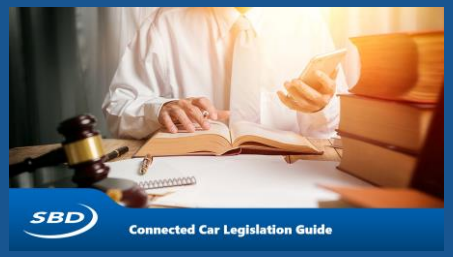

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RELATED SBD REPORTS

535 – Autonomous Car Legislation Guide

This Guide provides an in-depth analysis of how and where legislation is impacting on active safety systems within the car.

It identifies the threats and opportunities generated by government mandates, incentives, standards, and frequencies, and it projects within Europe, USA, Japan, China and Russia.

CON

Connected Car

#528

Connected Car Legislation Guide

The connected car eco-system is evolving at a rapid pace. Today, legacy OEMs and suppliers are investigating how to enhance their offering to satisfy ever-changing consumer demands. At the same time, new players - including start-ups and consumer technology firms - are emerging who intend to explore opportunities to embed connectivity across the development, production, and user experience of their vehicles.

As new connected vehicles, systems, features, and applications have launched over time - governments and governing bodies have historically responded with a variety of legal and regulatory activity. In the present day, where dozens of OEMs are releasing and updating new connected systems at an increasingly frequent rate, its legal landscape is becoming increasingly complex.

The Connected Car Legislation Guide works to define this landscape clearly across multiple regions and countries around the world. In addition to identifying the active and developing legislation impacting connected services, it understands how legislation can vary from region to region. For developing legislation, it assesses how likely it is to be implemented and highlights its potential impacts. The guide is divided into three sections that each cover a different aspect of connected car legislation and is released quarterly to account for any new activity within the space.

COVERAGE

GLOBAL NA CHINA EUROPE

FREQUENCY

ANNUALLY QUARTERLY ONE-OFF

PUBLICATION FORMAT

PDF POWERPOINT EXCEL ONLINE

PAGES

45+

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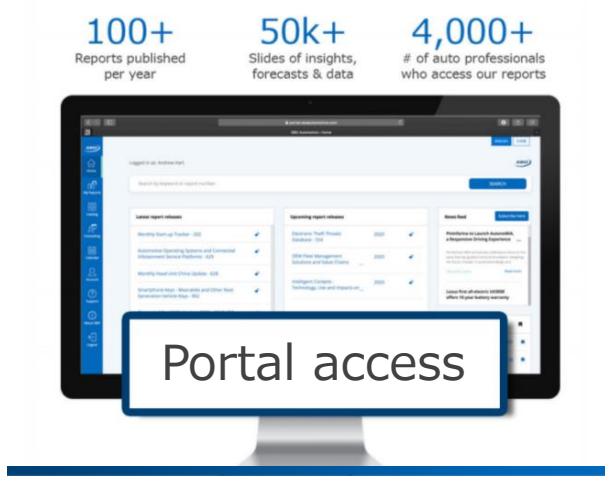
Key questions answered

