

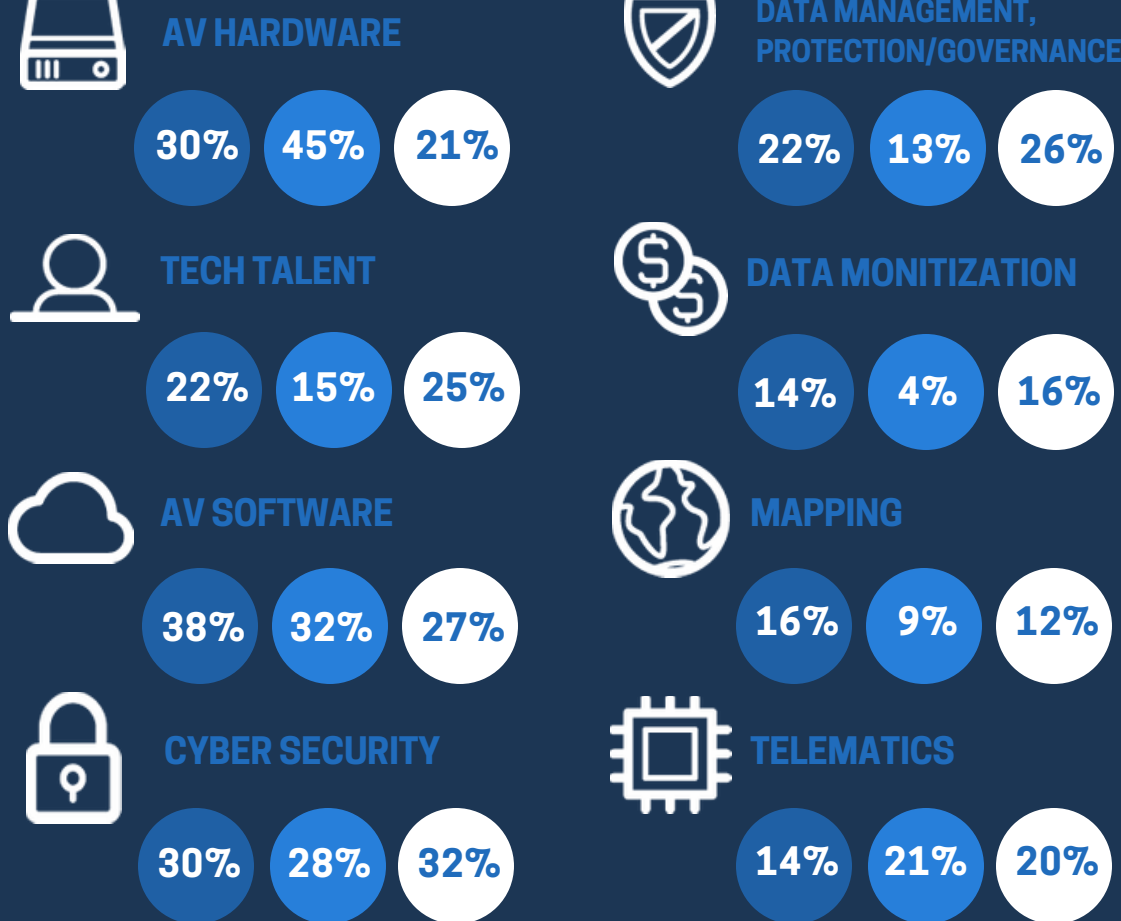
CYBER SECURITY FOR A CONNECTED CAR

STRATEGIC PRIORITIES FOR 2018

Ahead of the **Automotive Cyber Security Summit**, taking place October 24-26 in San Jose, we surveyed 325+ global automotive experts to learn where they are on their cyber security journey as the industry prepares for a connected future, their largest cyber security concerns, and how these concerns have impacted their strategic priorities for 2018. As vehicles become more and more connected, the systems become more vulnerable to hacking. This infographic is a summary of OEMs, suppliers, and mobility providers largest cyber-related priorities, challenges, and investment plans for 2018.

