December 2006. The Ministry of Industry, Commerce and Energy has specified which products and components will be relevant to this policy. This policy increased the demand for auto components in Korea.

Trade and Investment Policy

In South Korea, trade policy formulation and implementation is primarily the responsibility of the Ministry of Foreign Affairs and Trade (MOFAT). The Ministry of Commerce, Industry, and Energy (MOCIE) regulates imports and exports. The South Korean Government has brought in a paradigm shift in its trade policy and there has been an increasing willingness to negotiate regional FTAs and Preferential Trade Agreements (PTAs). The Asian financial crisis seems to be an important factor in altering South Korea's past opposition to preferential trade agreements.

3.2.7 China

The Chinese Government has identified the automotive sector as a priority industry. The Government introduced the Automotive Industry Development Policy to strengthen the sector's international competitiveness. The policy was aimed at introducing market competition to help strengthen domestic capabilities, with a focus on brand, quality and technology, rather than just price. The policy also encouraged local auto enterprises to draw on existing competitive advantages to target international markets.

China's Revised Automotive Policy

China's State Development and Reform Commission (SDRC) unveiled a revised automotive policy, which came into effect on June 2, 2004. The object of the revised version was to bring the automotive policy in line with China's World Trade Organization (WTO) membership commitments and to design the blueprint for the automotive industry's comprehensive development.

The revised automotive policy clearly suggests that the Government's systemic intervention was aimed at consolidating the industry through weeding out the inefficient auto manufacturers from the industry, preventing the industry from overheating investment and over capacity, and encouraging mergers and acquisitions in the industry. The revised policy also aimed to foster a united and open national auto market that is mainly dependent on private consumption. In addition to this, all local Governments are likely to be forbidden from taking discriminatory action on vehicles produced in other regions.

Recent Developments in Automotive Taxation in China

New Import Rules for Automotive Components

The General Administration of Customs (GAC) has announced a new set of import rules for automotive components and accessories for the assembly of complete vehicles. The new regulation as per Decree #125 seeks to impose the same tariff rates that are applicable for the import of "complete vehicle". This would include all the imported automotive components and accessories that are CKD or SKD. Except the automotive components that are treated as "complete vehicle", other

automotive components will continue to be eligible for a much lower tariff of between 13 percent and 17 percent.

The higher tariff rule would be extended to any imports of automotive components or accessories valued at 60 percent or more of the total price of a complete vehicle and the rule is effective from July 1, 2006.

The following forms of key component imports to assemble vehicles in China are expected to be treated as completed automobile imports:

- ❑ Engines and auto bodies
- ❑ Engines and any three or more of a combination of transmissions, driving axles, driven axles, chassis, steering systems, braking systems, and air conditioning systems.
- ❑ Auto bodies and any three or more of a combination of transmissions, driving axles, driven axles, chassis, steering systems, braking systems and air conditioning systems

Trade Policy Developments

Recent Developments in China's Trade Policy

China expects to engage in a great deal of trade negotiations and agreements. Tariff reductions and other trade distortion measures are rapidly getting eliminated with every successive trade policy development in China.

FTA between ASEAN and China

The Economic Cooperation Framework Agreement that came into existence in November 2002 laid the foundation for the establishment of a free trade area between China and the six original members of ASEAN by 2010 and between China and the less developed ASEAN members by 2015.

Implications of WTO on Chinese Automotive Industry

China's accession to the WTO toward the end of 2001 had resulted in widespread changes in the system of tariffs, regulations, and quotas in the country. Consequently, tariff rates constantly varied depending on the specific tariff codes with the sole aim of achieving the requirements of free trade stipulated under the WTO Agreement.

Tariffs, Quotas and Licenses

China is likely to undergo major policy changes on importing automotive products. Abolition of import licenses and quotas for all automobiles had come into effect on January 1 2005. The base level quota is expected to be INR 240,000 Crores and increase at a rate of 15 percent annually. Import tariff is slashed to 30 percent as a part of the WTO commitment. With the automatic import license

for automotive products in place, only those firms that have obtained the foreign auto manufacturer's authorization are qualified to import and sell imported automobiles.

3.2.8 Japan

Trends in the Japanese Automotive Components Segment

1. Changing automotive component procurement structure, increasing modularization, global components procurement strategy, and consolidation of the domestic industry are some key trends.
2. Growing cost pressure in the vehicle-manufacturing category is expected to result in lower purchase orders from the suppliers in the future and this is expected to have a negative impact on the future prospects of the Japanese automotive OE Suppliers.

Industry Policies

Automotive Trade Agreements

Japan has entered into a series of economic partnership agreements (EPAs) with Mexico, Thailand, Indonesia, the Philippines and Malaysia. The policy dialogues have been formulated for similar agreements with South Korea, India and ASEAN+3. All these economic partnerships are highly significant and hold great promise for the Japanese automotive industry. Interestingly, the recent EPAs have been targeted mostly at the emerging automotive markets of the world.

India

India easily is the second most attractive market for Japan in Asia after China. A strong ancillary and auto components manufacturing segment in India and the establishment of production facilities by the global automakers catering to both domestic as well as international markets have contributed to the growth.

3.3 Intra-APEC free-trade agreements

The range of preferential rules of origin found in 21 intra-APEC free-trade agreements. Its aim is to assist discussions within APEC on the scope of rationalising preferential rules of origin.

This is confined to headings 4011 (tyres), 7007 (safety glass), 7009 (mirrors), 8407 (engines), 8408 (diesel engines), 8409 (components of engines), 8512 (electrical lighting or signalling equipment), 8701 (tractors), 8702 (motor vehicles for more than ten persons), 8703 (passenger motor vehicles), 8704 (goods vehicles), 8705 (special purpose vehicles), 8706 (chassis fitted with engines), 8707 (bodies) and 8708 (components and accessories). A summary of the rules considered is presented on next page:

Agreement	Abbreviation	Entry into force
Australia New Zealand Closer Economic Relations Trade Agreement	AUS–NZL	1 January 1983
Australia–United States Free Trade Agreement	AUS–USA	1 January 2005
Chile–Korea Free Trade Agreement	CHL–KOR	1 April 2004
Chile–United States Free Trade Agreement	CHL–USA	1 January 2004
Japan–Brunei Economic Partnership Agreement	JPN–BRN	Not yet in force
Japan–Chile Economic Partnership Agreement	JPN–CHL	Not yet in force
Japan–Malaysia Economic Partnership Agreement	JPN–MAL	13 July 2006
Japan–Mexico Economic Partnership Agreement	JPN–MEX	1 April 2005
Japan–Philippines Economic Partnership Agreement	JPN–PHL	Not yet in force
Japan–Singapore Economic Partnership Agreement	JPN–SGP	30 November 2002
Japan–Thailand Economic Partnership Agreement	JPN–THA	Not yet in force
Korea–United States Free Trade Agreement	KOR–USA	Not yet in force
Korea–Singapore Free Trade Agreement	KOR–SGP	2 March 2006
Mexico–Chile Free Trade Agreement	MEX–CHL	1 August 1999
New Zealand and Thailand Closer Economic Partnership	NZL–THA	1 July 2005
North American Free Trade Agreement	NAFTA	1 January 1994
Peru–United States Free Trade Agreement	USA–PER	Not yet in force
Thailand–Australia Free Trade Agreement	AUS–THA	1 January 2005
Trans-Pacific Strategic Economic Partnership Agreement	P–4	8 November 2006
United States–Singapore Free Trade Agreement	USA–SGP	1 January 2004

3.4 MERCOSUR – India Preferential Trade Agreement

The PTA was signed between India and MERCOSUR in 2004

Implications for the Indian Auto Components Industry:

The auto components industry in MERCOSUR enjoys significant economies of scale in comparison to India. Both the imports and exports of components are significant in MERCOSUR vis-à-vis India. The component market in MERCOSUR is mainly Brazil and Argentina. The auto component industry of Brazil is three times that of India and that of Argentina is marginally less than India.

Global tier-I suppliers have followed their OEMs into Brazil and have set up significant capacities. The Brazilian auto component industry is very competitive but is not profitable at the moment and most local tier-II/ tier-III manufacturers are getting out of the business. Brazil imports stamping components, engines, gearboxes and other sub-assembly (e.g. steering column). Brazil is a highly

protected market and is expected to remain so. The Argentina auto component industry lacks economies of scale but component manufacturing is profitable. Imports account for 50 percent of the turnover of the component industry. Argentina imports electrical motors and systems, differentials, transmission systems, body components and interiors. Argentina is competitive in stampings, seats, glass, plastics, panels and tyres where logistics cost is high and natural protection is thus ensured. Argentina is a highly protected market and is expected to remain so.

Importing components by OEMs in MERCOSUR is mainly a strategic issue.

India – EU FTA

- The EU expected to complete elimination of duties on all industrial goods including auto sector.
- The India-EU summit agreed to finalize a trade deal by 2008 end.

Table 3.2 Comparison of Trade Dynamics in Select Asian Countries

	India	China	Thailand	Indonesia
Trade Structure	Component sector is growing. Strong patent regulation is encouraging manufacturers to increase production facilities including supply.	Imports more than exports. Specializing in basic auto components but imports engine components. Technology absorption is given importance through JVs and follow up is made for component sector development and export of that. Lack of R&D and designing limits the export growth. Patent issues need to be addressed.	Strong government support of domestic auto component sector. Exports mainly to Japan, Australia and ASEAN countries. FTA with Australia, India and AFTA are helping Thailand to increase exports. Components are getting exported to other ASEAN countries also.	Specializing in basic auto component sector. Export opportunity of CVS and vans are increasing within ASEAN. Imports components from Thailand and Japan.
Product Specialization	Component industry is being developed and system and sub system suppliers are increasingly into it due to country's capability in R&D.	China is specializing in basic component sector. Product development progress has limitation and may face competition.	Currently focusing on gaps in component supply chain and will develop those missing links to have robust component sectors	Has strength in components required for this segment.
Tax Structure	High corporate income tax and import duties on CBUs. Differentiated excise and sales tax on cars and other vehicles. Higher import duties on vehicles.	Lower corporate income tax for JVs to attract foreign players. Import duties are lower than India. Differentiated duties for vehicles and components.	Import tariff on CBU is high. No significant reduction of duties on vehicles in last 5 years. Differentiated import duties and excise taxes for different kind of vehicles	Range of excise duties are quite long implying low for some vehicles and high for other. Different import duties for cars, CVs and bikes.

Source: Automotive Associations in Asia Pacific

4.0 Study Findings

4.1 Industry Trends and Forecasts

4.1.1 Global Overview

The global auto component industry is expected to touch INR 7,000,000 Crore by 2015, of which around 40 percent (INR 280,000 Crore) is expected to come from low cost countries including India.

4.1.2 Global Market Dynamics

The world's leading automotive and auto component manufacturers continue to invest in production facilities in emerging markets in order to reduce production costs. These emerging markets include Latin America, China, Malaysia and other markets in South East Asia. The world automotive industry, in its early stages of development, was concentrated mainly in developed countries like U.S., Japan, etc. As the automobile industry became more and more standardized, the production base of most of large auto companies is shifting from the developed countries to developing countries. Standardization makes production more profitable in developing countries due to low cost of labour. That is why countries like India, Thailand, and China today are the main production bases for many multinational automobile companies.

4.1.3 Dynamics of International Trade

The dynamics of international trade in automotive sector has attracted the attention of economists and policy makers to formulate trade strategy. Automotive trade has been influenced both by liberalization as well as protectionism.

Table 4.1 International Trade of Major Auto Component Producing Countries

(Value in '000 Crores)

Country	Exports			Imports		
	1995	2000	2005	1995	2000	2005
France	70.0	78.4	115.2	47.2	54.0	99.2
Germany	119.6	142.0	293.2	63.2	90.4	188.0
Italy	45.6	50.8	94.0	22.4	29.2	46.8
Japan	160.8	140.8	191.6	12.4	18.4	34.0
Korea	4.4	10.4	38.8	13.2	11.2	20.0

Source: WITS Database

Exports of auto components from countries such as Japan, Korea and Germany are gradually increasing in comparison to the exports from U.S.A. China and Thailand have emerged as major competitors to India in the global exports market.

Table 4.2 International Trade of Major Asian Auto Component Producing Countries (in Crores)

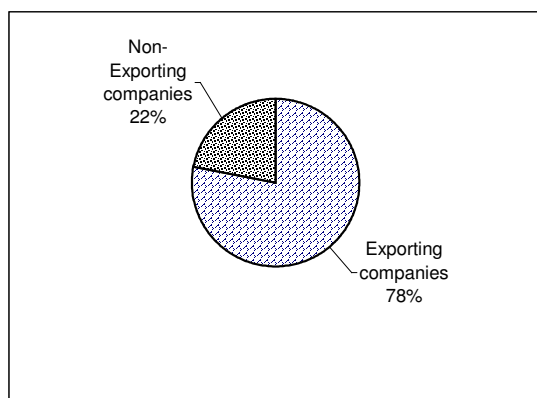
Country	Exports		Imports	
	2000	2004	2000	2004
China	12172.0	3876.8	1791.6	6023.2
India	302.8	641.6	298.4	644.0
Thailand	534.0	1245.2	1100.0	2036.8
Indonesia	200.4	422.4	986.0	1186.4

Source: WITS Database

4.2 Growth Trends in the Auto Component Sector

India exports a vast range of automotive chassis and components. The major component categories that have shown a healthy growth in exports are vehicle components and accessories, transmission shaft and cranks, drive axles, starter motors, generators, and bumpers. The automotive mission plan document has set a target of INR 1,00,000 Crores by 2016 for export of auto components. India's share in the international exports of auto components is comparable to Indonesia, Malaysia and Thailand, but lower than most of the other major players. However, in terms of exports of components of two-wheelers, India's shares are lower than even that of Indonesia and Thailand.

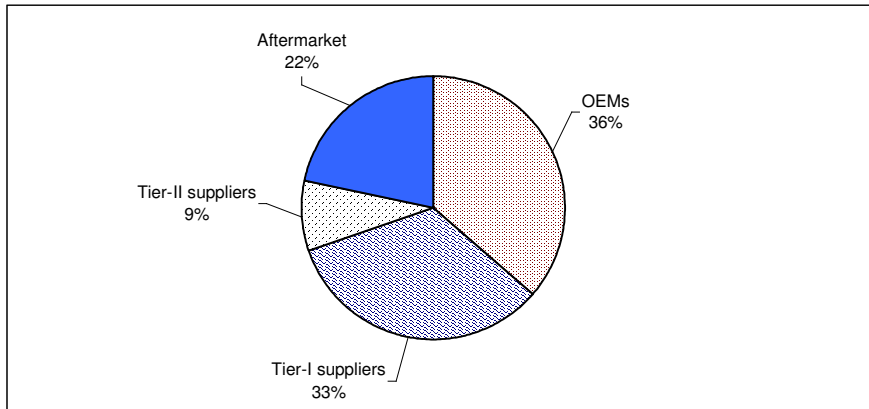
Figure 4.1 Auto Component Market: Percentage of Indian SME Auto Component Companies Exporting the Components



Source: IDC Study Analysis N=82

One of the major findings of the study was that out of the 82 companies, 78% of the companies were exporting their products to different destinations across the globe.

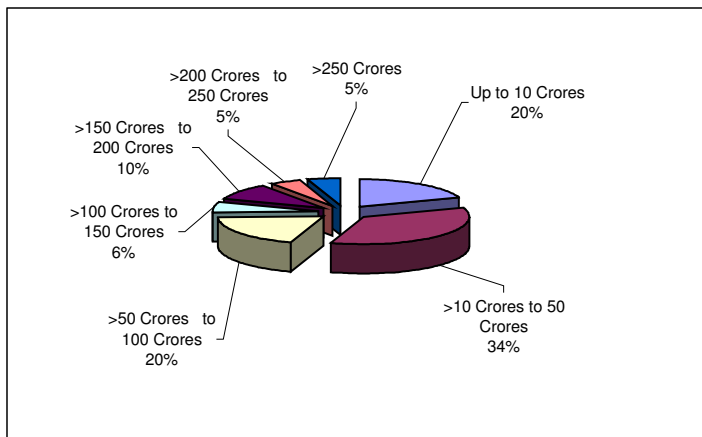
Figure 4.2 Auto Component Market: Customer Profile of Indian SME Auto Component Companies selected for the study, 2007



Source: IDC Study Analysis N=82

The customer profile of the companies exporting the products to various destinations shows that OEMs constitute 36 percent of the customers, tier-I suppliers constitute 33 percent and tier-II suppliers constitute 9 percent of the customers. The aftermarket comprises only 22 percent. This shows that the aftermarket share of exports is shrinking in the global market, which was as high as 80 percent in the last decade.

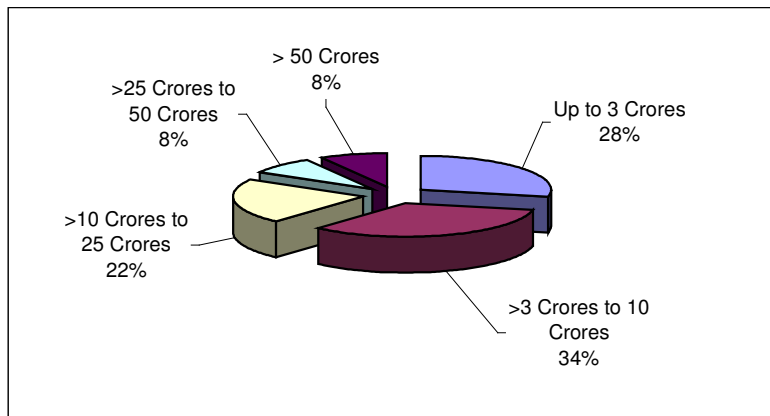
Figure 4.3 Auto Component Market: Domestic Sales Turnover of Companies Selected for the Study (India), 2007



Source: IDC Study Analysis N=82

The domestic sales turnover of the companies selected for the study shows that 74 percent of the companies are in the range of less than or equal to INR 100 Crores.

Figure 4.4 Auto Component Market: Exports Turnover of Companies Selected for the Study (India), 2007



Source: IDC Study Analysis N=64

The export turnover of the companies selected for the study shows that 38 percent of the companies have export turnovers of more than INR 10 Crores.

4.3 Current status of Transnationalisation among the SME auto component companies

4.3.1 Current level of transnationalisation

Out of 82 companies that responded for the study, 64 companies have already trans-nationalized through exports, Joint Ventures and Technical collaborations”

Table 4.3 Current Methods of Transnationalisation among Indian SME Auto Component Manufacturers Selected for the Study

Particulars	No. of companies
Exports only	53
Exports & Technology collaboration	5
Exports & Joint venture outside India	3
Exports & Contract manufacturing	3
Total	64

Source: IDC Analysis N=82

4.4 Learnings from Past Efforts to Transnationalise

A number of auto component companies have not been able to transnationalise due to different reasons. Some of them are listed below:

Poor infrastructure:

Some of the auto component manufacturers failed in transnationalisation through JV because the space available with them was limited and they could not match with the expectation of the prospective JV partner in acquiring additional area because of exorbitant prices prevalent in the industrial areas. The prospective JV partners carry a poor impression of small manufacturers located in industrial areas which are unclean, have poor sewerage, bad roads and unreliable power supply. Congested ports are also impacting export competitiveness of small and medium manufacturers. Reliable Autotech, Nashik could not get into JV with a German company because they were not impressed with the infrastructure of the company and also the general basic infrastructure. M K Auto Components India Limited of Chennai had a similar experience.

Inability to match the prices and quality standards with the competing suppliers:

A number of small auto component companies located in different clusters across the country have not been able to bag export orders in spite of sending samples on many occasions because their products were priced higher and they could not match the prices of suppliers from other countries. Sterling Industries, Nashik is has suffered from this in past. This scenario emerges from low-end technology adoption, higher input prices, rapidly increasing minimum wages in addition to the appreciation of the Rupee.

The quality of material used by small suppliers is often not up to the mark. Many manufacturers have lost export orders because the samples did not meet the quality standards of the buyers. If the quality standards are improved to match with buyers' standards, it gets rejected on price grounds. Sterling Industries of Nashik faced this problem while trying to bag an order for suspension components and U-bolts from German buyers. Small manufacturers have poor production efficiency and they have not deployed machinery for precision manufacturing.

Lack of level playing field

Creation of SEZ and its benefits to select few

The small players located outside SEZ fail to avail of the tax benefits. These players have neither the necessary resources nor can they move to an SEZ. This limitation is eroding their competitiveness due to an anomaly in policy guidelines, which does not appreciate the limitations of small players. A number of small auto component manufacturers, like M K Auto Components India Limited, Chennai, have seen themselves getting pushed out of the level playing field even in India.

Scale of operation

The logistics cost of export becomes prohibitively high for small manufacturers, making them less competitive or their export non-profitable. Under such circumstances, small manufacturers have to be content with supplying to an export house in India, who in turn exports the products abroad. This is a challenge for almost all small suppliers.

The scale of operation of emerging enterprises does not allow them to even import raw material from low cost countries and they have to bear the brunt of higher raw material prices in Indian market.

Lack of awareness about foreign markets customers and vice-versa

Many small manufacturers fail to transnationalise because lack of awareness about the customer base and their need. These players do not have the resources for collecting market intelligence on foreign market and customers. Some companies do not have information on the existing market scenario. Some companies have spent substantial time on approaching a company for forming a JV, only to find that one of their subsidiaries is already having a JV with another company in India for the same range of products.

Product liability

For many small and medium companies, it is very costly if the product is rejected in the global market. This is one of the reasons why companies are hesitant towards entering the export market and concentrate on the domestic market where it is easier to handle rejections, etc. Even delivery schedules and payments are cumbersome and lengthy in global markets and companies are jittery about banking on exports.

Arbitration

One of the necessary clauses of partnership with a foreign company is the arbitration clause. The lack of faith of foreign partner in an Indian arbitration center and fear of arbitration in the partner company's home country has inhibited JVs.

4.5 Future focus of transnationalisation, methods, markets and strengths

4.5.1 SME focus for future methods of transnationalisation

Out of 82 companies, 77 have indicated their willingness to transnationalise. The companies have indicated multiple routes to transnationalise, the two popular ones being joint venture outside India and exports. Many companies are considering contract manufacturing and technology collaboration for transnationalisation. Experts are of the view that Russia and Eastern Europe offers substantial opportunities in contract manufacturing. Some of them are planning to undertake joint R&D with a foreign partner.

However, companies with experience of forming joint ventures with foreign companies emphasized the necessity of having clarity related to the objectives for which the joint venture is being sought by the organizations. The objective of going for a JV should be crystal clear—whether it is for technology collaboration, for acquiring customers abroad or for financial assistance. Indian companies should also have the clarity on the terms and conditions of the JV. The strength of the joint venture partner and the willingness of customers to buy the final product coming out of the JV also need to be analyzed, opined industry representatives.

Table 4.5 Future Focus for Transnationalisation among Indian SME Auto Component Manufacturers selected for the study

Profile	No. of companies
Setting up of Joint Ventures outside India	23
Product exports	22
Contract manufacturing	15
Technology collaboration	13
Joint R&D with a foreign partner	4

Source: IDC Analysis N=82

4.5.2 Potential Markets for Transnationalisation

The discussions with the SME auto component manufacturers show that the following markets have significant potential for transnationalisation.

Table 4.6 Collaboration with Auto Components/ OEMs for Joint Ventures/ Technology Collaborations/ Contract Manufacturing

Continent	Major Countries	Mode of Transnationalisation	Trend
North-America	U.S.A	Technical Collaboration, Techno-Commercial	Increasing
Europe	Spain, Sweden, Germany	Technical, Financial	Increasing
Asia-Pacific	Japan, Korea	Technical, JV	Increasing

India offers certain competitive advantage for different geographies, which also differ from market to market. The preferred methods for transnationalisation that vary among markets depending upon the product category are listed in the next table.

Table 4.7 Product and market specific transnationalisation method

The product specific opportunities and our strengths are summarized in the table below:

Particulars	Engine Components	Drive Transmission & Steering Components	Suspension & Braking Components	Body Chassis Components	Electrical Components	Others
Competitive Advantage	<ul style="list-style-type: none"> • Low labour costs • Overall cost advantage • Competitive price • Products are preferred in U.S and Europe by OEMs 	<ul style="list-style-type: none"> • Access to technology • Local production • Skills • Ability to supply complete assemblies • Design capabilities • Competitive price 	<ul style="list-style-type: none"> • Skilled manpower • Quality • Increased outsourcing to low cost 	<ul style="list-style-type: none"> • Skilled manpower • Quality 	<ul style="list-style-type: none"> • High volumes • Low labour costs 	<ul style="list-style-type: none"> • High volumes • Low labour costs
Target Markets	<ul style="list-style-type: none"> • U.S., Mexico • Europe 	<ul style="list-style-type: none"> • U.S • Europe, Asia-Pacific 	<ul style="list-style-type: none"> • U.S and Europe 	<ul style="list-style-type: none"> • U.S and Europe 	<ul style="list-style-type: none"> • U.S • Europe, Asia-Pacific 	<ul style="list-style-type: none"> • U.S and Europe
Preferred Mode of Transnationalisation	<ul style="list-style-type: none"> • Exports • JV • Technology collaboration 	<ul style="list-style-type: none"> • Exports • JV • Technology collaboration 	<ul style="list-style-type: none"> • Exports • Technology collaboration 	<ul style="list-style-type: none"> • Exports • Technology collaboration 	<ul style="list-style-type: none"> • Exports 	<ul style="list-style-type: none"> • Exports
Support Measures and Incentives required to enable companies to transnationalise	<ul style="list-style-type: none"> • Reduce the tax on exports or modify the tax structure for exports • Finance at low interest rates 	<ul style="list-style-type: none"> • DGFT slashing, removing the excise ceiling and capital gains concession • Finance at low interest rates 	<ul style="list-style-type: none"> • DGFT slashing, removing the excise ceiling and capital gains concessions 	<ul style="list-style-type: none"> • DGFT slashing, removing the excise ceiling and capital gains concessions 	<ul style="list-style-type: none"> • Reduce the tax on exports or modify the tax structure for exports 	

4.6 International acquisitions by Indian suppliers

Supported by the strong domestic market, a number of large Indian companies are now in a position to tap the export markets. While the pioneers in the exports push were suppliers like Bharat Forge, Sundaram Fasteners and Amtek Auto, the trickle is fast gaining in strength and volumes. A number of suppliers are taking the acquisition route in order to expand internationally. Indian suppliers find a number of advantages in taking over foreign companies.

- ❑ International suppliers give access to global clients, which are difficult to bag otherwise. Bharat Forge benefited from the acquisitions of CDP Aluminiumtechnik and CDP Forge by acquiring a client list including BMW, MAN and DaimlerChrysler.
- ❑ An international acquisition gives an offshore manufacturing facility to the Indian manufacturer. Bharat Forge's acquisition strategy has focused on having production facilities in all its major markets.
- ❑ Indian manufacturers prefer to acquire companies internationally which are not doing well financially. Loss making operations often come at a lower price than they would otherwise cost. Good management can later turn them around.
- ❑ Offshore manufacturing facilities can often be used for high-end manufacturing while low-end components can be supplied from the Indian center. It helps retain customers at different levels of value chain.
- ❑ Buying an international supplier would be a strategic move in cases when the acquisition brings expertise and significant market share for some specific components. For example, Amtek's acquisition of Zelter gives the Indian company a strong presence in turbocharger housings.

Table 4.8 Some recent International acquisitions by Indian Auto Component Manufacturers

Year	Acquirer	Target	Target's Country	Agreement Value	Remarks
2006	Apollo Tyres	Dunlop South Africa	South Africa	INR 250 Crores	Gives Apollo tyres access to the African and European Markets
2006	Clutch Auto	Clutch related assets of Pioneer	USA	Not disclosed	Gives access to the north and Latin American Markets
2006	Mahindra Systems and Automotive Technologies	Stokes Forgings	UK	Not disclosed	Gives M&M access to a number of European clients in the passenger car segment
2006	Bharat Forge	FAW Corporation	China	Not disclosed	52 percent JV
2006	Amttek Auto	Zelter GmBH,	Germany	Not disclosed	-
2007	Endurance Technologies	Fondalmec SpA	Italy	Not disclosed	Fondalmec is high-pressure die-casting and machining company
2007	Sakthi Auto Component Ltd	Internet Europe	Germany	Rs. 533 Crores	-
2007	Systech (Mahindra & Mahindra)	Stokes Group Ltd	United Kingdom	NA	Acquired a 98.6 percent stake from stockholders, is the largest automotive forgings company in the UK
2007	Mahindra & Mahindra	Jeco Holding AG	Germany	Rs 830 Crores	Acquired 67.9 percent stake in the forging company

Source: Company websites

4.7 Performance on Transnationalisation efforts of Auto Component Companies in China

4.7.1 Factors supporting transnationalisation

4.7.1.1 Preferential Government Policies

The Chinese Government has led investment in the manufacturing sector by giving preferential loans to targeted industries. In recent years, the Government has promoted growth in the value-added manufacturing industries such as electronics and automotive components. The Chinese Government is providing major stimulus to the automotive components segment as it recognizes its export

potential. Most of the policies are towards export promotion and the opportunities created in the process are enormous for the global suppliers to cash in. If these plans fructify, the Chinese automotive components segment can really be a force to reckon within the global suppliers game plan.