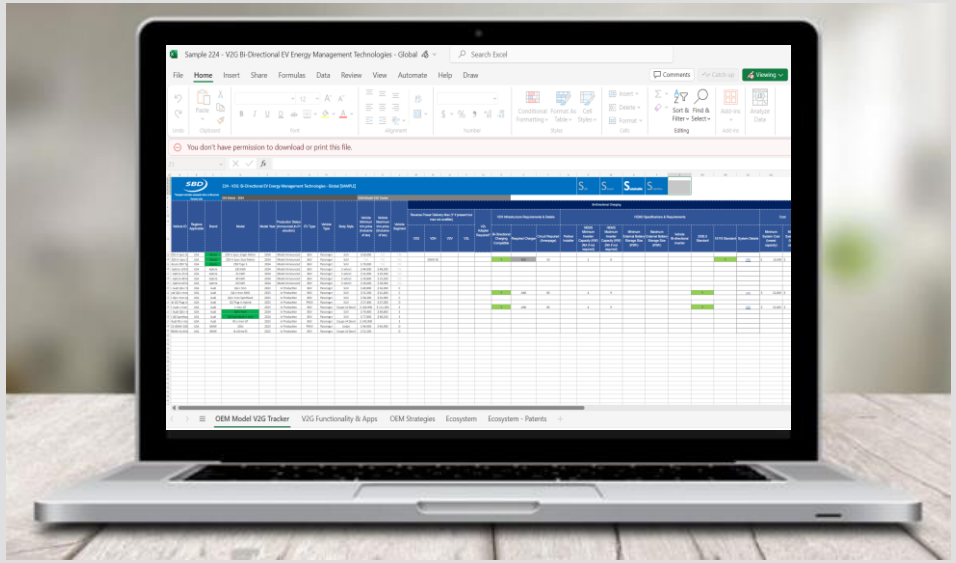
- What legislation is currently impacting connected services?
- What is the likelihood developing legislation will be implemented?
- How does the legislation for connected services differ by region?
- What is the potential impact of certain proposed legislation?

This research supports

- PRODUCT PLANNERS
- ENGINEERS
- MARKETING
- C-SUITE

Do I have access?