PRIORITIES

OVER THE NEXT 18 MONTHS



OEMs Suppliers Mobility Providers

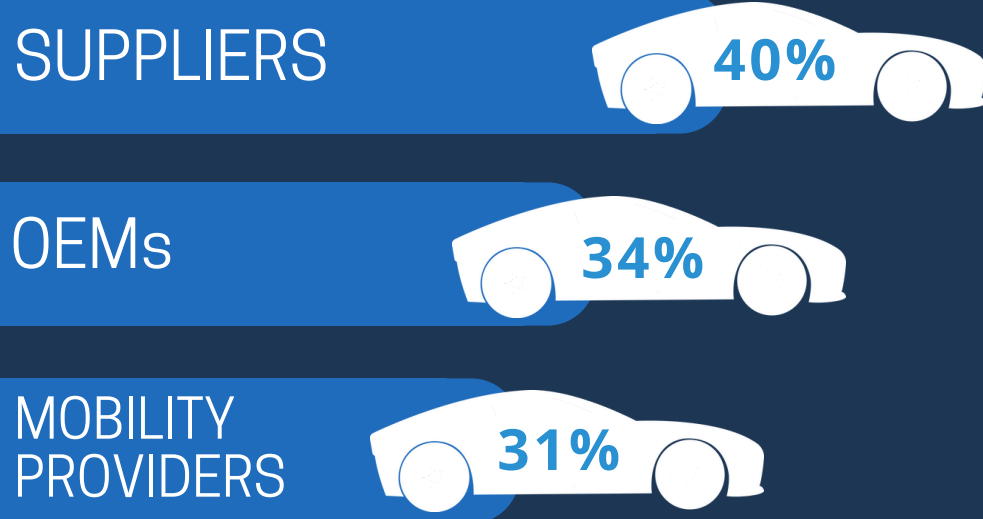
PROMINENT TRENDS



The automotive sector is still working to develop industry standards and best practices for automotive cyber security. As vehicles are currently becoming more connected and there are more driver automated support systems in vehicles as we prepare for full autonomy, these systems create more safety vulnerabilities as systems are hackable. As systems become more intricate and produce larger amounts of data, they become less secure and more susceptible to hacking. Over the next 18 months, the use of artificial intelligence in cyber security will help to evaluate the current safety and privacy concerns regarding the large amounts of data resulting from connectivity.

CHALLENGES

WHO FACES THE MOST CYBER SECURITY HURTTLES?

