EATA

European Automotive and Telecoms Alliance

Manifesto

European Automotive and Telecoms Alliance

ACEA European Automobile Manufacturers Association

CLEPA European Association of Automotive Suppliers

ecta

etno

GSA Global mobile Suppliers Association

GSMA

1. Introduction

The European Automotive and Telecoms Alliance (EATA) was created in 2016 following an initiative by Commissioner Günther Oettinger. It has become a unique forum for cooperation between Europe's automotive and telecoms sectors: the main aim is to jointly explore how to best accelerate the deployment of **connected and automated mobility (CAM)** in Europe.

EATA currently counts 32 member companies from across the automotive and telecom sectors in Europe. As far as day-by-day operations are concerned, it is run by six associations who represent such companies[1]. EATA has focused on a number of European legislative priorities, organised a series of High-Level Roundtables and it has also started a pre-deployment project for connected vehicles.

Besides policy-related dialogues and outreach, one of the key actions of EATA has been to bring together the two sectors to facilitate the deployment project "CONCORDA" (Connected Corridor for Driving Automation). Launched in 2017 with funding from the Connecting Europe Facility, the project will prepare European motorways for automated driving and high-density truck platooning with adequate connected services and technologies. The CONCORDA project has in the meantime been extended to more partners and is currently managed by ERTICO.

In parallel, the European Commission, Parliament and Council have worked out a policy framework for CAM that needs further developments. The Commission published two key documents: its Strategy on Intelligent Cooperative Transport Systems from 2016 and a Strategy on Automated Mobility in May 2018. The EU Member States adopted the Amsterdam Declaration on connected and automated driving in 2016, jointly with the Commission and the private sector. In addition, the European Parliament has published several own-initiative reports on the topic.

It is crucial that the new EU institutions continue focusing on creating the right enabling conditions across the EU to accelerate the deployment of new mobility solutions, leveraging both connectivity and automation. The goal remains to make Europe's roads and vehicles safer and smarter by using state-of-the-art technology. At the same time this supports the competitiveness of both the automotive and non-automotive companies, which have become active players in this new mobility ecosystem.

With the completion of the first major deployment project – CONCORDA – ending in 2020, we have reached a critical moment for the future development of such services. This Manifesto aims to give you our view on what policy actions require urgent attention. This is of utmost importance as, in the next five years, we will move from testing and pre-deployment of connected and automated vehicles to the actual introduction of these vehicles in Europe's transport systems.

EATA core policy subjects are:

1. **Enabling a clear framework to foster investment and innovation**
2. **Avoiding fragmentation by ensuring coordination of policy initiatives**
3. **Technology neutrality is critical for the development of CAM**
4. **Accelerating cooperation and leverage on the international stage**

1 These associations are ACEA, CLEPA, ECTA, ETNO, GSA and GSMA

2. What EATA can offer to policy makers

EATA is today the leading platform bringing the automotive and telecoms sectors together with a view to accelerating policy discussions between the industry and European as well as national policy makers. Over the past few years, we have exchanged best practices, performed an impact analysis of various draft policies and organised joint dialogues at the highest level, including Commissioners and CEOs. The members of the Alliance also actively participate into the EU Member States' High-Level Structural Dialogue on CAM.

