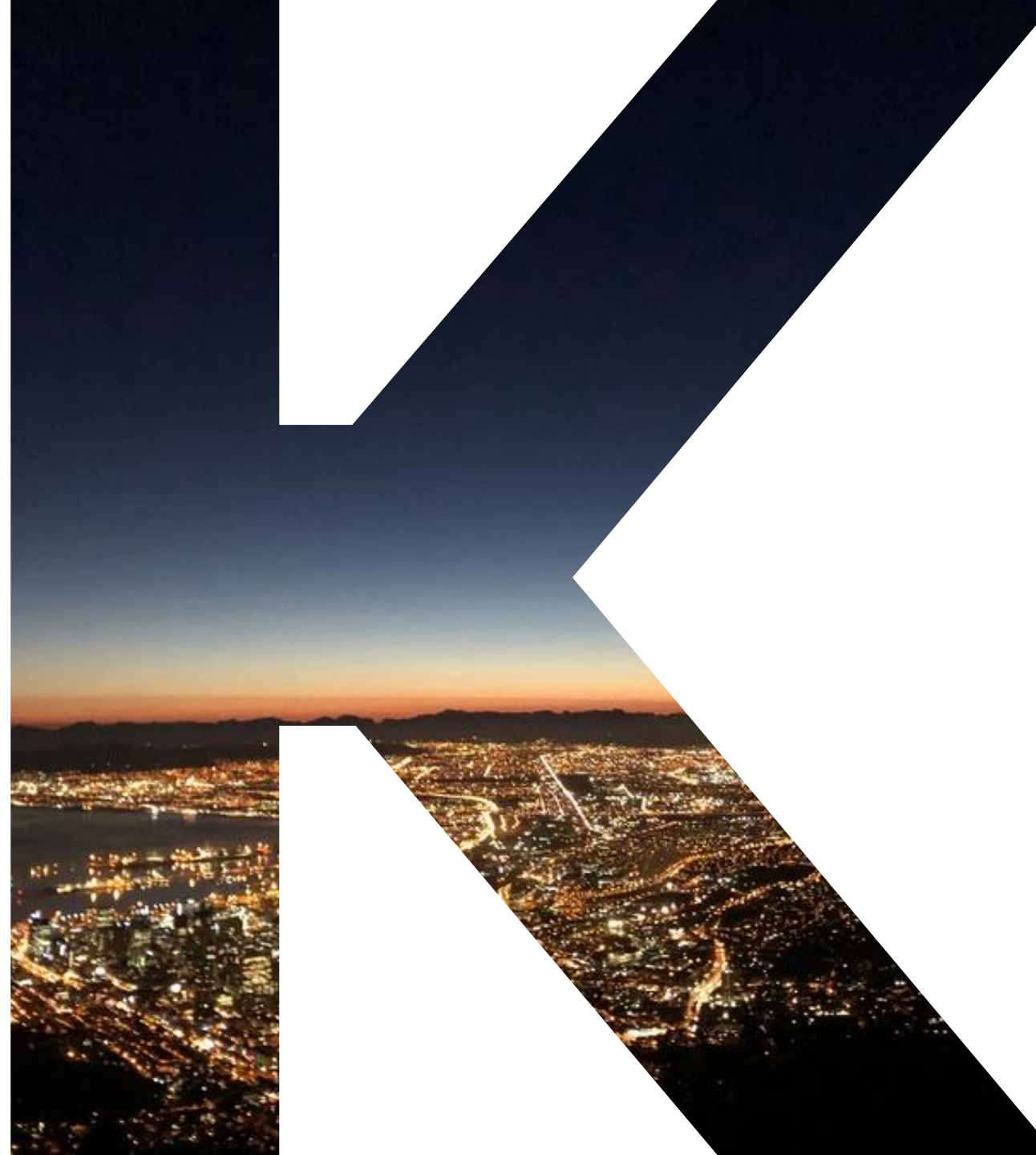


Cybersecurity in Africa – a call to action

20 June 2023

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