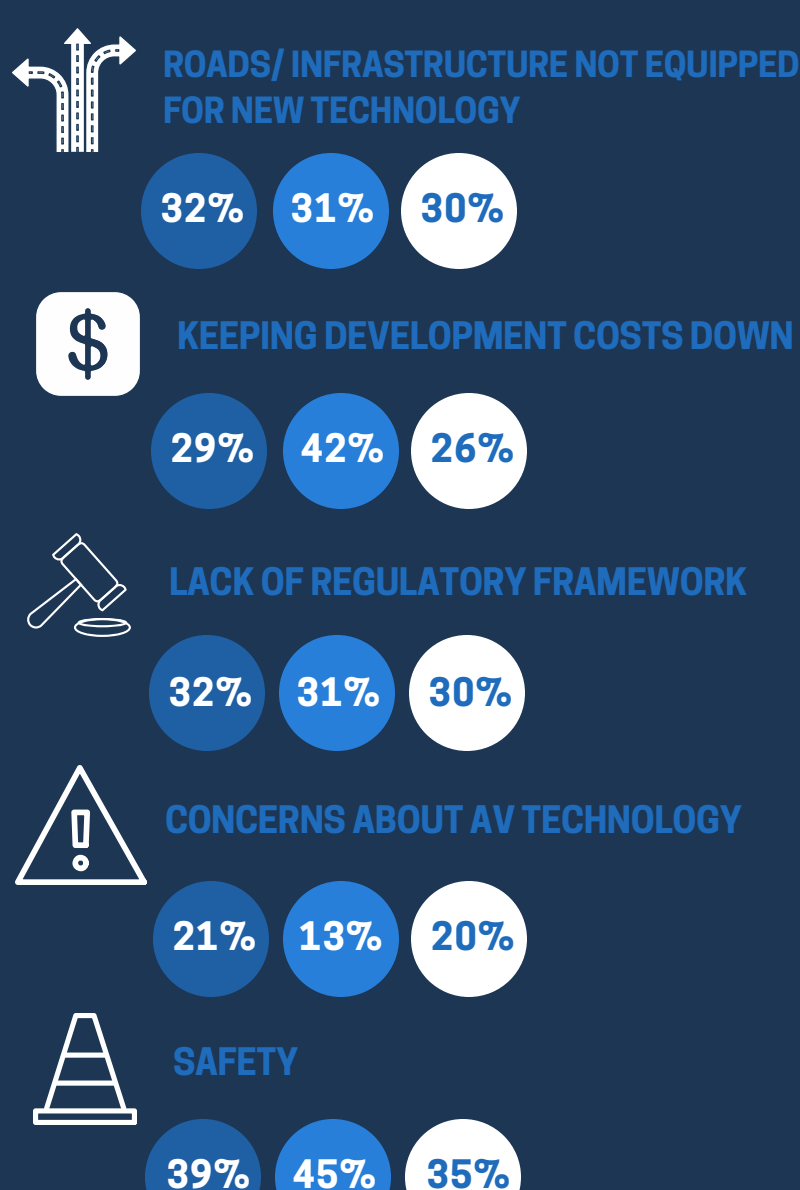


In 2018, nearly a third of all automotive experts indicated their largest company-wide challenge is cyber security.

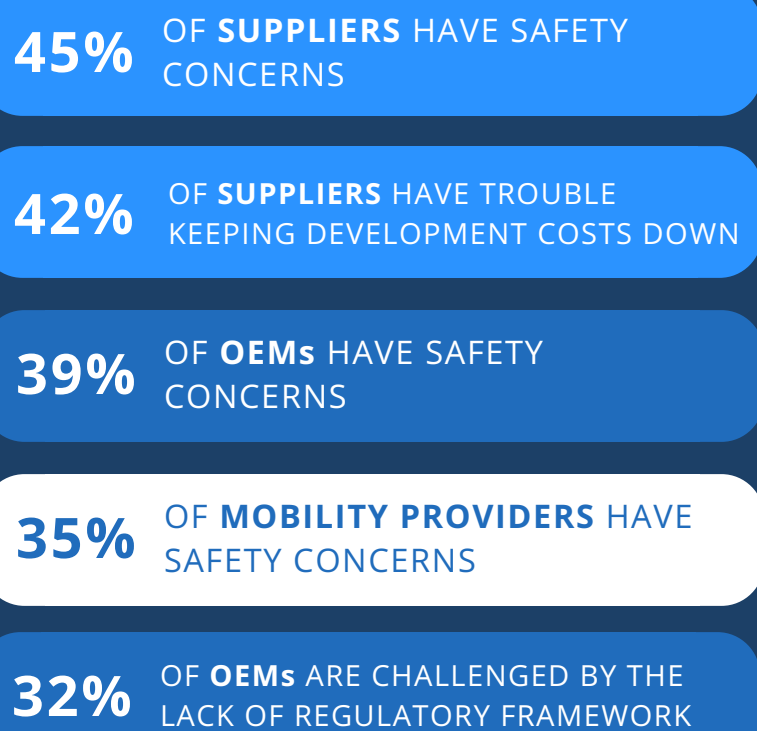
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CORRELATED CHALLENGES