4.7.1.2 Overseas Investments by Auto Component Companies

Chinese auto component manufacturers are acquiring companies in the U.S.A and Europe to plug gaps in technology, markets and branding. In the last decade, Chinese companies were not allowed to acquire global businesses nor export products. The auto component companies responded by developing high-quality products by improving their processes, HR policies, obsolete technology and imported high precision equipment. They also improved their overall talent pool. This led to the acquisition of companies in different parts of the globe and also sole ownership of companies in overseas markets selling to global giants like Ford and GM. Chinese companies have also established strategic alliances with leading auto component companies such as Delphi and Bosch.

Example: Lu Guanqiu

Lu Guanqiu has established 30 companies in 8 countries including U.S.A, U.K, Germany, Canada and Australia. The company has sole ownership or control over 18 of these companies. The company sells products to General Motors, Ford and has established alliances with other auto component companies abroad.

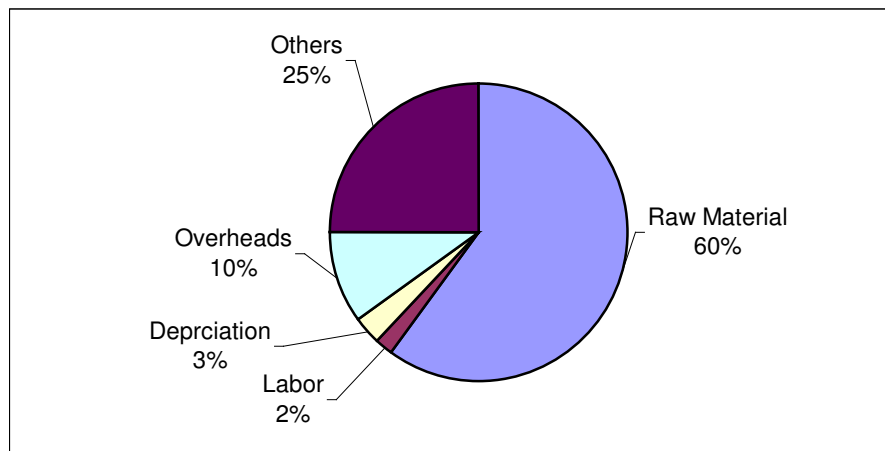
Lu Guanqiu aims to become a company that operates on a multi-national basis, using the most advanced technology and playing in key world markets. The company has acquired Schiller, Universal Automotive Industries and Rockford Powertrain among other companies, as these companies have access to markets, technology, and brands. These companies were affected by rising labour costs, where Lu Guanqiu had significant advantages. By combining with these companies, Lu Guanqiu brought down the costs and improved overall efficiency, thus penetrating companies such as General Motors and Ford.

4.7.1.3 Competitive Labour Costs

Many outside China express interest or concern with China's labour costs, which are assumed to be China's key competitive advantage in manufacturing. Unquestionably, the U.S. dollar rate of Chinese wages and salaries is extremely low. Even a Chinese currency rate appreciation of 25-40 percent against the U.S. dollar, as sought by some U.S. industries and Members of Congress, would do little to equalize them with equivalent U.S. wages and salaries. China's cost is 10 percent cheaper than Taiwan's and is similar to India's. This assumes significance given an average operating profit margin of less than 10 percent in the industry.

For components like hand-sewn seat covers, where labour accounts for about 45% of the total cost, China's advantage is likely to remain significant. The production of certain components, such as car radios, has already shifted almost entirely from North America to China and others will probably follow over time. Projections made by China Automobile Industry Association when responding to the blueprint for China's automobile development in the 11th Five-Year Program (2006-2010) shows a total automobile sector export value of INR 200,000 Crores in 2010. The majority of this would be for components, with probably a third in finished automobile exports.

Figure 4.5 China Auto Component Cost Structure, 2004



Source: Report available on website

4.7.1.4 Improving Quality of Components

The technology gap between China and other countries producing quality products is fast narrowing. Chinese auto components are expected to catch up with Korean Components in 3 years time. Some auto component companies in China have products that are competitive in the world market. One of the best examples is Fuyao Glass, which is based in China, but now exports to the top OEMs around the world. Fuyao Glass exports to the U.S, and to Europe. The difference of technology between what they can do and what a Korean manufacturer can do is minimal.

There is increasing Chinese impact on the U.S automotive components industry in recent years. China is a major supplier of components to the U.S, and the only one (if the European Union is counted as a single entity), whose components exports are not linked to the export of vehicles. Many U.S. companies, both nameplate automotive manufacturers and components suppliers, have set up operations in China, and components from those operations are increasingly being circulated in the global trade. Moreover, Chinese companies themselves have become active in this business, especially in the aftermarket. Beyond the aftermarket, however, Chinese-made components and

equipment are being used by original equipment manufacturers in assembled vehicles. The pressure to use Chinese components is likely to increase as the major international vehicle manufacturers increase their commitment to production in China for the sake of the local market there. It is thus likely that Chinese production will be increasingly integrated into international motor vehicle and components production and distribution networks.

This gives Chinese firms direct access to the U.S. “just-in-time” automotive manufacturing market, but also allows them first hand access to and experience with modern U.S. technology. The Chinese Government has a plan to use this knowledge and skill base ultimately to create an independent, world-class motor vehicle industry, including a presence in export markets.

4.8 Performance on transnationalisation efforts of auto component companies in South Korea

The automotive components industry in South Korea had a turnover of 166,928 Crores (2005), with approximately 3,400 companies employing over 150,000 employees. There are 922 tier-I suppliers for the automotive industry in South Korea, out of which 76 are large conglomerates and 830 are small and medium sized companies. Investments and JV establishments by foreign auto suppliers have been active over the past 5 years.

Automotive suppliers are heavily concentrated in the South East and the central region of South Korea, where most OEM manufacturing sites are located

4.8.1 Development trend for auto components in Korea

Globalization of production and expansion of exports to global OEMs are driving the industry's growth. Increased efforts into R&D and development of core technologies are critical as many key auto components are imported from representative countries such as Japan and Germany. South Korean automakers may possibly seek to procure automotive components from foreign suppliers for their overseas production to reduce costs and improve profitability. Hyundai and Kia, the two largest S. Korean OEMs are expanding their overseas production, especially in Europe (Slovakia, Czechoslovakia) over the next few years. Lack of innovative, independent technology by the South Korean auto suppliers is becoming a critical issue for future survival. South Korean auto suppliers are looking to expand exports to the global auto manufacturers. South Korean auto suppliers are willing to collaborate or enter into alliances for joint development of innovative technologies.

4.8.2 Some features of South Korean auto component industry

The South Korean auto component industry has an industrial structure that focuses on small and medium industries. The component manufacturers directly deal with auto manufacturers totaled 878,

with 154,000 employees (as of 2003). Among them, the manufacturers categorized into large-sized companies (INR 32 Crores or more with 300 or more employees) accounted for 7.9 percent or 69 manufacturers. But the number of companies with more than 1,001 employees totaled around 30.

4.8.3 Foreign direct investment (FDI) in South Korea

There are 148 foreign-invested firms which account for 16.9% of the total firms. The number of foreign advanced component manufacturers investing in South Korea outnumbers those in Japan, supplying about one-third of total demand by local auto manufacturers. Foreign investment has prompted the domestic auto components industry to streamline the organization and sharpen their competitiveness as well.

4.8.4 Key Success Factors of South Korean Auto Component Companies in Global Markets

Hyundai Motor Co. and its affiliate Kia Motors Corp have increased their sales by 12 percent in 2007 to 32 lakh vehicles, of which three-quarters were sold abroad. Even though there are several low-cost manufacturing sites, globally they cannot match Hyundai in Thailand or Mexico.

The Koreans have become one of the global leaders in quality in the last one-decade. That turnaround is due in part to a relentless focus on quality at Hyundai but also results from an increased availability of top-notch components from foreign suppliers. In 2007, foreign-controlled companies supplied a third of the components South Korean automakers used, up from less than a fifth in the 1990s.

The business is accelerating. Sales of South Korean auto components are expected to surge to INR 145,600 Crores in 2007, up from INR 136,800 Crores in 2006, according to the Korea Auto Industries Cooperative Association (KAICA).

Exports of South Korean components are increasing consistently in the global market. KAICA forecasts that components shipments abroad will climb to INR 28,800 Crores in 2005, up from INR 23,600 Crores last year. A lot of those components are going to garages that service Korean-made cars, but more Korean component makers are selling directly to foreign auto manufacturers. GM, for example, bought INR 1,960 Crores worth of steering columns, headlights, wiper systems, and other components from 50 Korean companies last year. Hyundai Mobis, the largest Korean player and an affiliate of Hyundai Motor, in July began supplying 300,000 steering columns a year to DaimlerChrysler, and in 2006 started selling INR 680 Crores worth of complete chassis modules—which include the frame, engine, transmission, brakes, steering, and suspension—to the U.S.-German auto maker annually.

4.8.5 Government Support to Auto Component Industry in South Korea

4.8.5.1 Free trade zones

Export-free trade zones were established in Masan (1971) and Iksan (1974) in an attempt to attract export-centered foreign direct investment, and they were officially renamed as free trade zones in accordance with revised laws designating the free trade zones in January 2000.

Support for free trade zones

Lower rental for space

Rentals of around one-fifth level compared with other areas in South Korea, with long-term contracts of more than 10 years, which may be further extended.

Tax benefit

When moving to free trade zones, a five-year 100% tax exemption on corporate and income tax is granted, and 50% reduction for another 2 years is also granted. Local tax (acquisition, registration, property and integrated land tax) is 100% exempted for 5 years, with 50% exemption for another 3 years, which can be extended up to 8-15 years maximum. A tariff, special excise tax and value-added tax on capital goods are also subject to exemption.

4.8.5.2 Foreign investment zones

In the case of high tech manufacturing and industry support services with foreign investment amounting to INR 120 Crores, it may be designated as a foreign investment zone, granting most of the benefits granted by Foreign Investment Promotion Act.

Support for foreign investment zones

Lower rental for space

The rental for state-owned property within foreign investment zones may be 100% exempted.

Tax benefits

When designated as foreign investment zones, income and corporate tax, if they are national tax, are exempted for 5 years, and 50% for another 2 years (when no income is generated for 5 years from the date of business, the period is counted after 5 years). Local tax, (acquisition, registration, property and integrated land tax) is 100% exempted for 5 years, with 50% exemption for another 3 years, which can be extended up to 15 years maximum.

Other benefits

Support includes development cost within a foreign investment zone, and infrastructure such as harbor, roads, water supply and electricity. The foreign-invested company is not obliged to hire nationally meritorious persons as required by the government's labour regulations; and they are

exempted from payment of disruption costs during factory construction, as well as the medical, education and housing benefits.

4.9 Factors Driving Competitiveness of Indian SME Auto Component Manufacturers

4.9.1 Exports from India to global destinations

Indian auto component companies have a direct export potential in volume markets such as the U.S, Europe and Japan. Europe is particularly lucrative on account of low duties, open market economy and minimum import restriction. The U.S. and EU already have very low tariffs on auto component (0-2%) and FTAs are not essential to boost exports to these developed markets. Indian auto component companies can also look at other low volume markets such as ASEAN, MERCOSUR, Russia, Iran, and China.

4.9.2 Quality certification

Out of the 82 companies' responses that were analysed, as many as 62 have TS 16949 certification. Other certifications adopted by a large number of companies are ISO 9000, ISO 14001 and OHSAS. This shows that Indian SME auto component companies are increasingly integrating with global quality standards.

Table 4.9 Compliances and Standards followed by Indian SME Auto Component Manufacturers

Compliance/ Standard	No. of companies
TS 16949	62
ISO 9000	31
ISO 14001	24
OHSAS	20
QS 9000	8
E-mark	2
BIS mark	1
Japan Quality Model	1

Source: IDC Analysis N=82

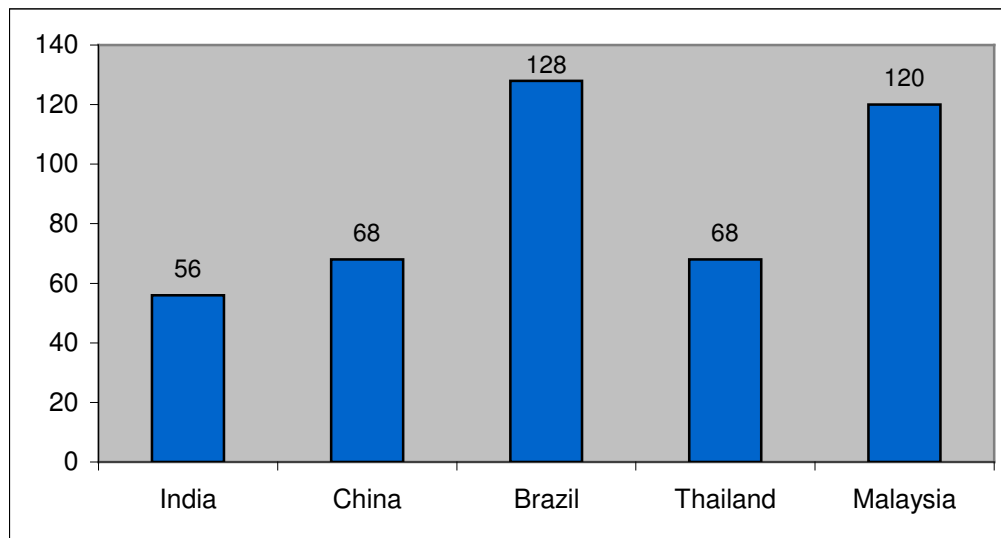
4.9.3 Indian companies being recognized as a quality supplier

Indian companies are increasingly recognized as major suppliers by leading companies across the globe both in the OE and aftermarket and this has led the growth in domestic sales as well as the export sales. Growth in exports is expected from increased procurement of components by tier-I manufacturers, global vehicle makers and direct exports by Indian companies to the aftermarket.

4.9.4 Cost will continue to be the key competitive advantage

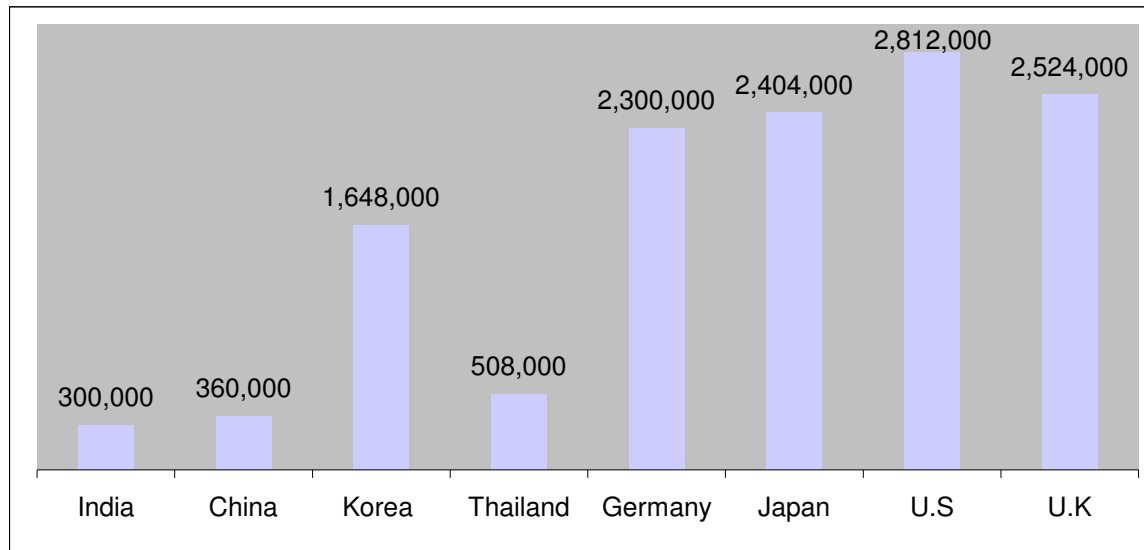
Competitive wage costs and talent availability would help to drive strong growth for the Indian auto component manufacturers. But India's cost advantage is eroding fast. India's fragmented component industry needs to do more to consolidate in order to achieve critical mass. India's primary cost advantage is in low labour costs coupled with good availability of trained workers.

Figure 4.6 Labour Cost Comparison in Emerging Economies, 2006 (in Rs/ Hr)



Source: United Bank of Switzerland (UBS), 2006

Figure 4.7 Engineering Designer Annual Wage (in INR), 2006



Source: UBS

4.9.5 Indian auto component makers will increasingly grow by international acquisitions

Continued international mergers and acquisitions would support increasing international sales. Through acquisition India’s component makers could break free from the limitations of small scale and local customer bases. This facilitates access to advance technology and new markets/customers.

4.9.6 Other factors that have driven the Indian suppliers' export push:

- ❑ Lower manufacturing costs in India offer an advantage to international OEMs and tier-I suppliers.
- ❑ India has an automobile industry in an advanced stage of development. The significant volumes of the industry ensure that the top fifty suppliers have the base to grow their export businesses.
- ❑ Due to the cost advantage, Indian companies have a stronger position in supplying semi-finished and labour intensive components like ferrous castings and forgings, heavy-duty crankshafts and semi-finished components.
- ❑ Indian suppliers are ambitious and at the same time respect IPR laws, so it is 'safer' to manufacture in India than other markets like China.

5.0 Challenges faced by Indian SME Auto Component Industry in Transnationalization and Recommendations

5.1 Introduction

The SME auto component companies in India are facing challenges on many fronts in their efforts to transnationalise and export. If these factors are overcome, they have the potential to drive the competitiveness of the Indian SME auto component companies. There are tremendous outsourcing opportunities available for the Indian component manufacturers. The industry is on a growth path and has truly become globalized by convincing the key global buyers through its best practices and delivery. It has helped them both in increasing their customer base globally and acquiring global companies. The acquisition of overseas companies and opening own offices in different countries has helped the auto-component companies in increasing their responsiveness to customer needs.

5.2 Challenges faced by the Indian SME auto component industry in transnationalisation

5.2.1 Brand India as a quality manufacturing destination

Indian auto manufacturers face a very steep brand building challenge in the global market. Very often, small companies lose out as a result of low awareness created about the Brand India. Bigger markets like Germany and Europe are skeptical about the quality of product. Even in other countries, OEMs purchase only minor parts from Indian component manufacturers. Barring a few companies, products of Indian component manufacturers cater only to aftermarkets or tier-I suppliers. Establishing Indian brands as quality brands in key markets is going to be a huge challenge. Indian components have to compete against established players, and need to spend a huge amount of time and energy on demonstrating the qualities of the brand. Brand building needs substantial and long-term investment. For many Indian companies, overcoming perceptions on performance and quality is one of the biggest challenges. The reputation of some of the Indian component companies such as Bharat Forge and Sundaram Fasteners has risen globally and needs to be replicated by others. For example, today anything coming from Bharat Forge and Sundaram Fasteners is recognized as first quality.

Recommendation:

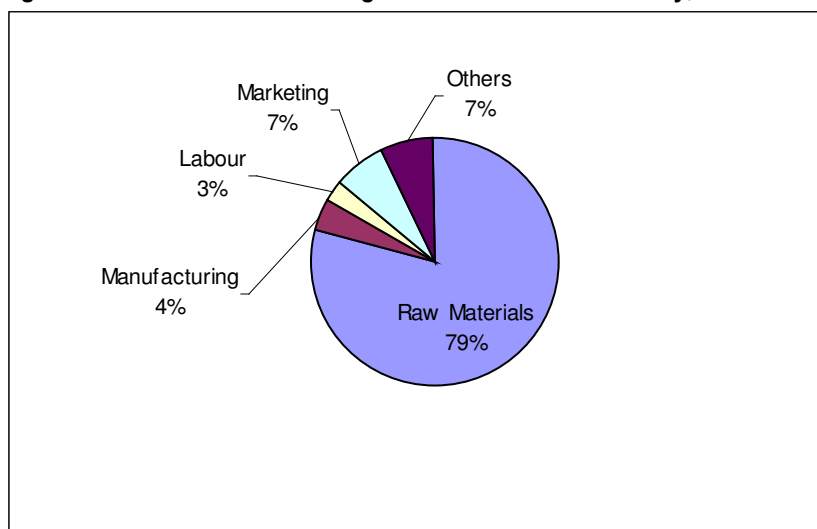
Consulates of the Government of India should plan activities in key markets to create awareness about the prowess of Indian manufacturing industry including auto component manufacturing sector. Industry associations may be roped in to provide the necessary inputs for the same.

5.2.2 Raw Material Prices

Price Rise

Raw material costs are by far the largest cost portions. Steel is the most important raw material for auto component manufacturers. The SMEs in the auto component sector in India are currently grappling with the high raw material prices, price rise and the monopoly of suppliers. There are three categories of steel used by the automotive industry—flat (hot/cold rolled and plates for making vehicle bodies), long (used for making forged components) and pig iron (used by foundries for making cast components). While the flat and long products witnessed an increase of 25 percent, prices of pig iron have gone up by as much as 40 percent.

Figure 5.1 Cost of Manufacturing in the Indian Auto Industry, 2007



Source: SIAM

Cartelization in the steel industry has resulted in the price of domestic steel to be on par with the imported steel leaving the auto component manufacturers with little option to choose from. This cartelization is evident from the fact that India is the cheapest source of iron ore and still steel price is high when compared to other countries. For example, China's cost of production of steel works out to around INR 25,000 a tonne, to which it adds the export tax and profits. Indian steel companies had set the prices closer to INR 34000 a tonne.

India is exporting steel to countries where it is a scarce resource and these countries do not have any import duty on steel. This scenario is making Indian auto component industry almost unviable as the domestic price of steel in China and some other competing countries is lower than the steel prices in India. London Metal Exchange (LME) rates are also not matching the landed price of raw material in India. The cost in India is higher than LME prices while in few cases the customer takes LME as a base price. The variation in the quality of steel (raw material in form of bars/rods) available to the manufacturers leads to the inconsistency in the finished output.

Price Fluctuation

Price fluctuation of steel, coal and coke and other raw materials has become a hindrance to the industry. The Indian steel suppliers have been accused of canceling the previous supply contracts in the wake of increased prices without any firm commitment on the delivery schedule at increased prices. This influences global competitiveness adversely as Indian component manufactures are unable to schedule their production and extend the delivery commitment to their customers.

Discriminatory Pricing

Even foreign suppliers seem to go for discriminatory pricing while supplying the raw material to Indian companies. It has been reported by the industry that in few cases, the Freight On Board (FoB) price for the same product is higher for Indian customers as compared to European customers.

FTA with ASEAN Countries

The SMEs in the Indian auto component sector are apprehensive of the FTAs with the ASEAN countries as they are on par with India on quality and end up pricing their products lower than the Indian products in India due to lower raw material cost, thus losing the domestic market in India.

Taming Steel Prices

The concern of rising steel prices were echoed at all levels with in the industry and the Government. Appreciating the concerns shown by the Government of India, Industry reduced the steel price by up to INR 4000 per tonne in recent past. Taking cognizance of the fact that the price of pig iron increased by 40% in a year, the Government of India banned the pig iron export by Public Sector Undertaking (PSU) Steel Manufacturers. In its effort to control the spiraling prices of steel, the Government has decided to auction pig iron manufactured by PSUs to give first choice to local buyers. It is expected that it will help the domestic industry. Though the world markets decide the price of raw material, India being a source of steel, it shall be available at much lower cost to domestic industry. The Ministry of Railways has also withdrawn port congestion charges on domestic steel. The Government has ensured that steel prices are reduced substantially, which may ease the pressure on the cost of production.

Recommendation:

Government should take necessary steps to ensure that the prices of steel do not increase against the global price trends. Government needs to come up with a a slew of policies for containing steel prices through regulating export of steel, monitoring steel price, and lowering the import duty to enable import of cheap steel from outside India.

5.2.3 Competitiveness

The small and medium enterprises in the auto component sector consider massive scale of manufacturing in China as a major threat. Unlike Chinese companies, the scale of operation of most of the companies in this segment does not allow them to execute large orders at a short notice.

The South East Asian companies are over taking Indian auto-component companies in competitiveness. Thailand and Korea apart from China are highly competitive. Thailand's competitiveness emanates from higher efficiency of the manpower and consistency in quality. Korean companies have strength in higher manufacturing efficiency and consistent product quality. China is highly competitive in cost. Chinese components like steering, gears, and wheel rims for heavy and light commercial vehicles, are giving competition to Indian vendors with an estimated price difference of 30 to 35 percent, making them price their products lower than raw materials' costs in India. The major threat to India's export potential is expected to be from other Asian nations such as Thailand and Taiwan.

SMEs face multiple challenges primarily due to their scale of operations. Corporate office in a large enterprise addresses to such challenges. Such challenges include collecting market intelligence, raw material requirement estimation, centralized purchase decisions, price negotiation, marketing, and legal support. In case of SMEs the important challenges would also include exploring and developing shared infrastructure for R&D, design and testing laboratories, identification of technical collaboration/ joint venture partners/ R&D partners etc. Such support services are by and large not available to small and medium auto-component manufacturers.

Recommendation:

In order to make Indian auto-component sector competitive vis-à-vis other Asian nations, Government of India should review its policies in a holistic manner and take necessary steps to make the industry competitive.

To manage the challenges of SME sector auto-component manufacturers associated with small scale of operation, a consortium of SME auto component companies should be formed. Government should encourage and support creation of a consortium of auto-component manufacturers in the SME sector. Alternatively, the existing industry associations should be encouraged to take up this role.

The government and industry association must explore the relevance of various schemes and how these can be utilized to benefit SME auto component manufacturers. The schemes of the Ministry of Micro, Small and Medium Enterprises, National Manufacturing Competitiveness Council, EXIM Bank, Export Credit Guarantee Corporation of India Limited, SIDBI Venture Capital Limited etc., need to be reviewed in detail to understand how these schemes can be utilized to make the sector competitive in global arena.

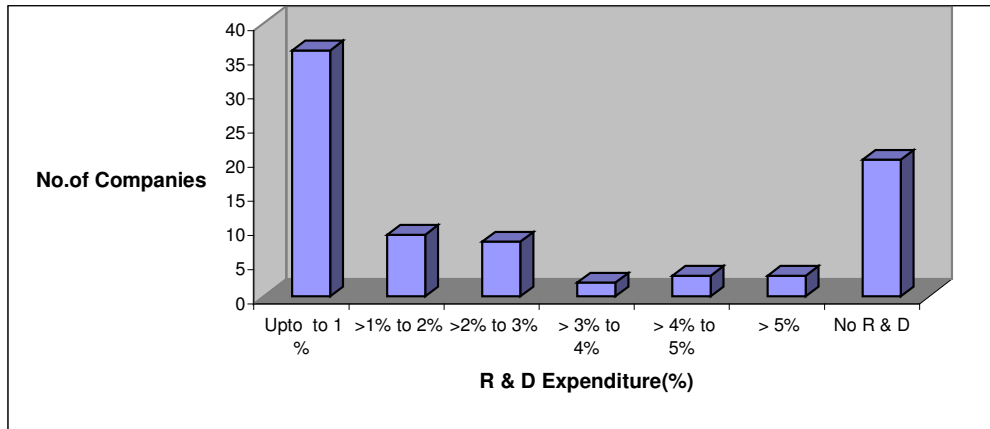
5.2.4 Inability to have dedicated R&D, testing and design capability

Many auto component companies in India have moved up the technology ladder and are confident that they are comparable to the best global component manufacturers. However, there are a large number of small size companies who don't have capabilities to design the products end-to-end. These companies do not have necessary infrastructure for doing R&D to match the requirements of their customers. Their financial strength and their size do not permit them to have a dedicated in-house designing and R&D facilities.

The automotive companies and large tier-I suppliers look for designing capabilities in their suppliers before placing order for their regular requirements. Indian auto component companies having designing capability are preferred by foreign companies looking for collaboration in India.

The R&D expenditure of companies contacted during the study shows that majority of the companies (50%) spending on R&D in comparison to the total turnover is small and 25% companies R&D spending is negligible.

Figure 5.2 Auto Component Market: R&D Expenditure as Percentage of Total Turnover (India) for the Companies selected for the Study, 2007



Source: IDC Analysis, N=82

A number of small and medium sized companies have expressed an interest towards having shared facilities for i) R &D, ii) Testing and iii) product design closer to their respective manufacturing hubs. This will encourage the SME auto component manufactures in acquiring research and design capabilities, which has proved to be a major weak link to their transnationalisation effort and getting orders from OEMs. Though the Government has taken major initiatives under NATRIP and has big plans under this scheme to provide expensive infrastructure for developing capabilities of automotive industry, the non-availability of such facilities in each hub may be of limited help to SME auto component manufacturers.