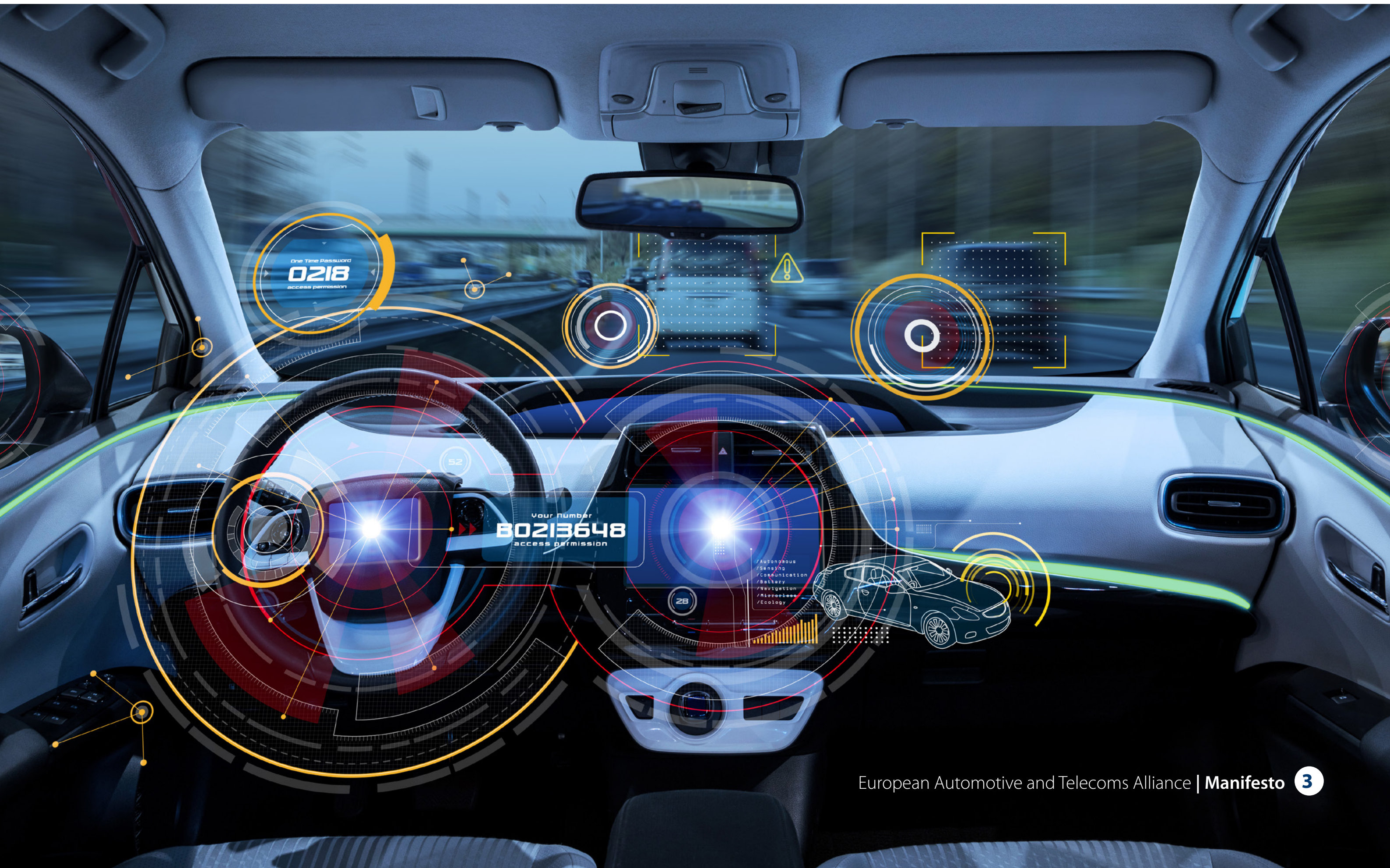
In the next EU term, all actors should continue embracing this crucial dialogue and ensure its continuation. In particular, it is fundamental to ensure the industry provides its perspective on the core principles of CAM and on how to ensure their implementation.

An area of shared focus and priority for both the automotive and the telecoms sectors is to ensure secure and trusted CAM solutions for vehicles, networks and in their interaction, as challenges to information-, network- and cybersecurity multiply.

Similarly, a speedy and comprehensive rollout of CAM services in Europe requires innovation in both the telecoms and the automotive sector. For telecom operators, CAM is a key opportunity to jointly deploy new infrastructure and thereby promote a society that meets the European Gigabit Society vision. For the automotive sector, CAM drives the sector into a new mobility and data ecosystem with a focus on flexible solutions for connected and automated use cases.

The European automotive and telecoms sectors are united in their pursuit of effective and sustainable competition to ensure that their CAM solutions are provided flexibly, reliably and with a competitive edge in global markets.

