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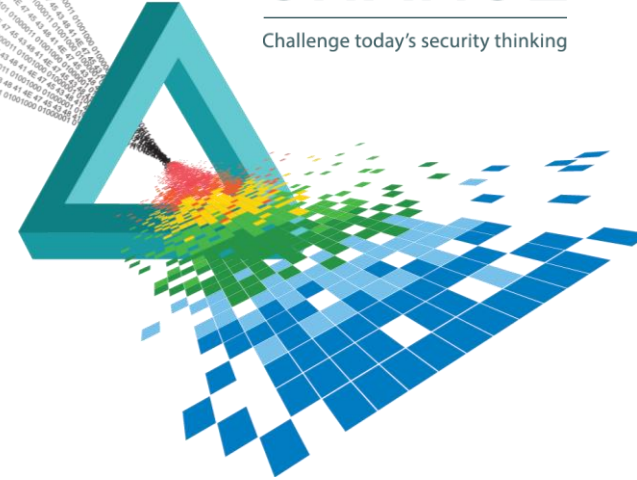
Unpacking Asia-Pacific Cyber Maturity

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CHANGE

Challenge today's security thinking



ASPI's Cyber Maturity Report



ASPI's Cyber Maturity Report

- ◆ Provides holistic snapshot of Asia Pacific cyber development.
- ◆ Designed for Governments, Business and the Public.
- ◆ Scores and ranks 'maturity' levels of individual countries.
- ◆ Covers Economic, Governance, Legislative, Military, and Civil Society realms.
- ◆ Provides engagement opportunity scale for business and government.

A Picture of the Region

- ◆ Within Asia 1.32 billion are online.
- ◆ Home to least networked countries and some of the most networked.
- ◆ Varying approaches to cyberspace, eg. threat vs. opportunity.
- ◆ Growing connectivity has exposed lack of domestic supporting structures.
- ◆ Geopolitical regional tensions reflected in cyberspace.

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A Government Perspective & Military Uses of Cyber



Government Organisation

What we've seen

- ◆ Flurry of new national cyber strategies.
- ◆ Cyber security given ministerial prominence.
- ◆ Barriers to implementation still an issue.
- ◆ Opportunity to share understandings.



Photo Courtesy of Christian Schnettelker

Military Uses of cyber

What we've seen

- ◆ US, China, Australia, Singapore and South Korea are ahead regionally.
- ◆ North Korea, continuing threat.
- ◆ Traditional flare points replicated in online environment.