Recommendation:

Government shall facilitate and or incentivize the auto-component manufacturers for creation and use of shared infrastructure and capacity development for R&D and testing labs. Schemes run by institutions like National Manufacturing Competitiveness Council and some Ministries like Micro-Small and Medium Enterprises can be tapped to meet financial requirements of setting up such facilities. There seems to be a lack of awareness about such schemes in the industry. Government institutions interested in encouraging auto component sector should not only take initiatives to create awareness about such schemes but also facilitate the stakeholders' to avail of the benefits of such schemes.

5.2.5 Finance related issues

Availability of Capital and Cost of the Capital

In the wake of entry of global auto component manufacturers in India, technology up-gradation involving huge investments has become a necessity for the SME auto component companies. Many Indian SMEs in auto component sector are facing challenges in getting credit and credit at a low cost. Many companies are finding it difficult to get necessary financial resources from banks or venture capitalists. Inability of these companies in getting credit has led to difficulties for such companies. The companies need to upgrade their technology in order to remain competitive in global market.

The manufacturers feel that the rate of interest for working capital should be less. The finance is available at high interest rate (nearly 12%), which is very high in comparison to other countries. The rate of interest has relationship with the level of modernization, high technology adoption and professional management of the companies. The challenge of getting credit from banks is not so acute for the companies having processes and advanced technology, which manufactures high quality products for major OEMs. Initiatives to rate the SMEs could help the better SMEs overcome this challenge. Banks have been reported to be open to not only providing funds quickly but also offer good deal on interest rate to SMEs getting better rating by the SME Rating Agency of India Limited (SMERA). SMEs in auto-component sector can also benefit from the scheme.

Duty drawback and incentives

Auto component exporters find duty drawback a cumbersome process. It requires dealing with too many procedures and offices. For relatively small players, at times the expenditure incurred on follow-up is higher than the duty drawback amount.

The Government takes a long time to refund duty drawbacks and incentives. Right now it takes anywhere between 3 months to 6 months to get duty drawback amount. The industry is looking for

less time in getting duty drawbacks and other incentives/refunds from the government offices. This will help them have enough capital for their requirements thereby reducing the cost of working capital and business expansion.

Currency Fluctuations

A recent phenomenon that has impacted export earnings of automotive component manufacturers is the appreciating Rupee. The component manufacturers', who have entered into fresh negotiations with their customers, have started insisting on building in currency fluctuation clauses to counter further changes in the Indian Rupee.

The contracts currently under negotiations are building in currency fluctuation clauses. Previously this was not a common practice, particularly since no one anticipated this kind of appreciation of the rupee. Most automotive component manufacturers working under old contracts are asking their customers to revise pricing based on rupee appreciation. Some of the Indian auto components makers are rushing to re-open key supply contracts with their U.S.-based customers as the rising rupee is sending the entire industry into a tailspin. According to the Automotive Component Manufacturers' Association of India, exports to US companies are worth over INR 2,000 Crores. As Indian auto component makers work in a very competitive environment with thin margins, many companies, which do not have currency fluctuation clause built into the old agreements, are now trying to re-negotiate the contracts. But there are other manufacturers who are trying to shift their focus to the Euro.

Indian automotive component companies are trying to balance out this impact by focusing on European exports while decreasing its exports to the U.S. Even though the Euro is emerging as the most preferred currency for Indian exports, there could be hurdles to move away from the U.S. Dollar. Some companies who have their exports in Pounds and Euros have not been impacted due to the appreciating Rupee. The dual trap of high interests and the appreciating Rupee have squeezed the margins of the exporters.

The currency fluctuation and the appreciation of the Indian Rupee in comparison to the Dollar have affected the profitability of Indian companies dependent on the U.S market. Since China is not having the floating rate currency system for the Industry, the Chinese industry is insulated from these fluctuations.

Frequent changes in DEPB rates

The duty entitlement passbook (DEPB) scheme is regarded as a positive initiative of the Government. Exporters keep the available benefits from this duty in mind while negotiating the orders with the foreign customers and any change in it affects the profitability of the company. There is also a time lag between applying for it and getting the benefit. The cost of agents and time cost nullifies its benefits. As a result, quite often, it remains only a notional income.

Recommendation:

The Government should create awareness among SMEs about the need for getting credit worthiness rating done. There is also a need for creating awareness among the SMEs about availability of low cost institutional equity capital and risk capital funds for expansion plans of SMEs. Some of the schemes of this category include SME Growth Fund of SIDBI Venture Capital Limited (SVCL). This can be tapped to meet the financial requirements for transnationalisation of auto-components' SMEs. Unlisted companies are the focus of this Growth Fund. The Risk Capital Fund proposed in 2008-09 budget to be administered by SIDBI Venture Capital Limited can help Indian auto component industry in acquisition of high-end technology and manufacturing facilities outside India. Government may take steps to ensure that the assurance of Minister of Finance, Government of India that "SIDBI will reduce the guarantee fee from 1.5 per cent to 1 per cent and the annual service fee from 0.75 per cent to 0.5 per cent for loans up to Rs.5 Lakh", is implemented at the earliest. The EXIM bank also has several schemes for financing SMEs, firms, product export and overseas investments. There is a need for creating awareness among the SMEs about such schemes.

The relevant departments or the Government should find the modalities of reducing the time taken in providing duty drawback and other incentives to at least a month.

India's commitment to market dynamics may not allow it to directly regulate currency prices or manage the incongruity arising from fixed rate of Chinese Yuan vis-à-vis floating rate of INR. However, alternative methods need to be looked at to ensure global competitiveness of the export oriented Indian manufacturing industries including auto component sector. Government should consider creating awareness among the smaller companies about the need for building currency fluctuation clause in their medium and long-term contracts with the customers. The government may also create awareness about the need to diversify the client base and the need for doing business in different and more stable currencies.

There is a need to minimise the frequency of change of DEPB rates. The time lag between application and realization of DEPB rates related benefit needs to be reduced.

5.2.6 Law related issues

Trust in Indian Arbitration System

At present, foreign partners of Indian companies insist on arbitration in their home country primarily due to lack of trust in Indian arbitration process. Among SMEs, this works as a deterrent for entering in to any business relationship with a foreign company. Government should consider creating trust in Indian arbitration process so that foreign partners of auto component manufacturers agree for arbitration in India in case of any dispute.

Documentation for transnational business

Small companies find it difficult to navigate through the legal documentation for any transnational business interaction. Such companies are not aware of legal experts who can address to their legal documentation requirements keeping the law of the land of the country where they want to do business.

Recommendation:

For trust in Indian arbitration system the Government should consider coming up with a policy or law to create an institution for arbitration similar to Hong Kong International Arbitration Center (HKIAC). “HKIAC is a non-profit making company limited by guarantee. It operates under a Council composed of business and professional people of many different nationalities and with a wide diversity of skills and experience. Administration of HKIAC arbitration activities is conducted by the Council through the Centre's Secretary-General who is its chief executive and registrar.” “HKIAC was established in 1985 to assist disputing parties to solve their disputes by arbitration and by other means of dispute resolution. It was established by a group of the leading business and professional people in Hong Kong to be the focus for Asia of dispute resolution. It has been generously funded by the business community and by the Hong Kong Government but it is totally independent of both and it is financially self sufficient.”

In order to support SMEs to meet documentation requirements for their transnational business, the Government should either create a set-up or a system or identify a pool of resources that can facilitate documentation and handhold SMEs in initial negotiations, deal maturing and liaising during their early efforts to transnationalise.

5.2.7 Market Exposure

Inspite of having improved the product quality standards closer to global standards, many of these companies in SME sector have not been able to bag substantial orders from OEMs abroad.

Awareness about Indian auto component companies

The small and medium companies in auto component sector do not have enough resources to create awareness about their companies and products in even key markets and among potential customers.

Buyer-seller meets and events

Small players in auto-component manufacturers neither have the information about buyer seller meets and events nor resources to attend such meets.

Exhibition in foreign markets

The fund provided by the Government for participating in foreign exhibitions is too meager and hence is not of much use.

Senior government officials opine that SME engineering exporters must do their research/ homework properly to fully benefit from participation in any international event.

Recommendation:

Indian Consulates in the countries having export potential for auto components should facilitate marketing efforts by sharing information about Indian auto component manufacturing companies. Industry bodies may be roped in to further give a fillip to this exercise.

Since many of the small companies may not be able to do their research in-house, Government should consider empanelling some consultants having relevant experience and capability to undertake research on their behalf. Alternatively, consortium of SME auto-component manufacturers, as recommended earlier can also be assigned this responsibility.

Government should move beyond direct financial support for participation in exhibitions. Government should coordinate with the key countries to get exhibition space/floor at discounted rate for SME manufacturer. Government should negotiate with foreign exhibitors or relevant Government bodies to get space at discounted rate for SMEs and should reciprocate when the exhibitors of those countries participate in exhibitions in India.

Government should create opportunities for interaction between Indian manufacturers with exporters, foreign raw material suppliers, buyers, and OEMs. The Government needs to arrange such meets, as private visits are very costly for small players. The Government can also look at sending small businesses delegations for aftermarket business. Alternately, these industry exposure visits can be done through government/ private tie-ups and some concessions given to small players.

The Government should make available the benchmarking data and the quality assessment in the importing country. The Government shall consider creating awareness about the products, which have marketability in the global market. Information on the changing needs and product requirements will also be useful to SME component manufacturers. Details such as per capita consumption, installed capacity, quality standards, projected demand in the global market will be helpful. The proposed SME consortium can also address these information needs of auto component manufacturers.

Though some institutions like EXIM bank provides consultancy to SMEs in exploring markets and exporting products, etc. The awareness on these services seems to be low and hence there is a need for creating awareness about these.

5.2.8 Upgrade component manufacturers' facilities

A number of SME sector auto component companies have not been able to upgrade technology due to various reasons. In the highly competitive markets, this has started impacting their business adversely and becoming a hindrance to their transnationalisation.

Recommendation:

The government should encourage Automobile companies to work with the SME auto component manufacturers (as a part of their commitment to the industry) in upgrading their manufacturing facilities and capabilities. These efforts could be in the direction of setting up component manufacturing under joint venture or adopting them to upgrade their manufacturing capabilities.

ACMA has started an initiative in this direction by putting up a system in place where in experienced professionals from large auto component manufacturing companies work full time for a year closely with a number of auto component manufacturers guiding them to improve the productivity, meet quality standards and manage cost. This initiative is helping small and medium auto component manufacturers move up the value chain, which would help them transnationalise easily. The Government may encourage such initiatives in an appropriate manner.

5.2.9 Manpower/ Human resource related issues

Availability of trained manpower and productivity

A large chunk of available manpower from the automotive industry is going to either the service industry or to the new manufacturing units that have come in recent past. Retention of skilled manpower is proving to be a challenge. If companies do not plan ahead, there may be disruptions in production. The quality requirements from the industry are changing with the global requirements and achieving skill development for a new set of employees on a regular basis is a challenge.

For improving productivity, need for skill development and attitudinal training of work force is being increasingly felt by the industry. Production heads of auto component manufactures feel that job security has vitiated the work culture at the lower level. The workforce at lower level spends time less productively during working hours. Some experts have also echoed similar views.

Rising wage cost

Minimum wages in several states has gone up by over thirty percent in the last six months. This has severe implications on the profitability of the companies employing low wage earning workers. The implications are equally relevant for automated manufacturing systems because of the cascading effect of minimum wages among the middle level and senior level employees.

Labour laws

SMEs in auto-component sector feel that the current labour laws have resulted in poor productivity in India. These companies expect productivity friendly labour laws. The general feeling is that Chapter 5B of the industrial dispute act should be done away with. Under provisions of this act, companies can not retrench more than 100 workers with out prior permission from the Government even if the company does not have enough work for them. At few places, the Government is pressurizing companies to make the contract labour permanent, which the companies cannot afford. The Government of India is already working on a policy to mitigate the situation.

Recommendation:

Training for specific skills suited for the specific work is needs to be imparted to help India emerge as a global player. Industry is increasingly feeling the need for skill development and attitudinal training of work force for improving productivity. The Government should encourage and support schools and universities to collaborate with the industry to come up with short and industry relevant courses. This will help the industry meet the requirements of technically qualified and trained manpower needed for its ambitious growth and realization of the potential of the sector.

Sensitization of workforce for attitudinal change is needed. This will help improve productivity. The Government shall support setting up of facilities for attitudinal training of manpower in the different industrial hubs.

The Governments should assess the implications of wage rise at a lower level and should take the industry in to confidence before coming up with wage related regulations.

The Government should amend labour laws that help enhance the efficiency of production system with out impacting reasonable job security of workers.

5.2.10 Other challenges

SEZ policy

The inability of existing SMEs to operate in SEZs where tax benefits are available will make small and medium enterprises in the auto component sector unviable. The SME component manufacturers are wary of benefits extended to companies located in these zones. The benefits to SEZ based manufactures are putting others at a competitive disadvantage

Exorbitant cost of land and long gestation period of Greenfield projects

The acquisition of land for a Greenfield venture is perceived to be another major problem with prohibitive rates and bureaucratic procedures. Land prices in most of the industrial hubs have become prohibitively high, creating barriers for expansion for the small and medium enterprises. Even the expansion procedures are cumbersome with clearances required from a number of bodies/ boards.

Since built-in premises are available on lease in China and the companies only need to bring in the machinery to start the production. The time lag for setting up new production line is much shorter in China. High cost of land and time required to develop infrastructure is impacting competitiveness of Indian companies.

Import regulations

The procedures for advance licenses for import are cumbersome, time consuming and difficult to implement. The license for duty free import is issued only in Delhi and the committee for this meets once in 6 months. The bond received from the import is given to customs and the bond redemption process is very cumbersome. It takes 1-3 months for the same.

Coordination with multiple offices

Like any other SME sector manufacturer, auto component manufactures need to submit several documents related to taxes, labour laws, duty drawbacks etc. at different places. This is time consuming and impacts productivity and increases the non-tariff cost of production.

Recommendation:

Government should create level playing field for auto-component manufacturers in SEZ and outside SEZ. Creation of virtual SEZs will minimize the impact of SEZ policy on existing small and medium auto component manufacturer.

Government should seriously consider developing industrial clusters and provide land at a reasonable price or create infrastructure on the lines of China in order to sustain growth of the

industry in an era of global competition. Creation of special auto component parks, as recommended in the Automotive Mission Plan could be an answer to this. This would take care of various concerns related to SEZ and competitiveness related issues emerging out of various bilateral and multi-lateral trade agreements as well.

Government should ensure that the committee for advance licence for import is formed in some more cities/ industrial hubs and it should meet at least once a month.

Government should facilitate single point interaction for submitting all types of documents. This will allow the component manufacturers to focus on the business. There is a need for improved ESI and Labour laws and single window clearance for taxes, duty drawbacks enabling operations. This will also reduce the non-tariff cost (unofficial cost) of doing business.

5.2.11 Basic Infrastructure

Poor basic infrastructure like power, port facilities and transport/ logistics issues are major causes of worry for the small and medium enterprises located across the country. The component manufacturers in remote locations face the challenge of instilling confidence of their prospective joint venture or exports partner in the overall conditions prevailing in the industrial area (sewage, roads, power supply, etc). Poor infrastructure also leads to higher manufacturing cost, apart from erosion of confidence amongst the customers.

Power

Power shortage is the main issue with many companies located in several industrial belts across the country. Lack of adequate power supply leads to the usage of gensets, thereby increasing the operational cost, and finally the cost of the end product, leading to lowering of competitiveness in global market. The companies need to pay a minimum amount for sanctioned load; power supply for shorter duration pushes up the actual cost of electricity.

Logistics/ transport

Logistics/ transport along with the poor condition of roads and seemingly cartelization of transporters is also a major concern. This increases the overall logistics cost, which adds to the final delivery price to the customers, making them less competitive in global market. The cost of logistics amounts to a significant portion of the overall transportation cost. This is also a major factor affecting the exports and the competitiveness of the Indian products in the global market.

Port facilities

The prominent ports in India are congested and as a result there are delays in shipment of consignments. The non-availability of ports leads to longer lead-time for export causing delay in

delivery of consignments. These delays in turn lead to delay in receiving of payments, affecting the finances.

Recommendation:

In order to support the auto component industry in transnationalisation; the Government should try to bring in parity between power tariffs of Indian Power Generation companies with the power tariff in China. The Government shall ensure regular supply of quality power at a reasonable rate. Considering the investment in development of power generation infrastructure, the industry should not have difficulty in meeting the power requirements by the year 2010-2011.

Government should focus on reducing the logistics cost of export and import to make Indian auto component manufacturers globally competitive. Government is already developing expressways and dedicated corridors for enhancing the efficiency of transport. Government may enhance its focus on removing the bottlenecks coming up in timely development of the expressways and dedicated corridors.

The infrastructure at the ports also needs to be upgraded. Government is serious about upgradation of port facilities. Timely upgradation of the ports would be able to address to the concerns of the manufacturers.

6.0 Case Studies of some Successful SME Auto Component Manufacturers

The case studies have been developed based on the best available information. The cases have been selected in such a way that it represents major auto component manufacturing hubs. Since most of the companies have not given their consent to share the case study, DSIR may use these cases with discretion. The cases represent companies manufacturing different types of products as well.

CASE STUDY I: Electromags Automotive Products Pvt. Ltd (EAPL)

EAPL is one of the leading auto electrical companies in India. The company is in the business of electronics/ electrical products for the past three decades. EAPL is the OE supplier to automobile manufacturing companies in India and abroad.

EAPL group of companies is a subsidiary of Bombay Burmah Trading Corporation (BBTCL are leaders in many diversified fields). BBTCL belongs to the Wadia group of companies (the total group turnover is more than Rs. 3000 Crores, while EAPL's turnover is Rs. 60 Crores).

Electromags Automotive Products Pvt. Ltd., comprises the following three companies: -

- Electromags Automotive Products Pvt. Ltd.,
- Switch International
- Electromags

Products

Slip rings, brush holders, MVG Cont. Assy., solenoids, rubber and plastic molded parts

The company is one of the leading manufacturers of slip rings and solenoid valves in the world. In India, the company is No.1 in the slip ring and solenoid valve business. EAPL is the exclusive supplier to FIP, starter motor, alternator and braking system along with two wheeler manufacturers in India. Main range of products are: slip rings, solenoids, ECU, water sensors, inlet valves, vacuum valves, end covers, relays, various types of switches, fluid level warning indicators, floats, EMR control unit, etc.

Turnover: INR 60 Crores, with 35 percent of revenues coming from exports.

Infrastructure

Established in 1980 in Chennai, the company has 3 plants spread across 70,000 square feet. The latest plant of the company was commissioned in 2001. The company was recently taken over by Bombay Burmah Trading Corporation Ltd, belonging to the Nusli Wadia Group and the company is trying to consolidate its presence in the global markets. The company is a manufacturer and supplier of OEM and tier-1 and tier-II. A total of 250 employees were working in the organization in 2007.

For injection molding and thermoset/ thermoplastic usage the company has an injection molding line comprising of high precision programmable injection molding machines with special features like micro processor control, vertical shuttle type and screw type injection with different capacities.

For assembly of various products, the company has installed heat sink guns and sleeves, orbital riveting machines, impact riveting machines, roller type metal marking, ultra sonic cleaning machine, pneumatic swaging machines, sealing machine, ovens and dryers.

The company has test facilities for valves and solenoids

All the manufacturing plants and central functions are registered with ISO/ TS quality systems. The company has a product engineering and R&D facility to develop all electronics and electrical requirements and specifications.

Clients:

Domestic Customers

TVS Motor, Hero Honda, Kinetic, M&M, MICO Bosch, Delphi TVS, Sundaram Clayton, Brakes India, Mando Brakes, Bosch Chassis, Meder Electronics, Crompton Greaves, Visteon, Stanadyne, Lucas TVS, Birla Yamaha, and Greaves.

International Vehicle Manufacturers

Prestolite Electric Ltd., UK, Knorr Bremse SCV Ltd. UK, Robert Bosch Australia Ltd.

Foreign Market

USA, Canada, Denmark, UK, Germany, Canada, Taiwan, South Africa, Belgium, Taiwan, China

Exports: Prestolite – UK/ USA/ China/ Argentina, Bosch – Australia/ UK/ Spain, Valeo – France, Knorr Bremse – UK, Raufoss – France, WAI – USA, Holger Christiansen – USA/ Europe. Hermann Peters, RCP Inc., Unipoint, Wilson Electric, Stanadyne etc.

Certifications:

ISO: 9001:2000

TS 16949 Certified by TUV

Some of the awards the company has received

- Direct Online supplier status from Hero Honda
- "Overall quality performance" from Brakes India
- Best Supplier Award from MICO BOSCH

Corporate strategy for transnationalisation

The company intends to consolidate its present export market, while looking for new markets for exports. The company intends to collaborate with a suitable partner in future to broaden its horizons in different markets abroad and increasing its domestic presence."

Company outlook for the future

EAPL has been actively leveraging its strength in value engineering and speedy design and development capabilities to great success. The company intends to develop more than 20 new products some of which are in advanced stages of development. The company is very positive about the exports growth but seeks Government support for factors such as currency fluctuations, benchmarking data and for exhibitions abroad. Some of the clients it intends to target are Delphi-TVS, Stanadyne, MICO BOSCH, Bosch-Cardiff, and Valeo-France.

CASE STUDY II: IM Gears Pvt. Ltd

Founded in 1965, IM Gears began as Industrial Markings, manufacturing various nameplates and dials used in relays in the electrical industry. In 1982, the company shifted into the manufacture of precision turned and machined parts for the automotive industry. IM Gears enjoys 'single source' status with most of its customers both at home and abroad.

IM Gears has earned a reputation for not merely keeping pace but setting exemplary standards in quality, precision and delivery. IM Gears is equipped with state-of-the-art machines tools and measuring systems.

Products

Two Wheelers

Shaft kick-starter, shaft clutch, shaft gearshift, gear blanks, kick-starter gears, rack and pinion for clutch and shaft rear brake.

Four Wheelers

Front axle shafts, constant velocity joint outer (machined), tripot outer (machined), rocker arm shaft, rail shift assembly for gears and control shaft assembly

Infrastructure

IM Gears is equipped with its two plants near Chennai. The list of machine tools includes single and multi-spindle CNC lathes, CNC machining centers, CNC gear hobbers, CNC cylindrical grinders and CNC induction heat treat equipment. The machines are dedicated to specific customers and laid out in bays, often using the "cell" concept, to maximize productivity.

IM Gears also has a fully equipped, state-of-the-art metrology laboratory and metallurgy laboratory and advanced testing and measurement equipment.

The metallurgical lab has spectrum analyzer, image analyzer, ultra sonic testers, Eddy liners and magnaflux equipment for comprehensive raw material testing and analysis. IM Gears has a full-fledged metrology lab to calibrate all the gauges and fixtures. IM Gears also ensures that all quality systems are in place as per the requirements of TS 16949. Various techniques like SPC, APQP and FMEA are used to ensure quality.

IM Gears has a dedicated team for Total Plant Maintenance (TPM) practices and continuous improvement. The team is also a part of the ACMA Center for Technology (ACT) cluster for quality.

Clients:

Major Clients of the company include TVS Motors, Delphi Automotive Systems, Hyundai.

Turnover

INR 90 Crores in 2007–08 and exports constitute 30 Crores.

Certifications:

ISO 14001

ISO/ TS-16949 By Underwriter Laboratories Inc, USA.

The company follows the 5-M best practices

Recent Investments

The company is investing in an in-house heat treatment furnace (sealed quench type). It will also have a cold forging plant for backward integration and a powder metal plant for the manufacture of sintered gears is on the anvil.

Corporate strategy for transnationalisation

The company is looking at undertaking technology collaboration and interested in undertaking R&D jointly with a foreign partner. Apart from these efforts, the company is focused on exports and looking at reaching newer markets with support from the Government in facilitation their own R&D or R&D on sharing basis in line with changing technology requirements

Company outlook for the future

IM Gears is very positive about the immediate future but has concerns on FTAs with Thailand and Malaysia that pose a major threat to Indian companies, apart from China, East Europe and South America.

CASE STUDY III: Continental Engines Ltd.

Products

Aluminium alloy automobile components and sub-assemblies like cylinder heads, crankcases, manifolds, pipes, etc.

Infrastructure

Design & Development department consisting of six workstations loaded with Uni-graphic software for solid modeling and Magma stimulator for solidification and thermal images;

Foundry division consisting of melting furnaces including striko, induction and tilting furnaces, 20 stations of low pressure die casting machines and 10 stations of gravity die casting machines, 8 units of heat treatment furnaces supported by utility services such as generators, compressors, nitrogen gas generators, etc.

Machining division consisting of 40 numbers of Makino, Mazak & Moriseki make CNC machining centres– both vertical and horizontal types, high-pressure washing machines, leak-testing machines supported by utility services such as generators, compressors, etc.

Quality assurance department consisting of three numbers of spectrometers, RC sand fineness and hot tensile strength testing machines, microscope for studying micro-structure, three numbers of co-ordinate measuring machines, shadow graph, surface contour measuring machine, hardness testing machines, tensile strength testing machine, etc.

Well-qualified and experienced personnel manage all facilities.

Clients:

International: Iran khodro, Mega Motors, VM Motori, Vege Motors, Piaggio, Lombardini, Eton, ITEC, Mann Hummual, Borg Wormer, etc.

Domestic: Eicher, Sona Koyo Steering, Hindustan Motors, International Tractors, Greaves, Mahindra & Mahindra, Swaraj Mazda etc.

Turnover

INR 2300 millions in 2007–08 and expected to be around Rs. 3900 million in 2008–09.

Certifications:

ISO/ TS-16949: 2002,

ISO 14001: 2004 &

OHSAS 18001: 1999

Awards

ACMA award for export excellence – twice

ALUCAST award for developing intricate casting

Rajasthan Government award for export excellence

Recent Investments

Out of Rs. 260 million earmarked for expansion in foundry division, already Rs. 230 million is spent in creating a gravity die casting facility and modernizing of the low pressure die casting facility in the financial year 2007–08 and remaining will be spent in the current financial year.

Out of the Rs. 230 million earmarked for expansion in machining division, already Rs. 138 million is spent in financial year 2007–08 and remaining will be spent in current financial year.

Contracts

International Truck and Engine Corporation, Borg Warmner & Mann Hummual contracts are secured amidst worldwide competition including China.

Corporate strategy for transnationalisation

Once RFQs are received and perceived to be good business opportunities, a close follow-up with the clients showcasing Continental Engines' strengths in design of tooling, manufacturing techniques involving best practices of 5S, Kaizens, cellular lean manufacturing, quality assurance systems, safety concerns, etc is made. Further, visits are made to the customers' facilities to understand their requirements in terms of quality parameters, delivery and cost expectations to try to build up confidence levels and follow up with meeting the expectations of the customers.

Company outlook for the future

In view of globalization, lot of opportunities are being seen as most of European and North American auto companies are looking for out-sourcing their requirements of ready to assemble components/ sub-assemblies in their final products from single sources. This requires competence in technologies of foundry, machining, assembling and testing. Having these competencies in-house, Continental Engines is well poised to meet these requirements and hence company's future is very bright.

CASE STUDY IV: Supreme Industries Ltd.

The company with an annual turnover of around Rs 100 Crores and manufacturing injection-moulded components for automobiles has the manufacturing facilities in Mumbai and Pune. The company is a tier-II manufacturer supplying to OEMs as well as a tier-I manufacturer. The export constitutes 5% of the annual turnover.

Initially the company was not focused on export of the products. Rather it focused on building the capabilities and has got all its plants TS 16949 certified. The objective was to have the capabilities to handle export in manufacturing and operations.

Then the company started focusing on increasing its export turnover. To expedite the process, the company has worked out an MOU with an international group comprising of several auto companies. It has entered into an agreement to work jointly for the period of one year to assess the compatibility and then go on to sign the collaboration. The company believes that the best part of this approach for collaboration is that any sort of differences will be sorted out during this engagement period and this will eventually lead to happy marriage.

The company also believes that value added business brings an edge over the competitors. Better assembly, new technology, backward and forward integration helps bringing this edge. The company has upgraded its offering following the similar principle. It has also opened a new design centre as part of R&D in product design.

CASE STUDY V: Jay Switches India Pvt. Ltd.

The company, based in Gurgaon, commenced production in the year 1995, and manufactures auto electrical switches and automobile electrical lights. The company has ISO 9001 and TS 16946 accreditations to its credit, and has an annual turnover of around Rs 17 Crores.

The company till recently catered only to Indian OEMs and had not concentrated on aftermarket as well as exports. Also, supply to OEMs outside India was perceived to be quite a challenge owing to infrastructure and technology concerns. It was increasingly felt by the company that foreign OEMs prefer the vendor with a foreign collaboration and it felt lost out on this front.