By pooling our expertise in EATA, we break down technical and operational silos and advance a sustainable ecosystem for connected and automated mobility.



3. Four focus areas for the new European Commission and European Parliament

3.1 Enabling a clear framework to foster investment and innovation

Automotive and telecom industries represent a significant investment and hold great potential for innovation and leadership in Europe. Our industries continue to embrace the benefits and challenges of digital transformation. The regulatory environment today is very different from the past, where policies were depicted in a more isolated way, i.e. automotive from a technical product regulation point of view and telecoms from a service point of view. The Internet of Vehicles changes both ecosystems and a refit of the various regulatory policies is needed.

The overview in Annex 2 shows the increasing complexity of the regulatory framework and its various policies. At present, there is no one-stop-shop process and approach for these policies. The policy frameworks are handled by various bodies (UN-ECE, ITU, European Union, Member States, NRA's) and risk being, not always, fit for purpose, in a fast moving innovative connected and automated mobility environment where Europe should strive to be a leader.

To address the strong international competition, additional publicly funded research and innovation activities are required to support collaborative testing, demonstration and pre-deployment projects in and across EU member states, to ensure a wider expansion and deployment of current and upcoming technologies for connected and automated driving.

Europe needs a holistic approach to CAM. One that promotes investment and innovation, while taking into account the complexity of the legal frameworks currently governing the automotive and telecommunications sectors.

3.2 Avoiding fragmentation by ensuring coordination of policy initiatives

We welcome an increased synchronisation between the different Commission services and ideally one overarching leader for CAM within the Commission, overseeing all policy initiatives affecting the core area of connected and automated mobility. Focus should be on a dynamic regulatory framework that does not stifle innovation.

Policies should therefore be holistic and provide consistent regulatory solutions to avoid a fragmented approach among the Commission services.

Legal certainty is critical for all actors, and the Commission must avoid regulation containing unsolved issues, or leaving open-ended questions.

The European Commission and European Parliament must ensure the coordination of policymaking between different areas relevant to CAM. Our sectors stand ready to support the Commission and Parliament in this work.

3.3 Technology neutrality is critical for the development of CAM

As roll-out will continue to be a priority for both sectors, a technology-neutral regulatory framework that stimulates the adoption of new technologies will be key. This implies that any new policy initiative should not favour one technology over another but let market-forces be a leading force in innovation and deployment.

Avoid favouring one technology over another based on political priorities. Instead adopt a technology-neutral approach in which market-forces drive innovation and deployment.

3.4 Accelerating cooperation and leverage on the international stage

Cooperation with international institutions should be increased, and there is strong potential for the Commission to align its regulatory agenda with these institutions to ensure a better interaction with issues already tackled in other policy fora. Cybersecurity and type approval are good examples of that.

The deployment of connected and automated mobility is by definition not limited to national territories. Sharing of expertise, operational and regulatory best practices across the globe should be encouraged.

Europe should further leverage its CAM leadership at the international level. European policies and regulations need to build on and shape international developments, while reflecting the global reach of the European industry.

Background

The European context

In its strategy on Intelligent Cooperative Transport Systems from 2016, the European Commission sought to ensure a harmonised framework for cybersecurity, data protection and interoperability to speed up deployment of connected and automated vehicles in Europe. Therefore, cooperation between sectors, avoiding vertical silos, will be key. Here, the Commission's work was focused on facilitating cross-sector cooperation, providing advice, international cooperation and in specific cases, making use of its mandate under the ITS Directive to adopt delegated act(s) by 2018.

