Keynote Address

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ACCELERATING CHANGE: TODAY’S IMPERATIVE

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Director
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The imperative to change
Intelligence must remain a strategic advantage for our nation

Lessons learned from a decade of war demand it:

- Gain a more thorough understanding of the cultures and environments in which we operate
- Recognize shortfall of spies contributed to ignoring tribal and cultural realities
- Implement strategy to meet military intelligence, surveillance and reconnaissance (ISR) needs
- Increase importance of Cyberwarfare capabilities, ISR, and undersea systems
- Increase access to expeditionary ISR platforms
- Promote the fusion of information and reduce compartmentalization of intelligence
- Improve training to enable focused, intelligence driven operations
- Introduce new legislation to bolster interagency ties

- CJCS Enduring Lessons, Vol 1 June 2012
  http://www.blogs.defensenews.com

“We’re transitioning from a decade of war, a complex and uncertain security environment looms, and as we look toward the future each service in our total joint force faces fundamental questions about their identities, their roles, and their capabilities.”

- General Martin Dempsey, CJCS
  Joint Warfighting Conference 2012
Chairman’s Guidance for the Future

Chairman’s Strategic Direction

“The Joint Force will also be used differently. Specialized capabilities, once on the margins, will move to the forefront. Networked special operations, cyber & intelligence, Surveillance, and Reconnaissance (ISR) will become increasingly central.”

Joint Force 2020

“Flexible, low-signature or small-footprint capabilities such as cyber, space, special operations, global strike & ISR will play more pronounced roles in future joint operations.”
Amid profound **transition**...

- **Winding Down Direct Combat Roles**
- **Rebalance toward Asia-Pacific**
- **Aspiring Regional Peer Competitors**
- **Anti-Access/Area Denial Challenges**
- **Cyber Operations**
- **Arab Awakening**
- **Economic Uncertainty**

“When the rate of change outside is faster than the rate of change inside… the end is near.”

- Former GE chairman Jack Welch

“When even if you are on the right track, you will be run over if you just sit there.”

- Will Rogers
Sharp break from the past
Requires new ways to think about the world around us
How we pursue our interests
How we influence actors decision making
New Era: Population Shift

**WHAT:**
“Demand for food is expected to rise at least 35 percent by 2030 while demand for water is expected to rise by 40 percent. Nearly half of the world’s population will live in areas experiencing severe water stress.”
- National Intelligence Council Global Trends 2030

**WORLD POPULATION**

- **1950** 3.4 BILLION
- **2000** 6.1 BILLION
- **2020** 7.6 BILLION (Estimated)
- **2030** 8.3 BILLION (Estimated)

**SO WHAT:**
- Lack of arable land, access to food, water, and energy at risk
- Unstable governments struggling to provide for their people
- Resource competition driving social unrest
- The rise of transnational groups expanding

**WHAT:**
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**SOURCE:** UN Data
New Era: Economic Shift

**WHAT:**
“By 2030 Asia will have surpassed North America and Europe combined in terms of global power, based upon GDP, population size, military spending, and technological investment.”
- National Intelligence Council
Global Trends 2030

**SO WHAT:**
- Shifts in global trade and focus
- Significant increase in regional influence globally
- Tensions from new roles of new powers
- Global Shift to multi-polar world
- Challenges to global governance

**By 2016..**
China will displace the U.S. as the world’s largest economy.
- Source IMF

**By 2025...**
China and India will be bigger than that of France, Germany, Italy, Japan, UK, US and Canada put together.
- Source OECD

China and India will serve as nearly twice the engine for growth as that of the United States and the euro zone
- Source World Bank

China will contribute about one third of global growth, far more than any other economy
- Source World Bank
New Era: Technology Shift

WHAT:
“Enabled by communications technologies, power will shift toward multifaceted and amorphous networks that will form to influence state and global actions.”
- National Intelligence Council Global Trends 2030

INFORMATION REVOLUTION

SO WHAT:
• Technology and the cloud provide the crowd a voice
• The network is the new weapon system
• Bandwidth is the new class of supply
• Data is our ammunition

In 1980
First 24/7 news network
IBM’s PC still under development
Mobile phone network in its infancy

In 2005*...
Facebook did not exist for most
Twitter was still a sound
The cloud was in the sky
4G was a parking space
Applications went to colleges
LinkedIn was a prison

Today
214 Jihadists are using Twitter
One has over 53,000 followers

By 2020...
the number of Internet users is expected to double to over 4 billion

Information taken from That Used to be Us, by Thomas Friedman and Michael Mandelbaum
And this Change Continues at an Exponential Rate

Library of Congress = 10 Terabytes
At best transmission line speed:
1998 = 16.5 days
2013 = .00008 seconds

Facebook Launch, 2004
Worldwide cell subscribers

5 Billion

1 Billion Users, 2012

5.3 Billion
28%

4 Billion
20%

740 Million
5%

42 Million

2.3 Billion

758 Million

10 Billion Mobile Connect Devices Projected by 2016
(1.4 per person on the planet)
Mobile Computing

Current and Future Trends
• User self-service
• Pervasive use of encryption
• Security features built into the device
• Cloud storage renders access device agnostic
• Data accessible from anywhere
• Location-based services

More Mobile
• Smaller, lighter
• Sales of tablets and smartphones overtook personal computers in 2011

Increasingly Capable
• More applications
• Greater computing power
• Better user interface

Secure, mobile computing critical for tactical users
Leveraging national and tactical intelligence in a seamless and timely manner
GLOBAL COMMONS

OUTLIERS

GLOBAL COMMONS

CONNECTED IN WAYS WE DON’T UNDERSTAND

DIGITAL NATIVES

ADAPTIVE

AGILE

RESILIENT

Open System

Complex

Everyone is an actor!
It takes a network to dominate in **cyberspace**

Support Offensive Cyber Operations

- Assess, Predict, Alert if JWICs threatened, Inform DOD Policy
- Deliver Phase III BDA, Revise Assessments, Inform Re-strike

**Main Effort**

- Conduct HUMINT Collection & Reporting, Task and Evaluate All-source Collection
- Conduct Computer Forensics, Investigate CI, Attack Attribution

Support the Warfighter

- Support the Policy Maker
- Support Acquisition

Defend JWICS

- HUMINT Collection, Behavioral and Cyber Infrastructure Analysis
- Analyze JWICS Threats & Vulnerabilities, Monitor JWICS Network Activity

- Enable Target Systems Analysis and Vetting, Ops Planning Teams
- Evaluate Abnormal JWICS Network Activity

**Find**

- Support Approved Cyber Operations

**Exploit**

- Fix Known Vulnerabilities, Eliminate or Respond to Threats (Malware, Insider)

**Fix**

- Support Offensive Cyber Operations

**Finis**

- Customers/Partners: CCMDs, USCC J2/J3, NSA, NGA, Service Centers, JCS, OSD, Service Cyber Units, Service/OSD Investigative Arms
Why we must succeed

- Prevent strategic surprise
- Understand rising regional ‘near-peer’ competitors
- Overcome Anti-Access/Area Denial strategies
- Counter enduring extremist threats
- Ensure decision advantage / confidence
- Weather fiscal uncertainty

Defense Intelligence Agency
You cannot fight, wage, or win war without us
Questions