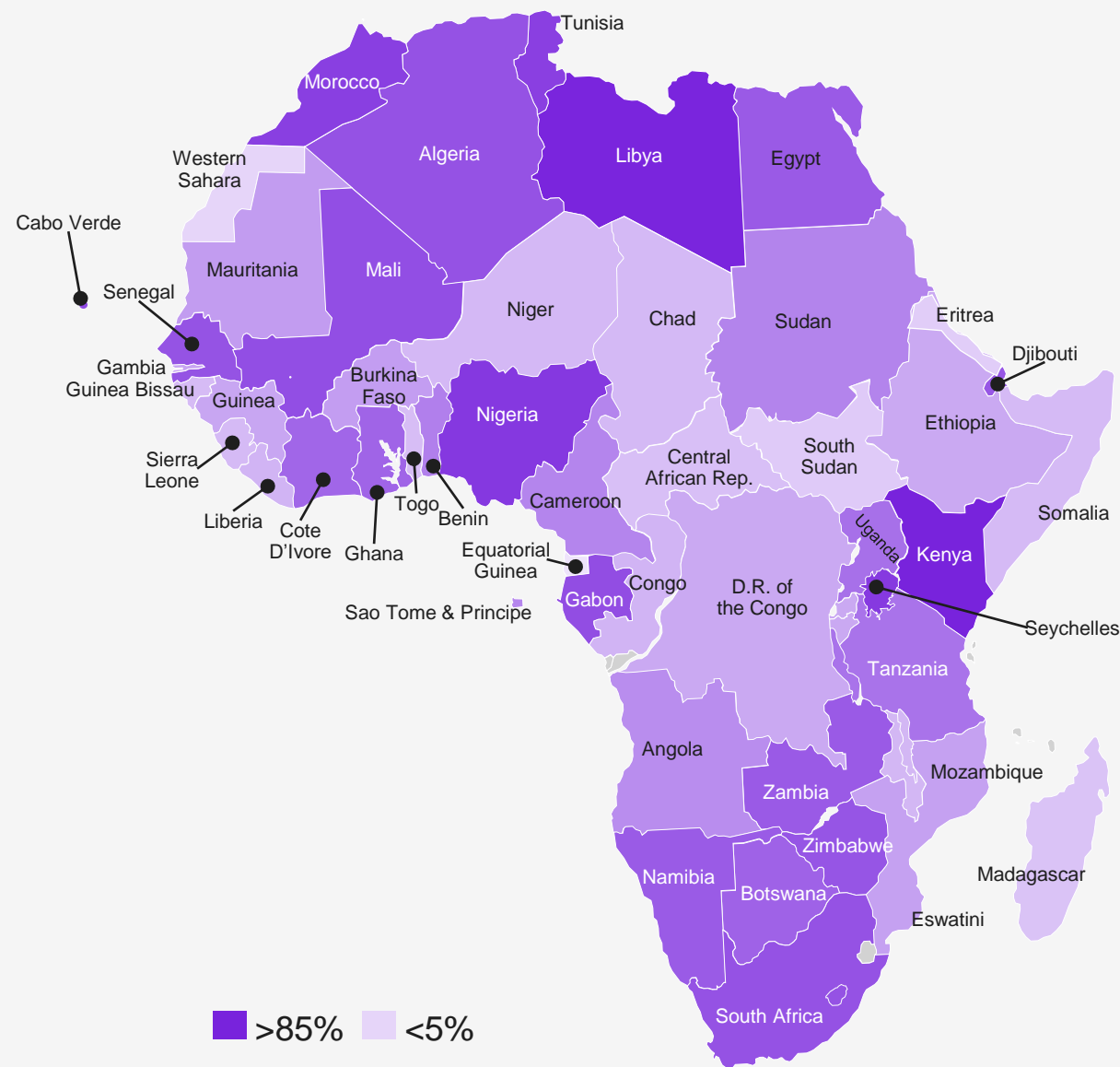
Africa is a prime target for cyberattacks due to its growing strategic relevance, economic development, and evolving digital landscape

