Key Update for OSCORE (KUDOS)

draft-ietf-core-oscore-key-update-01

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Content Recap

- OSCORE (RFC8613) uses AEAD algorithms to provide security
  - Need to follow limits in number of encryptions and failed decryptions, before rekeying
  - Excessive use of the same key can enable breaking security properties of the AEAD algorithm*

- (1) AEAD Key Usage Limits in OSCORE
  - Defining appropriate limits for OSCORE, for a variety of algorithms
  - Defining counters for key usage; message processing details; steps when limits are reached
  - Now recommends (q, v, l) = (2^20, 2^14, 2^8) for AES 128 CCM 8; details in Appendix A

- (2) Defined Key Update for OSCORE (KUDOS) ← MAIN FOCUS OF TODAY
  - Loosely inspired by Appendix B.2 of OSCORE
  - Goal: Renew the Master Secret and Master Salt; derive new Sender/Recipient keys from those
  - Achieves Forward Secrecy

*See also draft-irtf-cfrg-aead-limits-03

Key Update Recap

- Method for rekeying OSCORE
  - Key Update for OSCORE (KUDOS)
  - Client and server exchange nonces R1 and R2
  - *UpdateCtx()* function for deriving new OSCORE Security Context using the nonces

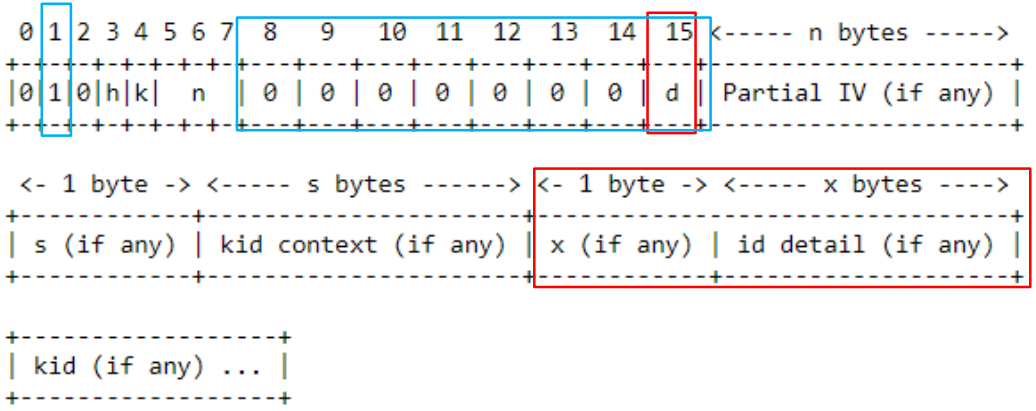
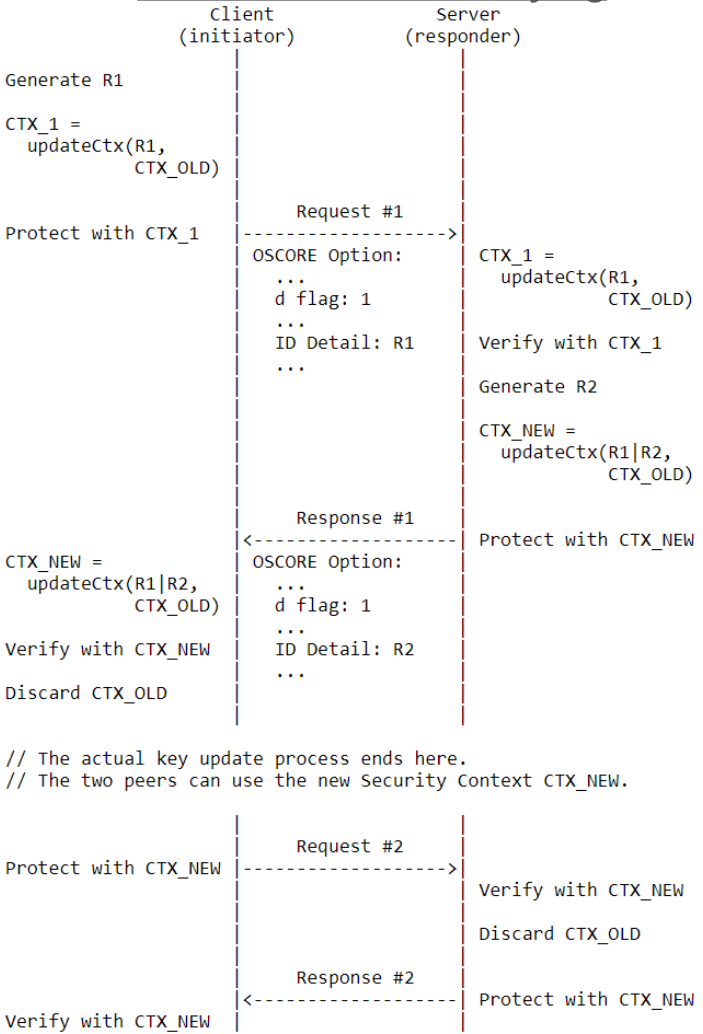