To bridge the perceived gap in technology, the company tried to establish joint venture/ technical collaboration with a foreign firm. After scanning the geographies across the world, Taiwan as a country was focused on to scout for the joint venture partner, as it was perceived to be a good market for electronics and related products. One of the big players that was competitive in cost and quality was approached for a joint venture.

The preferred market for export for the products manufactured by the company depended on its product range as different products have different market trends. In South East Asia, the market is for 2-wheelers and commercial pick up vehicles. In Europe, it is for passenger cars while for Africa, the prominent market is for commercial vehicles. Being a comparatively small player, the company faced marketing challenges to export.

To overcome these marketing related challenges, the company has suggests the Government to promote the model followed by Tata group in its quest to help SMEs transnationalise. According to the company, the TACO group gets orders from OEMs outside the country and get them executed through the Indian vendors. The Government can encourage other big players like Mahindra & Mahindra, Bharat Forge, Sundaram group with adequate financial strength and good marketing network to follow similar model, which can help Indian SMEs and in effect lead to greater export from India.

CASE STUDY VI: Advik Hi-Tech Pvt. Ltd.

The company based out of Pune manufactures auto components/ products like lifter tensioner assemblies, oil pumps, fuel pumps, fuel feed pumps, fuel cocks, decompression units, water pumps, one way clutch, precise machined components like pinions, screws, nuts & control shafts for automotive OEMs.

Its annual turnover is around Rs 40 Crores. The company has a strong focus on R&D and spends 4% of its turnover on its automotive engineering and design services. The company cares about the environment and has installed eco friendly windmills around its factory area thereby generating more energy than it actually consumes.

The company in its quest to grow has taken a step-by-step approach. The first step being increasing the production capacity and it has commissioned a new plant in Uttaranchal to achieve the same. It has introduced lean manufacturing techniques throughout its facilities. It practices Kaizen, follows TS16949 quality system standards and has implemented TPM across the company.

The company intends to expand globally and plans to achieve 15% sales from export as opposed to the current 8%. With an objective of becoming the global suppliers to its existing customers in ASEAN and BRIC countries, the company has opened sales offices in Thailand and Indonesia. The company has a technical collaboration with Japanese company and is also trying for collaboration with a European company to have a larger footprint. It is also striving to expand its customer base by planning a new venture for 4 wheeler automobiles. The company believes that its step-by-step philosophy of strengthening the base has put it in a good stead to expedite its efforts of transnationalisation.

CASE STUDY VII: Polyplastics

Polyplastics was established in the year 1967 for the manufacturing of components for Telecommunication Industry. Products were exported to many European countries in seventy's & eighty's. Till the year 1983, it manufactured products for telephone, textile, defence & home appliance industries. It was in the year 1983 that Polyplastics started moving towards Auto components manufacturing and currently it makes parts only for the automotive industry.

Polyplastics, though being not located in one of the auto component manufacturing hubs has succeeded in building its business brick by brick. Polyplastics is engaged in the business of electroplating of various components, Painted & Hot stamped badge & Monograms, Wheel rim covers, Radiator grills, RR Garnishes/ Ducklid Handles Assembly control brackets, Dash board components, Door handles, Ash trays, Auto electrical assemblies.

Polyplastics realized early in its growth journey that it needs to be the best manufacturer of the critical components that it manufactures. In order to achieve this it entered into technical collaboration with Sakae Riken Kogyo Co., Japan for Electroplating on plastics and Extrusion mouldings. It also entered into technical collaboration with Zanini Auto Group, Spain in the year 2006 for manufacturing Wheel covers.

Polyplastics has developed expertise and experience to make products, meetings, and global specifications. The collaborations have helped to build up further confidence in the domestic OEMs, Maruti Udyog Ltd., Tata Motors Ltd., Toyota Kirloskar Motors Pvt. Ltd., General Motors India Pvt. Ltd., Swaraj Mazda LTD., Ford India Ltd., Honda Sael Cars India Ltd., Mahindra Renault, Fiat.

Further it has also helped us to upgrade our manufacturing technology with the result we are able to get orders from Global OEMs such as General Motors, Nissan & Renault for their overseas locations to endless but serious enquiries are being released from all over the Globe.

Polyplastics has also been a supplier to General Motors, Thailand. The quality of its products has helped it get bigger orders from other OEMs. The increased demand for its products has necessitated expansion of its facilities. Two years ago a manufacturing facility was created in Gurgaon which is almost 100% utilized. The Pune facility, which will manufacture the similar components, is coming up with an investment of Rs. 25 Crores. This facility will become operational by end of the year 2008. Also the groundwork for a manufacturing facility in Chennai has already started.

While Polyplastics did not have any major problem in any of the Joint Ventures so far, it feels that the Government shall work towards making Indian arbitration institutions and systems internationally

credible. Such an arbitration process will install confidence between the two Joint Venture partners. Polyplastics though feels that continuously increasing prices of raw material and disparity in the pricing policy of the global raw material suppliers is fast making Indian auto component manufacturers less competitive in the globalized economy. Another factor that is making India less competitive is the lack of availability of dedicated manpower.

The quality of its products has helped it get bigger orders from other OEMs. Till the year 2004, it exported very small components like emblems to GM-Thailand. In 2004 it got an order from GM-Thailand for the supply of Chevy Bowtie. This component was a very complicated one. Because, there were three processes, Injection molding, vacuum metalizing and painting involved to produce the parts.

The design of the part was in Unigraphics, for which the company did not have software in-house; yet, it successfully developed the part, without any major problem. It was one of the first auto components (Assy of two parts ABS +PMMA with vacuum metalizing), which Polyplastics had developed in-house for the overseas customers.

Keeping in mind the successful development and supply of above part, GM again selected Polyplastics for their new programme S4200 car for their Maxico plant and awarded order for 4 components to it. These parts are presently under approval stage.

The growing confidence of GM in the company has resulted in some of its getting tested in China and USA and have resulted in satisfactory quality. This is likely to help them getting selected as approved global supplies.

Similar situation happened with the Renault. Polyplastics was an unknown supplier to Renault. But after the successful development of components for Logan car (Being produced by their Indian JV company Mahindra Renault), they awarded order to it for two more components for their manufacturing plant in Turkey and France. Testing of these parts have been cleared by Renault approved test labs in France. This further deepened the relationship and further orders are likely to be placed with Polyplastics. Renault is having alliance with Nissan. The successful development of the above projects has helped it in getting business from Nissan for their plant in UK and Spain as well.

The Renault/ Nissan requirements in terms of Systems are very stringent. The OEM has worked with the Polyplastics in guiding them improve their systems from the score "D" to "C" and is further guiding the company to improve its systems to level B.

Recently it finalized three emblems and one wheel rim cover for their forthcoming project in Chennai. The management of Polyplastics is expecting orders for their many more projects in future also. The management of the Polyplastics credits team spirit in the company to its current and future growth.

Looking into the success of Polyplastics to deliver quality products and rapid improvement in the system, OEMs are sending many Requests for Quotation (RFQ) for its products.

While the company did not have any major problem in any of the JVs so far, it feels that the Government should work towards making Indian arbitration institutions and systems internationally credible. Such an arbitration process will instill confidence between the two JV partners.

CASE STUDY VIII: Indication Instruments Ltd.

This Faridabad-based company was set up in 1976. It is a manufacturer and OEM supplier of instruments, clusters, sensors, switches, speedo cable and display units. This family owned yet professionally managed company has a turnover of nearly 60 Crores, of which nearly one fourth comes from exports. It is a supplier to over 60 OEMs of all classes of buses and trucks, farm equipment, construction equipment, marine application, compressors, generators, passenger cars and two wheelers.

The company manufactures a large range of products at its modern manufacturing facility at Faridabad. It gained competitive strength through continuous improvement in quality, service and response time. To gain access to the world market, the company realized it needs the necessary quality certifications, R&D facility and sales and warehouse facility outside India. In 2006, it went for ISO/ TS 16949:2002 Certification. In order to have better control on quality, the company gradually developed R&D facility, reliability lab, calibration lab, modern assembly, press shop, machine shop, molding shop, printing shop, paint shop in house.

The company's focus on quality of its products has helped it get export orders from markets like Middle East, Europe, USA, Far East Asia, Mexico, Turkey, South American Countries, Latin American Countries, etc. As a strategy to expand its business, it started undertaking contract-manufacturing work with adaptation and visual changes in the product for after markets.

When faced with the challenge of high lag time in supplying the product to its customers, the company set up its branch offices in key locations likes Mumbai, Kolkata, Chennai and Pune in India. It has also set up its sales office and warehousing facility in USA to meet the requirements of OEMs in North America.

The company has worked with the objective of manufacturing its quality products and providing unmatched services to delight its customers. In order to achieve this, the company focused on continuous development of its human resources.

Its mission is to emerge as the preferred global supplier for vehicle display and other automotive products for commercial vehicles (including three wheelers), farm tractors, and off-road vehicles.

The Managing Director of the company is confident of the quality of its products. The company is in touch with some European and American companies for R&D collaboration for new product range planned for production. It does not feel the need for any collaboration for its existing range of products, as the company perceives its quality to be comparable with the best in world.

To facilitate its growth plan and strategy, the company expects the Government to intervene to minimize non-tariff barriers and spiraling raw material prices and also offer appropriate DEPB (Duty Entitlement Passbook) and DBK (Duty Drawback) rates.

CASE STUDY IX: Jayem Auto Industries Pvt. Ltd.

The company based out of NCR of Delhi started production of gaskets for automotive and industrial applications in the year 1968. Now, it has entered in manufacturing of sheet metal components and insulations as well. It has grown from one manufacturing plant in 1968 to six manufacturing plants in India in 2008. The products manufactured in these plants are used by both domestic and foreign OEMs.

The domestic customers of this auto component manufacturer include most of the major automotive companies in India and a number of tier-I suppliers.

The company consistently focused on meeting global manufacturing practices and quality standards. It is an ISO 14001 certified company and has TS 16949 and OHSAS certifications as well. Its quality standards have helped it get selected as approved sourcing partner for CMH Europe. The company has also been able to attract customers from developed markets like USA, Japan, Australia and Europe.

The company having mastered the art of best practices in manufacturing and having transnationalised through exports is now looking forward to transnationalisation in the form of technical assistance from a global partner for up-gradation of its facilities in India.

The company focused early on R&D. It spends nearly 5% of the turnover on R&D.

Its small size in terms of turnover has worked against its efforts to set up a JV or having technical collaboration with a foreign partner. The company is committed to grow through its strength in production and is confident that its strength in quality production systems and adherence to best manufacturing practices coupled with investment in R&D will help it attract good partners for collaboration.

Annexure

Annexure – I: Questionnaire

Questionnaire

Confidentiality Clause: IDC India subscribes to the code of ethics laid down by the Market Research Society of India. The report will not identify any individual response from a respondent or a company.

Q 1 Name of the company _____

Q 2 a) Postal Address (Corporate office) _____

b) Website _____

Q 3 Contact details of the respondent

3.1 Name & Designation _____

3.2 Telephone Number _____

3.3 Mobile No _____

3.4 E-mail _____

Q 4 Location of Plants (India / Abroad) 1. _____ 2. _____ 3. _____
(Pl. mention name of the City/Town) 4. _____ 5. _____ 6. _____

Q 5 Year of establishment

5.1 Company _____

5.2 First Plant _____

5.3 Latest Plant _____

Q 6 Company Type (Pls tick the relevant option)

1) *Public Limited* 2) *Private Limited* 3) *Partnership firm*

4) *Other (Pls specify)* _____

Q. 7 Total Number of employees in the company?

Q 8 Does your company have a foreign collaboration? 1) Yes 2) No

If No in the above question, Pl. skip Q 9

Q 9 Kindly mention the nature of foreign collaboration (Technology collaboration / Joint venture / License agreement / Others), name of collaborator and share of foreign equity in the collaboration.

Type of collaboration	Collaborator	Foreign Equity (%)

Q 10 Please tick mark the codes of the products of following categories manufactured by your company? What is the percentage share of each of these product categories to the sales turnover of the company? (Pl. encircle the appropriate code for each product)

Code	Product Category	% Share of the total turnover							
		Up to 10%	>10 to 20 %	>20 to 30%	>30 to 40%	>40 to 60%	>60 to 80%	> 80 to 90%	> 90 to 100%
1	Engine parts	1	2	3	4	5	6	7	8
2	Drive transmission & Steering parts	1	2	3	4	5	6	7	8
3	Suspension & Braking parts	1	2	3	4	5	6	7	8
4	Body & chassis	1	2	3	4	5	6	7	8
5	Equipment	1	2	3	4	5	6	7	8
6	Electrical parts	1	2	3	4	5	6	7	8
	Others (pl. specify)	1	2	3	4	5	6	7	8

Q 11 What is the Domestic Sales Turnover of the company for 2006-07? (Pl. tick the relevant option)

1) Up to Rs. 10 Crores	2) >Rs. 10 Crores to Rs. 50 Crores
3) >Rs. 50 Crores to Rs. 100 Crores	4) >Rs. 100 Crores to Rs. 150 Crores
5) > Rs. 150 Crores to 200 Crores	6) > Rs.200 Crores to 250 Crores
7) > Rs.250 Crores	

Q 12 Does the company export the products? (Pls tick the relevant option) 1) Yes 2) No

If yes, Pl. Continue, else go to Q 16

Q 13 Export turnover of the company for 2006-07 (Pls tick the relevant option)

- 1) Up to Rs. 3 Crores
- 2) >3 Crores to Rs. 10 Crores
- 3) >Rs. 10 Crores to Rs. 25 Crores
- 4) >25 Crores to Rs. 50 Crores
- 5) > Rs. 50 Crores
- 6) Not exporting

Q 14 The customer profile of the products exported by you (Pl. tick the relevant option(s))

- 1) OEMs
- 2) Tier-I suppliers
- 3) Tier-II suppliers
- 4) Aftermarket
- 5) Others (Pl. mention_____)

Q 15 Kindly mention the important 'Products Exported' and their 'Destinations'

Year	Products			
2006 - 2007	Product I	Product II	Product III	Others
Product				
Destination (Country Name)				
2005 - 2006	Product I	Product II	Product III	Others
Product				
Destination (Country Name)				

Q 16 What is the R& D expenditure as percent of total turnover for 2006-07(both domestic and export) of the company? (Pl. tick the relevant option)

- 1) Up to 1 percent
- 2) >1% to 2 percent
- 3) >2% to 3 percent
- 4) >3% to 4 percent
- 5) >4% to 5 percent
- 6) > 5 percent

Q 17 Which of the following compliances and standards are being followed by your company? (Pl. tick the relevant option(s))

- 1) ISO 9000
- 2) QS 9000
- 3) ISO 14001
- 4) TS 16949
- 5) E-Mark
- 6) BIS Mark
- 7) Japan Quality Model
- 8)OHSAS
- 8) Others (Specify).....

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Q. 18 Is your company transnationalised by any of the following processes? *(Pl. tick the relevant option)*
 1) Yes 2) No

(If yes, Pl. encircle the appropriate code in the table below else go to Q 19)

Q. 19 Is your company considering transnationalisation through any of the following processes?
 (Pls tick the relevant option) 1) Yes 2) No

(If yes, Pl. encircle the appropriate code in the table below else go to Q 20)

Ways to Transnationalise	Q. 18 Already transnationalised	Q. 19 Willing to transnationalise
Establishing a Joint venture outside India	1	1
Undertaking a technology collaboration	2	2
Exporting the products	3	3
Undertaking R&D jointly with a foreign partner	4	4
Contract manufacturing	5	5
Others (pl. specify)	6	6

Q. 20 Briefly describe the challenges faced and support required for transnationalisation of your company?

Challenges faced: -----

Support Required: -----

(Pl. add additional sheet if required)

Pl. indicate if we can contact you for any clarifications 1) Yes 2) No

Kindly attach your visiting card along with the filled in questionnaire before sending it to us

Thank You for your Precious Time & Co-operation

Annexure – II : Profile of the companies contacted for interview

Sl.	Company Name	City	No. of Employees	Sales Turnover (in Crores INR)#	Domestic Sales Turnover (in Crores INR) #	Export Turnover (in Crores INR) #	Product - Broad Category	Product - Micro Category
1	Harsha Engineers Ltd.	Ahmedabad	850	198	103	95	Non-Core product	Bearing Housing
2	Rucha Engineers Pvt. Ltd.	Aurangabad	231	132.3	132.1	0.2	Engine Parts	Exhaust Systems/ Parts
3	Yeshshree Press Comps. Pvt. Ltd.	Aurangabad	165	121	121	NA	Body Parts	Cold Forged/ Cold Extruded Parts, Three wheelers body, Load bodies
4	Aditya Auto Products And Engineering (I) Pvt. Ltd.	Bangalore	196	67	41	26	Suspension and Braking Parts	Parking Brakes/ Lever
5	AUTOLIV IFB India Pvt. Ltd.	Bangalore	268	109	108	0.9	Others	Seat Belts
6	Kavia Engineering Pvt. Ltd.	Bangalore	57	5	5	0.2	Engine Parts	Engine Valves, Inlet & Exhaust
7	Kongovi Electronics Pvt. Ltd.	Bangalore	413	27	27	NA	Drive Transmission & Steering Parts	Wheel rims
8	BPL Ltd. (Automation Division	Bangalore	250	20	18.6	1.4	Body Parts	Plastic Moulded Parts
9	Investment & Precision castings Ltd.	Bhavnagar	469	60	51.3	8.3	Drive Transmission & Steering Parts	Transmission parts
10	Garg Industrial Corporation	Chandigarh	45	0.6	0.6	NA	Drive Transmission & Steering Parts	Clutch Assembly
11	Amalgamations Repco Ltd.	Chennai	172	65	62	3	Drive Transmission & Steering Parts	Clutch Assembly
12	Amararaja Batteries Ltd.	Chennai	2101	215	195	20	Electrical Parts	Battery
13	Ibex Products Pvt. Ltd.	Chennai	88	9	9	NA	Engine Parts	Fuel Filters
14	IM gears Pvt. Ltd.	Chennai	300	90	60	30	Drive Transmission & Steering Parts	Clutch Components

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SI.	Company Name	City	No. of Employees	Sales Turnover (in Crores INR)#	Domestic Sales Turnover (in Crores INR) #	Export Turnover (in Crores INR) #	Product - Broad Category	Product - Micro Category
15	India Pistons Ltd.	Chennai	1200	268	242	26	Engine Parts	Pistons, Pison Pins, Piston Rings, Cylinder Linders, Circlips
16	M K Auto Components India Ltd.	Chennai	125	1.5	1.5	NA	Engine Parts	Fuel Injection Pumps, Single Cylinder, Fuel Injection Parts
17	Mitsuba Sical India Ltd.	Chennai	500	13	13	0.04	Engine Parts	Fuel Pumps (Petrol) & Repair Kits, Engine Cooling Fan Assembly
18	Southern Auto Castings Pvt. Ltd.	Chennai	600	41	22	19	Engine Parts	Valve Tappets & Seat Inserts, Camshafts
19	Taylor Rubber Pvt. Ltd.	Chennai	130	7	3	4	Body Parts	Rubber Components/ Profiles
20	Electromags Automotive Products Pvt. Ltd.	Chennai	100	60	39	21	Engine Parts	Fuel Injection Parts
21	Rangamma Steels and Malleables	Coimbatore	50	15	15	NA	Engine Parts	Wheels
22	RSM Autokast Ltd.	Coimbatore	63	NA	NA	NA	Suspension And Braking Parts	Brake Components
23	Gajra Gears Pvt. Ltd.	Dewas	1773	117	62	55	Drive Transmission & Steering Parts	Transmission Gears
24	Elofic Industries Ltd.	Faridabad	537	71	48	23	Engine Parts	Air Filters and Cartridges, Fuel Filters, oil Filters
25	Global Automotive Components (P) Ltd.	Faridabad	120	7	0	7	Engine Parts	Gaskets
26	Indication Instruments Ltd.	Faridabad	597	58	44	14	Equipments	Switches
27	Jayem Auto Industries Pvt. Ltd.	Faridabad	50	11.4	9.6	1.9	Engine Parts	Gaskets

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SI.	Company Name	City	No. of Employees	Sales Turnover (in Crores INR)#	Domestic Sales Turnover (in Crores INR) #	Export Turnover (in Crores INR) #	Product - Broad Category	Product - Micro Category
28	Polymer Papers Ltd.	Faridabad	127	NA	NA	NA	Engine Parts	Air Filters and Cartridges, Fuel Filters, oil Filters
29	Surya Springs	Faridabad	50	5	4.36	0.48	Suspension And Braking Parts	Coil Springs- Suspension
30	Urastun Metal Industries Pvt. Ltd.	Faridabad	208	30	30	NA	Others	Forgings & Stampings
31	Victoria Tool Engineers (P) Ltd.	Faridabad	511	NA	NA	NA	Miscellaneous	Sheet Metal Components, Dies, Tools and Panel Checkers and their Toolings
32	Continental Engines Ltd.	Gurgaon	705	180	46	134	Engine Parts	Cylinder Block, Push Rods & Rocker Shafts, Fork Shifter, Camshafts, Oil Coolers, Exhaust Manifold
33	Emkay Automobile Industries Pvt. Ltd.	Gurgaon	1320	104	99	5	Engine Parts	Engine Mountings
34	Jay Switches India Pvt. Ltd.	Gurgaon	323	17	17	NA	Equipments	Other Lamps
35	Napino Auto & Electronics Ltd.	Gurgaon	881	222	222	0	Electrical Parts	Voltage Regulators
36	Sellowrap Manufacturing Pvt. Ltd.	Gurgaon	53	10	10	NA	Engine Parts	Gaskets
37	Spun Micro-Processing Pvt. Ltd.	Gurgaon	200	18	2	16	Drive Transmission & Steering Parts	Tie Rod Ends/ parts
38	Stork Rubber Products Pvt. Ltd.	Gurgaon	200	14.9	0.5	14.4	Engine Parts	Engine Mountings
39	Trim India P Ltd.	Gurgaon	62	11	11	NA	Body Parts	Door Trims
40	Fine Blanking Pvt. Ltd.	Hubli	49	6	6	0	Non-Core product	Fine Blanked Components
41	Guru Nanak Auto Enterprises Ltd.	Jalandhar	670	94	94	NA	Engine Parts	Camshafts
42	Nalin Rubber (P) Ltd.	Jamshedpur	32	3	3	NA	Engine Parts	Gaskets (rubber)

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SI.	Company Name	City	No. of Employees	Sales Turnover (in Crores INR)#	Domestic Sales Turnover (in Crores INR) #	Export Turnover (in Crores INR) #	Product - Broad Category	Product - Micro Category
43	Jkew Forgings Ltd.	Kanpur	126	NA	NA	NA	Miscellaneous	Forged parts
44	Highway Industries Ltd.	Ludhiana	1150	93	90.6	2.8	Body Parts	Cold Forged/ Cold Extruded Parts
45	Mehta Engineers Ltd.	Ludhiana	450	33	30.5	2.6	Non-Core product	Sheet Metal Parts
46	Nicks Auto Industries	Ludhiana	237	13	13	0	Non-Core product	Sheet Metal Parts
47	Gilard Electronics Pvt. Ltd.	Mohali	340	12	12	0	Equipments	Horn Relays
48	Bharat Gears Ltd.	Mumbai	1319	216	187	29	Drive Transmission & Steering Parts	Transmission Gears
49	Chandok Automotive Manufacturers Ltd.	Mumbai	50	NA	NA	NA	Drive Transmission & Steering Parts	Transmission Gears
50	Mahindra SAR Transmission Pvt. Ltd.	Mumbai	400	41	38	3	Engine Parts	Exhaust Manifold
51	Prabha Engineering Pvt. Ltd.	Mumbai	208	26.4	5.8	20.6	Suspension And Braking Parts	Hand Brake Assembly
52	The Supreme Industries Ltd.	Mumbai	230	83	83	NA	Body Parts	Bumper
53	UMC Auto Industries Pvt. Ltd.	Mumbai	60	7.7	2.4	5.3	Suspension And Braking Parts	Leaf Springs
54	Vaid Elastomer Processors Ltd.	Mumbai	746	42	36	6	Engine Parts	Gaskets, Gaskets (Rubber), Fuel Injection Tubes
55	Vibrant Auto Components Pvt. Ltd.	Mumbai	99	5	5	NA	Electrical Parts	Ignition Coils
56	Hindustan Hardy Spicer Ltd.	Nashik	256	28.6	18.4	10.2	Drive Transmission & Steering Parts	Propeller Shaft
57	Innova Rubbers Pvt. Ltd.	Nashik	383	39.6	36.4	3.2	Engine Parts	Engine Mountings
58	Reliable Autotech Pvt. Ltd.	Nashik	211	6.5	4.8	1.6	Non-Core product	Forgings & Stampings

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SI.	Company Name	City	No. of Employees	Sales Turnover (in Crores INR)#	Domestic Sales Turnover (in Crores INR) #	Export Turnover (in Crores INR) #	Product - Broad Category	Product - Micro Category
59	Sterling Industries	Nashik	480	151	147	4	Drive Transmission & Steering Parts	Tie Rod Ends/ parts
60	National Rubber Engineers	Navi Mumbai	25	0.9	0.3	0.6	Engine Parts	Gaskets
61	Allena Auto Industries Pvt. Ltd.	New Delhi	225	74	74	NA	Engine Parts	Oil Filter, Oil Pump Assembly, Exhaust Manifold
62	D. D. INDUSTRIES LTD.	New Delhi	1200	14.6	14.3	0.3	Non-Core product	CNG ./ LPG Kits
63	Horizon Industrial Products Pvt. Ltd.	New Delhi	200	28	24	4	Engine Parts	Radiators & Radiators Cores
64	IST Ltd.	New Delhi	500	12.6	10.5	2.1	Engine Parts	Carburettors & Repair Kits
65	JBM Auto Ltd.	New Delhi	596	135	125	10	Drive Transmission & Steering Parts	Front Axles (Tractors)
66	Maco Pvt. Ltd.	New Delhi	165	8	7	1	Engine Parts	Piston Pins, Piston Rods, Connecting Rods, King Pins, Crank Pins, Differential Pins
67	Mandap International Pvt. Ltd.	New Delhi	35	NA	NA	NA	Drive Transmission & Steering Parts	Wheel rims
68	Sunpac Auto (India) Pvt. Ltd.	New Delhi	33	2	2	0	Equipments	Head Lamps
69	Automotive Stampings & Assemblies Ltd.	Pune	1565	303	298	5	Engine Parts	Oil Sumps
70	Chaphekar Engineering Pvt. Ltd.	Pune	100	26	26	NA	Drive Transmission & Steering Parts	Steering Fear systems (shaft, columns & Gears)
71	JHS Taigene Electrical Co. Pvt. Ltd.	Pune	167	18	11	7	Engine Parts	Engine Cooling Fan Assembly
72	Kailash Vahan Udyog Ltd.	Pune	400	60	60	NA	Body Parts	Load bodies

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SI.	Company Name	City	No. of Employees	Sales Turnover (in Crores INR)#	Domestic Sales Turnover (in Crores INR) #	Export Turnover (in Crores INR) #	Product - Broad Category	Product - Micro Category
73	Minda Stoneridge Instruments Ltd.	Pune	380	67	60	7	Equipments	Speedometers
74	Poona Shims Pvt. Ltd.	Pune	184	47	45	2	Engine Parts	Fuel rail, Radiators & Radiators Cores, Oil Coolers
75	Premium Energy Transmission Ltd.	Pune	890	NA	NA	NA	Drive Transmission & Steering Parts	Transmission Gears
76	ADVIK HI-TECH Pvt. Ltd.	Pune	173	20	20	NA	Engine Parts	Oil Pumps Assembly
77	Amtek	Pune	40	4.0	3.7	0.3	Engine Parts	Fluwheel Rings Gears, Crankshafts,
78	Dali & Samir Engineering Pvt. Ltd.	Pune	195	26	26	NA	Engine Parts	Radiators & Radiators Cores
79	JKM-DAERIM Automotive Ltd.	Sriperumbudur	357	135	128	7	Engine Parts	Fork Shifter, Fuel rail, Oil Pump Assembly, Exhaust Manifold
80	Technical Stampings Automotive Ltd.	Sriperumbudur	1777	306	306	NA	Body Parts	Sheet Metal Parts
81	Liners India Ltd.	Vijaywada	500	39	32	7	Engine Parts	Cylinder Liners
82	Polyplastics	Yamuna Nagar	309	35	35	0	Engine Parts	Radiator Grills