Africa loses >\$3.5 bn annually due to direct cyber attacks

+ bn's more from missed business opportunities

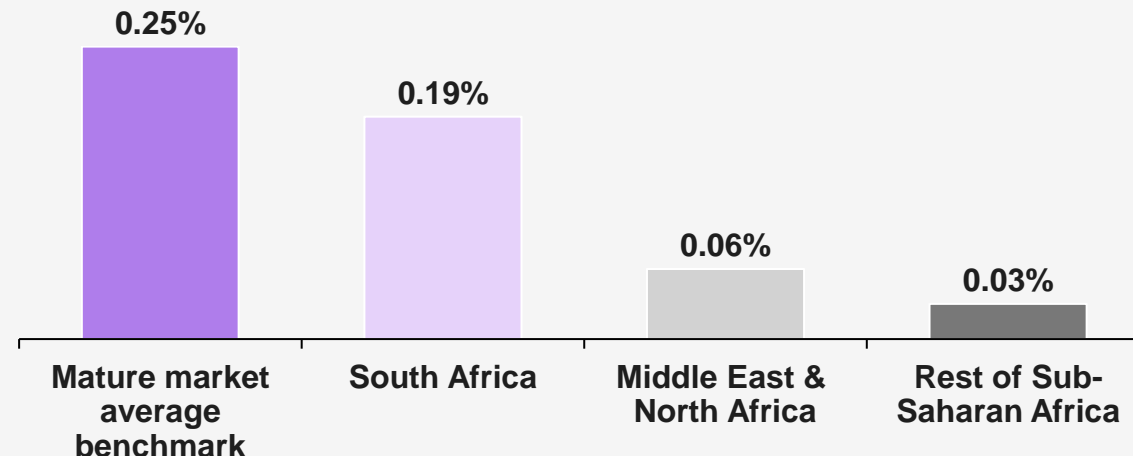
Internet penetration in Africa, by country

December 2022



Through benchmarking, we've seen that despite South Africa being a regional leader in cybersecurity spending, it is still severely vulnerable to cyber attacks