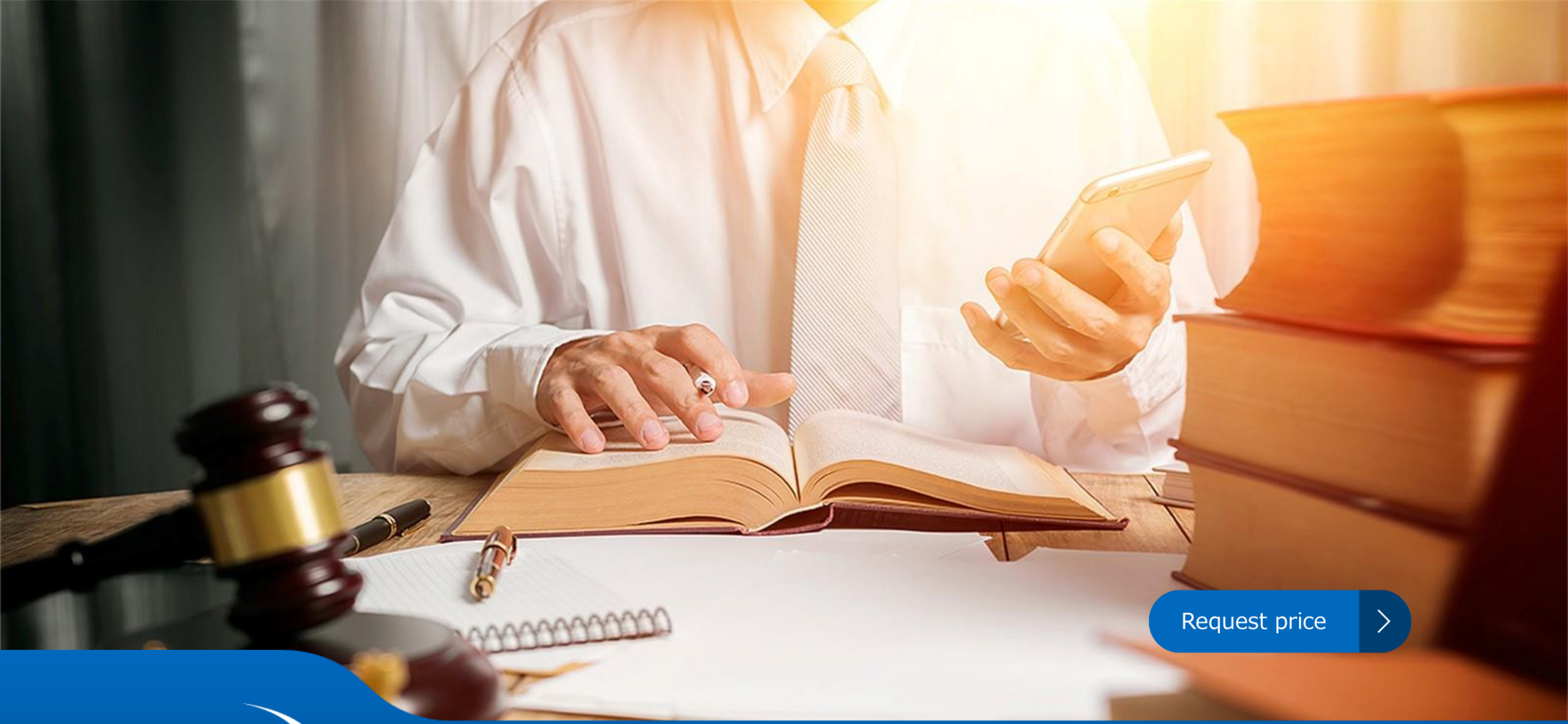


View Excel Data Sheet Sample

Connected Car Legislation Guide

Identify the active and developing legislation impacting connected services

Click for Sample



Connected Car Legislation Guide

Contents

528 Connected Car Legislation Guide

Total number of pages - 49

Introduction

Introduction

With more 'connected' cars rolling off the assembly line every passing year, the automotive industry is facing regulatory hurdles previously seen in other industries that have progressed along the technology adoption lifecycle. The government bodies are increasingly taking note of the fast pace this industry is growing and the issues (more importantly the impact of these issues) that prevail due to the very growth.

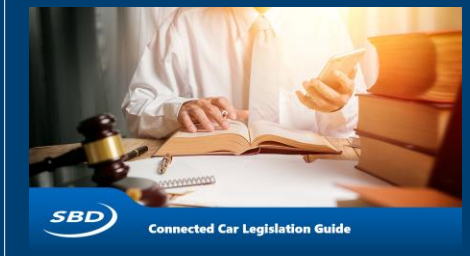
The major concerns include passenger safety, data privacy, liability, intellectual property rights, cybersecurity, interoperability and access to the wireless spectrum among others. Legislators and SMEs have started to proactively address these issues in ways that ensure consumer protection - but not at the expense of development. In short, the groundwork that the government bodies are undertaking must spur innovation and rapid deployment rather than being an impediment in the progress.

The **Connected Car Legislation Guide** provides an inside look at the policy activities taking place across the globe. In doing so, it details the scope of these policies, identifies the various organizations responsible, the legal status of bills and the timeline of activities. It also includes some peripheral legal aspects that may have a direct or indirect impact on connected car development in the near-foreseeable future.

Section	Content
Bird's Eye View	Overview of trends and insights relevant to the legislation guides series
Executive Summary	This section highlights some of the recently enforced and introduced regulations/legislations/guidelines
The Basics	A brief overview of the different type of legal aspects (regulation, legislation, standards etc.) covered in this report along with the regions in focus.
Analysis	Key regulatory activities that are impacting the connected car development and best practices published by the authorities
Summary Tables	Summarizing the legislative activities identified in the associated Excel spreadsheet where some laws are seeing an increasing level of activities and are nearing enforcement while some haven't seen the light of the day after being introduced and debated several times.
Next Steps	Can SBD help you with any unanswered questions?

