THE CYBERSECURITY LANDSCAPE IN LATIN AMERICA

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Founded in 1990

- First coverage was commercial applications of wireless semiconductors used by the military
- Coverage gradually expanded beyond semis to end-equipment markets and services

Global firm; Boutique support

- Analysts located in all major regions: Americas, Europe and Asia
- Sales and client support in localized markets

Focused on the identifying emerging technology trends first

- Early beachheads provide strong relationships in nascent markets
- Relationships continue as markets mature

Proven research methodology

- Key analyst relationships provide supply-side intelligence
- Enterprise and consumer surveys provide demand-side intelligence

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Introduction to ABI Research

ABIresearch

> Research Services

Mobile Networks

Mobile Devices

M2M

Telematics & Navigation

Mobile Services

Enterprise

Digital Home

RFID & Smart Cards

NextGen

Security

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Research Services

Standard Offerings

- Over 30 services tracking rapidly changing industries
- Each service contains a unique package of standard deliverables

Flexible Packaging

- Adjust budget/coverage to meet client needs
- Add services to fill gaps

Consulting Services

- Custom Research Reports
- White Papers
- Competitor Analysis
- Distribution Analysis

Research Deliverables

Products

- Research Reports
- Market Data
- Research Briefs
- ABI Insights
- Executive Briefs
- Vendor Matrices

Analyst Inquiry

- Included with services

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Cybersecurity Landscape in Latin America

1. State of Cyber Affairs
2. Addressing Critical infrastructure Protection
3. Implementing Policies and Regulation
4. Security Spending
5. Concluding Insights

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- Emerging market
- Powerful Telecoms
- Weak national policies in cyber
- Strong need for attention in this area, particularly due to cybercriminal element

Threat Actors	Individuals	Groups
Financial	Lone Actors	Criminal Organizations
Political	Hacktivists	State Actors

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Cyberhacktivists in Latin America

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Table: Selected Cyberhacktivists Operating in Latin America

(Source: ABI Research)

Name	Region	Motivation	Targets	Tools and Methods
HighTech Brazil HackTeam	Brazil	Hacktivism	Government, Law Enforcement	SQLi, Data Breach & Dump
Red Eye Crew	Brazil	Hacktivism	Automotive Industry	Web Defacement
Team BCA (Brazilian Cyber Army)	Brazil	Hacktivism	Government, Business	Breached Accounts, Data Leaks/Dumps, SQLi
LulzSec Ecuador	Ecuador	Hacktivism	Government, Industry, Business, NGO	Data Dumps From Server Hacks, SQLi
LatinHackTeam	Regional	Hacktivism	Government, Industry, Business, Petroleum Corp	Web Defacement, Hack And Dump
Yei Zeta	Mexico	Hacktivism	Government, Education, Law Enforcement	Data Dumps From Server Hacks, SQLi
LulzSec Peru	Peru	Hacktivism	Government, Industry, Business, NGO	Data Dumps From Server Hacks, SQLi, Account Hijacking
HighTech Brazil HackTeam	Brazil	Hacktivism	Government, Law Enforcement	SQLi, Data Breach & Dump
Red Eye Crew	Brazil	Hacktivism	Automotive Industry	Web Defacement