% of GDP spent on cybersecurity annually

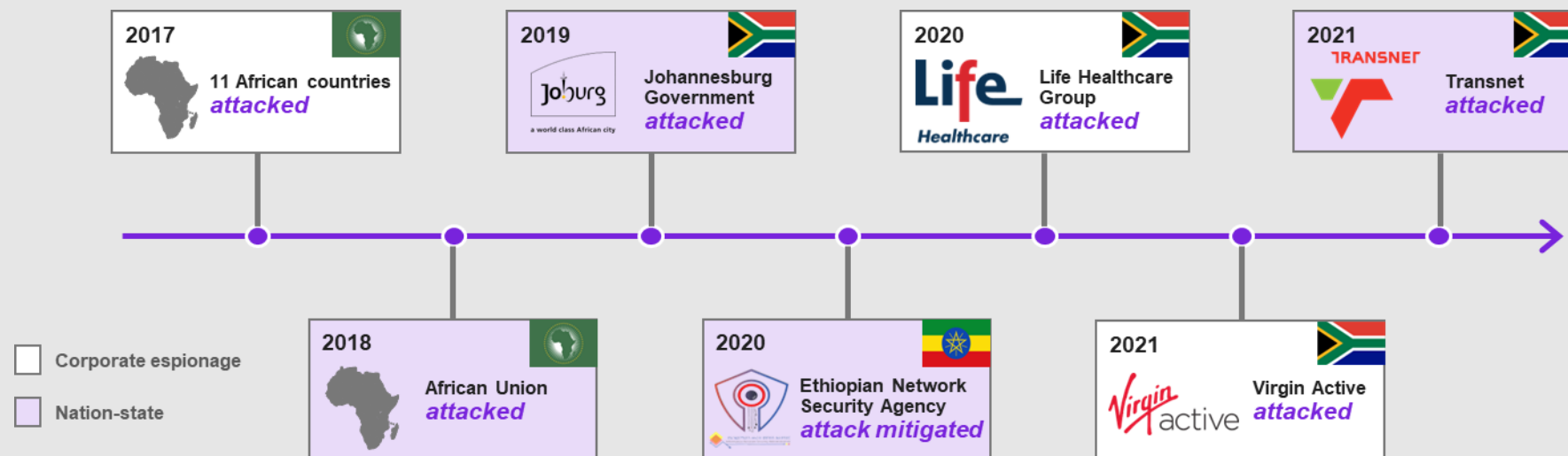


South Africa is a regional leader in cybersecurity spending but **needs to step up investment** to reach the mature market average benchmark level



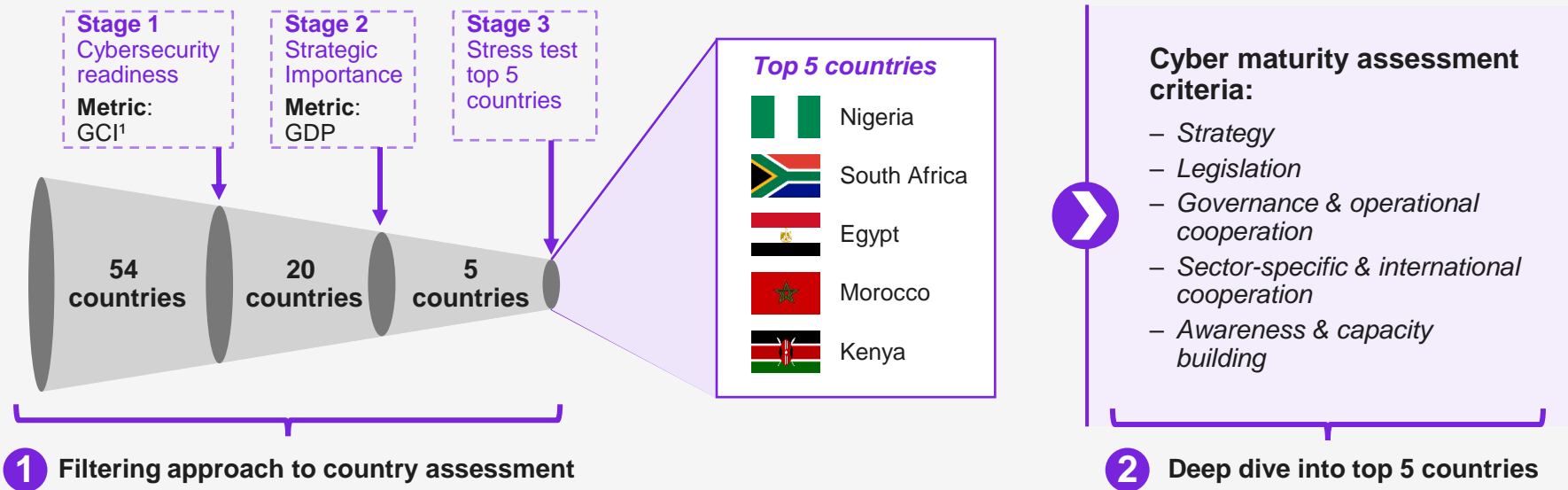
Major cybersecurity incidents over the past few years

Non-exhaustive



Our cybersecurity readiness assessment has shown that Africa’s cyber resilience is low, even among the most advanced countries in the region

Our cybersecurity readiness assessment consisted of a two-step approach



Top 5 country outcomes: *Cyber maturity by country*

Absent Nascent Established Advanced

| | Strategy | Legislation | Governance & operational entities | Sector-specific & international cooperation | Awareness & capacity building |
|--|-------------|-------------|-----------------------------------|---|-------------------------------|
| | Established | Established | Established | Established | Established |
| | Established | Established | Nascent | Established | Nascent |
| | Established | Established | Established | Established | Absent |
| | Absent | Established | Nascent | Absent | Absent |
| | Established | Established | Nascent | Nascent | Established |