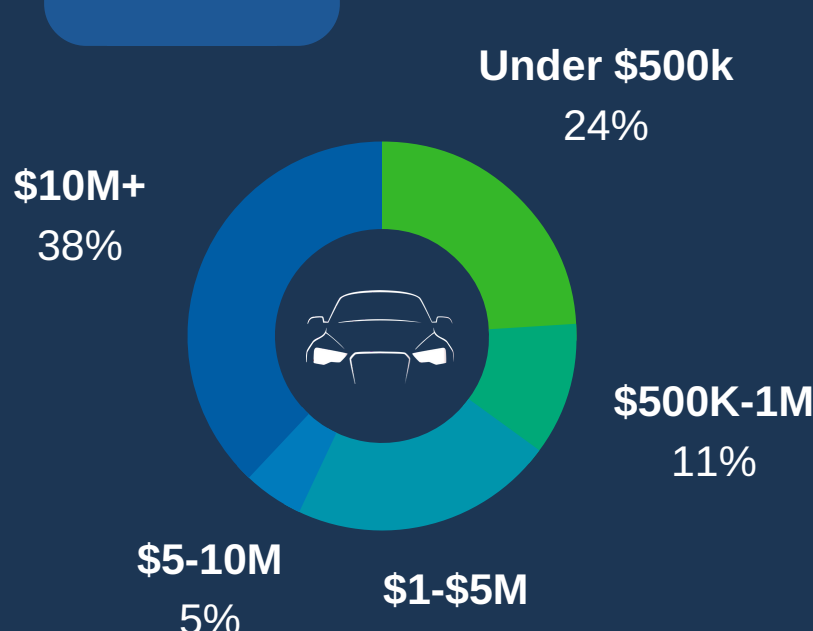
PROMINENT TRENDS



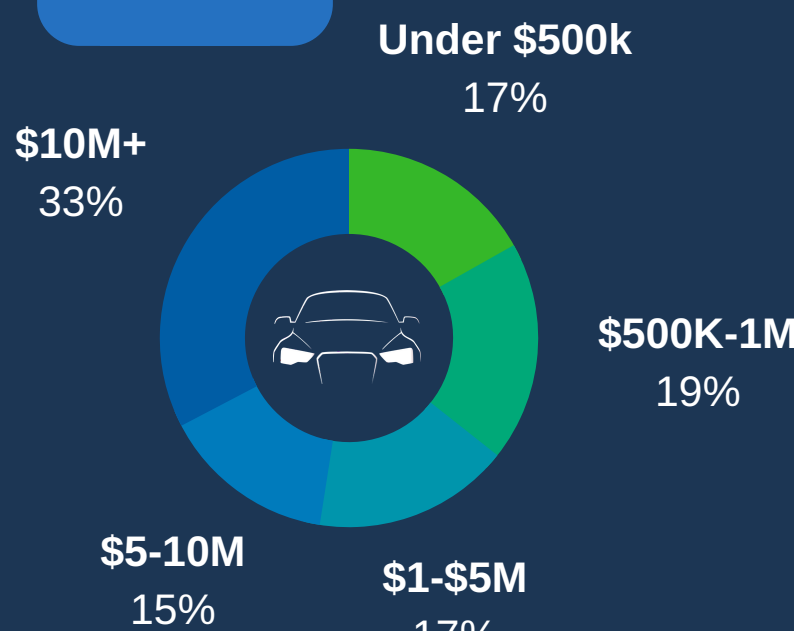
When respondents were asked to share the largest company-wide challenges preventing the implementation of semi-autonomous technology, the top voted inhibitor was safety. The safety inhibitor represents a number of current issues: the insufficiency of safety and performance data, the difficulty of storing and analyzing data, the tradeoffs between design and functionality, and the cost of sensors and LIDAR technology. The public's preoccupation with safety has been an influential factor in driving focus to this inhibitor. As automakers become more fluent in developing semi-autonomous technology, they must also recognize the need to take the next step: mapping the roads.