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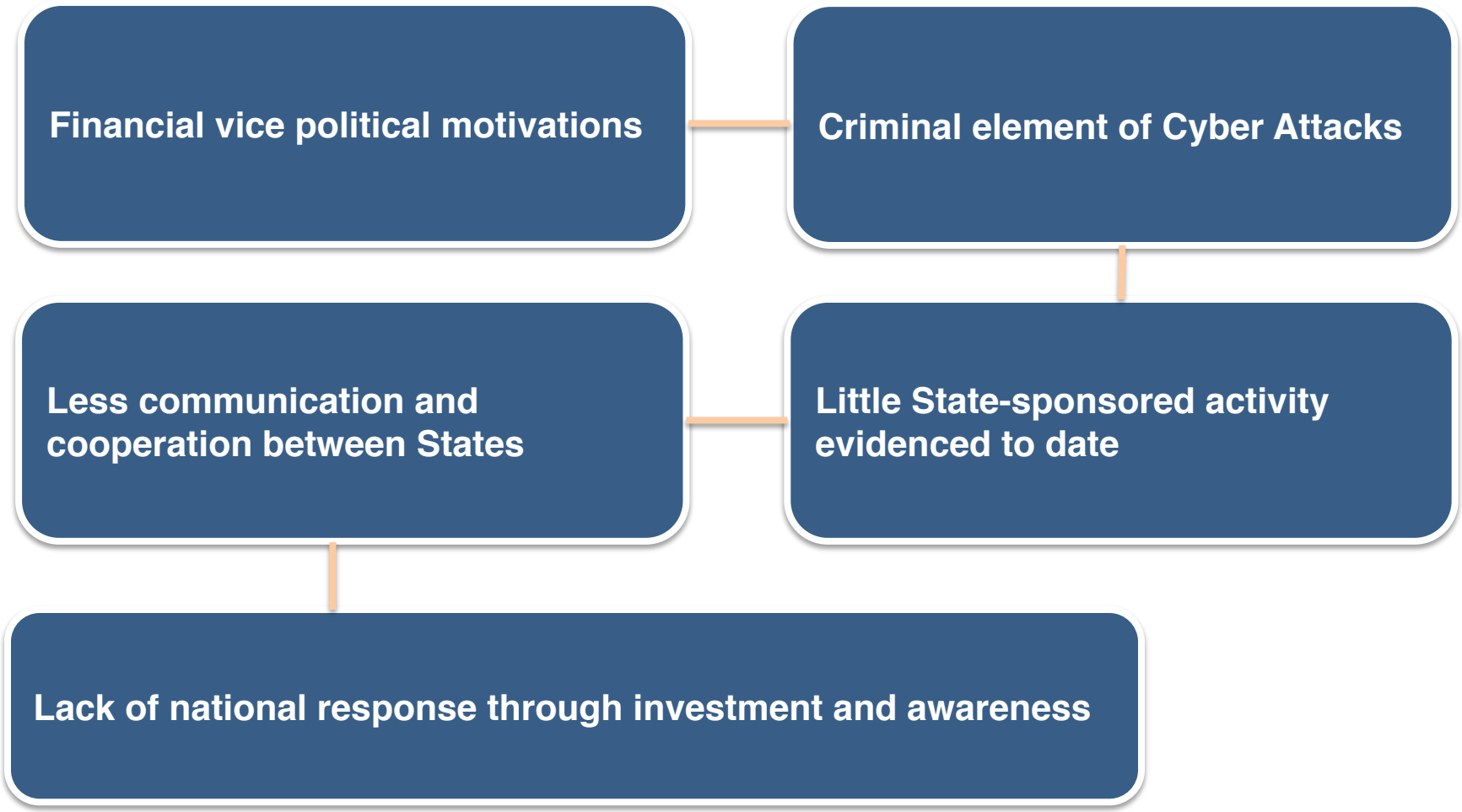
Investment in Localized over National Level



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- Attacks will likely overcome the ability to defend on a localized basis, and could threaten national interests
- Critical sectors are increasingly interconnected and inter-reliant and *currenly vulnerable*
- Argentina, Peru, Columbia, Mexico, Chile, Costa Rica, Panama, Ecuador, and Bolivia: Combined 3,000 industrial control system devices connected to the Internet, which were vulnerable to hacking and publicly viewable on Shodan.

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Implementing Policies and Regulation

Our focus for today

- Importance of national CERT with legal mandate
- Create a favorable environment for promoting careers in technology
- Protect Critical Infrastructure
- Understand strength and weaknesses and reach out to fill gaps
- Build demand for cybersecurity services, sell the economic benefit

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Cybersecurity Spending – Critical Infrastructure