Figure 3: The OSCORE option value, including 'id detail'

Client-initiated rekeying



Key Update without FS (1/2)

- Added alternative KUDOS mode without Forward Secrecy in Appendix E
  - Initially raised on the CoRE mailing list in [1]
  - It allows stateless key update on loss of state (e.g., rebooting)
    - Needed for constrained devices that cannot store information to persistent memory

- Extension to KUDOS, enabling the selection of a no-FS mode through a new bit ‘p’
  - 'p' set to 0 ==> run KUDOS in FS mode (original mode)
    - Devices capable of writing to persistent memory should initiate the procedure with ‘p’ set to 0
  - 'p' set to 1 ==> run KUDOS in no-FS mode

- New concepts defined
  - Latest Master Secret and Latest Master Salt
    - From the latest derived OSCORE Security; should be stored on disk by a device capable to do so
  - Bootstrap Master Secret & Bootstrap Master Salt
    - If provisioned they are stored on disk, and they are never changed by the device

[1] https://mailarchive.ietf.org/arch/msg/core/EL0yHxQrP2DQwHxo6ojnQedvFbY/

Key Update without FS (2/2)

- Running KUDOS in no-FS mode
  - Before starting KUDOS, the current OSCORE Context CTX_OLD is modified to ensure that
    - Master Secret = Bootstrap Master Secret ; Master Salt = Bootstrap Master Salt
  - Thus forward secrecy is sacrificed, but all other properties of KUDOS remain!

- This mode of KUDOS requires that both peers have Bootstrap Master Secret/Salt

- Agreed downgrading of mode is possible
  - If the initiator sets 'p' to 0, the responder might be unable continue (if it cannot write to disk)
    - Server responder: Return a protected 5.03 error response to Request #1, with 'p' set to 1
    - Client responder: Send a protected Request #2, with 'p' set to 1
    - In either case, abort KUDOS
  - Then, the initiator may retry with 'p' set to 1, to support the best possible common thing

- Reasonable approach? Comments? Good to move to the draft main body?

Keeping Observations (1/2)

- Scenario description:

1. The client starts an observation Obs1 by sending a request Req1 with req_piv X
2. The two peers run KUDOS and reset their Sender Sequence Number (SSN) to 0.
3. Later on, while Obs1 is still ongoing, the client sends a new request Req2 also with req_piv X. This is not necessarily an observation request.

- Problem: A notification sent by the server for Obs1 or a response to Req2 would both cryptographically match against Req1 and Req2

- Now Appendix C defines
  - A method for “long-jumping" beyond PIVs already in use for observations (more on next slide)
  - A new bit ‘b’ to signal interest in keeping observations
    - If there is no mutual interest, delete observations after key update

Keeping Observations (2/2)

- "Long-jumping" method
  - When wishing to send a first request after a KUDOS execution, the client determines the PIV* as the highest req_piv among all the ongoing observations.
  - The client updates its SSN to be (PIV* + 1)

- Issue: Client needs explicit confirmation from server to remove an ongoing observation
  - What if the client cannot get this confirmation?
  - A peer maintains a counter EPOCH for each ongoing observation it participates in, incrementing the EPOCH for every KUDOS execution
  - When EPOCH reaches MAX_EPOCH (same for both peers) the associated observation is deleted by both peers

- MAX_EPOCH
  - Need good default value to recommend

Comments?