Conversion Rate: USD 1 = INR 40

Source: Buyers' Guide, 2008 published by ACMA

Annexure – III: List of companies to whom questionnaire was sent

S. No	Organization Name	Address	City	No. of Employee	Sales Turnover (in Crores INR)#	Export Turnover (in Crores INR)#	Foreign Collaboration – Yes/ No
1	Benara Bearings & Pistons Ltd.	A - 3/4, Site B, Industrial Area, Sikandra, Agra, Uttar Pradesh - 282007. Phone: 0562 2641258,2641381, 2641481	Agra	446	11.32	3.32	N
2	Benara Udyog Ltd.	Bharatpur Road, Bodla, Agra, Uttar Pradesh - 282007. Phone: 0562 2275347, 2275282	Agra	250	16.92	8	N
3	Automotive Valves Pvt. Ltd.	Shraddha, Opp. Kirtisagar Flats, Usmanpura, Ahmedabad, Gujarat - 380 013. Phone: 079 27550389	Ahmedabad	90	6.4	NA	NA
4	Harsha Engineers Ltd.	Sarkhej-Bavla Road, NH- 8a, P.O Changodhar, Ahmedabad - 382213. Phone: 02717-391200	Ahmedabad	850	198.16	95.44	N
5	Precision Autowares Pvt. Ltd.	Avadh Indus. Estate, G H High School Road, Saijpur Bogha, Ahmedabad 382 345, Gujarat. Phone: 079-32907238, 22819264, 079-22820639, 22820892	Ahmedabad	97	9.32	2.04	Y
6	Texspin Bearings Ltd.	8, Pragatishil Society, Opp. Mangal Maitry Hall, Paldi, Ahmedabad - 380008. Phone: 079-26581492, 079-26574764	Ahmedabad	800	53.32	8	N
7	Indian Diecasting Industries	Sasni Gate, Agra Road, Aligarh 202 001, Uttar Pradesh. Phone: 0571-2411797, 2411925, 3290694, 0571-2411926	Aligarh	115	11.16	0.24	Y
8	Devendra Exports Pvt. Ltd.	35-B/2, Second Main Road, Ambattur Industrial Estate, Chennai - 600058. Phone: 044-26258127, 044-26252215, 26250267, 26251432	Ambattur	173	10.4	8.48	N
9	Aurangabad Electricals Ltd.	Gut No. 65, Village Chitegaon, Tal Paithan, Aurangabad - 431105. Phone: 02431-251793, 251482-84	Aurangabad	850	408	60	Y
10	Badve Engineering Pvt. Ltd.	Gut No. 15, Naigavan, Khandewadi, Tal Paithan, Aurangabad - 431107. Phone: 0240-2694485	Aurangabad	1200	118.2	0.92	N
11	BCL Springs	F13, MIDC Industrial Area, Chikalthana, Aurangabad - 431210. Phone: 0240-6637000	Aurangabad	130	81.6	0.84	N
12	Birla Perucchini	B-15/3/2, MIDC, Waluj, Aurangabad - 431 133. Phone: 0240-2555882-83	Aurangabad	218	14.92	2.8	N

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S. No	Organization Name	Address	City	No. of Employee	Sales Turnover (in Crores INR)#	Export Turnover (in Crores INR)#	Foreign Collaboratio n – Yes/ No
13	Dhoot Transmission Pvt. Ltd.	Gut No. 100, 15 Km Stone, Aurangabad-Paithan Road, Farola, Aurangabad - 431137. Phone: 02431-251446, 251776	Aurangabad	350	128.8	2.4	N
14	Durovalves India Pvt. Ltd.	F 57/58 MIDC Industrial Area, Waluj, Aurangabad - 431 136. Phone: 0240-2564161	Aurangabad	433	43.16	12.12	Y
15	Endurance Systems (India) Pvt. Ltd.	K-120, MIDC Industrial Area, Waluj, Aurangabad - 431136. Phone: 0240-2556683, 0240-2556684, 2555304	Aurangabad	3449	1206	81.2	Y
16	Endurance Transmission Systems (I) Pvt. Ltd.	K-228/229, MIDC Industrial Area, Waluj, Aurangabad - 431136. Phone: 0240-2556686-87	Aurangabad	531	280.2	NA	NA
17	Rucha Engineers Pvt. Ltd.	K-249, MIDC, Waluj, Aurangabad - 431136. Phone: 0240-2564884, 0240-2555692	Aurangabad	231	132.28	0.16	N
18	Sanjeev Precision Components Pvt. Ltd.	C-238, MIDC Industrial Area, Waluj, Aurangabad 431 136, Maharashtra. Phone: 0240-2244016-7, 0240-2564606	Aurangabad	101	11.04	2.12	N
19	Varroc Engineering Pvt. Ltd.	E-4, MIDC Industrial Area, Waluj, Aurangabad - 431136. Phone: 0240-2556227-8	Aurangabad	4034	973.6	13.96	Y
20	Yeshshree Press Comps. Pvt. Ltd.	B-48, MIDC, Waluj, Aurangabad - 431136. Phone: 0240-2555810	Aurangabad	165	121.2	NA	N
21	Anurang Engineering Co. Pvt. Ltd.	B-2, M.I.D.C.Industrial Area, Post Box No. 960, Waluj, Aurangabad, Maharashtra- 431 136. Phone: 0240 2564864-65, 2555026-27, 2554816	Aurangabad	775	83	NA	NA
22	Aditya Auto Products and Engineering (I) Pvt. Ltd.	13 E, Kiadb Industrial Area, Doddaballapur, Bangalore - 561203. Phone: 080-27623329, 080-27622707, 27622708	Bangalore	196	67.04	25.68	Y
23	AISIN NTTF Pvt. Ltd.	No. 40/40 A, Electronics City Hosur Road, Bangalore - 560 100. Phone: 080 28522212-13, 28523408	Bangalore	58	46.8	NA	Y
24	AUTOLIV IFB India Pvt. Ltd.	No. 16 Visveshwariah Industrial Estate, 1st Main Road, Off White Field Road, Bangalore - 560048. Phone: 080-28524017	Bangalore	268	109.08	0.92	Y

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25	Bill Forge Pvt. Ltd.	9C, Bommasandra Industrial Area, Bangalore, Karnataka - 560 099. Phone: 080 7832325	Bangalore	310	28.68	1.64	N
26	BPL Ltd. (Automation Division)	No. 238, Iii Phase, Bommasandra Industrial Area, Bangalore - 560 099. Phone: 080 27832328-29	Bangalore	250	20	1.4	N
27	Demanik Enterprises	328/12, 15th Cross Jayanagar, IInd Block, Bangalore - 560 011. Phone: 080-26567770	Bangalore	3	0.008	NA	N
28	Denso Kirloskar Industries Pvt. Ltd.	30th Km Stone, Tumkur Road, NH-4 Vishveshwarapura, Nelamangala - 562123. Phone: 080-27722339, 27722060	Bangalore	384	204.52	NA	Y
29	ESSAE AUCOM Pvt. Ltd.	195 A, Bommasandra Industrial Area, Bangalore - 560 099. Phone: 08110-329722-4	Bangalore	60	17.68	2.8	N
30	Gearock Forge Pvt. Ltd.	No. 143, B-8, Bommasandra Industrial Area, Bangalore 560 099, Karnataka. Phone: 080-27831720, 7835647, 7835648, 080-27831719	Bangalore	320	10.4	NA	N
31	IFB Automotive Pvt. Ltd.	No. 16, Vishveshwaraih Industrial Estate, Mahadevapura, Bangalore – 560048. Phone: 080-28524057-58-59	Bangalore	375	228.84	0.4	Y
32	John Fowler (India) Pvt. Ltd.	Plot No. 6 & 6 P, Bommasandra Industrial Area, Bangalore 560 099, Karnataka. Phone: 080-27836788, 080-27836791	Bangalore	147	23.8	0.008	N
33	Kar Mobiles Ltd.	Sri Chitrapur Commercial Complex, Iv Floor -E, No. 68, 15th Cross, 8th Main, Malleswaram, Bangalore - 560058. Phone: 080-23340880	Bangalore	558	62.4	31	N
34	Karnataka Hybrid Micro Devices Ltd.	Plot No. Part 103, 4th Cross, Electronics City, Hosur Road, Bangalore 560 100, Karnataka. Phone: 080-28520208, 28521456, 080-28520209	Bangalore	150	16	NA	N
35	Kavia Engineering Pvt. Ltd.	320/2 Sidappa Layout, Bomanahalli, Hosur Road, Bangalore 560 068, Karnataka. Phone: 080-25732425, 25730785, 080-25732425, 25730785	Bangalore	57	5.28	0.2	N
36	Kongovi Electronics Pvt. Ltd.	No.377, 10th Cross, I Main, IV Phase, Peenya Industrial Area, Bangalore 560 058, Karnataka. Phone: 080-28360563, 080-28362981	Bangalore	413	26.96	NA	N

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37	Maini Precision Products Pvt. Ltd.	B-165, 3rd Cross, 1st Stage, Peenya Industrial Estate, Bangalore - 560058. Phone: 080-28392807, 080-28398176	Bangalore	636	128	92	N
38	NTTF Industries Ltd.	23/24, ii Phase, Peenya Industrial Area, Bangalore 560 058, Karnataka. Phone: 080-28394840,28394848,28394849, 080-28392428	Bangalore	621	38	NA	N
39	Owari Precision Products (India) Pvt. Ltd.	20, Bidadi Industrial Area, Ramnagar Taluk, Bangalore Rural Dist. 562 109, Karnataka. Phone: 080-27287170, 080-27287155	Bangalore	30	7.56	NA	N
40	Polyflex (India) Pvt. Ltd.	No. 116 & 117, Bommasandra Industrial Area, Anekal Taluk, Bangalore - 560099. Phone: 080-27832851, 7832852	Bangalore	360	83.2	NA	N
41	Sansera Engineering Pvt. Ltd.	261/C, Bommasandra Industrial Area, Bommasandra Post, Bangalore - 560099. Phone: 080-27833056, 27833442	Bangalore	1054	165.04	13.48	Y
42	Siemens Ltd.	140, Hosur Road Bangalore - 560095. Phone: 080-25531580-84	Bangalore	890	75.04	NA	N
43	Sree Lakshmi Industrial Forge & Engineers Ltd	89/1, J.C. Road, Bangalore 560 002, Karnataka. Phone: 080-41224100, 080-41224099	Bangalore	323	92	4	N
44	Stanzen Toyotetsu India (P) Ltd.	Plot No. 20, Building No. 2, Bidadi Industrial Area, Ramnagar Taluk, Bangalore Rural - 562109. Phone: 080-27287158-59, 080-27287174-75	Bangalore	524	61.6	NA	N
45	Stumpp, Schuele & Somappa Pvt. Ltd.	139/2, Hosur Road, Koramangala, Bangalore - 560095. Phone: 080-25532335	Bangalore	876	135.4	13.04	Y
46	Suprajit Engineering Ltd.	No. 100, Bommasandra Industrial Area, Bangalore - 560099. Phone: 080-27833827-6	Bangalore	780	192	55.36	N
47	TG Kirloskar Automotive Pvt. Ltd.	Toyota Techno Park, Plot No. 20, Bldg No.1, Bidadi Industrial Area, Ramanagara Taluk, Bangalore Rural Dist. 562 109, Karnataka. Phone: 080-27287160/61, 27287176/77, 080-27287152/71/72	Bangalore	128	37.2	NA	N
48	Toyota Boshoku Automotive India Pvt. Ltd.	41, Bhimenahalli, M. N. Halli, Bidadi, Bangalore - 562109. Phone: 080-27282001-07	Bangalore	702	192.44	NA	N

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49	Toyota Kirloskar Auto Parts Pvt. Ltd.	Plot No. 21, Bidadi Industrial Area, Ramanagaram Taluk, Bangalore - 562109. Phone: 080-27287141, 080-27287143-150	Bangalore	748	546	388.8	N
50	TRIGNO Engineering Pvt. Ltd.	No. 13, SNS Chambers 239, Sankey Road, Bangalore 560 080, Karnataka. Phone: 080-23614625, 080-23610504	Bangalore	70	12.12	NA	NA
51	Vinayaka C.N.C. Centre Pvt. Ltd.	A-347, 9th Main, II Stage, Peenya Industrial Estate, Bangalore 560 058, Karnataka. Phone: 080-28360383, 51172061, 51172062, 080-28360582	Bangalore	85	12.16	NA	N
52	Ashok Iron Works Pvt. Ltd.	Mazagaon Road, Udyambag, Belgaum - 590008. Phone: 0831-2442599, 0831-2441799	Belgaum	2500	223.24	33.6	N
53	Fairfield Atlas Ltd.	3941/2, B-9, Club Road, Basavanagar, Belgaum, Karnataka - 590002. Phone: 02320-236605	Belgaum	577	103.36	59.36	Y
54	Investment & Precision Castings Ltd.	Nari Road, Bhav Nagar - 364006. Phone: 0278-2523300-04	Bhavnagar	469	59.56	8.28	N
55	Microsign Products	Mehta Terrace, Satyanarayan Road, Bhavnagar 364 001, Gujarat. Phone: 0278-2432025, 2436272, 0278-2421621	Bhavnagar	23	3.2	NA	N
56	Climate Systems India Ltd.	Sp- 812 A, Industrial Area, Phase-II, Bhiwadi - 301019. Phone: 01493-225058-59	Bhiwadi	96	56.88	NA	Y
57	Acey Engineering Pvt. Ltd.	105, G.I.D.C.,Antalia, Billimoria, Gujarat - 396 325. Phone: 02634 - 284199, 02634-284599	Bilimora		22.32	0.02	N
58	Emmbros Autocomp Ltd. (Formerly Emmbros Metals Pvt. Ltd.)	S.C.O.: 60, 1st Floor, Sector-26-C, Madhya Marg, Chandigarh, 160 019. Phone: 0172-2792048, 0172-2793652	Chandigarh	116	24.24	12.88	N
59	Garg Industrial Corporation	359, Industrial Area, Phase I, Chandigarh 160 002. Phone: 0172-2650326, 2659984	Chandigarh	45	0.64	NA	N
60	Accurate Products Corporation Pvt. Ltd.	No. 285 (Old No. 36), Main Road, Velachery, Chennai - 600 042. Phone: 044 22432125, 044-22430933, 22430922, 22434681	Chennai	108	1.4	0.88	N

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61	ALPUMP Pvt. Ltd.	170-172, Industrial Estate, Perungudi, Chennai - 600 096. Phone: 044 24961177, 044-24961745, 24961431, 24961142	Chennai	300	36.72	3.6	N
62	Amalgamations Repco Ltd.	J' Gardens, G.N.T. Road, Chennai - 600110. Phone: 044-25580909, 044-25581765, 25581769	Chennai	172	65.2	3.44	NA
63	Amararaja Batteries Ltd.	No. 12, Kodambakkam High Road, Chennai - 600034. Phone: 044-28213270	Chennai	2101	215.48	20.48	N
64	Amul Polycure Industries Ltd.	1, Parthasarathy Street, Coronation Nagar, Korukkupet, Chennai- 600021. Phone: 044-25922001-2, 044-25921133	Chennai	60	4.6	NA	N
65	Arham Plastics Ltd.	Thiru Complex, 2nd Floor, Pantheon Road Egmore, Chennai- 600008. Phone: 044-28553456, 3533, 044-28553533	Chennai	115	23.72	NA	N
66	Autotech Industries (India) Pvt. Ltd.	Sp-114, Ambattur Industrial Estate, Ambattur, Chennai - 600058. Phone: 044-26259151, 044-26257601, 26243470	Chennai	506	90	66.32	Y
67	Borgwamer Cooling Systems India Pvt. Ltd.	No. 12, Kasturi Industrial Estate, Ponnamman Nagar, Aynambakkam, Chennai - 600095. Phone: 044-26534761-63	Chennai	70	74.76	3.76	N
68	CRP (India) Pvt. Ltd.	No. 101- Developed Plot Estate, Perungudi, Chennai - 600 096. Phone: 044-24961082, 044 24961087	Chennai	400	3.56	0.52	N
69	Electromags Automotive Products Pvt. Ltd	6, Gerizim P. H. Street, Seevaram Village, Chennai - 600 096. Phone: 044-24960370, 044-24965302, 24965304	Chennai	100	60	20.8	N
70	Ennore Foundries Ltd.	Ennore, Chennai - 600057. Phone: 044-25752103	Chennai	2396	292.92	5.12	N
71	Expansion Tools	8, G.S.T. Road, Alandur, Chennai - 600 016. Phone: 044-22342090	Chennai	13	0.8	0.16	N
72	Fenner (India) Ltd.	Khivraj Complex II, 5th Floor, 480, Anna Salai, Chennai - 600035. Phone: 044-24312450-57	Chennai	2800	211.04	51.96	N
73	Ibex Products Pvt. Ltd.	'Raheja Towers', 7th Floor, Sigma Wing, 177, Anna Salai, Chennai 600 002, Tamil Nadu. Phone: 044-28601610, 044-28607205	Chennai	88	8.72	NA	N

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74	IM Gears Pvt. Ltd.	235, 1A & 2C Vengaivasal Main Road, Madambakkam Selaiyur, Chennai - 600073. Phone: 044-22780085, 044-22780598, 22780386	Chennai	300	43.04	NA	N
75	India Japan Lighting Pvt. Ltd.	No. 1, Puduchatram (Via) Thirumazhisai, Tiruvellore High Road, Chennai - 602107. Phone: 044-26811300-02	Chennai	505	89.32	NA	Y
76	India Pistons Ltd.	Huzur Gardens, Sembiam, Chennai - 600011. Phone: 044-26729200	Chennai	1200	268.4	25.92	N
77	IP Rings Ltd.	"Arjay Apex Centre" 24, College Road, Chennai - 600006. Phone: 044-42143593, 044-42143594	Chennai	200	58.04	0.02	Y
78	Lucas-TVS Ltd.	Padi, Chennai - 600050. Phone: 044-26258211, 044-26257273	Chennai	1850	840	41.88	Y
79	M K Auto Components India Ltd.	Sp-25, 26 & 27, Industrial Estate, Ambattur, Chennai 600 058, Tamil Nadu. Phone: 044-42180031, 044-42180201	Chennai	125	1.48	NA	N
80	Madras Engineering Industries Pvt. Ltd	C-6, Industrial Estate, Ambattur, Chennai 600 058, Tamil Nadu. Phone: 044-26258433, 26256008, 044-26250178	Chennai	200	68	44	N
81	Mando Brake Systems India Ltd.	F-64, SIPCOT Industrial Park, Irrungattukottai, Sriperumbudur, Chennai - 602105. Phone: 044-2715645-47	Chennai	357	90.48	NA	Y
82	Mitsuba Sical India Ltd.	D-8, SIPCOT Industrial Complex, Gummidipoondi, Chennai - 601201. Phone: 044-27921701, 044-27922558, 27922403, 27922559	Chennai	500	13	0.04	Y
83	Natesan Synchrocones Pvt. Ltd.	No. 6, First Cross Road, Kasturba Nagar, Adyar, Chennai - 600020. Phone: 044-23450823, 044-23450824	Chennai	99	62.12	2.04	N
84	NELCAST Ltd.	159, TTK Road, Alwarpet, Chennai 600 018, Tamil Nadu. Phone: 044-24983111, 24984111, 044-24982111	Chennai	893	3.56	0.32	Y
85	Nippon Thermostat (India) Ltd.	Riviera Park, GA & GB, No. 11, 4th Main Road Extension, Kotturpuram, Chennai 600 085, Tamil Nadu. Phone: 044-24473306, 044-24473311	Chennai	32	18.16	2.32	N

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86	Rajsriya Enterprises Pvt. Ltd.	Plot No - 706, Door No - 29/137 B, Poonamallee Avadi Road, Paruthipattu, Chennai 600 071, Tamil Nadu. Phone: 044-26556711- 16, 044-26556174	Chennai	220	19.08	0.44	Y
87	Rane (Madras) Ltd.	154, Velachery Main Road, Valechery, Chennai - 600042. Phone: 044-22452344	Chennai	361	252.8	6.92	Y
88	Rane Brake Linings Ltd.	Plot No. 30, Ambattur Industrial Estate, Chennai - 600058. Phone: 044-42215500	Chennai	846	160	11.28	N
89	Rane Engine Valves Ltd.	Level-5, "Anmol Palani" Post Box No. 4964, 88, G. N. Chetty Road, T. Nagar, Chennai - 600017. Phone: 044-28153182	Chennai	1482	120	52.8	Y
90	Rane TRW Steering Systems Ltd.	45, TTK Road, Alwarpet, Chennai - 600018. Phone: 044-24994390	Chennai	1498	365.08	6.4	Y
91	Southern Auto Castings Pvt. Ltd.	R-32/6, T.S. Krishna Nagar, Mugappair, Chennai 600 050, Tamil Nadu. Phone: 044-26258257,26243285, 26241574, 044-26258809	Chennai	600	40.84	18.64	Y
92	Sundaram Brake Linings Ltd.	Padi, Chennai - 600050. Phone: 044-42205300	Chennai	980	176	51.2	Y
93	Sundaram-Clayton Ltd.	Jayalakshmi Estates, No. 29 (Old No. 8) Haddows Road, Chennai - 600006. Phone: 044-28272233	Chennai	1473	600	80.84	Y
94	Sundram Fasteners Ltd.	98-A, Dr. Radhakrishnan Salai, Mylapore, Chennai - 600004. Phone: 044-28478500	Chennai	1649	1248.52	333.24	Y
95	Super Auto Forge Ltd.	Ts- 82/2 Mettu Street, Ganapathy Nagar, Ekkatuthungal, Chennai - 600097. Phone: 044-22252544, 044-22252545	Chennai	550	192	112	Y
96	Susira Industries Ltd.	G-16, Ist Main Road, Ambattur Industrial Estate, Chennai 600 058, Tamil Nadu. Phone: 044-26253881, 26248334, 26233079, 044-26258060	Chennai	159	18.64	5.12	Y
97	Swathanthra Industries	2b/8, South Phase, Industrial Estate, Ambattur, Chennai 600 058, Tamil Nadu. Phone: 044-26244781, 044-26250788	Chennai	133	3.72	NA	Y
98	Taylor Rubber Pvt. Ltd.	137, Pillaiyar Koil Street, Oggiam – Thuraipakkam, Chennai 600 096, Tamil Nadu. Phone: 044-24960352, 24961459, 044-24961051	Chennai	130	7	3.88	Y

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99	TIDC India (Unit Of Tube Investments Of India)	Post Bag No. 11, Ambattur, Chennai 600 053, Tamil Nadu. Phone: 044-42235555, 044-42235556, 42235516	Chennai	1191	168.4	NA	NA
100	Tube Investments Of India	"Dare House" 234, NSC Bose Road, Chennai - 600001. Phone: 044-42177770-6	Chennai	1860	430.92	57.52	Y
101	UCAL Fuel Systems Ltd.	"Raheja Towers", Delta Wing, Unit 705, 177, Anna Salai, Chennai - 600002. Phone: 044-42208100	Chennai	1191	274	30.56	Y
102	UCAL Machine Tools Ltd.	"Raheja Towers" 7th Floor, Sigma Wing, 177 Anna Salai, Chennai 600 002, Tamil Nadu. Phone: 044-28601610, 28601837, 42158313, 044-28606354	Chennai	529	32.96	14.92	N
103	UCAL Products Pvt. Ltd.	324, Anna Salai, Nandanam, Chennai 600 035, Tamil Nadu. Phone: 044-24342618, 044-24346170	Chennai	71	3.24	0.008	N
104	Wavecurrent Automotives Ltd.	177, SIDCO Industrial Estate, Ambattur, Chennai 600 098, Tamil Nadu. Phone: 044-26253639, 044-26250285	Chennai	85	2.8	NA	NA
105	Western Thomson (India) Ltd.	"Riviera Park", GA & GB, No. 11, 4th Main Road Extension, Kotturpuram, Chennai 600 085, Tamil Nadu. Phone: 044-24473306, 044-24473311	Chennai	63	18.52	3.72	Y
106	Wheels India Ltd.	Padi, Chennai - 600050. Phone: 044-26258511	Chennai	1434	933.28	169.56	Y
107	Rangamma Steels and Malleables	603 – C Block, Pioneer Complex, 1075, Avanashi Road, Coimbatore 641 018, Tamil Nadu. Phone: 0422-6585908, 6586908, 0422-2218408	Coimbatore	50	15.36	NA	N
108	RSM Autokast Ltd.	603-C Block, Pioneer Complex, 1075, Avanashi Road, Coimbatore 641 018, Tamil Nadu. Phone: 0422-6585908, 6586908, 0422-2218404	Coimbatore	63	11.92	NA	NA
109	Textek Electronics Pvt. Ltd.	S.F.No. 339/2 A, Nava India Road, Peelamedu, Coimbatore 641 004, Tamil Nadu. Phone: 0422-2562811, 0422-2563239	Coimbatore	40	0.8	NA	N
110	Auto Shell Perfect Moulder Ltd.	S-129, Private Industrial Estate, Coimbatore, Tamil Nadu - 641 021. Phone: 0422 2672247 (5 Lines)	Coimbatore	127	19.44	NA	NA

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111	Bimetal Bearings Ltd.	18, Race Course Road, Coimbatore, Tamil Nadu - 641018. Phone: 0422-2220054, 0422-2221434, 2221081	Coimbatore	456	80.6	18.52	N
112	Deccan Radiators and Pressings Pvt. Ltd.	Sf 293, Malumachampatti, Pollachi Road, Coimbatore - 641021. Phone: 0422-2610609, 0422- 2611075	Coimbatore	95	11.24	NA	N
113	Indo Shell Mould Ltd.	A-P. SIDCO Industrial Estate, Coimbatore - 641021. Phone: 0422-3982600	Coimbatore	450	144.48	28.8	N
114	L G Balakrishnan & Bros. Ltd.	6/16/13 Krishnarayapuram Road, Ganapathy, Coimbatore - 641006. Phone: 0422-2532325	Coimbatore	2960	400	29.6	N
115	Pricol Ltd.	702/7, Avanashi Road, Coimbatore - 641037. Phone: 0422-4336000	Coimbatore	4615	542.68	95.6	Y
116	Roots Industries Ltd.	R. K. G. Industrial Estate, Ganapathy, Coimbatore-641006. Phone: 0422-4330330	Coimbatore	923	70.92	30	Y
117	Gajra Gears Pvt. Ltd.	Station Road, Dewas - 455001. Phone: 07272-421000, 07272-421111, 421222	Dewas	1773	116.88	55.36	N
118	Tata Holset Ltd.	Industrial Area No. 2, Agra-Bombay Road, Dewas - 455001. Phone: 07272-406300, 07272-406393	Dewas	209	104.8	NA	NA
119	Mahle Migma Pvt. Ltd.	Plot No. 112, Sector- 1, Industrial Area, Pithampur, Dhar - 454775. Phone: 07292-407738, 07292-401209, 253504, 253815, 253523	Dhar	600	66.08	33.12	Y
120	Pinnacle Industries Ltd.	191, Sector 1, Industrial Estate, Pithampur, Dhar 454 775, Madhya Pradesh. Phone: 07292-308030-33, 07292-400966, 253488	Dhar	637	86.56	NA	N
121	Agrim Components Pvt. Ltd.	111/A, DLF Industrial Area, Phase – 1, Faridabad - 121 003. Phone: 0129 5113144 (5 lines), 0129-2279617, 5113142	Faridabad	90	2.76	0.196	N
122	Auto Ignition Ltd.	Plot No. 1, 19/6, Mathura Road, Faridabad - 121006. Phone: 0129-4003291, 0129-4003292, 4003294, 4003284-88	Faridabad	684	145.84	54.64	N
123	Bony Polymers (P) Ltd.	Plot No. 37 P, Sector- 6, Faridabad - 121006. Phone: 0129-2211701-03	Faridabad	470	74.4	0.56	Y

