Mobility Revolution in India? – Inclusive, Sustainable and Transformational

Guenter Butschek, CEO & MD, Tata Motors
Indian economy is well placed to become one of the largest automotive hubs

**Economy**
- 7.4% GDP Growth rate (~Fastest growing economy in the world IMF report) 18 FY)
- Rising per capita income

**Auto Industry**
- of GDP 7.1% Auto contributing of manufacturing GDP 49%
- 29 million people employed
- 29 people
- 1000 Cars/21 Huge latent demand with

**Competition**
- Price sensitive market
- Level playing field with global players
- Disruption by new market entrants
Growth story well supported by Government Initiatives

**Make In India**
- Foster Innovation
- Facilitate Investment
- Enhance Skill Development
- Build Best in Class Manufacturing
- FDI 100%

**FAME Incentives**
- Faster Adoption & Manufacturing of Electric Vehicles in India
- Subsidies, tax heavens for promoting EVs

**SMART Cities**
- Comprehensive development of institutional, physical, social and economic cities
- 100% infrastructure of

**Automotive Mission**
- By 2026
- 3rd largest in world
- 9.4 million passenger vehicles
- $300 billion in annual revenue
- 65 million additional jobs

5 years growth in next 10-15%
However, there are some fundamental challenges

Safety
- Road Accidents: 4 fatality every 1 minute
- Reinforcement by law
- Behavioral & Discipline issue
- Traffic congestion (Km/hr 20 average speed)

Environment
- Auto contribution to 15% Pollution
- Most polluted 15 out of 14 cities globally are in India
- 94 level > 2.5 (PM 2.5 level) micrograms/cubic m

Regulatory Framework
- Higher cess on Diesel engine > 2L BS 6 transition coming in 2020, to catch up with RoW
- 14 out of 15 most polluted cities globally are in India (PM 2.5 level > 94 micrograms/cubic m)

Infrastructure
- 2nd largest road network, but 2 low quality
To be solved by leapfrogging & leveraging the CESS ecosystem

**Connected**
Connected Vehicle Platform, advanced electronics, comfort & convenience

**Electric**
Lead in EVs, alternative fuels, Invest in tech & powertrain

**Shared**
Ride sharing, freight aggregation, BRTS

**Safe**
Solve India’s problems at root, adapting global NCAP measures
Evoking a strong focus on IST approach to Mobility

**Inclusive**
- All ecosystem partners’ alignment to enjoy best value (Govt., OEMs, Suppliers, Customers, drivers, community)
- Joint platform for policy making
- Implementation enabled by Govt/PPP

**Sustainable**
- Better fuel economy, light weighting
- Improving efficiencies in value chain
- Alternate fuels, xEV solutions

**Transformational**
- Diffusion of advanced technologies
- Crashing timelines
- Use of Digital, Big Data
- New business models, revenue pools
We are actively looking for partnerships to lead the mobility future

Vision

We innovate mobility solutions with passion to enhance quality of life

Israel’s USP

A hot spot of mobility disruption, innovative technologies

Great Opportunity to learn and collaborate in the smart mobility movement

Good match to Indian auto industry’s ‘need of the hour’