Admit negotiation of MAX_EPOCH in KUDOS?

Renew Sender/Recipient IDs (1/3)

- Appendix D defines a method to update peers' Sender and Recipient IDs
  - Based on earlier discussions on mailing list [1][2]

- Properties
  - Each peer specifies its own new Recipient ID (similar to EDHOC)
  - Accepting to update the Sender/Recipient IDs is optional; explicit confirmation is needed
  - **This procedure can be embedded in a KUDOS execution or run standalone**
  - Possible for both client and server to initiate this procedure
  - Changing IDs practically triggers derivation of new OSCORE key material
  - Must **not** be done immediately following a reboot (e.g., KUDOS must be run first)

[1] https://mailarchive.ietf.org/arch/msg/core/GXsKO4wKdt3RTZnQZxOzRdIG9QI/
[2] https://mailarchive.ietf.org/arch/msg/core/ClwcSF0BUVxDas8BpgT0WY1yQrY/

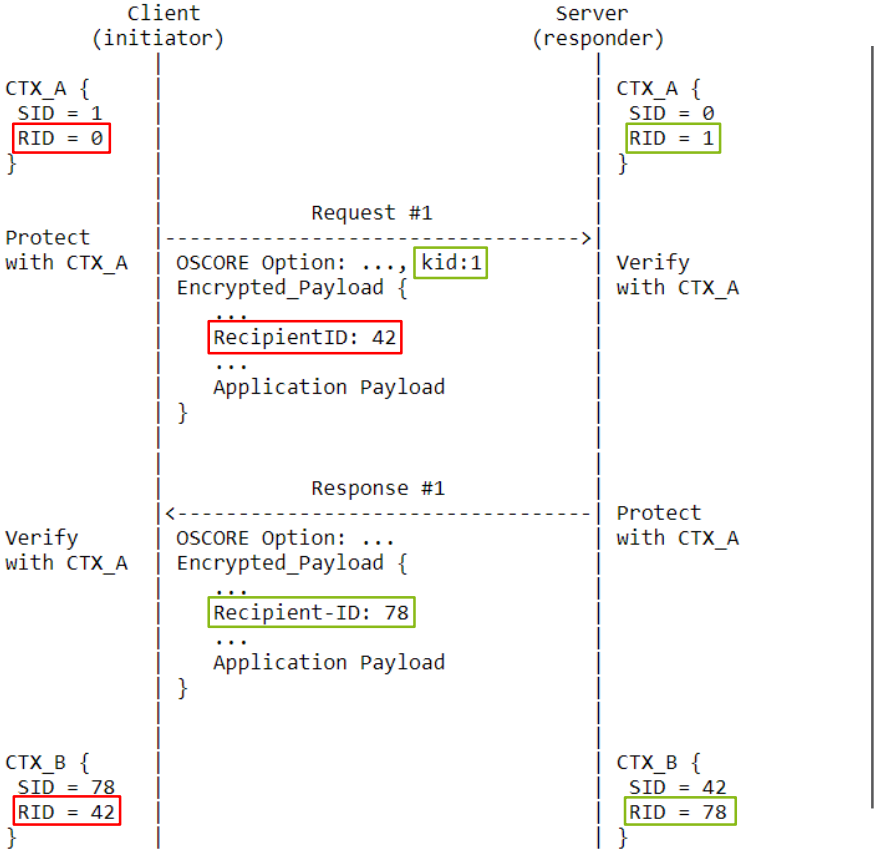
Renew Sender/Recipient IDs (2/3)

- Defined new CoAP Option to carry the desired Recipient ID
  - Proposed option number 24 (00011000)
  - The option value is the selected new Recipient ID of the message sender
  - The peer selects and offers a free Recipient ID for the used ID Context
  - Class E option for OSCORE processing