Note: *This guide only highlights the actual regulatory activities and does not give any recommendations. This guide's analytical and forward-looking statements shouldn't be construed as legal advice.*

Example slides from the report



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What? Snapshot of Key Regulatory/Legislative updates

	Introduced* Legislation/Regulations recently introduced	Enforced/Published** Legislation/Regulations recently enforced
Global	*No new legislations were introduced in the rest of the world recently (Q1 2024)*	*No new legislations were enforced in the rest of the world recently (Q1 2024)*
China	Draft C-NCAP evaluation protocol has been formulated in three years, C-V2X systems are also included in scope though it is not yet clear how much weightage they would carry on the overall score	**Shen Gong Xin [2023] No. 292** Aims to promote the comprehensive integration of vehicles and transportation, energy, support digital transformation and to create a leading multi-for infrastructure system. **Chongqing Economics and Telematics Regulation [2023] No.18** It proposes that intelligent networked vehicle manufacturers that meet the conditions for pilot application should have design verification capability, safety guarantee capability, safety monitoring capability and user notification mechanism
Europe	**Regulations (EC) No 715/2007 and (EC) No 595/2009** This concerns type-approval of motor vehicles and engines and of systems, components and separate technical units intended for such vehicles, with respect to their emissions and battery durability (Euro 7)	**Directive (EU) 2023/2661** The directive concerns the structure for implementing Intelligent Transport Systems within road transportation and their integration with other transportation modes (approved as of December 2023)
USA	**Legislation to protect the privacy of 911 callers (HB 4323 MA)** Massachusetts General Laws amends 911 recording retention to a minimum of 1 year. Audio recordings are confidential but accessible under specific circumstances, with violations punishable by a fine up to $1,000. Transcripts are public records. **Motor Vehicle Consumer Data Protection (SB 215 UT)** SB 215 establishes regulations concerning the protection of consumer data in the motor vehicle industry. **US examines data security risks from imported Chinese connected cars**	*No new legislations were enforced in the US (Q1 2024)*

**In some regions (primarily outside the US) the word 'issued', 'proposed' are used for the legislations instead of introduced*
***Standards and Guidelines/Best Practices are often not enforceable by law. They are introduced and reviewed by the subject experts before being published.*

US ramps up data privacy regulatory development, no federal law yet

Legislation Overview

Status: Introduced | Draft | Passed

Modern connected cars can produce a significant amount of data in communicating with infrastructure and other technologies via the cloud. As the industry develops in coming years, the automotive industry is expected to be one of the largest data intensive sectors. Such data may include information about the vehicle, personal details of the driver, biometrics, driving habits, locations visited, engine performance etc. Given the sensitivity and personal nature of some data, connected cars may fall under the purview of any 'Data Privacy' rules specific to that country. In the US, data privacy is a high-profile area for legislation. Many consumers are very protective of their data privacy, and this has an impact on the design of connected car services.

Details

State	Data privacy bills
California	California Consumer Privacy Act
Colorado	Colorado Privacy Act (SB 21-190)
Delaware	Personal Data Privacy Act (HB 154)
Illinois	Data Privacy & Protection (HB 3385)
Indiana	Consumer Data Protection Act (SB 5)
Iowa	Consumer Data Protection Act (SB 262)
Oregon	Data privacy regulation (SB 619)
Minnesota	Consumer Data Privacy Act (SB 2915)
Massachusetts	Data Privacy Protection Act (HB 83)
Montana	Consumer Data Privacy Act (SB 384)
Tennessee	Tennessee Information Protection Act (SB 73)
Texas	Data privacy and Security Act (HB 4)
Utah	Vehicle Consumer Data Protection (SB 215)

California took the lead with CCPA regulation

Image source: IAPP

What's New?

New bill to bar data brokers from selling sensitive personal information to U.S. adversaries passed by the House

The bill bans organizations that profit from selling personal data, known as data brokers, from making data accessible to a foreign adversary country or entities controlled by adversaries.

It also authorizes the Federal Trade Commission to seek civil penalties of more than $50,000 for each violation.

Note: Many data privacy legislations have been passed/signed by the governor but not enforced yet.

Key takeaways

Data privacy legislation (s) are aimed at ensuring that personal data is stored securely and that it is not passed or sold on to third parties without the agreement of the consumer. It is likely that the broader data privacy regulations will have sector-specific guidelines establishing a rules that promote local data processing and users' control over vehicle data. However, in absence of any federal-level data privacy law or broader guidelines, it remains unclear how the state-level regulations will differ from one another.