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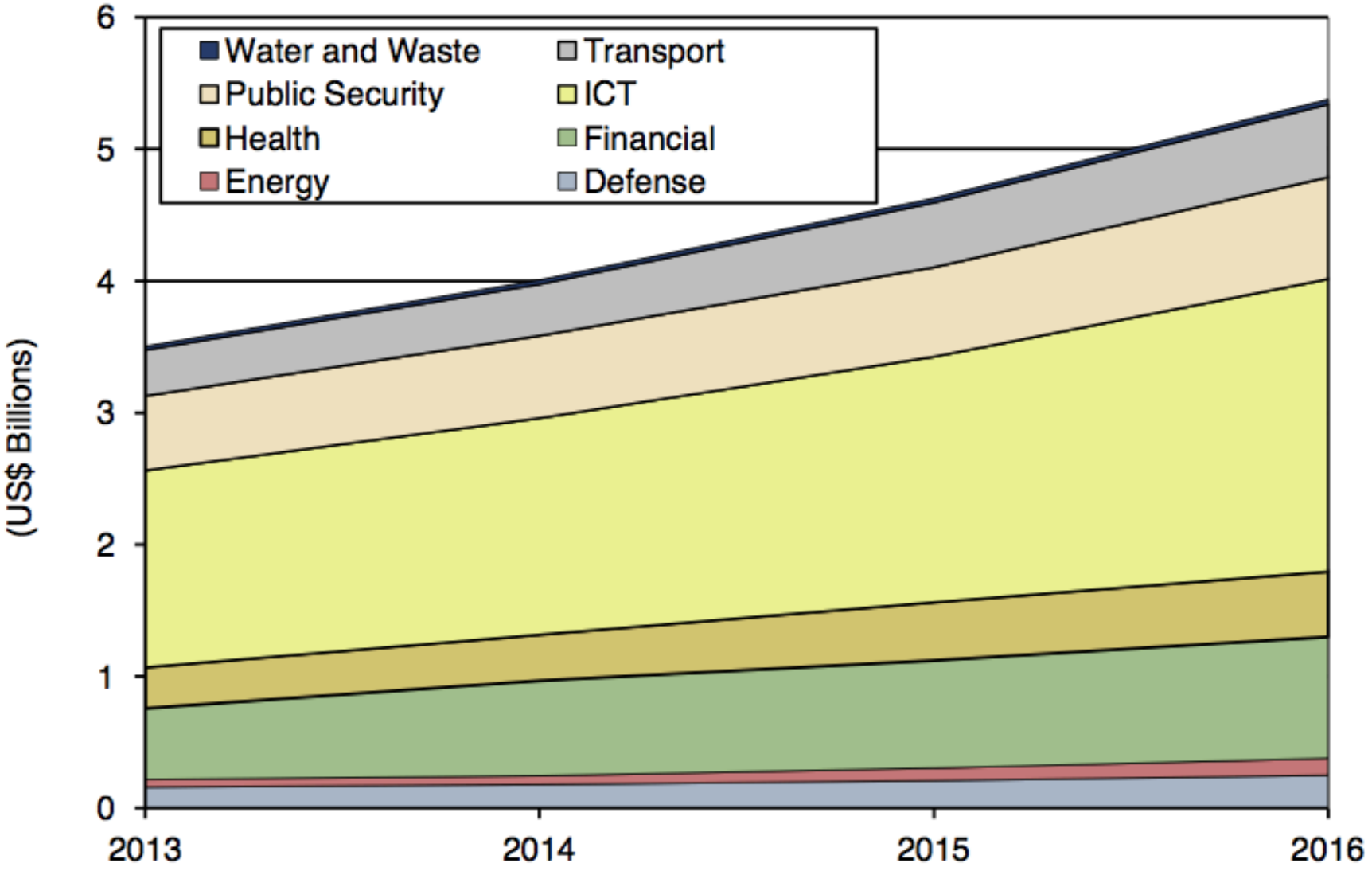

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1. Increase in frequency, scale and sophistication of attacks
2. Consumers look to vendors and regulators to manage security
3. Demand for industry regulation and government response
4. Expectation that the bad guys are prosecuted – political ramifications

Bottom line: When there is a large scale attack, consumers will increasingly look to governments/ regulators to provide protection and to hold services providers and vendors accountable for data loss.

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1. Increase role of government in cybersecurity
2. Harness existing hacker talent pool sources, provide alternatives
3. Leverage large telecommunications market
4. Build global relationships, other CERTs and ITU-IMPACT

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