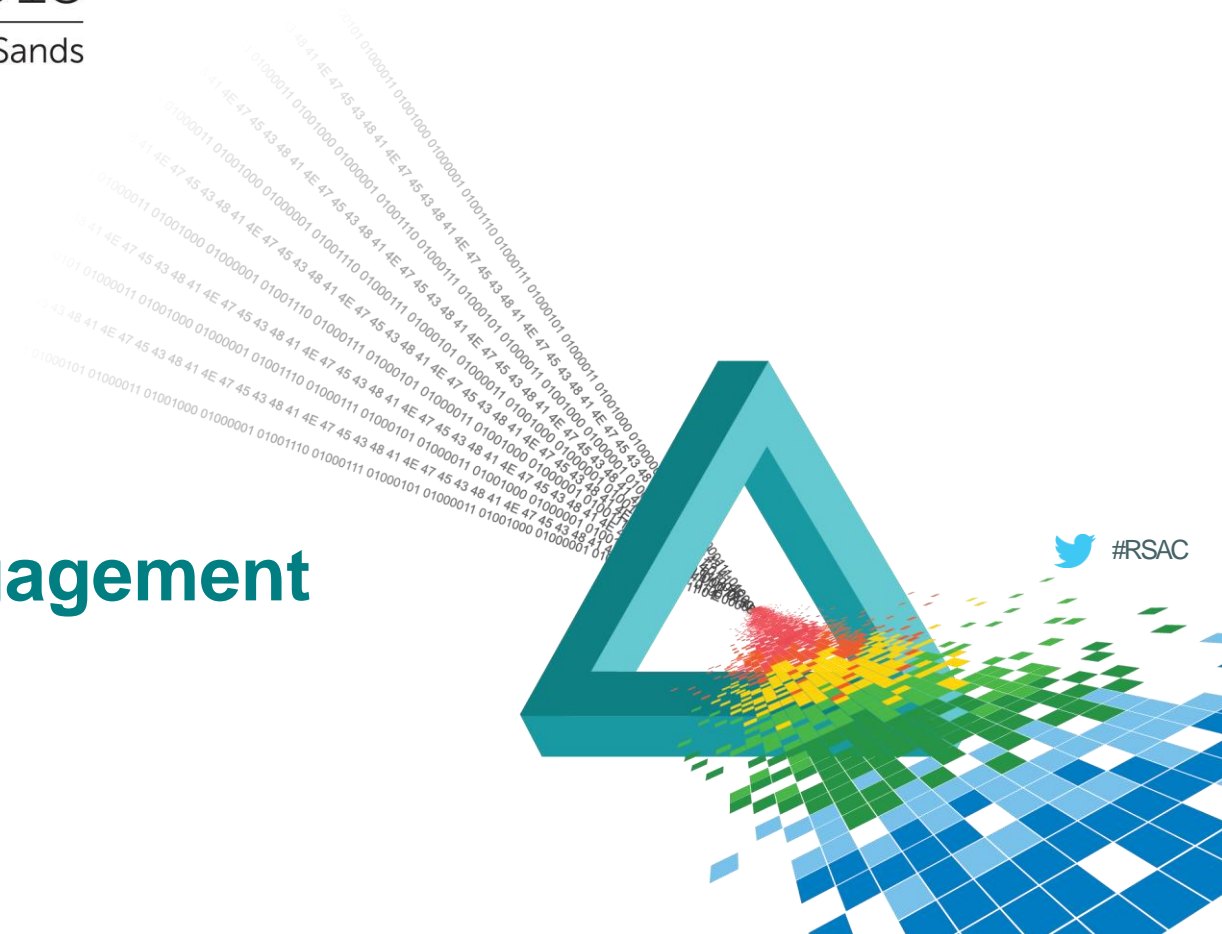


Photo Courtesy of Australian Department of Defence

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International Engagement & Cybercrime



International Engagement

What we've seen

- ◆ Snowden revelations still reverberating.
- ◆ Positive agenda of Confidence & Capacity Building measures.
- ◆ ARF Workshops & bi-laterals.
- ◆ Malaysia and China playing increasingly visible roles.



Photo Courtesy of the United States Government

Cybercrime

What we've seen

- ◆ Massive growth in new internet users, double edge sword.
- ◆ Lack of harmonized legal structures, served as a barrier.
- ◆ Large percentage software is pirated (84% in Indonesia 81% in Vietnam), increases botnet risk.

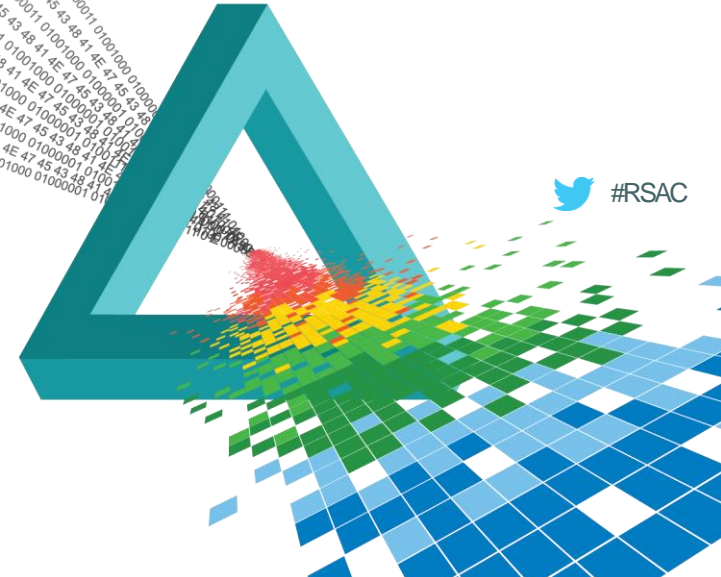


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Regional Cyber Maturity: a business perspective



Regional Cyber Maturity: a business perspective

- ◆ The regional economy set to grow by 6.2%
- ◆ Australia, Japan, Singapore, New Zealand, USA, & South Korea
 - ***The safe bets***, strong, relatively stable economies.
- ◆ Vietnam and Indonesia
 - ***The up and comers***, opportunities via mobile markets.
- ◆ China and India
 - ***The economic engines***, strong sustained growth.

Room for Growth

Vehicles for development

- ◆ Improved infrastructure
- ◆ Mobile markets
- ◆ Improved government organisation
- ◆ Open engagement
- ◆ Receptive to external capacity building efforts



Photo Courtesy of Yutaka Tsutano

Applying Cyber Maturity

- ◆ How does the growth in the digital economy in the Asia-Pacific impact your potential growth as a company or government?
- ◆ What are the broader sets of risks involved for you?
- ◆ Assess where your 'sweet spot' is in the new emerging markets in the region and build decisions you make from a solid research base.
- ◆ When making policy decisions look beyond your usual horizons and try and assess how they will be impacted upon by political trends, legislation, and societal considerations.

Questions?

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