European strategy for Artificial Intelligence

Regulation overview

Status		Introduced	✓	Draft		Enforced

The European AI Act is the first ever dedicated set of proposed laws by a major regulator. The European Commission seeks to establish a pan-European AI framework that unlocks all the benefits of the fast-evolving artificial intelligence space for the European stakeholders. In addition, the Act also aims to develop the minimum necessary requirements to address the risks and problems linked to AI. At the same time, this framework aims to be flexible enough for it to be dynamically adapted as the technology evolves and new concerning situations emerge. This proposed regulation has entered the final stages of negotiations between the EU's co-legislators.

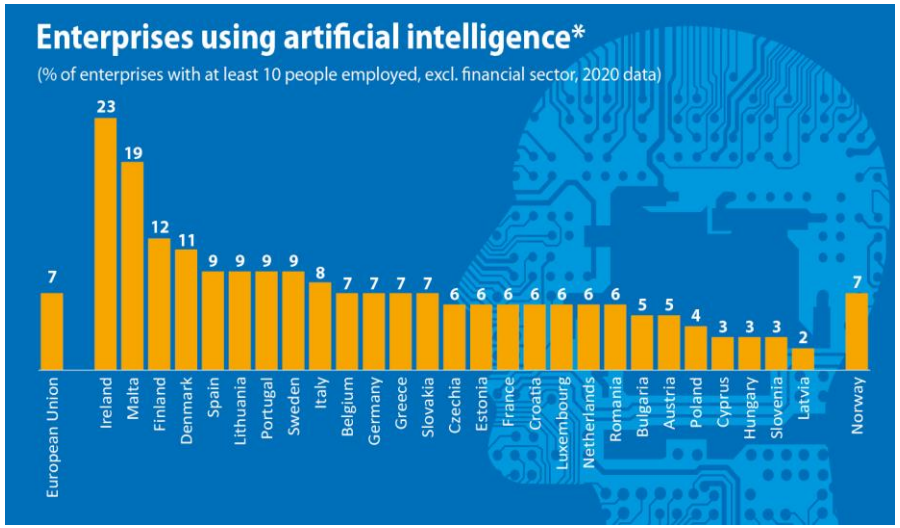
Details

EU AI Act and the automotive industry

The automotive OEMs are committed to leverage AI and machine learning technology in response to the ever-changing consumer demands. AI is becoming instrumental across the entire value chain to from manufacturing to post-production and connected services to vehicle autonomy.

After the publication of AI Act guidelines, the members of European Automobile Manufacturers' Association (ACEA) welcomed the EC's approach of having a 'balance' between the AI requirements and the risk level of AI applications.

ACEA also emphasized the need to incorporate automotive-specific AI guidelines to improve vehicle production efficiency and promote safer mobility across Europe. These guidelines could be further integrated into the existing vehicle type-approval framework.



Source: European Commission

What's New?

European Parliament approved AI Act

The new rules ban certain AI applications that threaten citizens' rights, including biometric categorization systems based on sensitive characteristics (e.g., facial recognition). It will enter into force twenty days after its publication in the official Journal, and be fully applicable 24 months after its entry into force

EC publishes guidelines for the responsible use of Generative AI

The Commission, together with the European Research Area countries and stakeholders, has put forward a set of guidelines to support the European research community in their responsible use of generative artificial intelligence (AI). More here