The Commission followed up with a Strategy in 2018 focusing more on a common vision and supporting actions for developing and deploying key technologies, services and infrastructure. The strategy also underlined, that while connectivity and automation work separately, the former is a "major enabler for driverless vehicles"[2]. The Commission's actions are generally focused on soft-law such as stressing the importance of a harmonised European framework, funding programmes, and guidance. The same goes for cybersecurity, data protection and data access, for which the strategy suggests focussing on monitoring developments. The strategy involves support for Artificial Intelligence and communication infrastructure, while stressing a technology neutral approach.[3] The Commission stressed that the deployment of connected and automated driving will depend on the acceptance by the general public.[4] Thus, it should be noted that hard-law legislative initiatives are focused on liability, in the form of rules on data recorders for automated vehicles.[5]

The European Parliament has also taken an active approach through its own initiative report on C-ITS[6] and an own initiative report on automated transport[7]. Long-term effects on the labour market and the European Skills Agenda are also core concerns in this strategy.

Regulatory and policy clusters of relevance for CAM and EATA

The regulatory framework for connected and automated mobility (CAM) has become increasingly complex. The graph below shows the policy clusters that are relevant for the intersection between the two sectors. While automotive and telecoms traditionally had sector-specific regulation, digitalisation has unlocked new potential for both sectors, but has also blurred the regulatory, vertical separation. Vehicles communicate to each other (V2V), to instances such as infrastructure managers (V2I) and many others third party service providers (V2X) (e.g. traffic authorities, insurance companies, diagnostics centres, suppliers, etc.). This involves physical and digital infrastructure, communication technologies and cooperation amongst different eco-systems. The core component of such integration of systems is a functional (digital) single market for transportation of people, goods and data. Furthermore, traditional vertical policy clusters will need to undergo a refit test, be it at International (United Nations Working Party 1 & 29), European Union or national level. In order for European industry to be leaders in CAM we will need a higher degree of synchronisation between these levels.

Finally, CAM implies an increased attention to the skills evolution, the effects on labour markets, the public awareness and social interaction. Hence, a holistic and complex new eco-system.

An EATA perspective on CAM policies

Vehicle related	Technology/ITS	Data economy	Data protection/ privacy	Other
UNITED NATIONS WP 1 & WP 29 + EU	EU Cooperated and connected ecosystem	EU Data Single Market	EU Data, privacy & cyber	EU M2M/platforms IT & telecoms
• Vienna and Geneva Conventions • National traffic rules • Safety regulations • Certification/type approval • Data storage • Cybersecurity	• V2V/V2/I2V/V2N • Hybrid/tech neutral • 5G action plan • EU funded projects • Public Private Partnership (PPP)	• Free flow of data • Common European Data Space Package/B2B-B2G • Use, reuse of data • Access to data • Artificial Intelligence (AI)	• GDPR • ePrivacy (draft) • NIS directive • Cybersecurity act	• New EECC • Liability rules • Ethical principles • Competition law

The CONCORDA project

Collaboration between automotive and telecoms in practice

One of the milestones of EATA has been the joint application to the CONCORDA (Connected Corridor for Driving Automation) project, launched in 2017 with a 20 million EUR budget. The project, co-funded by the Connecting Europe Facility, will prepare European motorways for automated driving and high-density truck platooning with adequate connected services and technologies. While EATA transferred management of CONCORDA to ERTICO, the alliance was key in coordinating the sectors.

The two CONCORDA use-cases, truck platooning and high-way chauffeur, require ultra-reliable, low latency communication between vehicles. Experts meet regularly to evaluate the trials, focusing on interoperability and interconnectedness between different systems. Shaping and agreeing on a common view of available solution concepts is a first step for reaching the goal of defining a holistic end-to-end solution for European C-ITS.

A core aim of CONCORDA is also to enhance interoperability of technologies, services and implementation in the EU (test sites are located in the Netherlands, Belgium, France, Germany, and Spain). By early 2020, the partners in CONCORDA will present the outcomes, including recommendations on regulations, policies and standardisation.[8, 9]

2 COM(2018) 283 final
3 ibid, p. 6
4 ibid, p. 2
5 ibid, p. 11
6 2017/2067(INI)
7 2018/2089(INI)
8 http://erticonetwork.com/new-project-driving-automation-kick-off-brussels/
9 https://clepa.eu/mediaroom/connected-automated-driving-eata-presents-deployment-roadmap-submits-proposal-eu-wide-project/

About EATA

The European Automotive and Telecoms Alliance (EATA) comprises six sectorial associations: ACEA, CLEPA, ETNO, ECTA, GSMA and GSA. Together they represent around 32 leading European companies, including telecom operators, vendors, automobile manufacturers and automotive suppliers.