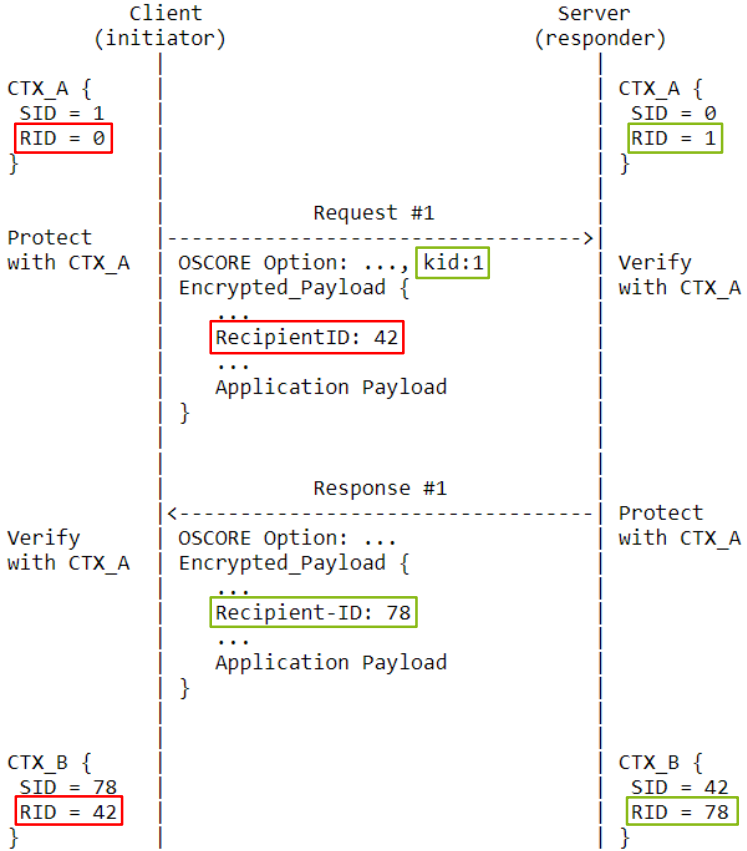
No.	C	U	N	R	Name	Format	Length	Default
TBD1					Recipient-ID	opaque	0-7	(none)

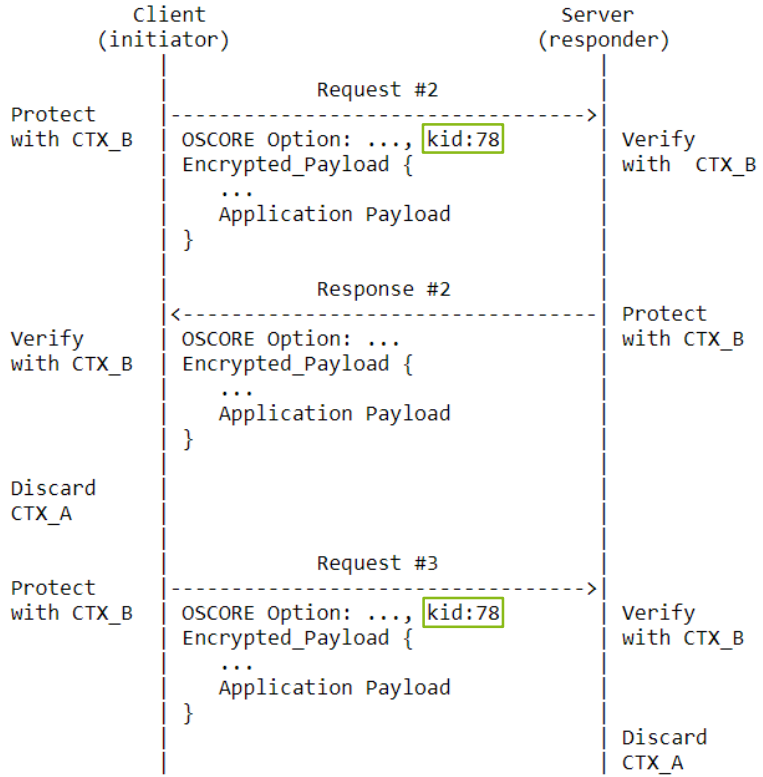
C=Critical, U=Unsafe, N=NoCacheKey, R=Repeatable

Renew Sender/Recipient IDs (3/3)



Renew Sender/Recipient IDs (3/3)





Objections? Alternatives?