Africa’s cyber-resilience is very low



These issues stem from political, societal, educational, and technological reasons

Six key reasons why Africa is in this state



Lack of strategic mindset, policy preparedness, and institutional oversight needed to address cybersecurity issues



Absence of a unifying framework makes regional efforts largely voluntary



Cyber risk is perceived to be an **IT problem** rather than a business problem



Regional businesses do not have a comprehensive approach to cybersecurity



Shortages of homegrown capabilities and expertise




Products and solutions are fragmented, and there are **few comprehensive solution providers**


African countries can't isolate themselves. The interconnectivity of systems exacerbates the threat

Four drivers that will increasingly expose Africa to outsized cyber risk:

i The growing **interconnectedness and flow of people, goods, and information across the region**



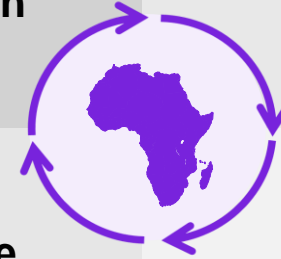

Widespread socioeconomic difficulties leading to diverging national priorities and a varying pace of digital evolution



iii Countries' hesitancy to share **threat intelligence**, due to mistrust and a lack of transparency

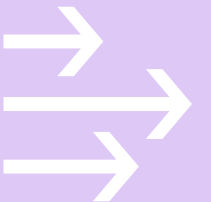


iv Technological advances will render **threat monitoring and responses more complex**



Critical responses to move forward:

- A. A comprehensive and collaborative approach**
- B. Multiple stakeholders' input**
- C. An active defense mindset**



Kearney's four-point agenda to proactively build resilience and build cyber defense



1. Elevate cybersecurity on the national and regional policy agenda



2. Secure a sustained commitment to cybersecurity



3. Fortify the ecosystem



4. Build the next wave of cybersecurity capability

Kearney's four-point agenda to proactively build resilience and build cyber defense