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124	Chanda Enterprises Pvt. Ltd.	Plot No. 1, Mujesar, Faridabad - 121 005. Phone: 0129 4024901, 0129 4024902	Faridabad	68	10.96	NA	N
125	Clutch Auto Ltd.	12/4 Mathura Road – Faridabad - 121003. Phone: 012-2275246, 0129-2270809	Faridabad	675	218.8	46.6	N
126	Dee Ess Buhin Pvt. Ltd.	Plot No. 88, Sector-24, Faridabad - 121 005. Phone: 0129-2232722, 0129 2234931, 2445101, 2445104	Faridabad	92	11.76	0.12	Y
127	Eco Auto Components Ltd.	Plot No. 20, Sector – 6, Faridabad - 121 006. Phone: 0129-2242168, 0129-2212431	Faridabad	218	8.32	NA	N
128	Elofic Industries Ltd.	14/4, Mathura Road, Faridabad - 121003. Phone: 0129-4049988	Faridabad	537	71.44	23.44	N
129	Escorts Ltd. (Engineering Division)	18/4 Mathura Road, Faridabad - 121007. Phone: 0129-2281556, 0129-5193378	Faridabad	622	32.56	27.08	Y
130	GKN Driveline India Ltd.	Plot No. 270, Sector-24, Faridabad - 121005. Phone: 0129-4091100	Faridabad	595	270.72	3.72	Y
131	Global Automotive Components (P) Ltd.	Tigaon Road, Indra Complex, Faridabad (Old) 121 002, Haryana. Phone: 0129-2229821, 2229658, 0129-2229498	Faridabad	120	7.2	7.2	Y
132	Imperial Auto Industries Ltd.	Opposite Railway Goods Shed, Faridabad - 121001. Phone: 0129-2412311	Faridabad	2125	334.88	79.08	Y
133	Indication Instruments Ltd.	Plot 19, Sector 6, Faridabad - 121006. Phone: 0129-4195300, 0129-2305500	Faridabad	785	58.16	13.68	N
134	Indo Industrial Engineers	334-338, Sector – 24, Faridabad 121 005, Haryana. Phone: 0129-4028209-11, 0129-4028212	Faridabad	222	31.36	NA	N
135	Jayem Auto Industries Pvt. Ltd.	17/6 Mile Stone, Main Mathura Road, Faridabad 121 007, Haryana. Phone: 0129-4107701, 4107702, 2296856, 0129-4007701	Faridabad	50	11.44	1.88	Y
136	Karan Automotives Pvt. Ltd.	Plot No.: 17 C, Opposite Whirlpool India Ltd., Industrial Area, N.I.T., Faridabad 121 001, Haryana. Phone: 0129-4025057, 4025058, 4022061, 4022060, 0129-4025056	Faridabad	150	22.76	NA	NA
137	Lakhani Rubber Works	Plot No-234, Sector-24, Faridabad 121 005, Haryana. Phone: 0129-2233797, 223797, 0129-2230811	Faridabad	492	29.92	0.68	N

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S. No	Organization Name	Address	City	No. of Employee	Sales Turnover (in Crores INR)#	Export Turnover (in Crores INR)#	Foreign Collaboration – Yes/ No
138	LMC Enterprises Pvt. Ltd.	15/3, Mathura Road, Faridabad 121 003, Haryana. Phone: 0129-4045551, 0129-4045551	Faridabad	10	1	NA	NA
139	Macas Brakes Automotive Pvt. Ltd.	Plot No. 111, Sector-6, Faridabad 121 006, Haryana. Phone: 0129-2211485, 2211486, 0129-2210182	Faridabad	62	7.52	0.4	N
140	Oswal Electricals	49, Industrial Area, Faridabad - 121001. Phone: 0129-2233091/92/93, 0129-4023091-93	Faridabad	950	128	26	Y
141	Parkash Automotive Industries (P) Ltd.	Tigaon Road, Indira Complex, Baselva, Faridabad 121 002, Haryana. Phone: 0129-2229616, 2229172, 0129-2229616	Faridabad	23	1.24	NA	NA
142	Pee Cee Castings Pvt. Ltd.	14/5, Mathura Road, Faridabad 121 003, Haryana. Phone: 0129-2276957, 2275546, 0129-2276964	Faridabad	102	19.76	NA	N
143	Polymer Papers Ltd.	12/6, Mathura Road, Faridabad 121 003, Haryana. Phone: 0129-2275325, 2275346, 2275377, 0129-2277262, 2273720	Faridabad	127	15.76	NA	N
144	Pooja Forge Ltd.	14/4, Mathura Road, Faridabad - 121003. Phone: 0129-4046801-02, 0129-4046809	Faridabad	646	105.72	3.76	N
145	Presco-Mec Autocomp Pvt. Ltd.	Plot No. 9-D, Sector 6, Faridabad 121 006, Haryana. Phone: 0129-4061224, 4061225, 0129-4061223	Faridabad	136	20.32	0.32	Y
146	Pritika Auto Products Pvt. Ltd.	14/3, Mathura Road, (Behind Gemco Controls Ltd.), Faridabad 121 003, Haryana. Phone: 0129-4048915 -17, 98104-00535, 0129-4048919	Faridabad	80	11.84	NA	N
147	R.K. Profiles Pvt. Ltd.	Plot No. 262-O, Sector-24, Faridabad 121 005, Haryana. Phone: 0129-2236643, 2238230, 0129-4063075	Faridabad	61	9.08	4.44	N
148	Sadhu Forging Ltd. (Gear Division)	Opp. Plot No. 84, Sector – 25, Faridabad 121 005, Haryana. Phone: 0129-4061946, 4061947, 0129-2230274	Faridabad	305	61.6	10.16	N
149	Sanauto Engineers (India) Pvt. Ltd.	Plot No. 70, Sector 6, Industrial Area, Faridabad 121 006, Haryana. Phone: 0129-2241379, 0129-4062272	Faridabad	75	2.52	2.52	Y
150	Shivani Locks Pvt. Ltd.	14/6, Mathura Road, Faridabad - 121003. Phone: 0129-419979, 0129-4049479	Faridabad	782	42	0.36	Y

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S. No	Organization Name	Address	City	No. of Employee	Sales Turnover (in Crores INR)#	Export Turnover (in Crores INR)#	Foreign Collaboratio n – Yes/ No
151	Sterling Tools Ltd.	5-A, DLF Industrial Estate, Faridabad - 121003. Phone: 0129-2270621	Faridabad	356	151.24	4.28	Y
152	Super Auto India Ltd.	Plot No. 50, Sector- 6, Faridabad - 121006. Phone: 0129-4061137, 0129-2241320	Faridabad	565	72.28	NA	N
153	Surya Springs	2736, Gali No. 1 A, Block A, SGM Nagar, NIT, Faridabad 121 001, Haryana. Phone: 0129-2428899, 4058699, 0129-2417799, 2428899	Faridabad	50	4.84	0.48	N
154	Talbros Automotive Components Ltd.	14/1, Delhi-Mathura Road, Faridabad - 121003. Phone: 0129-2275434-7 (4 LINES)	Faridabad	584	146.64	12.96	Y
155	Talbros Engineering Ltd.	Plot No. 74-75, Sector- 6, Faridabad - 121006. Phone: 0129-4061545-8	Faridabad	275	54.36	4.68	Y
156	Talbros Pvt. Ltd.	Plot No. 60, Sector 6, Faridabad 121 006, Haryana. Phone: 0129-4067000 (10 Lines), 0129-2243130, 4067799	Faridabad	59	6.52	NA	Y
157	Urastun Metal Industries Pvt. Ltd.	Plot No. 125, DLF Industrial Area, Phase-I, Faridabad 121 003, Haryana. Phone: 0129-5113061, 5113062, 5113063, 2277128, 2274686, 0129-5113065, 2277440	Faridabad	208	29.76	NA	Y
158	Victoria Tool Engineers (P) Ltd.	Plot No. 46, Sector 25, Faridabad 121 004, Haryana. Phone: 0129-4061880-2, 0129-2230504	Faridabad	511	39.2	NA	NA
159	Wings Automobile Products Pvt. Ltd.	I – 35, DLF Industrial Area - Phase 1, 13/7, Mathura Road, Faridabad 121 003, Haryana. Phone: 0129-4113201-04, 0129 - 2250820	Faridabad	213	22.6	2.08	Y
160	Allied Nippon Ltd.	A-12, Site- IV, Sahibabad Industrial Area, Ghaziabad - 201010. Phone: 0120-2896686-95	Ghaziabad	514	103.6	32.8	Y
161	Everitwist Control Cables (Pvt.) Ltd.	A-8/1 & 2, Sector - 22, Meerut Road, Industrial Area, Ghaziabad - 201 001. Phone: 0120-3290555, 0120-3290556	Ghaziabad	45	1.52	0.6	N
162	Ghaziabad Precision Products Pvt. Ltd.	D-32, Bulandshahr Road, Industrial Area, Ghaziabad 201 009, Uttar Pradesh. Phone: 0120-2866417-8, 0120-2866419	Ghaziabad	400	27.52	10.52	Y
163	Nipman Fastener Industries Pvt. Ltd.	C-198, Site I, Industrial Area, Bulandshahr Road, Ghaziabad 201 009, Uttar Pradesh. Phone: 0120-2866074-76, 0120-2866079	Ghaziabad	261	50.68	NA	N

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S. No	Organization Name	Address	City	No. of Employee	Sales Turnover (in Crores INR)#	Export Turnover (in Crores INR)#	Foreign Collaboratio n – Yes/ No
164	Punjab Bevel Gears Ltd.	B-44/1, Site Iv, Industrial Area, Sahibabad, Ghaziabad - 201010. Phone: 0120-2895344, 0120-2896075, 2895386	Ghaziabad	182	69.72	38.16	Y
165	Radiant Polymers Pvt. Ltd.	A-4/7-8, Site-Iv, Sahibabad Industrial Area, Ghaziabad Dist. 201 010, Uttar Pradesh. Phone: 0120-2895307, 2895467, 0120-2896206	Ghaziabad	755	36.2	2.32	Y
166	Autoflex Pvt. Ltd.	167, Anand Industrial Estate, Mohan Nagar, Ghaziabad, Uttar Pradesh - 201 007. Phone: 0120 2940047, 011 26221836	Ghaziabad	60	3.92	3.92	N
167	Global Autotech Ltd.	6 F, Sector 40-41, Greater NOIDA - 201308. Phone: 0120-2341617, 0120-2341618, 2341620	GREATER NOIDA	425	41.76	NA	N
168	A G Industry	GP- 9, HSIDC Industrial Area, Sector 18. Gurgaon - 122015. Phone: 0124-2341735, 0124-2345821, 4013382	Gurgaon	1040	200	NA	N
169	Anand Motor Products (P) Ltd.	38 Km Stone, NH - 8, Khandsa, Gurgaon, Haryana - 122 001. Phone: 0124 2212101-4	Gurgaon	340	32	NA	Y
170	Anand Nishikawa Company Ltd.	Plot No. 119, Udyog Vihar, Phase -1, Gurgaon- 122016. Phone: 0124-4002945, 0124-4003071	Gurgaon	746	71.2	19.16	Y
171	Anand NVH Products Pvt. Ltd.	39km Stone, NH-8, Begumpur Khatola Industrial Area, Sector - 35, Gurgaon, Haryana - 122 001. Phone: 0124 5030580-84	Gurgaon	250	48	48	Y
172	Asahi India Glass Ltd.	GLOBAL BUSINESS PARK, Mehrauli-Gurgaon Road, Gurgaon - 122002. Phone: 0124-4062212-19	Gurgaon	1164	854.84	38.08	Y
173	Ask Automotive (P) Ltd.	66-67, Udyog Vihar, Phase- I, Gurgaon - 122001. Phone: 0124-4003701, 0124-4003702, 2340973	Gurgaon	475	161	4	Y
174	Bajaj Motors Ltd.	39-40, Km Stone, Delhi-Jaipur Highway, Narsingpur, Gurgaon - 122001. Phone: 0124-2371453, 0124-2373453, 2371653	Gurgaon	2200	220.64	NA	N
175	Bundy India Ltd.	Plot No. 39 & 40, Sector- 03, IMT, Manesar, Gurgaon - 122050. Phone: 0124-2291099, 0124-2842700, 2842407	Gurgaon	200	64	NA	N

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176	Caparo Engineering India Pvt. Ltd.	Plot No. 7, Maruti, J.V. Complex, Delhi-Gurgaon Road, Gurgaon 122 015, Haryana. Phone: 0124-4318000, 0124-4016829	Gurgaon	576	124.16	4.92	Y
177	Continental Engines Ltd.	Global Business Park, Tower "D", 3rd Floor, Mehrauli-Gurgaon Road, Gurgaon - 122002. Phone: 0124-4107050-55	Gurgaon	705	180	134	N
178	EMKAY Automobile Industries Pvt. Ltd.	39/7, Km Stone, NH- 8, Delhi-Jaipur Highway, Village Begumpur Khatola, Gurgaon - 122001. Phone: 0124-2215522-26	Gurgaon	1320	104	5.2	N
179	Helical Springs (Unit Of T K Precision Pvt. Ltd.)	139-A, Sector -7, Phase II, IMT Manesar, Gurgaon 122 050, Haryana. Phone: 124-4368851-3, 124-4368850	Gurgaon	39	9.2	NA	NA
180	Hella India Electronics Pvt. Ltd.	9th Milestone, Farookh Nagar Road, Dhankot, Gurgaon - 122001. Phone: 0124-2278584, 0124-2278586-7	Gurgaon	102	91.44	13.8	N
181	Hema Engineering Industries Ltd.	1/3 Km, Khandsa Road, Gurgaon - 122001. Phone: 0124-2370740-45	Gurgaon	986	149.2	16	N
182	Hi-Tech Gears Ltd.	14th Floor, Tower- B, Millennium Plaza, Sushant Lok-1, Gurgaon – 122002. Phone: 0124-2806080-84	Gurgaon	1052	250.8	53.92	Y
183	Jay Switches India Pvt. Ltd.	407, Phase-iii, Udyog Vihar, Gurgaon 122 016, Haryana. Phone: 0124-4001465-66, 0124-4001187	Gurgaon	323	16.8	NA	N
184	Jay USHIN Ltd.	Gp-14, HSIDC Industrial Estate, Sector-18, Gurgaon - 122001. Phone: 0124-2340422, 0124-2340423, 2342173, 2342175	Gurgaon	550	154	NA	Y
185	Johnson Matthey India Pvt. Ltd.	Plot No. 12, Sector 3, IMT, Manesar, Gurgaon - 122050. Phone: 0124-4580100, 0124-2290234, 2290546-553	Gurgaon	85	157.2	1.24	Y
186	Krishna Maruti Ltd. (Seat Division)	40th KM. Milestone, NH - 8, Village Narsinghpur, Gurgaon 122 001, Haryana. Phone: 0124-2371650, 0124-2371618	Gurgaon	305	42.88	NA	N
187	LUMAX Filters Pvt. Ltd.	5-A, Industrial Development Colony, Mehrauli Road, Gurgaon 122 001, Haryana. Phone: 0124-5084198, 2322310, 2335439, 5088731, 0124-5084198	Gurgaon	33	7.44	NA	N

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188	M & M Auto Industries Ltd.	1/3 Km Stone, Khandsa Road, Gurgaon 122 001, Haryana. Phone: 0124-4030224, 0124-4030229	Gurgaon	264	40.8	0.8	Y
189	M & M Machine Craft Pvt. Ltd.	Darbaripur-Hasanpur Road, Vill. Khirki Daula, 46 Km Stone, Behind Haldiram Food Complex, Delhi-Jaipur Highway, Gurgaon - 122004. Phone: 0124-2370835-37, 01424-2370961-63	Gurgaon	650	5.32	1.12	N
190	Madhusudan Auto Ltd.	38 Km Stone, Delhi-Jaipur Highway, Behrampur Road, Village Khandsa, Gurgaon 122 001, Haryana. Phone: 0124-2372736, 2372737, 011-26852647, 0124-2372204	Gurgaon	170	38.12	16.48	Y
191	Magnum Strips & Tubes Pvt. Ltd.	38.5 Km Stone, Delhi-Jaipur Highway, Khandsa, Gurgaon - 122001. Phone: 0124-4031777-79	Gurgaon	445	69.28	NA	N
192	Mark Exhaust Systems Ltd.	39/7, NH- 8, Delhi-Jaipur Highway, Begumpur Khatola, Gurgaon - 122011. Phone: 0124-2373113	Gurgaon	896	280.52	1.08	Y
193	Mayur Industries Ltd.	Unit- 3, Behind Haryana Roadways Bus Workshop, Behrampur Road, Gurgaon, Haryana. Phone: 0124-4033160, 0124-4033161	Gurgaon	250	37.48	NA	N
194	Minda Industries Ltd.	Village Nawada Fatehpur, P.O. Sikanderpur Badda, Manesar, Gurgaon - 122004. Phone: 0124-2290696, 0124-2290697	Gurgaon	2100	413.16	15.12	Y
195	Mindarika Pvt. Ltd.	Village Nawada Fatehpur, P.O. Sikanderpur Badda, Gurgaon - 122004. Phone: 0124-2290317-19	Gurgaon	460	107.68	3.44	Y
196	Munjal Showa Ltd.	9-11, Maruti Industrial Area, Sector- 18, Gurgaon - 122015. Phone: 0124-2341001, 0124-2341003, 2341102, 2340428-9, 2340427	Gurgaon	1966	750.8	NA	Y
197	Napino Auto & Electronics Ltd.	Plot No. 7, Sector- 3, IMT, Manesar, Gurgaon - 122050. Phone: 0124-2290050	Gurgaon	881	222	0.08	Y
198	NTF (India) Pvt. Ltd.	49, Sector-3, IMT Manesar, Gurgaon 122 050, Haryana. Phone: 0124-2290446 - 48, 0124-2290443	Gurgaon	250	23.64	1.56	N
199	Omax Autos Ltd.	5/13, Gurgaon-Sohna Road, Village Tikri, Gurgaon - 122001. Phone: 0124-4343000	Gurgaon	3750	641.44	28.6	Y

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S. No	Organization Name	Address	City	No. of Employee	Sales Turnover (in Crores INR)#	Export Turnover (in Crores INR)#	Foreign Collaboratio n – Yes/ No
200	Premium Mouldings & Pressings Pvt. Ltd.	185, Udyog Vihar, Phase 1, Gurgaon 122 016, Haryana. Phone: 0124-2340351, 2341670, 0124-2341832	Gurgaon	152	29.16	3.08	N
201	Purolator India Ltd.	38th Stone, Beharampur Road, Khandsa, Gurgaon - 122001. Phone: 0124-4501200	Gurgaon	559	142.92	19.64	Y
202	QH Talbros Ltd.	400, Udyog Vihar, Phase-III, Gurgaon - 122016. Phone: 0124-4002963-65	Gurgaon	528	148	44	N
203	Ranee Polymers Pvt. Ltd.	157, Sector - 3, IMT Manesar, Gurgaon 122 050, Haryana. Phone: 0124-2290663, 2290150, 2291103, 0124-2291102	Gurgaon	225	20.4	0.08	N
204	RICO Auto Industries Ltd.	38 Km Stone, Delhi-Jaipur Highway, Gurgaon - 122001. Phone: 0124-2824000	Gurgaon	3772	1200	120	Y
205	Rising Sun International	Kh. No. 4364/70, Daulatabad Road Industrial Area, Behind Bhalla Chemicals, Opp. Krown Industries, Across Railway Station, Gurgaon 122 001, Haryana. Phone: 0124-2469081, 2468441, 3096016, 0124-2469082	Gurgaon	24	1.72	1.6	NA
206	Roop Automotives Ltd.	19 Roz Ka MEO Industrial Area, Sohna, Gurgaon 122 103, Haryana. Phone: 0124-2362136, 2363611, 0124-2362568	Gurgaon	250	20	6.68	Y
207	Roop Polymers Ltd.	27, IDC, Mehrauli Road, Gurgaon - 122001. Phone: 0124-4084096 (10 LINES)	Gurgaon	600	6.6	0.16	Y
208	Sandeep Axles Pvt. Ltd.	Plot # 114, Sector-3, IMT Manesar, Gurgaon 122 050, Haryana.	Gurgaon	40	39.6	22.8	Y
209	Sandhar Technologies Ltd.	3, HSIDC Industrial Area, Sector-18, Delhi-Gurgaon Road, Gurgaon - 122015. Phone: 0124-2340269, 0124-2340572, 2340368, 4012841-43	Gurgaon	2350	439.24	3.4	N

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210	Satyam Auto Components Ltd.	Plot No. 26-C, Sector- 3, IMT, Manesar, Gurgaon - 122050. Phone: 0124-4325100	Gurgaon	600	155.2	NA	N
211	Sellowrap Manufacturing Pvt. Ltd.	Plot No. 54, Sector-18, Maruti Industrial Estate, Gurgaon 122 016, Haryana. Phone: 0124-5015973, 74, 0124-5015975	Gurgaon	53	10.4	NA	Y
212	Shivam Autotech Ltd.	58th Km Stone, Delhi-Jaipur Highway, Village Binola, Gurgaon - 122413. Phone: 0124-2379442-446	Gurgaon	981	140.56	NA	Y
213	SKH Metals Ltd.	Plot No. 2, Maruti Joint Venture Complex, Gurgaon - 122015. Phone: 0124-4017613-21, 0124-4031116-19	Gurgaon	380	235.48	9.36	Y
214	Sona Koyo Steering Systems Ltd.	8th Floor, DLF Square, DLF City, Phase-II, Jacaranda Marg, Gurgaon - 122002. Phone: 0124-4104641-44	Gurgaon	989	628	60	Y
215	Sona Okegawa Precision Forgings Ltd.	8th Floor, DLF Square, Jacaranda Marg, M- Block, DLF City Phase -2, Gurgaon - 122001. Phone: 0124-4104641-44	Gurgaon	152	105.64	10.28	Y
216	Sona Somic Lemforder Components Ltd.	Sona Enclave, Begumpur Khatola, Gurgaon - 122001. Phone: 0124-4031271-73, 0124-4104635-36	Gurgaon	300	100.48	4.24	N
217	Spun Micro-Processing Pvt. Ltd.	Behrampur Road, Village Begampur Khatola, Gurgaon 122 001, Haryana. Phone: 0124-2215824-6, 0124-2215823	Gurgaon	200	17.68	15.8	Y
218	Stork Auto Engineering Pvt. Ltd.	Plot No. 84, Sector-3, IMT- Manesar, Gurgaon 122 005, Haryana. Phone: 0124-4012312, 4017738, 4369313-14	Gurgaon	69	6.12	4.2	N
219	Stork Rubber Products Pvt. Ltd.	"Stork Building", NH 8, 38th KM Stone, Behrampur Road, VPO Khandsa, Gurgaon 122 001, Haryana. Phone: 0124-2215901-06, 0124-2215907	Gurgaon	200	14.92	14.44	N

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220	Sun Steering Wheels Pvt. Ltd.	Plot No. 35, Huda Industrial Area, Sector 18, Gurgaon 122 015, Haryana. Phone: 0124-4558500 (30 Lines), 0124-4558555	Gurgaon	92	24	NA	N
221	Sunbeam Auto Ltd.	38/6, Km Stone, Delhi-Jaipur Highway, Narsingpur, Gurgaon - 122001. Phone: 0124-4129200	Gurgaon	3500	929.2	30.52	Y
222	Sunrise Automotive Ltd.	45th Milestone, Naurangpur, Delhi-Jaipur Highway, Gurgaon 122 001, Haryana. Phone: 09871394579, 09871394575, 0124-2378502	Gurgaon	220	25.36	22.84	N
223	T K W Fasteners Pvt. Ltd.	B-49, Old DLF Industrial Area, Mehrauli Road, Gurgaon 122 001, Haryana. Phone: 0124-4081712, 4081711, 0124-2330672	Gurgaon	59	10.88	0.8	N
224	Technico Industries Ltd.	Plot No.17, Sector-3, IMT, Manesar, Gurgaon 122 050, Haryana. Phone: 0124-4369340, 4369350, 4369354, 0124-2291536	Gurgaon	574	52.08	NA	Y
225	Trim India P Ltd.	Village Narsinghpur, Old Khandsa Road, Gurgaon 122 010, Haryana. Phone: 9810008532, 0124-2371292	Gurgaon	62	10.88	NA	N
226	VNM Polymers Pvt. Ltd.	E-3, Ansal Palam Udyog, Maruti Industrial Area, Sector-18, Gurgaon 122 015, Haryana. Phone: 0124-3097356, 0124-2349057	Gurgaon	50	4.92	NA	N
227	GNA Axles Ltd.	Phagwara-Hoshiarpur Road, Mehtana, Hoshiarpur - 146001. Phone: 01882-262273-79 (7 LINES)	Hoshiarpur	623	155.4	46.08	N
228	Harita Seating Systems Ltd.	Hosur-Thally Road, Belagondapalli, Hosur, Tamil Nadu - 635114. Phone: 04347-233445	Hosur	521	146	7.84	N

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229	India Nippon Electricals Ltd.	Hosur-Thalli Road, Uliveranapalli, Krishnagiri Dist, Hosur, T.N - 635114. Phone: 04347-233432-38	Hosur	550	152.24	0.2	Y
230	Rajsriya Automotive Industries Pvt. Ltd.	N-44, SIDCO Industrial Estate, IVth Phase, Zuzuvadi, Hosur 635 126, Tamil Nadu. Phone: 04344-277281, 04344-277383	Hosur	506	22.68	NA	N
231	Sundaram Auto Components Ltd.	Hosur-Thally Road, Belagondapalli, Hosur, T.N - 635114. Phone: 04347-233445	Hosur	673	127.44	3.96	Y
232	Bharat Technologies Auto Components Ltd.	#1, TVS Industrial Estate, Haritha, Hosur, Tamil Nadu - 635109. Phone: 04344 277756, 04344 275478	Hosur	247	68.48	NA	NA
233	Fine Blanking Pvt. Ltd.	"Mangal Gouri", 27, Ashok Van, Gokul Road, Hubli 580 030, Karnataka. Phone: 0836-2330446, 0836-2335946	Hubli	49	6	0.16	N
234	Mikroflo Filters Pvt. Ltd.	3-4-495, 3rd Floor, Hi-Line Apartments, Barkatpura, Hyderabad 500 027, Andhra Pradesh. Phone: 040-55828813, 55825880, 040-27564332	Hyderabad	120	6.92	NA	NA
235	Samkrp Pistons and Rings Ltd.	1-201, Divya Shakti Complex, 7-1-58, Ameerpet, Hyderabad - 500016. Phone: 040-23730596, 040-23735578, 23735587	Hyderabad	949	94.56	24.56	Y
236	Shriram Fuel Injection Industries Ltd.	P.O. Balanagar Township, Hyderabad 500 037, Andhra Pradesh. Phone: 040-23078697, 040-23078629	Hyderabad	490	40.92	16.24	Y
237	Adroit Industries (India) Ltd.	50-A, Laxmibai Nagar, Fort, Indore, Madhya Pradesh - 452006. Phone: 0731-2410568, 0731-2412821	Indore		18	17.2	N
238	Gajra Bevel Gears Ltd.	3/1, Race Course Road, Indore 452 001, Madhya Pradesh. Phone: 0731-2434327, 5065246, 0731-2432909	Indore	876	116.88	55.36	Y

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S. No	Organization Name	Address	City	No. of Employee	Sales Turnover (in Crores INR)#	Export Turnover (in Crores INR)#	Foreign Collaboratio n – Yes/ No
239	Raghu Engineering	188, Saket Nagar, Indore 452 001, Madhya Pradesh. Phone: 0731-4216004	Indore	48	3.24	NA	N
240	Autolite (India) Ltd.	D-469, Road No 9a, V K I Area, Jaipur, Rajasthan - 302 013. Phone: 0141 2333994 - 96	Jaipur	385	72	22.48	N
241	Guru Nanak Auto Enterprises Ltd.	G. T. Road, Goraya, Jalandhar - 144409. Phone: 01826-262301	Jalandhar	670	94.24	NA	N
242	ASL Industries Pvt. Ltd.	C-54, 55, 56, IVth Phase, Adityapur Industrial Area, Gamharia, Jamshedpur 832 108, Jharkhand. Phone: 0657-3099888, 5571890, 5574909, 0657-2200418	Jamshedpur	63	16.84	NA	N
243	EMDET Jamshedpur Pvt. Ltd.	B-7& 8, Industrial Estate, Adityapur, Jamshedpur - 832 109. Phone: 0657-3290441, 0657 -6573203	Jamshedpur	115	19.12	0.04	N
244	Highco Engineers (P) Ltd.	B-23 & 25, 1st Phase Industrial Area Adityapur, Jamshedpur 8321 09, Jharkhand. Phone: 0657-3292664, 3293677	Jamshedpur	125	16.28	NA	N
245	Industrial Forge & Engineering Co. Ltd.	A21p- A25p, Phase Vi, Industrial Area Gamharia, Jamshedpur 832 108, Jharkhand. Phone: 0657-3296082, 0657-2203366	Jamshedpur	51	0.44	NA	N
246	JMT Auto Ltd.	C-19-20, D- 8-12, Ns 29-34, 7th Phase, Industrial Area, Phase-II, Adityapur, Jamshedpur - 832109. Phone: 0657-2200454, 0657-3291251, 3294147	Jamshedpur	600	117.28	3.92	N
247	Kross Manufacturers (I) Pvt. Ltd.	M-4 (Part) Phase Vi, Gamharia, Adityapur Industrial Area, Jamshedpur 832 108, Jharkhand. Phone: 0657-3293694-5, 0657-2381721	Jamshedpur	197	45.48	0.32	N
248	Multitech Auto Ltd.	A-5, Near Industrial Estate, Adityapur, Jamshedpur 832 109, Jharkhand. Phone: 0657-2409346, 6570466, 0657-2408103	Jamshedpur	39	13.2	0.12	Y