Alternatives for signaling

- **Currently 3 bits are defined**
  - "ID Detail Flag", 'd'
    - Signals inclusion of ID Detail in OSCORE option
  - "No Forward Secrecy", 'p'
    - Signals the use of the no-FS mode
  - "Preserve Observations", 'b'
    - Signals preservation of CoAP Observations

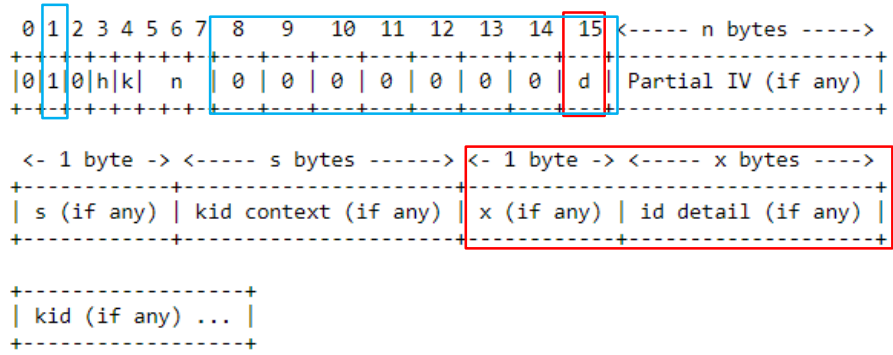


Figure 3: The OSCORE option value, including 'id detail'

- **Where to put bits 'b' & 'p', and integrity protect them?**
  - In the 1 byte 'x' following 'kid context', originally encoding the size of 'id detail'
  - Recommended size of nonces R1 & R2 (carried in 'id detail') is 8 bytes → Number of bits available in the 'x' byte is still sufficient to indicate the size of 'id detail'
  - The 'x' value is taken as input in the derivation of the new OSCORE Security Context

Comments?

Summary and next steps

- Latest updates
  - Suggested key update **without forward secrecy** (Appendix E)
  - Suggested method for **preserving observations** across key updates (Appendix C)
  - Suggested procedure to **update OSCORE Sender/Recipient IDs** (Appendix D)
  - Proposed alternative placement for signaling bits
  - Improvements in message processing
  - Optional storing optimization for ‘count_q’ (Appendix B)

- Address open points and issues – Feedback is welcome!
  - Improve the suggestions above, move to document body
  - Clarify which KUDOS messages can contain actionable payload

- Implementation
  - To build on existing implementation of OSCORE in Java Californium

Thank you!

Comments/questions?