1. Elevate cybersecurity on the national and regional policy agenda

Rapid Action
Cybersecurity
Framework

Update AU Cyber
Convention & Policies

Regional coordination
platforms &
agreements



2. Secure a sustained commitment to cybersecurity

Address spending
gap

Define and track
metrics



3. Fortify the ecosystem

Share threat
intelligence

Extend across supply
chain

Regional PPPs &
industry alliances



4. Build the next wave of cybersecurity capability

Professional
skills
development

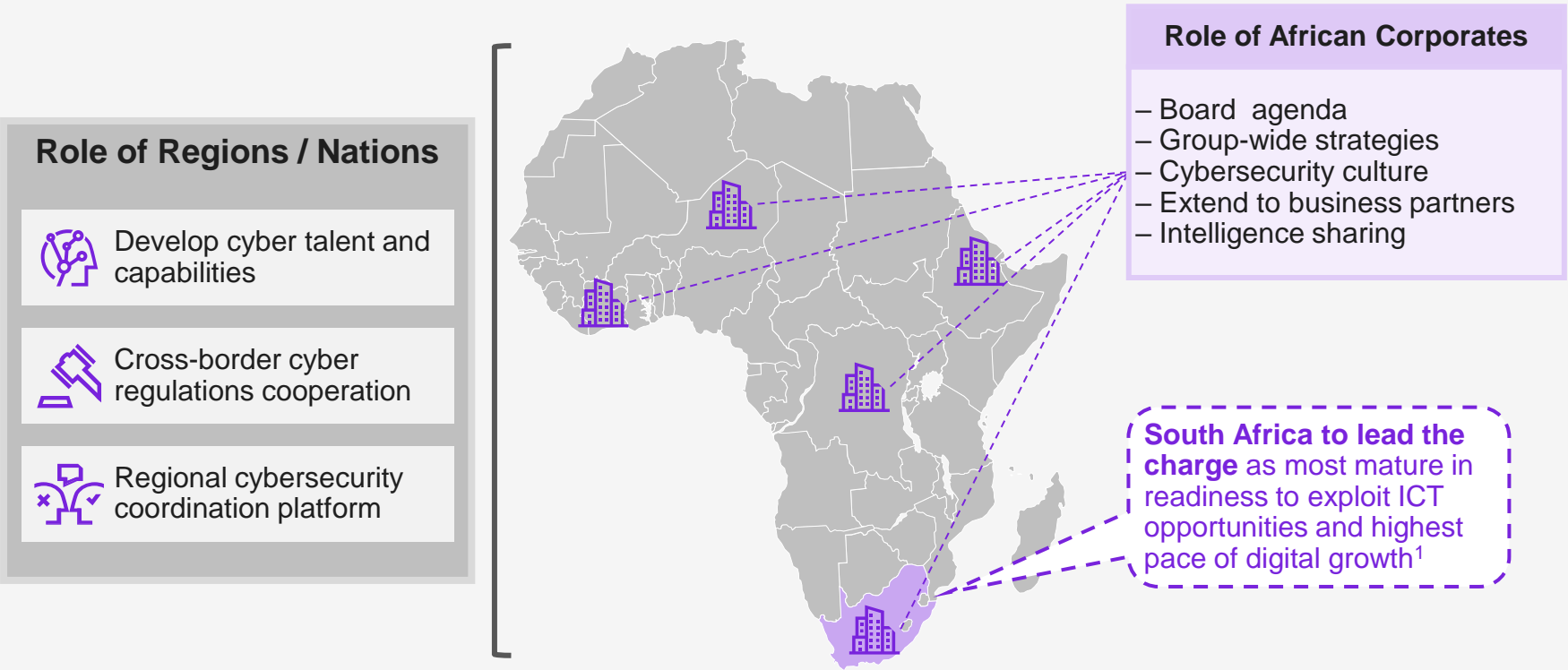
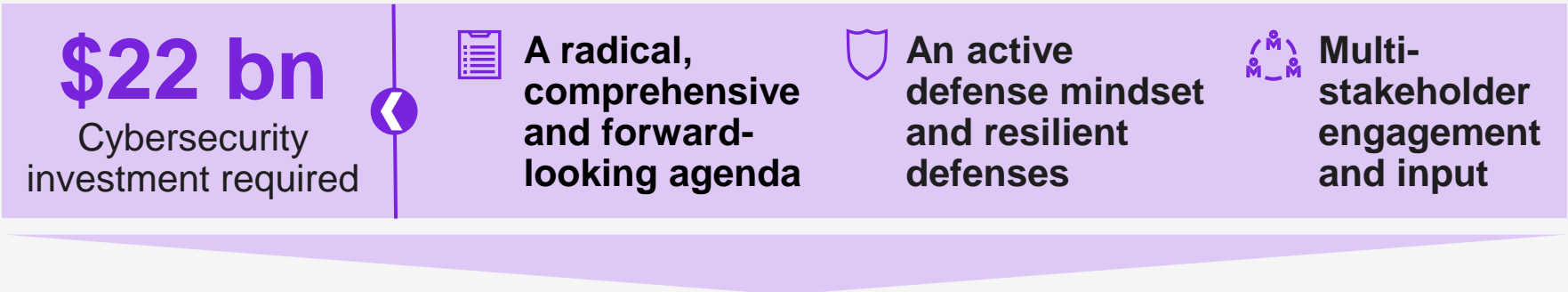
Local industry
collaboration

R&D (AI &
Blockchain)

Benchmark
global
capabilities

There is a clear and urgent call to action for Africa and South Africa, across all levels, for businesses to thrive in the digital economy

Enhancing Africa’s cybersecurity capabilities will foster the region’s business ecosystem and attract economic investment



Thank you

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