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249	Nalin Rubber (P) Ltd.	29, Circuit House Area (Old), Bistupur, Jamshedpur 831 001, Jharkhand. Phone: 0657-2407933, 6548567, 3292600, 0657-2407073	Jamshedpur	32	3.32	NA	N
250	New Engineering Works	C-91-92, IInd Phase, Adityapur Industrial Area Adityapur, Jamshedpur 831 013, Jharkhand. Phone: 0657-2200003, 6571237, 0657-2200003	Jamshedpur	46	3.48	NA	N
251	Samarth Engg. Co. Pvt. Ltd.	Adityapur - Kandra Main Road, Adityapur, Jamshedpur 832 109, Jharkhand. Phone: 0657-2201147, 6546315, 3292427	Jamshedpur	60	16.96	NA	N
252	Sri Ramadas Motor Transport Ltd.	Subhash Road, Po Box No. 42, Kakinada - 533001. Phone: 0884-2373211	Kakinada	589	48.68	0.2	N
253	Axles India Ltd.	Singapeumal Koil Road, Sriperumbudur, Kancheepuram, Tamil Nadu - 602105. Phone: 04111-262371-3	Kancheepuram	667	276.32	15.8	Y
254	Delphi- TVS Diesel Systems Ltd.	Mannur, Thodukadu Post, Sriperumbudur, Kancheepuram - 602105. Phone: 044-27658657, 044-27658454-60	Kancheepuram	700	460.4	22.6	Y
255	Delphi-TVS Diesel Systems Ltd.	Mannur, Thodukadu Post, Sriperrumbudur Taluk, Kanchipuram Dist. 602 105, Tamil Nadu. Phone: 044-27658657, 27658454-60, 044-27658351, 27658657	Kancheepuram	700	460.4	22.6	Y
256	INDRAD Auto Components (A Div. Of SICAL)	A1-F5, Industrial Estate, Maraimalai Nagar, Kancheepuram Dist. 603 209, Tamil Nadu. Phone: 044-27452485, 27451853, 044-27451852	Kancheepuram	89	21.8	NA	NA
257	Jai Parabolic Springs Ltd.	Plot No. 22-25, Sengundram Village, Melrosapuram, S.P Koil Post, Kancheepuram – T.N 603204. Phone: 044-27463800	Kancheepuram	330	96.2	22.04	Y

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258	Technical Stampings Automotive Ltd.	Plot No. G 16-18, SIPCOT Industrial Park, Irrungattukottai, Sriperumbudur, T.N - 602105. Phone: 044-27156032 (7 LINES)	Kancheepuram	1014	305.6	NA	N
259	Industrial Electronics (A Unit of LML Ltd.)	72 A, Co-Operative Industrial Estate, Dada Nagar, Kanpur 208 022, Uttar Pradesh. Phone: 0512-2230691- 94, 0512-2297940, 2691391	Kanpur	644	22.96	NA	NA
260	Injectoplast Pvt. Ltd.	D-3/A, Panki Industrial Estate, Kanpur 208 022, Uttar Pradesh. Phone: 05112-282001-9, 05112-282149	Kanpur	350	40.24	5.08	NA
261	JKEW Forgings Ltd.	Agarwala Building, Mall Road, Kanpur 208 004, Uttar Pradesh. Phone: 0512-2304864, 0512-2305792	Kanpur	126	16.28	NA	NA
262	Lohia Starlinger Ltd.	Lohia Industrial Complex, Chaubepur, Kanpur - 209203 . Phone: 05112-282001-09	Kanpur	895	168	87.2	N
263	Saraswati Engineering Ltd.	D-12, Site 1, Panki Industrial Estate, Kanpur 208 022, Uttar Pradesh. Phone: 0512-2691194-6, 0512-2691197	Kanpur	175	5.52	NA	NA
264	IFB Industries Ltd.	14 Taratolla Road, Kolkata 700 088, West Bengal. Phone: 033-24014917-20, 033-24014579	Kolkata	375	45.04	0.24	N
265	K.B. Poly Industries Pvt. Ltd.	847, Lake Town, Block-A, Kolkata 700 089, West Bengal. Phone: 033-25343749, 25347876, 033-25347875	Kolkata	14	3.72	NA	N
266	Ramkrishna Forgings Ltd.	6, Waterloo Street, Room No. 406, 4th Floor, Kolkata - 700069. Phone: 033-22435613, 033-22487164	Kolkata	1010	160.2	12.16	Y
267	Sawalka KEL Pvt. Ltd.	5A, Robinson Street, 3rd Floor, Kolkata 700 017, West Bengal. Phone: 033-22878117, 033-22878596	Kolkata	84	4.4	NA	N

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268	Special Engineering Services Ltd.	16, Cossipore Road, Kolkata 700 002, West Bengal. Phone: 033-25576497,25573235,25576330, 25577275, 033-25579728, 25578434	Kolkata	213	21.16	NA	N
269	Suraj General Engineers (P) Ltd.	22, Stand Road, First Floor, Kolkata 700 001, West Bengal. Phone: 033-22301118, 22311853, 033-22105086	Kolkata	16	0.8	NA	N
270	Vijayshree Industries Pvt. Ltd.	"Continental Chambers", 4th Floor, 15A, Hemanta Basu Sarani, Kolkata 700 001, West Bengal. Phone: 033-22430385-86, 22430407, 22430408, 033-22430485	Kolkata	210	31.24	NA	N
271	West Bengal Corporation	FMC Fortuna, A -10, 4th Floor, 234/3A, Acharya J.C. Bose Road, Kolkata 700 020, West Bengal. Phone: 033-22871801, 033-22831406	Kolkata	27	6.52	NA	N
272	Arvind Engineering Works Ltd.	P-25, Taratala Road, Kolkata, West Bengal - 700 088. Phone: 033 24018578, 033 24017437, 24014690	Kolkata	200	1.4	NA	Y
273	Baynee Industries	33A, Chowringhee Road, 5th Floor, Flat No. 3 &4, Kolkata, West Bengal - 700 071. Phone: 033 22888888, 033 30920559	Kolkata	75	4	NA	N
274	Birla Corporation Ltd. (Auto Trim Division)	Birla Building, 9/1, R.N. Mukherjee Road, Kolkata, West Bengal - 700 001. Phone: 033 22426324, 033 22436603	Kolkata	250	10.8	NA	N
275	Kusalava International Ltd.	No. 1-31, Gollagudem, Adavinekkalam, Agiripallimandalam, Krishna Dist, A.P - 521212. Phone: 08656-220254, 08656-220281, 220282	Krishna	1330	65.44	17.8	N
276	G.S. Auto International Ltd.	G. S. Estate, G.T. Road, Ludhiana - 141003. Phone: 0161-2511001-5	Ludhiana	1328	80.96	6.28	N

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277	Highway Industries Ltd.	698, Industrial Area- B, Ludhiana – 141003. Phone: 0161-2531624-6	Ludhiana	1150	93.4	2.8	N
278	JVR Forgings Ltd.	Industrial Area 'C' Sua Road, Dhandari Kalan, Ludhiana - 141010. Phone: 0161-2511608, 0161-2511609, 2511610	Ludhiana	451	40.2	15.08	N
279	Mehta Engineers Ltd.	D-118-119, Phase V, Focal Point, Ludhiana 141 010, Punjab. Phone: 0161-2673514, 2677376, 0161-2675464	Ludhiana	450	33.12	2.6	N
280	Metalman Auto Pvt. Ltd.	E-127, Focal Point, Ludhiana - 141010. Phone: 0161-2670187, 0161-2670188	Ludhiana	458	176.4	0.4	N
281	New Swan Enterprises	622, Industrial Area - B, Ludhiana 141 003, Punjab. Phone: 0161-2533622, 2533623, 0161-2532622	Ludhiana	250	36.56	NA	Y
282	Nicks Auto Industries	E-320/321, Phase Iv, Focal Point, Ludhiana 141 010, Punjab. Phone: 0161-2671946, 4624333, 4626869, 0161-2677946	Ludhiana	237	12.76	0.08	Y
283	RICO Castings Ltd.	B-26, Focal Point, Ludhiana, Punjab. Phone: 0161-2670810, 2670811, 2670812, 0161-2671398, 2670061	Ludhiana	450	22.4	NA	N
284	Rockman Industries Ltd. (Auto Div.)	A-7, Focal Point, Ludhiana 141 010, Punjab. Phone: 0161-2670701- 4, 0161-2670700	Ludhiana	1213	228.08	NA	Y
285	Tech Auto Pvt. Ltd.	C-37, Phase li, Focal Point, Ludhiana 141 010, Punjab. Phone: 0161-5027789,5027790,5013557, 0161-5013558	Ludhiana	430	49.28	11.44	N
286	Sundaram Industries Ltd.	Po Box No. 6, Usilampatti Road, Kochadai, Madurai - 625016. Phone: 0452-23815314 (4 LINES)	Madurai	1200	124.04	9.28	Y

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287	Gilard Electronics Pvt. Ltd.	C-132, Phase- 8, Industrial Area, SAS Nagar, Mohali, Chandigarh 160 071. Phone: 0172-5090771-74, 2236781, 0172-2236741	Mohali	340	12.4	0.36	N
288	ALF Engineering Pvt. Ltd.	Plot No. 14, ABC, Govt. Industrial Estate, Charkop, Kandivali (W), Mumbai - 400067. Phone: 020-28687337, 020-28688066, 28686600	Mumbai	669	88.4	NA	N
289	Bajinath Plastic Products Pvt. Ltd.	D/8, Ghatkopar Industrial Estate, L.B.S.Marg, Ghatkopar (West), Mumbai - 400 086. Phone: 022 55969561/66	Mumbai	58	1	NA	N
290	Balu India	506, Imperial Palace, 45, Telly Park Road, Andheri (East), Mumbai - 400 069. Phone: 022-55701608, 022-26839916	Mumbai	105	15.04	14.4	N
291	Bharat Gears Ltd.	Hoechst House, 14 Floor, Nariman Point, Mumbai - 400021. Phone: 022-22832370, 022-25352621	Mumbai	1319	216.2	29.12	N
292	Bombay Commercial Syndicate	23, Zakaria Aghadi Industrial Estate, Marol Maroshi Road, Marol, Andheri (E), Mumbai - 400059. Phone: 022-28526921 (4 LINES)	Mumbai	250	41.32	NA	NA
293	Bright Brothers Ltd.	B-54, Wagle Industrial Estate, Road No. 33, Gyaneshwar Nagar, Thane, Mumbai - 400604. Phone: 022-25831676	Mumbai	433	156.44	NA	N
294	Ceekay Daikin Ltd.	NKM International House, 4th Floor, 178, Babubhai Chinai Marg, Mumbai - 400020. Phone: 022-22020849, 022-22028526	Mumbai	550	116.76	0.32	Y
295	Chandok Automotive Manufacturers Ltd.	A-31, MIDC, Marol Indus. Area, Road No. 3, Opp. ESIC Hospital, Andheri East, Mumbai - 400093. Phone: 022 28200024, 022 28399963	Mumbai	50	4.8	NA	N

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296	Excel Packaging	118, Shivkrupa Industrial Estate, Lbs Marg, Vikhroli (W), Mumbai - 400 083. Phone: 022-25784723, 022-25784019	Mumbai	120	1.44	NA	N
297	Fag Bearings India Ltd.	Nariman Bhavan, 8th Floor, 227 Backbay Reclamation, Nariman Point, Mumbai - 400021. Phone: 022-22022144, 022-22022166, 22022362	Mumbai	1037	418.92	85.28	Y
298	Gold Seal Engineering Products Pvt. Ltd.	Gold Seal House, Opp.CEAT Tyre Ltd., Village Road, Bhandup (W), Mumbai 400 078, Maharashtra. Phone: 022-25663498 (4 Lines), 25665216, 022-25662171	Mumbai	120	7.28	1.64	N
299	Hindalco Industries Ltd.	1st Floor, Ahura Center 82, Mahakali Caves Road, Andheri (E), Mumbai – 400093. Phone: 022-66917000, 022-66917057, 66917086, 66917052	Mumbai	227	45.6	NA	N
300	Hindustan Composites Ltd.	B-11, Paragon Condominium, P B Marg, Worli, Mumbai – 400013. Phone: 022-66530101-04	Mumbai	615	70.4	7.68	Y
301	J.P. Tools & Components	51/A-2, Shah & Nahar Ind. Estate, Dhanraj Mill Compound, S.J. Marg, Lower Parel (W), Mumbai 400 013, Maharashtra. Phone: 022-24928649, 24921746, 022-24952537	Mumbai	60	4.8	NA	N
302	KLT Automotive and Tubular Products Ltd.	B-1/1, Mayur Ma Krupa Soc., Opp. Gokhale School, Shimpoli Road, Borivali (W), Mumbai 400 092, Maharashtra. Phone: 022-55704411, 89, 90, 022-28991854	Mumbai	887	1.04	NA	N
303	Luxite Industries Ltd.	31/32, Ideal Industrial Estate, Mathura Das Mill Compound, 124 N M Joshi Marg, Lower Parel, Mumbai 400 013, Maharashtra. Phone: 022-24926660, 24946040, 022-24939723	Mumbai	152	15.84	9.68	Y

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304	Mahindra Sona Ltd.	10, Peninsula House, 2nd Floor, 235, Dr. D. N. Road, Fort, Mumbai - 400001. Phone: 022-22696211, 022-22624895	Mumbai	350	156	51.76	N
305	Mutual Industries Ltd.	The Peerage, 86 M. V. Road, Andheri (E), Mumbai - 400093. Phone: 022-26833183, 022-26827595	Mumbai	430	148.84	0.76	N
306	NRB Bearings Ltd.	"Dhannur" 15, Sir P. M. Road, Fort, Mumbai - 400001. Phone: 022-22656604, 022-22662854	Mumbai	1568	282	22.72	N
307	PMP Components (P) Ltd.	35-B, Nirol Complex, Goregaon (East), Mumbai 400 063, Maharashtra. Phone: 022-26850669 - 70, 022-26850424	Mumbai	150	24.92	4.68	Y
308	Prabha Engineering Pvt. Ltd.	36, MIDC, Central Road, Andheri (East), Mumbai 400 093, Maharashtra. Phone: 022-66925241-47, 022-66925248	Mumbai	208	26.4	20.6	NA
309	Remsons Industries Ltd.	88-B, Govt. Industrial Estate, Kandivli (W), Mumbai - 400067. Phone: 022-28683883, 022-28684452, 26862368	Mumbai	800	55.28	11.76	Y
310	Ring Plus Aqua Ltd.	605, Jagdamba Complex, Link Road, Malad West, Mumbai - 400064. Phone: 022-28824443, 022-28898837	Mumbai	699	67.04	40	Y
311	SETCO Automotive Ltd.	54/A, Tardeo Road, Nr Film Centre, Mumbai - 400034. Phone: 022-23520092	Mumbai	462	140.6	6.24	Y
312	Simmonds Marshall Ltd.	Apeejay Chambers, 5, Wallace Street, Fort, Mumbai 400 001, Maharashtra. Phone: 022-66337425, 022-66337433, 66337434	Mumbai	226	27	4.6	N
313	SKF India Ltd.	Mahatma Gandhi Memorial Building, Netaji Subhash Road, Marine Drive Mumbai - 400002. Phone: 022-66337777	Mumbai	2200	772.76	NA	NA

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314	Spring India	1-A, Dudhia Industrial Estate, Off. S.V. Road, Dahisar (East), Mumbai 400 068, Maharashtra. Phone: 022-28488089, 28488015, 022-28488545	Mumbai	94	25.72	9.88	Y
315	Sujan Industries	77, Mistry Industrial Complex, MIDC Cross Road A, Andheri (E), Mumbai 400 093, Maharashtra. Phone: 022-26871769,26870441,26870494, 022-26870339	Mumbai	110	9.76	1.88	Y
316	Syndicate Exhaust Systems (P) Ltd.	23, Zakharia Aghadi Industrial Estate, Marol Maroshi Road, Marol, Andheri (E), Mumbai 400 059, Maharashtra. Phone: 022-28526921 (4 Lines), 022-28526089	Mumbai	110	20.48	0.004	N
317	The Supreme Industries Ltd.	1161 & 1162, Solitaire Corporate Park, Andheri Ghatkopar Link Road, Chakala, Mumbai- 400093. Phone: 022-67710000, 022-40430000	Mumbai	230	83	NA	Y
318	UMC Auto Industries Pvt. Ltd.	UMC Estate, Chakala Road, Andheri East, Mumbai 400 099, Maharashtra. Phone: 022-28327732, 28327734, 66950765-66, 022-28363423	Mumbai	60	7.72	5.28	N
319	Unique Suspensions Pvt. Ltd.	Lake Road, Next To Tata Power House, Bhandup (W), Mumbai 400 078, Maharashtra. Phone: 022-25951029, 25965337, 022-25951739	Mumbai	58	8.04	1.68	N
320	Universal Wire Forms	B-109, Ghatkopar Industrial Estate, Lbs Marg, Ghatkopar (W), Mumbai 400 086, Maharashtra. Phone: 022-25007310, 022-25007526	Mumbai	15	1.4	0.92	NA
321	Vaid Elastomer Processors Ltd.	Plot R-856, TTC Industrial Area, Rabale, P.O.Box No.21, P. O Ghansoli, Navi Mumbai 400 701, Maharashtra. Phone: 022-27607426-27, 022-27607423	Mumbai	746	42.4	6	Y

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322	Vibrant Auto Components Pvt. Ltd.	D-236/A, Ansa Industrial Estate, Sakivihar Road, Andheri (E), Mumbai 400 072, Maharashtra. Phone: 022-28474391, 28473430, 022-28474392	Mumbai	99	5.48	NA	Y
323	Vir Rubber Products Pvt. Ltd.	207, Planet Industrial Estate, Subhash Road, Vile Parle (E), Mumbai 400 057, Maharashtra. Phone: 022-26117124, 26118423, 022-26117641	Mumbai	150	16.72	0.48	N
324	Viral Engineers	A-74, Virwani Industrial Estate, 1st Floor, Goregaon (E), Mumbai 400 063, Maharashtra. Phone: 022-28761073, 28788838, 022-28755239	Mumbai	50	1.92	1.32	N
325	XLO India Ltd.	Dhanwatay Bldg., Wing-I, Third Floor, 80, Dr. Annie Besant Road, Worli, Mumbai 400 018, Maharashtra. Phone: 022-24937451,24937452, 24934289, 022-24931935, 24934294	Mumbai	325	32.84	0.08	N
326	C M Smith & Sons Ltd.	Dashrathwadi, Court Road, Dist. Kheda, Nadiad, Gujarat - 387 001. Phone: 0268 2566061, 0268 2567285	Nadiad	485	33.16	3.04	N
327	NSSL Ltd.	T-44, MIDC Industrial Area, Hingna Road, Nagpur - 440016. Phone: 07104-232582, 07104-232780	Nagpur	310	43.2	2.36	N
328	Sandeep Metalcraft Pvt. Ltd.	D-16, MIDC Industrial Area, Nagpur 440 028, Maharashtra. Phone: 07104-237878, 07104-236860	Nagpur	142	16.8	NA	N
329	Shanti Metalfab Pvt. Ltd.	73, Nagalwadi, Near Amar Nagar, Hingna Industrial Area, Nagpur 440 016, Maharashtra. Phone: 07104-235674, 236300, 07104-235145	Nagpur	18	3.12	NA	N
330	BCL Forgings Ltd.	67, MIDC Industrial Area, Satpur, Nasik, Maharashtra - 422007. Phone: 0253-2350124, 0253-2350552, 2350510, 2352056	Nasik	407	40.8	NA	N

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331	Flywheel Ring Gears Pvt. Ltd.	B-275, MIDC, Ambad, Nasik 422 113, Maharashtra. Phone: 02551-203115, 203011, 02551-230777	Nasik	179	12.88	3.2	N
332	Goldy Precision Stampings Pvt. Ltd.	Plot No. F - 84 & 85, MIDC, Satpur, Nasik 422 007, Maharashtra. Phone: 0253-2350885, 6604785, 6604885, 0253-2351412	Nasik	90	6.4	1.12	Y
333	Hindustan Hardy Spicer Ltd.	Plot No. C-12, M.I.D.C. Area, Ambad, Nasik 422 010, Maharashtra. Phone: 0253-2382018, 2382118, 2382754, 0253-2382528	Nasik	256	28.56	10.2	Y
334	Innova Rubbers Pvt. Ltd.	A-26, MIDC, Ambad, Nashik 422 010, Maharashtra. Phone: 0253-2381065, 0253-2381411	Nasik	383	39.6	3.2	N
335	Keystone Appliances Pvt. Ltd.	F-14, MIDC, Ambad Industrial Area, Nasik 422 010, Maharashtra. Phone: 0253-2385071-74, 0253-2385079	Nasik	189	2.12	NA	N
336	M. D. Industries	F-82, MIDC Area, Ambad, Nasik 422 010, Maharashtra. Phone: 0253-2383282, 2387459, 0253-2381950	Nasik	150	14.24	0.52	Y
337	Mungi Brothers	D-15, MIDC Ambad, Nasik - 422010. Phone: 0253-6601595	Nasik	112	46.52	NA	N
338	Perfect Circle India Ltd.	20, MIDC Industrial Area, Satpur, Nasik 422 007, Maharashtra. Phone: 0253-2202800, 2202803, 0253-2350584, 2351138	Nasik	858	73.2	36	N
339	Reliable Autotech Pvt. Ltd.	F-80, MIDC, Ambad, Nasik 422 010, Maharashtra. Phone: 0253-2382151, 0253-2384470	Nasik	211	6.48	1.64	Y
340	Right Tight Fasteners Pvt. Ltd.	F-45/46/47, MIDC, Satpur, Nasik 422 007, Maharashtra. Phone: 0253-2350786-87, 0253-2351787, 3043787	Nasik	105	45.04	1.44	N

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S. No	Organization Name	Address	City	No. of Employee	Sales Turnover (in Crores INR)#	Export Turnover (in Crores INR)#	Foreign Collaboratio n – Yes/ No
341	Sterling Industries	N-11, MIDC Ambad, Opp. Meltron, Nashik 422 010, Maharashtra. Phone: 0253-2382544, 0253-2382511	Nasik	480	151.2	4.28	Y
342	Tork Fastners (I) Pvt. Ltd.	W/B 33-36, Ambad M.I.D.C, Nashik 422 010, Maharashtra. Phone: 0253-2387908, 2381626, 0253-2387909	Nasik	136	6.04	0.36	Y
343	Electrica Engineers (India) Pvt. Ltd.	Shed No.W-316, Rabale Block, MIDC Industrial Area, TTC Ghansoli Post, Mumbai - 400 701. Phone: 022-27606670, 022-27606680, 27691507	Navi Mumbai	46	11.6	NA	N
344	National Rubber Engineers	W-173, TTC Industrial Area, Off. Thane Belapur Road, Village Pawane, Navi Mumbai 400 703, Maharashtra. Phone: 022-27682706, 27630891, 022-27630891, 25170163	Navi Mumbai	25	0.88	0.6	N
345	Allena Auto Industries Pvt. Ltd.	B-68, Wazirpur Industrial Area, Delhi - 110052. Phone: 011-27372291, 011-27377508, 27373704	New Delhi	225	73.72	NA	NA
346	Amtek Auto Ltd.	4, Bhanot Apartment, Local Shopping Center, Pushp Vihar, New Delhi - 110062. Phone: 011-51649800-01	New Delhi	4100	2917.2	354.04	Y
347	ANG Auto Ltd.	90, Okhla Industrial Estate Phase-III, New Delhi- 110020. Phone: 011-41002339	New Delhi	540	106.4	60.8	Y
348	AVS Brakelinings Pvt. Ltd.	209, Hemkunt Chambers, 89, Nehru Place, New Delhi - 110019. Phone: 011-30880410, 011-30888289	New Delhi		2.32	0.24	N
349	Bharat Seats Ltd.	D-188, Okhla Industrial Area Phase-1, New Delhi-110020. Phone: 011-26811967, 011-26811968	New Delhi	225	150.4	NA	Y
350	BIC Auto Pvt. Ltd.	GC-1, Shivaji Enclave, New Delhi - 110 027. Phone: 01276 280737-38	New Delhi	300	32.76	30.8	N

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351	D. D. Industries Ltd.	F - 1/9, Okhla Industrial Area, Phase I –New Delhi - 110 020. Phone: 011-26372222 (9 LINES)	New Delhi	1200	14.56	0.26	N
352	DD Industries Ltd.	F-1/9, Okhla Industrial Area, Phase-I, New Delhi - 110 020, 011-26372222	New Delhi	227	14.56	0.26	N
353	Denso India Ltd.	The Capital Court, 3rd Floor, Left Wing, Olof Palme Marg – Munirka, New Delhi - 110067. Phone: 011-26176693, 011-26182498	New Delhi	1700	391.64	0.004	Y
354	Federal-Mogul Goetze (India) Ltd.	A-26/3, Mohan Co-Operative Industrial Estate, Mathura Road, New Delhi - 110044. Phone: 011-41497600, 011-41497800	New Delhi	5085	360.4	14.4	N
355	Fiem Industries Ltd.	D-34, DSIDC Packaging Complex, Kirti Nagar, New Delhi - 110015. Phone: 011-25927919, 011-25927820	New Delhi	1500	156.8	7.8	Y
356	Gabriel India Ltd.	1, Sri Aurobindo Marg, New Delhi -110016. Phone: 011-26962561	New Delhi	2400	499.32	13.88	Y
357	Goindi Industries Pvt. Ltd.	T-3, 3rd Floor, Krishna Plaza, Local Shopping Centre, Mayur Vihar, Phase II, New Delhi 110 091. Phone: 011-22163181, 22165639, 011-22163181	New Delhi	300	140	2	Y
358	Harinder Industries (P) Ltd.	122, Chand Nagar, New Delhi 110 018. Phone: 011-28331127, 28331532, 011-28332283	New Delhi	40	2.44	NA	Y
359	Hella India Lighting Ltd.	B-13, Badarpur Extension, New Delhi 110 044.	New Delhi	219	23.12	1.04	N
360	Hero Motors Ltd.	601, International Trade Tower, Nehru Place, New Delhi - 110019. Phone: 011-40511700	New Delhi	1001	98.68	24.44	N
361	Hi-Lux Automotive Pvt. Ltd.	A-2/2, Mayapuri Industrial Area, Phase-I, New Delhi 110 064. Phone: 011-28116522, 28115833, 011-28116947	New Delhi	35	4.24	NA	N

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362	Horizon Industrial Products Pvt. Ltd.	80, Darya Ganj, New Delhi 110 002. Phone: 011-23270216, 23270266, 011-23283076, 23276711	New Delhi	200	27.92	3.8	Y
363	IST Ltd.	A-23, New Office Complex, Defence Colony, New Delhi 110 024. Phone: 011-24694291, 24694292, 24632287, 24690860, 011-24625694	New Delhi	500	12.6	2.12	N
364	Jamna Auto Industries Ltd.	2 Park Lane, Kishan Garh, Vasant Kunj, New Delhi - 110070. Phone: 011-26893331, 011-26896960, 32566748	New Delhi	1525	187.04	3.12	N
365	Jay Bharat Maruti Ltd.	Neel House, Lado Sarai, Opp Qutab Minar, New Delhi - 110030. Phone: 011-29522570 (5 LINES)	New Delhi	3800	483.28	NA	Y
366	JBM Auto Ltd.	Neel House, Lado Sarai, Opp Qutab Minar, New Delhi - 110030. Phone: 011-29522570	New Delhi	596	134.96	10.12	N
367	Kamal Rubplast Industries Pvt. Ltd.	308/1, Shahzada Bagh, Old Rohtak Road, Delhi 110 035. Phone: 011- 23644466, 23654466, 011- 23659831	New Delhi	123	9.76	0.44	Y
368	Kiran Udyog	Plot No. 47, Lane 6, Railway Line Side, Anand Parbat Industries, New Delhi - 110005. Phone: 011-28717887, 011-28717237	New Delhi	851	130.24	4.64	N
369	Kunstocom (India) Ltd.	AKC House, E-27, Defence Colony, New Delhi 110 024. Phone: 011-24339700, 011-24339200	New Delhi	205	30.28	3	Y
370	Lifelong India Ltd.	D-1, Soami Nagar (South), New Delhi - 110017. Phone: 011-26017063-5	New Delhi	1100	226.36	12.56	N
371	Lumax Automotive Systems Ltd.	A-116/117, DDA Sheds, Okhla Industrial Area Phase-II, New Delhi - 110020. Phone: 011-40500400	New Delhi	820	96.48	NA	Y