EATA was created in September 2016 in the margins of the 2016 Paris Motor Show. The Alliance has since developed into an important political platform in Europe, discussing regulatory issues on the introduction of connected and automated driving (CAD), boosting cross-border cooperation and coordination as well as on-the-ground testing of the upcoming technologies which will revolutionise Europe's road transport. The CEF funded project for the (pre-) deployment of CAD, known as CONCORDA, is coordinated and managed by ERTICO since the start of 2018.

The objectives of EATA are to:

- Facilitate and accelerate the EU-wide deployment of connected and automated driving
- Remove potential roadblocks and highlight needed technical and regulatory measures
- Identify the business models underlying connected and automated driving
- Provide a platform for knowledge-sharing between the automotive and telecommunications sectors to develop a 'common language'
- Create societal benefits by improving road safety and traffic efficiency
- Promote the European digital economy

Associations

ACEA, the European Automobile Manufacturers' Association represents the 15 Europe-based car, van, truck and bus manufacturers: BMW Group, CNH Industrial, DAF Trucks, Daimler, Fiat Chrysler Automobiles, Ford of Europe, Honda Motor Europe, Hyundai Motor Europe, Jaguar Land Rover, PSA Group, Renault Group, Toyota Motor Europe, Volkswagen Group, Volvo Cars, and Volvo Group. More information can be found on **www.acea.be** or **@ACEA_eu**

CLEPA is the European Association of Automotive Suppliers. More than 120 of the world's most prominent suppliers for car parts, systems and modules and 23 National trade associations and European sector associations are members of CLEPA, representing more than 3 thousand companies, employing more than 5 million people and covering all products and services within the automotive supply chain. Based in Brussels, Belgium, CLEPA is recognised as the natural discussion partner by the European Institutions, United Nations and fellow associations (ACEA, JAMA, MEMA, etc.). More information: **www.clepa.eu** or contact **s.devries@clepa.be**

ECTA, the European Competitive Telecommunications Association, is the pan-European pro-competitive trade association that represents over 100 of the leading challenger telecoms operators across Europe. For over a decade, ECTA has been supporting the regulatory and commercial interests of telecoms operators, ISPs & equipment manufacturers in pursuit of a fair regulatory environment that allows all electronic communications providers to compete on level terms. Our members have been the leading innovators in Internet services, broadband, business communications, entertainment and mobile. More information: **www.ectaportal.com** and **@twECTA**

ETNO represents Europe's leading telecommunications network operators, who provide European citizens with innovative digital communication and services. ETNO, founded in 1992, is the principal policy group for European network operators and aims at supporting a positive policy environment to deliver the best quality services to consumers and businesses. Follow **@ETNOAssociation**. More information: **www.etno.eu**

GSA represents the worldwide mobile supplier ecosystem who are engaged in the delivery of infrastructure, semiconductors, test equipment, mobile devices, applications and mobile support services. GSA is a trusted single source of information for industry reports and market intelligence on the progress and commercialisation of 3G, 4G and 5G technologies covering areas such as device features and availability, industry technology roadmaps and vertical applications for the Internet of Things. More information: Please visit **www.gsacom.com**

The **GSMA** represents the interests of mobile operators worldwide, uniting more than 750 operators and nearly 400 companies in the broader mobile ecosystem, including handset and device makers, software companies, equipment providers and internet companies, as well as organisations in adjacent industry sectors. The GSMA also produces the industry-leading MWC events held annually in Barcelona, Los Angeles and Shanghai, as well as the Mobile 360 Series of regional conferences. For more information, please visit the GSMA corporate website at **www.gsma.com**. Follow the GSMA on Twitter: **@GSMA** and **@GSMAEurope**

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