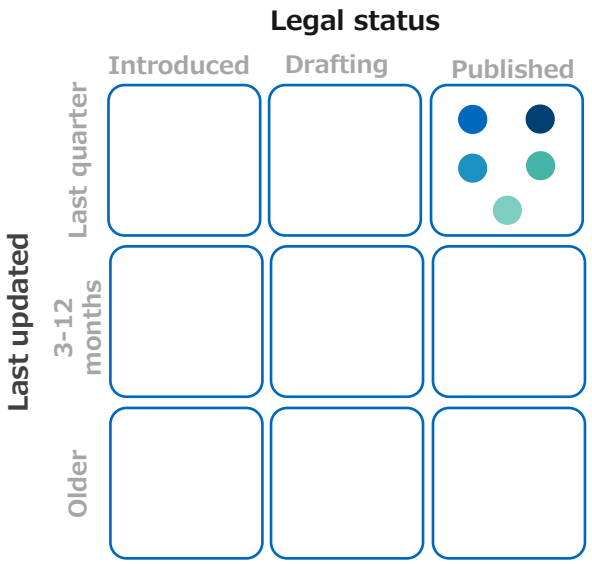
Key takeaways

European Commission maintains that the 'AI Act' once in effect, can serve as a reference point for the rest of the world to follow. After the GDPR act came into force in 2018, many emerging countries followed suit and launched their own version of data protection bills inspired by the original GDPR. Many bills that were introduced elsewhere incorporated various aspects of the GDPR before being published. The positive reception of EU AI Act by the automotive ecosystem is pushing the other countries to finally consider AI from a regulatory standpoint. Brazil congress was the first to follow EU with their own version of artificial intelligence bill introduced in 2021.

China – Best Practices & Guidelines (1/2)

Latest activity vs legal status

About the legislative/regulatory activity placement in the grid



Name of the law	Recent development(s)	Next activity/milestone
Several Opinions of the General Office of the People's Government of Zhejiang Province on Supporting the High-quality Development of State-level Telematics Pilot Zone (Deqing, Zhejiang)	Related authorities can use this publication to promote IoV innovation, accelerate industry development, strengthen public services, deepen IoV application and improve organizational guarantees.	Published on 2024/1/19 by the People's Government of Zhejiang Province.
Notice on the Pilot Work of "Vehicle-Road-Cloud Integration" Application for Intelligent Networked Vehicles (Nationwide)	Based on the principles of "government guidance and market-driven". a series of city-level pilot projects were planned, encompassing 9 main contents including roadside infrastructure construction, HD-map application, etc.	Published on 2024/1/17 by Ministry of Industry and Information Technology. The trial plan ends in 2026.
Three-Year Action Program for Digital Infrastructure Construction and Development in Anhui Province (2023-2025)	Anhui aims to establish a digital infrastructure system with 5G, gigabit optical networks and IPv6 development.	Published on 2023/12/15 by Anhui Data Resource Management Bureau.
Shenyang Intelligent Networked Vehicle Commercial Zone Construction Program	Shenyang comes up with a plan of IoV commercial zone construction to promote the development of economy by transforming and upgrading of the automobile industry's intellectualization and network connectivity.	Published on 2023/12/1 by Shenyang Municipal Government.
Telematics Security Standardization White Paper (2023) (Nationwide)	This white paper highlights the current state of telematics security standards, identifies key elements and aspects, and proposes standards.	Published on 2023/12/13 by China Communications Standards Association.

Key highlights

- Several provinces and cities in China, such as **Zhejiang, Anhui, and Shenyang**, have launched **pilot projects, action programs, and commercial zone construction plans** to promote the development of intelligent networked vehicles (IoV) and related infrastructure. These regional initiatives aim to **accelerate the adoption of IoV technologies, facilitate industry growth, and explore practical applications** in areas like public services, transportation, and digital infrastructure.

- China recognizes the importance of standardization and security in the rapidly evolving field of connected cars. The China Communications Standards Association has published a white paper (Telematics Security Standardization White Paper 2023) that evaluates the current state of telematics security standards, identifies key elements and aspects, and proposes standardization needs and future development directions. This effort highlights China's focus on **establishing robust security standards and guidelines to ensure the safe and reliable deployment of connected car technologies**.

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Do you have any questions?

If you have any questions or feedback about this research report or SBD Automotive's consulting services, you can email us at info@sbdautomotive.com or discuss with your local account manager below.

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