https://github.com/core-wg/oscore-key-update

Key update overview

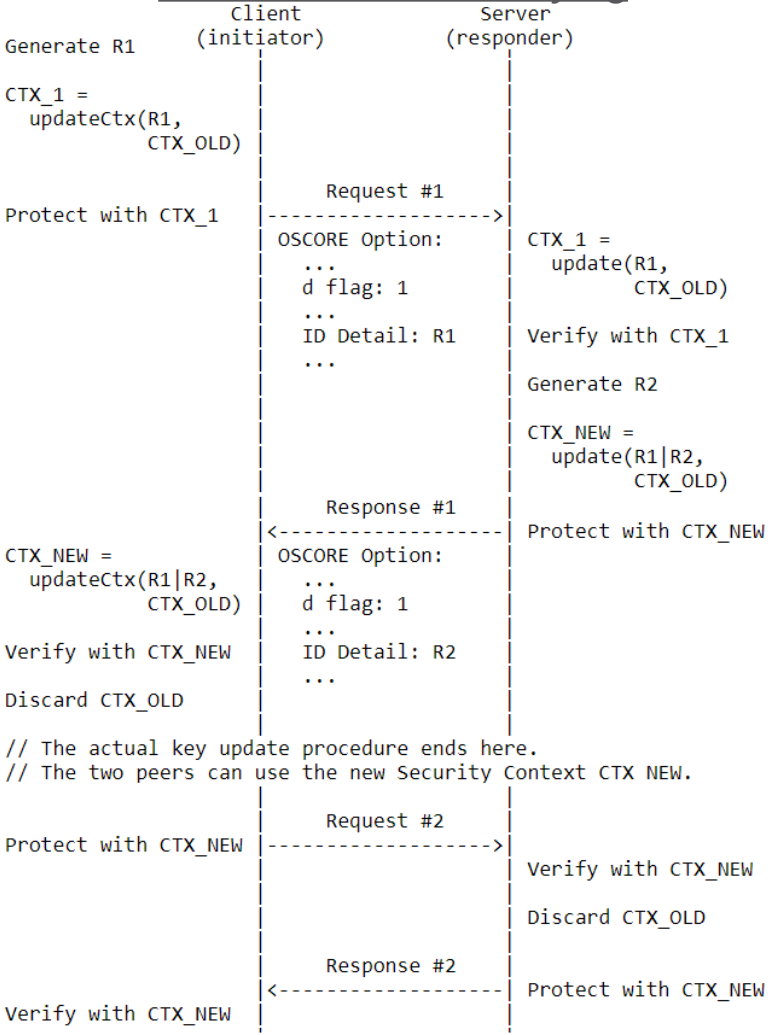
- Defined a new method for rekeying OSCORE
  - Key Update for OSCORE (KUDOS)
  - Client and server exchange nonces R1 and R2
  - *UpdateCtx()* function for deriving new OSCORE Security Context using the nonces

- Properties
  - Can be initiated by either the client or server
  - Completes in one round-trip (after that, the new Security Context can be used)
  - Only one intermediate Security Context is derived
  - The ID Context does not change
  - Robust and secure against peer rebooting
  - Compatible with prior key establishment using the EDHOC protocol

NEW - Mode with PFS (stateful) and without PFS (stateless)

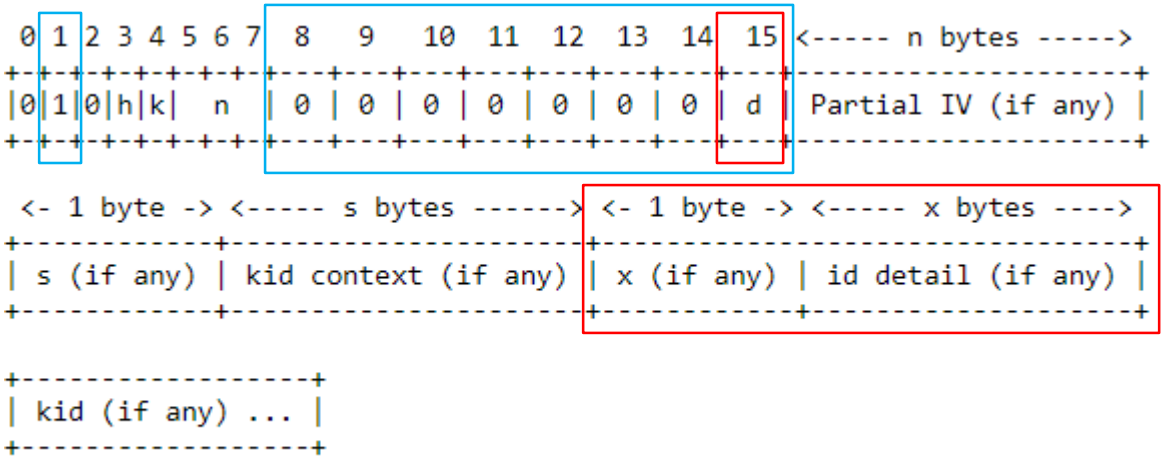
NEW - Possibility to update Recipient/Sender IDs

Client-initiated rekeying



OSCORE Option update

- OSCORE Option: defined the use of flag bit 1 to signal presence of flag bits 8-15
- Defined flag bit 15 -- 'd' -- to indicate:
  - This is a OSCORE key update message
  - "id detail" is specified (length + value); used to transport a nonce for the key update



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Key limits (1/3)

Confidentiality Advantage (CA): Probability of breaking confidentiality properties