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372	Lumax Industries Ltd.	B-86, Mayapuri Industrial Area, Phase- I, New Delhi - 110064. Phone: 011-28111777, 011-28116990	New Delhi	1200	698.92	10.52	Y
373	M V D Auto Components Pvt. Ltd.	C-59, Jangpura Extension, New Delhi 110 014. Phone: 011-26372965, 26810570, 011-24311238	New Delhi	125	6.96	3.52	N
374	Maco Pvt. Ltd.	Kundan Mansion, 2A/3, Asaf Ali Road, New Delhi-110002, Ph. 011-23263672, 23273274	New Delhi	165	7.6	0.84	N
375	Mandap International Pvt. Ltd.	C-28, Anand Niketan, New Delhi 110 021. Phone: 011-24110159, 24116579, 011-41661400	New Delhi	35	5.04	NA	NA
376	Meenakshi Polymers Pvt. Ltd.	E-478, Greater Kailash-II, New Delhi - 1100. Phone: 011-29210833, 011-29214034	New Delhi	98	45.6	NA	N
377	Moon Paper & Machinery Pvt. Ltd.	32, Rajasthani Udyog Nagar, G. T. Karnal Road, New Delhi 110 033. Phone: 011-27139462,27243593, 011-27139463	New Delhi	95	8.48	NA	Y
378	Multivac India Pvt. Ltd.	W-53, Greater Kailash - li, New Delhi 110 048. Phone: 011-29219292, 29219278, 011-29217098	New Delhi	65	17.84	2	N
379	Neolite Industries	D-4, Rajouri Garden, New Delhi - 110027. Phone: 011-28888025-27, 011-30991988	New Delhi	750	83.72	42.8	N
380	OCAP Chassis Parts Pvt. Ltd.	62, Srestha Vihar, Vikas Marg Extn, New Delhi 110 092.	New Delhi	158	10.64	10.4	Y
381	Pacco Industrial Corporation	D-31, Okhla Industrial Area, Phase I, New Delhi 110 020. Phone: 011-26812708, 26819054, 011-26819063	New Delhi	110	20	6	Y
382	Paul Components Pvt. Ltd.	17/6, New Rohtak Road, New Delhi 110 005. Phone: 011-32443447, 011-28717412	New Delhi	138	10	1.6	N

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383	Precision Castings & Components	B-69/1, Wazirpur Industrial Area, Delhi 110 052. Phone: 011-42473999, 65158023, 011-42473903, 23980433	New Delhi	200	7	3	N
384	Precision Pipes & Profiles Co. Ltd.	161, Okhla Industrial Estate, Phase-III, New Delhi - 110020. Phone: 011-26849369, 011-26311294	New Delhi	915	111	NA	N
385	Rasandik Engineering Industries India Ltd.	C-4 & 5, First Floor, C Block Market, Vasant Vihar, New Delhi 110 057. Phone: 011-26149276-77, 011-26159232	New Delhi	786	177.2	1.88	Y
386	Raunaq Automotive Components Ltd.	15th Floor, Chiranjiv Tower, 43, Nehru Place, New Delhi 110 019. Phone: 011-26418622, 26418633, 26418655, 011-26448962	New Delhi	354	57.6	2.12	Y
387	Sharda Motor Industries Ltd.	D-188, Okhla Industrial Area, Phase- I, New Delhi - 110020. Phone: 011-26811958, 011-26811967, 26811968	New Delhi	1283	400	NA	Y
388	Shriram Pistons & Rings Ltd.	3rd Floor, Himalaya House, 23, Kasturba Gandhi Marg, New Delhi - 110001. Phone: 011-23315941	New Delhi	3400	500	80	Y
389	Steel Strips Wheels Ltd.	Suit 398, Ashok Hotel, Chanakya Puri, New Delhi - 110021. Phone: 011-26878168-9	New Delhi	730	163.32	0.76	Y
390	Subros Ltd.	LFG, World Trade Centre, Barakhamba Lane, New Delhi - 110001. Phone: 011-23414946-49	New Delhi	1700	702.24	0.04	N
391	Sunpac Auto (India) Pvt. Ltd.	H-54, Udyog Nagar, New Delhi 110 041. Phone: 011-25473112, 011-25476566	New Delhi	33	2.24	0.16	N
392	Super Circle Auto Ltd.	A-43, Rajouri Garden, New Delhi 110 027. Phone: 011-41446500, 25431858, 25416973, 011-25457252, 41446501	New Delhi	476	38	26	N

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393	Super Seals India Ltd.	404, World Trade Centre, Babar Road, New Delhi 110 001. Phone: 011-23414540, 23412135, 011-23414540	New Delhi	349	18.6	0.56	N
394	Supercircle Pvt. Ltd.	B-45, Mayapuri Industrial Area, Phase - I, New Delhi 110 064. Phone: 011- 41833340, 28115615, 011-28115652	New Delhi	76	8.92	6.72	N
395	Unitech Machines Ltd.	Oshu House, 344/3, Lado Sarai, New Delhi - 110030. Phone: 011-29523163, 011-29523501	New Delhi	900	220	0.8	Y
396	Vimal Moulders India Ltd.	B-104/3, Naraina Industrial Area, Phase- I, Naraina, New Delhi - 110028. Phone: 011-65491393-94, 9811905850	New Delhi	350	110	NA	N
397	Abilities India Pistons & Rings Ltd.	G-89, Preet Vihar, New Delhi - 110 092. Phone: 011-22059744	New Delhi	173	9.72	8.24	N
398	Beta Industrial Products	B-17, G. T. Karnal Road, Industrial Area, Delhi - 110 033. Phone: 011 27467250-54	New Delhi		18	18	N
399	Brakewel Automotive Components (I) Pvt. Ltd.	C-28, Sector 57, NOIDA, U.P - 201 301. Phone: 0120 2581292, 0120 2585567	NOIDA	200	29.04	8.4	Y
400	Deusch Mediquip Pvt. Ltd.	A-82, Sector 57, Gautam Budh Nagar Dist., NOIDA - 201 301. Phone: 0120-2581503, 0120 3297939, 4257429	NOIDA	110	2.8	NA	N
401	Dipty Lal Judge Mal (P) Ltd.	D-55, Phase II Extension, NOIDA - 201 305. Phone: 0120-3042004, 0120-3042009	NOIDA	280	38	0.8	N
402	Keihin Panalfa Ltd.	A-1 & 2, Sector- 81, Phase- II, NOIDA - 201305. Phone: 0120-2568941-44	NOIDA	64	229	NA	N
403	Makino Auto Industries	D -146-148, Sector 63, NOIDA 201 301, Uttar Pradesh. Phone: 0120-2402985-6, 0120-2402987	NOIDA	379	40.28	0.32	N
404	Minda HUF Ltd.	D 6-11, Sector 59, NOIDA - 201301. Phone: 0120-2580249, 0120-2580250, 2580252	NOIDA	902	176.56	NA	NA

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405	Minda Sai Ltd.	B-20 & 21, Hosiery Complex, Phase II Extension, NOIDA - 201305. Phone: 0120-4352762, 0120-4352609	NOIDA	615	77.28	4.16	N
406	Motherson Sumi Systems Ltd.	C-14, A & B, Sector-1, NOIDA - 201301. Phone: 0120-2558658, 0120-2476200	NOIDA	7770	1152.08	226.8	Y
407	Nippon Audiotronix Ltd.	D-8, Sector-10, NOIDA - 201301. Phone: 0120-4266100-3, 0120-2555555	NOIDA	563	138	NA	Y
408	Phoenix Lamps Ltd.	59-A, NSEZ, NOIDA, Phase-II, Gautam Budh Nagar, NOIDA - 201305. Phone: 0120-4012222	NOIDA	1850	280	100	N
409	Trelleborg Automotive India Pvt. Ltd.	B-190, Phase II, NOIDA 201 301, Uttar Pradesh. Phone: 0120-2563124-28, 0120-2567675	NOIDA	265	35.48	8.12	Y
410	Friends Castings (P) Ltd.	P. B No. 5, Friends Marg, Phillaur-144 410, Punjab. Phone: 01826-222583, 222546, 01826-222287	Phillaur	60	8.44	1.72	N
411	Leo Fasteners	A-27/A, Industrial Estate, Thattanchavady, Pondicherry - 605009. Phone: 0413-2248225	Pondicherry	254	51.72	NA	N
412	Raja Forgings & Gears Ltd.	225-228, Industrial Area, Phase-1, PUNCHKULA 134 109, Haryana. Phone: 0172-2560831, 2560236, 5066662, 0172-2568523	Punchkula	501	36.36	0.6	Y
413	Advik Hi-Tech Pvt. Ltd.	Gat No. 357/ Plot No. 99, Part A, Chakan-Talegaon Road Village-Kharabwadi, Chakan, Pune, Maharashtra - 410 501. Phone: 02135 253862, 02135-254944	Pune	173	20.08	NA	N
414	Amtek	W-93, S Block, MIDC, Bhosari, Pune, Maharashtra - 411 026. Phone: 020 56113038, 020-56113039, 27119249, 27120274	Pune	40	4	0.32	N
415	Associated Manufacturing Company	D-3/80, M.I.D.C., Chinchwad, Pune 411 019, Maharashtra. Phone: 020-27475298, 27475299, 020-27470006	Pune	172	15.36	0.08	Y

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416	Auto Electronics	S.No. 64/5, Bhide Bag Ind. Estate, Vadgaon, Budruk, Pune, Maharashtra - 411 041. Phone: 020 24392351 - 3	Pune	100	20	NA	NA
417	Autocomp Corporation	Gat No. 392/2, Mahalunge, Chakan Talegaon Road, Tal Khed, Pune, Maharashtra - 411 025. Phone: 02135 259242, 02135 259351	Pune	86	18.72	NA	NA
418	Autofield Engineers Pvt. Ltd.	Sahajpur, Tal. Daund, Pune, Maharashtra - 412202. Phone: 0	Pune	114	7.32	NA	NA
419	Automotive Composite System (International) Ltd.	Plot No. 10, 11 & 12, Survey No. 399/1, Village Bhare, Taluka Mulshi, Pune, Maharashtra - 412 111. Phone: 020 22922238, 020 22922261	Pune	NA	15.2	NA	N
420	Automotive Stampings & Assemblies Ltd.	G-71/2, MIDC, Bhosari, Pune, Maharashtra - 411026. Phone: 020-27121500	Pune	1565	302.96	4.64	Y
421	Bosch Chassis Systems India Ltd.	Panchshil Quadra- I, 3rd Floor, Opposite Magarpatta City, 238 Hadapsar, Pune - 411028. Phone: 020-29870300, 020-39870333	Pune	2057	329.16	24.8	Y
422	Carraro India Ltd.	B-2/2, MIDC, Ranjangaon, Pune - 412210. Phone: 02138-562666	Pune	125	55.52	33	Y
423	Chaphekar Engineering Pvt. Ltd.	S. Nos. 239/240, Hinjawadi, Near Rajiv Gandhi Infotech Park, Tal Mulshi, Pune - 412108. Phone: 020 56524878-79	Pune	100	26.4	NA	N
424	Concentric Engineering Pvt. Ltd.	Gat No. 26/1, 27 & 28, Off Pune-Nagar Road, Village Lonikand, Pune - 412216. Phone: 020-66142300	Pune	155	57.72	NA	NA
425	Dali & Samir Engineering Pvt. Ltd.	36, D li Block, MIDC, Chinchwad, Pune - 411 019. Phone: 020-27477528	Pune	195	25.92	NA	N
426	DGP Hinoday Industries Ltd.	Bhosari Industrial Area, Pune - 411026. Phone: 020-27120811	Pune	775	204	NA	NA

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427	Dyna-K Automotive Stampings Pvt. Ltd.	/6, MIDC, Bhosari, Pune - 411 026. Phone: 020-27122351, 27120189	Pune	175	15.04	4.04	N
428	Enginotech Systems Pvt. Ltd.	100, Anand Park, Aundh, Pune - 411007. Phone: 020-25887201	Pune	150	66.96	0.08	N
429	ENKEI Cast Alloy Ltd.	Gat No. 1426, Shikrapur, Taluka Shirur, Pune - 412208. Phone: 02137-677100	Pune	1200	25.04	3.24	Y
430	G B Rubber Products	S-157, MIDC, Bhosari, Pune - 411026. Phone: 020-66113401, 020-27120366, 27120323	Pune	225	2.76	NA	N
431	GKN SINTER Metals Ltd.	146, Mumbai-Pune Road, Pimpri, Pune - 411018. Phone: 020-27426261-63	Pune	550	174.8	31.16	Y
432	HODEK Vibration Technologies Pvt. Ltd.	At Post Sahajpur (Nandur), Tal. Daund, Pune Dist. 412 202, Maharashtra. Phone: 02119-242111, 242184, 242317, 242318, 02119-242151	Pune	94	31.08	8.4	Y
433	Indo Schottle Auto Parts Pvt. Ltd.	Gat No. 378/387/389 Village Urawade, Taluka Mulshi, Pune - 412108. Phone: 020-22922005	Pune	640	66.52	29.24	Y
434	International Auto Ltd.	2nd Floor, Nyati Millennium, Viman Nagar, Pune - 411041. Phone: 020-66024844-45	Pune	821	217.76	5.92	N
435	Jaya Hind Industries Ltd.	Akurdi, Pune - 411035. Phone: 020-27473981	Pune	1632	178.8	7.6	Y
436	Jayashree Polymers Pvt. Ltd.	21/4, D-1 Block, M.I.D.C. Chinchwad, Pune 411 019, Maharashtra. Phone: 020-66111882-4, 020-27440237	Pune	364	50.6	10.12	Y
437	JHS Taigene Electrical Co. Pvt. Ltd.	Gat No. 436 - A/2, Takwe Budruk, Tal Maval, Pune Dist. 412 106, Maharashtra. Phone: 02114-244024, 244302, 02411-244301	Pune	167	18.12	7.44	Y

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438	Kailash Vahan Udyog Ltd.	703, 'Lyra' Satellite Tower, Mundhwa – Koregaon Park Ext., Pune 411 036, Maharashtra. Phone: 020-26876329, 26871163	Pune	400	60.12	NA	N
439	Kalyani Forge Ltd.	Gat No. 611-614, Koregaon Bhima, Tehsil Shirur, Pune - 412207. Phone: 02137-252335	Pune	600	220	24	N
440	Kalyani Thermal Systems Ltd.	Survey No. 72-76, Mundhwa, Pune 411 036, Maharashtra. Phone: 020-26810456, 26874880, 26872192, 26824633, 020-26810456, 26874880	Pune	350	38.96	NA	Y
441	Kemen Springs Pvt. Ltd.	W-250, J Block, MIDC Industrial Area, Bhosari, Pune 411 026, Maharashtra. Phone: 020-27120364	Pune	30	4.44	0.04	NA
442	Kirloskar Oil Engines Ltd.	Laxmanrao Kirloskar Road, Khadki, Pune - 411003. Phone: 020-25810341	Pune	865	86.72	14.8	N
443	Kulkarni Engineers	2/10, Gandhi Bhavan Industrial Estate, Kothrud, Pune 411 029, Maharashtra. Phone: 020-25380249, 020-25388611	Pune	40	4.8	NA	N
444	Mahindra UGINE Steel Co. Ltd.	371, Takwe Road, At & Post - Kanhe, Taluka-Maval, Pune 412 106, Maharashtra. Phone: 02114-255294, 322699, 02114-255293	Pune	277	36.88	NA	Y
445	Mahle Filter Systems (India) Pvt. Ltd.	Gat No. 410/411, Mauje Urawade, Tal Mulshi, Pune - 411042. Phone: 020-66742200	Pune	173	153.6	19.6	Y
446	Metlon Engineers Pvt. Ltd.	50/11, Vadgaonsheri, Off - Nagar Road, Pune 411 014, Maharashtra. Phone: 020-27030379, 27031936, 30905670, 020-27030379	Pune	60	3.72	NA	N
447	Minda Stoneridge Instruments Ltd.	Gut No. 287, Nanekarwadi, Chakan, Tal Khed, Pune 410 501, Maharashtra. Phone: 02135-280385, 280386, 02135-253036, 286225	Pune	380	66.96	7.32	Y

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S. No	Organization Name	Address	City	No. of Employee	Sales Turnover (in Crores INR)#	Export Turnover (in Crores INR)#	Foreign Collaboratio n – Yes/ No
448	Panse Autocomps Pvt. Ltd.	C/O Marigold Dies & Tools Pvt. Ltd., J - 215, MIDC, Bhosari, Pune 411 026, Maharashtra. Phone: 020-27475203, 27474805, 020-27471605, 27478021	Pune	124	34.48	0.44	Y
449	Paranjape Autocast Pvt. Ltd.	T-141, Bhosari Industrial Area, Pune - 411026. Phone: 020-27120187, 020-27120188	Pune	1290	141.52	8	Y
450	Patodia Glass Industries Ltd.	Gat No. 375, Koregaon Bhima, Nagar Road, Taluk Shirur, Pune Dist. 412 216, Maharashtra. Phone: 02137-666016, 666115, 666118, 02137-668424	Pune	185	11.2	NA	N
451	PEFCO Foundry (A Div. Of Kores (India) Ltd.)	E-14, Bhosari Industrial Area, Pune 411 026, Maharashtra. Phone: 020-27120741, 020-27120014	Pune	451	26.12	NA	Y
452	Pembriil Industrial & Engg. Co. Pvt. Ltd.	P.B. No. 5, Mumbai Pune Road, Chinchwad, Pune 411 019, Maharashtra. Phone: 020-27475141-4, 27488886, 020-27450287, 27476601	Pune	890	123.96	3.24	N
453	Polybond India Pvt. Ltd.	No. 7, Deccan College Road, Pune 411 006, Maharashtra. Phone: 020-26696820, 26683436, 020-26695655	Pune	600	32.88	NA	Y
454	Poona Shims Pvt. Ltd.	39/39, "Darshangad" Prabhat Road, Lane No. 9-C, Pune - 411004. Phone: 020-25410833, 020-25425492	Pune	184	46.92	1.68	N
455	Premium Energy Transmission Ltd.	Po Box No. 5, Mumbai-Pune Road, Chinchwad, Pune - 411019. Phone: 020-27475141-4, 020-27450287, 27476601	Pune	890	123.96	NA	NA
456	Rinder India Pvt. Ltd.	Gat No. 148, Mahalunge Ingale, Pune - 410501. Phone: 020-30616100-200	Pune	430	97.44	2.12	Y
457	Rojee-Tasha Stampings Pvt. Ltd.	J-212, MIDC, Bhosari, Pune - 411026. Phone: 020-30680200	Pune	1600	279.16	NA	N

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458	RSB Transmission (I) Ltd.	Nyati Millennium, 2nd Floor, Vimannagar, Pune- 411014. Phone: 020-66024844-5	Pune	613	179.76	26.12	Y
459	Shutham Electric Ltd.	Gat No. 819/1/2, Sanaswadi, Tal - Shirur, Pune 412 207, Maharashtra. Phone: 02137-252040, 252042, 02137-252477, 252557	Pune	390	40	NA	Y
460	SPACO Carburetors (India) Pvt. Ltd.	Po Box No. 13, D-II/62, MIDC, Chinchwad, Pune - 411019. Phone: 020-27472176-77	Pune	496	54.92	6.76	Y
461	Tata Autocomp Systems Ltd.	Survey No. 235 & 245, Taluka Munshi, Pune - 411057. Phone: 020-66522345	Pune	630	164	NA	NA
462	Tata Ficosa Automotive Systems Ltd.	Survey No. 235/245, Village Hinjewadi, Taluka Mulshi, Pune - 411057. Phone: 020-22932133-36, 020-22934224-26	Pune	415	65.32	11.64	Y
463	Tata Toyo Radiator Ltd.	S. No. 235/245 Village Hinjawadi, Taluka Mulshi, Pune - 411027. Phone: 020-66524100, 020-22932091	Pune	561	335.44	7.56	Y
464	Tata Yazaki Autocomp Ltd.	Gat No. 93, Survey No. 166, High Cliff Industrial Estate, Wagholi-Rahu Road (Off A'nagar Road), Kesnand, Pune 412 207, Maharashtra. Phone: 020-27050133-7, 020-27050131	Pune	1000	20	NA	N
465	Taurus Flexibles Pvt. Ltd.	S. No. 662, Pune-Mumbai Road, Talegaon, Dabhade, Pune - 410506. Phone: 02114-222213	Pune	300	45.48	NA	Y
466	Western Pressing Pvt. Ltd.	F-II/ 25, M I D C, Pimpri, Pune 411 018, Maharashtra. Phone: 020-27477376, 27472350, 020-27474034	Pune	40	6.84	NA	N
467	Yutaka Autoparts Pune Ltd.	Gat No. 316, Village Kasaramboli, Post Ambadvet, Off Urawade Road, Piranguti, Tal Mulshi, Pune Dist. 412 111, Maharashtra. Phone: 020-22922467, 020-66740436	Pune	113	33.76	NA	N

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S. No	Organization Name	Address	City	No. of Employee	Sales Turnover (in Crores INR)#	Export Turnover (in Crores INR)#	Foreign Collaboratio n – Yes/ No
468	ZF Steering Gear (I) Ltd.	Eden Hall, 6th Floor, Nr. Deep Bunglow, Model Colony, Pune - 411016. Phone: 020-25663271-74	Pune	653	234.04	1.04	N
469	Amul Industries Pvt. Ltd.	2- AJI Industrial Estate, Plot No. 332/332, Opp. Boring House, Rajkot- 360003. Phone: 0281-2387898, 0281-2387461, 2387036	Rajkot	350	105.6	12.8	N
470	Galaxy Bearings Ltd.	Survey No. 253, Shapar Industrial Area, Village: Shapar, Taluka. : Kotada Sangani, Rajkot Dist. 360 002, Gujarat. Phone: 02827-252401-2, 254411-3, 02827-252400	Rajkot	180	17.76	4.88	N
471	Mahindra Sar Transmission Pvt. Ltd.	Plot No. 1, 31 To 34 SRV No. 298/P, Galaxy Industrial Estate, Village Shapar, TAL KOTDASANGANI, Rajkot. Phone: 02827-252590, 02827-253162	Rajkot	400	40.72	2.84	N
472	Autofit Pvt. Ltd.	69th K M Stone, Delhi-Jaipur Highway, Daruhera, Rewari - 122106. Phone: 01274-267062-65	Rewari	492	567.12	NA	N
473	Lakshmi Precision Screws Ltd.	Opp. Northern Bye Pass, Hisar Road, Rohtak - 124001. Phone: 01262-249920, 01262-249921, 248288-9	Rohtak	1272	179.92	58.8	Y
474	DCM Engineering Products	Po Box No. 5, Ropar - 140001. Phone: 01881-270801-02	Ropar	1616	275.8	17.68	N
475	Abhijat Engineers	Plot No.32, Municipal Industrial Estate, Karanje, Near Akashwani, Satara, Maharashtra - 415 002. Phone: 021-62250446	Satara	18	0.68	0.028	N
476	Cooper Foundry Pvt. Ltd.	Plot No. L-3, Additional MIDC, Satara - 415001. Phone: 02162-244413, 02162-244273	Satara	913	82.16	49.24	N

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477	Mutha Founders Pvt. Ltd.	L-7, Additional MIDC, Satara 415 004, Maharashtra. Phone: 02162-245081-2, 02162-244246, 245170	Satara	204	38.68	1.04	Y
478	India Leaf Spring Mfg. Co. Pvt. Ltd.	61-A, Mahatma Gandhi Road, Secunderabad - 500003. Phone: 040-27714602, 040-27713564	Secunderabad	295	54.2	NA	NA
479	Kriti Industries (India) Ltd.	Plot No. C 9/C10, Opp.Frito-Lay Factory, Ranjangaon MIDC A/P-Karegaon, Tal. Shirur 412 220, Maharashtra. Phone: 02138-232398, 232470, 02138-232398, 232470	Shirur	63	3.6	NA	N
480	Rane TRW Steering Systems Ltd. (Seat Belt Division)	48th KM, GST Road, NH - 45, Singaperumal Koil, 603 204, Tamil Nadu. Phone: 044-2744427, 27464428, 044-27464429	Singaperumal Koil	100	365.08	6.4	Y
481	Precision Camshafts Ltd.	E 102/3, MIDC, Akkalkot Road, Sholapur 413 006, Maharashtra. Phone: 0217- 3295433-35, 0217-2653398	Sholapur	582	34.92	1.24	Y
482	Toyo Springs Ltd.	20th Mile, G.T. Road, Rai, Sonapat 131 029, Haryana. Phone: 0130-2366247, 2366290, 2366291, 2366297, 0130-2366248	Sonapat	350	28	NA	N
483	JKM-Daerim Automotive Ltd.	F-67, SIPCOT Industrial Park, Irrungattukottai Sriperumbudur, Tamil Nadu - 602105. Phone: 044-27156049/51/52	Sriperumbudur	357	135.4	6.92	Y
484	Technical Stampings Automotive Ltd.	Plot No. G-16-18, SIPCOT Industrial Park, Irrungattukottai Sriperumbudur, Tamil Nadu - 602105. Phone: 044-27156032-4	Sriperumbudur	1697	305.6	NA	Y
485	EICHER Engineering Components	S.V. Road, Chitalsar, Manipada, Thane - 400607. Phone: 022-25894314-15, 022-25894317-18	Thane	739	109.4	34.96	N

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S. No	Organization Name	Address	City	No. of Employee	Sales Turnover (in Crores INR)#	Export Turnover (in Crores INR)#	Foreign Collaboratio n – Yes/ No
486	HFH Auto Pumps	Survey No. 115, Hissa No. 6, Ghodbunder Village Road, Mira Road (E), Thane 401 107, Maharashtra. Phone: 022-28458156-58, 022-28458159,26495599	Thane	18	0.72	NA	N
487	Industrial Engineering Syndicate	Unit No.11, 12, 13 & 14, Walia Industrial Estate, Opp. Tungreshwar Industrial Complex Satali, Vasai (East), Thane 401 208, Maharashtra. Phone: 0250-2481170, 71, 2480840, 0250-2480531	Thane	80	9	NA	N
488	Industrial Rubber Products Pvt. Ltd	Plot No. 46, Sector No. 1, VTIC, Gaurai pada, Vasai (E), Thane Dist. 401 208, Maharashtra. Phone: 0250-2454705, 2454752, 022-2454752	Thane	52	4.8	0.12	N
489	Milton Plastics Ltd.(Industrial Products Div.)	C/O Kaizen Plastomould Pvt. Ltd., 1, Punjab Foundry Industrial Estate, Mira Bhayander Road, Bhayander (East), Thane 401 104, Maharashtra. Phone: 022-28458992, 28455450, 28458683, 022-28458967	Thane	54	0.8	0.24	N
490	Wire Rings	Y-5, Vinochem Industrial Estate, God - Dev Road, Bhayander (E), Thane 401 105, Maharashtra. Phone: 022-28141445, 022-28190213	Thane	10	2.8	1.4	Y
491	The Indian Smelting & Refining Co. Ltd.	1st Pokhran Road, Thane (W)-400606. Phone: 022-25882801-2	Thane (W)	320	52.4	NA	N
492	TI Metal Forming	Chennai Tiruvallur High Road, Thiruninravur - 302024. Phone: 044-26390194, 044-26390388	Thiruninravur	990	70.92	NA	NA
493	Banco Products (India) Ltd.	BIL, Near Bhaili Railway Station, Padra Road, Vadodara - 391410. Phone: 0265-2680220	Vadodara	600	242.04	80.48	Y
494	BIL Metal Industries Ltd.	Opp. Bhaili Railway Station, Post: Bhaili, Vadodara, Gujarat - 391 410. Phone: 0265 2680105-6	Vadodara	350	24.84	NA	N
495	Gujarat Metal Cast Industries Ltd	2, Panchratna Apartment, Ground Floor, Subhanpura Road, Vadodara 390 023, Gujarat. Phone: 0265-229128, 0265-229128	Vadodara	222	24.48	10.8	Y

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S. No	Organization Name	Address	City	No. of Employee	Sales Turnover (in Crores INR)#	Export Turnover (in Crores INR)#	Foreign Collaboratio n – Yes/ No
496	Munjil Auto Industries Ltd.	187, GIDC Industrial Estate, Waghodia, Vadodara - 391760. Phone: 02668-262421-26	Vadodara	1106	272	NA	N
497	Standard Radiators Pvt. Ltd.	1/12, BIDC, Gorwa, Vadodara 390 016, Gujarat. Phone: 0265-2280616, 2280417, 0265-2280522	Vadodara	150	36.68	4.8	N
498	Vikrant Auto Suspensions	301, Silver Point, BH Express Hotel, R.C. Dutt Road, Vadodara -390 007, Gujarat. Phone: 0265-2343081, 2359619, 0265-2331055	Vadodara	373	46.6	22.28	Y
499	Liners India Ltd.	Autonagar, Vijaywada 520 007, Andhra Pradesh. Phone: 0866-2542397, 2542953, 0866-2543220, 2542049	Vijaywada	500	39.08	7.44	Y
500	Polyplastics	O-15, Industrial Area, Yamuna Nagar 135 001, Haryana. Phone: 01732-291000 (5 Lines), 01732-251530	Yamuna Nagar	309	34.84	0.24	Y

Conversion Rate: USD 1 = INR 40

Sales turnover includes export turnover

Source: Buyers' Guide 2008, published by ACMA

Annexure – IV: List of references

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