INVESTMENTS

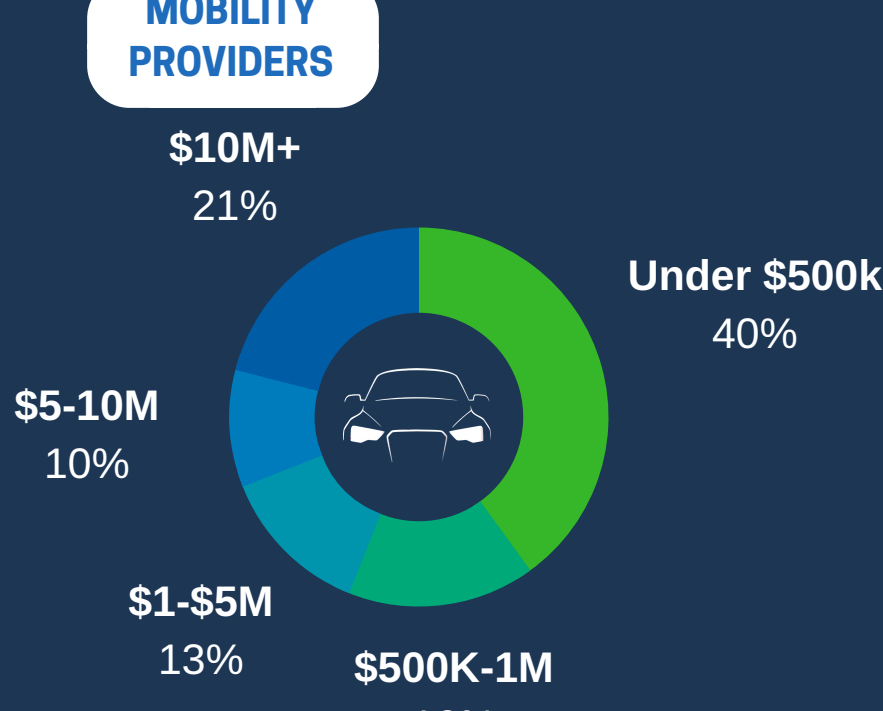
OEMs



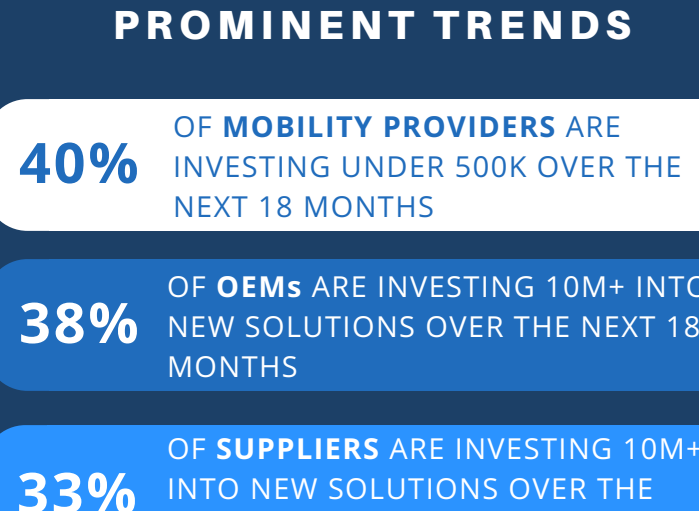
SUPPLIERS



MOBILITY PROVIDERS



PROMINENT TRENDS



Respondents were asked to share approximately how much their company is looking to invest in the top priorities mentioned above. The majority of OEMs and suppliers indicated that they are looking to invest at least \$10 million over the next 18 months. Automakers are also starting to pay more attention to startups. Nissan, Mitsubishi and Renault have created a fund, Alliance Ventures, which will invest up to \$1 billion over the next five years in mobility startups pursuing advances in electrification, autonomy, connectivity and artificial intelligence. Several other automakers, such as BMW and Jaguar Land Rover, have venture capital arms to fund startups working on technology that could facilitate the development of autonomous vehicles.

AUTOMOTIVE
CYBER SECURITY
SILICON VALLEY

INTERESTED IN LEARNING MORE ABOUT AUTOMOTIVE CYBER SECURITY?

SAN JOSE, CA | OCTOBER 24 - 26, 2018

The **Automotive Cyber Security Summit** brings together the leading cyber security experts working in automotive, mobility and parallel sectors. Discussions will surround key essentials such as threat modelling, building in physical security, AI and deep machine learning, cyber security throughout the supply chain, and much more!

Cyber security has become an important differentiator between auto makers, mobility and other transportation companies as these industries are challenged with emerging and growing cyber security threats and challenges in increasingly complex security environments with connectivity, ADAS, and autonomous tech.

You will be able to network with other security professionals across several sectors and at various senior and technical managerial levels. In the past, this summit has attracted 100 + attendees from industry to top management from various OEMs and Tier 1 suppliers, such as CEOs, Presidents, Vice Presidents, and Directors of Engineering/Seating and solution providers.

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