Integrity Advantage (IA): Probability of breaking integrity properties

- Recap on AEAD limits
  - Discussed in **draft-irtf-cfrg-aead-limits-03**
  - Limits key use for encryption (q) and invalid decryptions (v)
  - This draft defines fixed values for ‘q’, ‘v’, and ‘l’ and from those calculate CA & IA probabilities
    - IA & CA probabilities must be acceptably low
- Now explicit size limit of protected data to be sent in a new OSCORE message
  - The probabilities are influenced by ‘l’, i.e., maximum message size in cipher blocks
  - Implementations should not exceed 'l', and it has to be easy to avoid doing so
  - New text: *the total size of the COSE plaintext, authentication Tag, and possible cipher padding for a message may not exceed the block size for the selected algorithm multiplied with 'l‘*
- New table (Figure 3) showing values of ‘l’ not just in cipher blocks but actual bytes

Key limits (2/3)

- Increased value of ‘l’ (message size in blocks) for algos except AES_128_CCM_8
  - Increasing ‘l’ from 2^8 to 2^10 should maintain secure CA and IA probabilities
  - draft-irtf-cfrg-aead-limits mentions aiming for CA & IA lower than to 2^-50
    - They have added a table in that document with calculated ‘q’ and ‘v’ values

q = 2^20, v = 2^20, and l = 2^10

Algorithm name	IA probability	CA probability
AEAD_AES_128_CCM	2^-64	2^-66
AEAD_AES_128_GCM	2^-97	2^-89
AEAD_AES_256_GCM	2^-97	2^-89
AEAD_CHACHA20_POLY1305	2^-73	-

- Intent is to increase 'q', 'v' and/or 'l' further. Should we?
  - Since we are well below 2^-50 for CA & IA currently

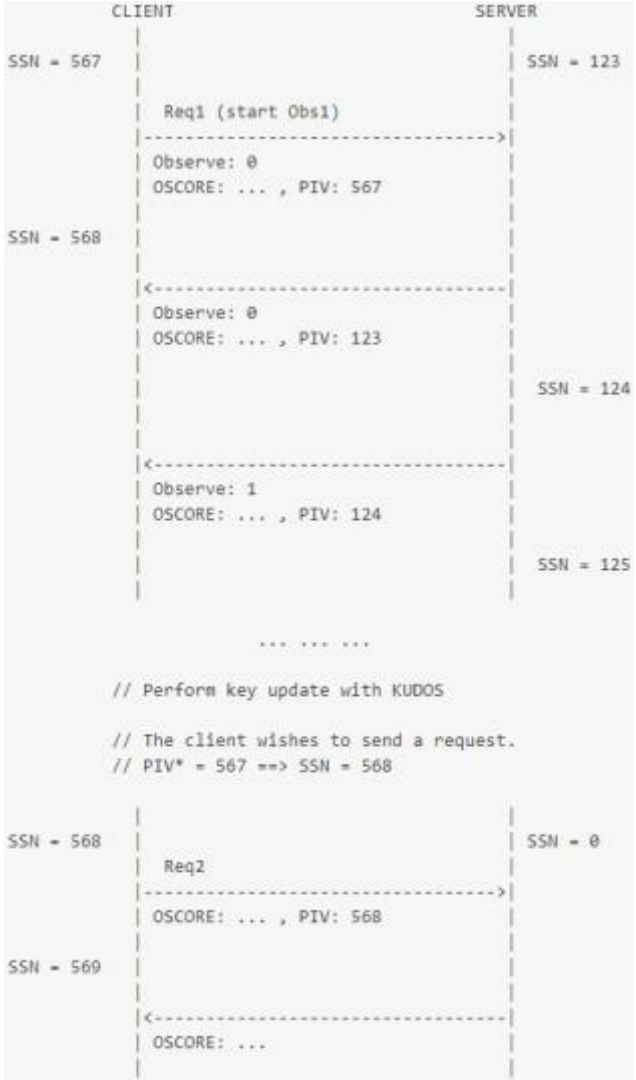
Key limits (3/3)

- Updated table of ‘q’, ‘v’ and ‘l’ for AES_128_CCM_8
  - Added new value for ‘v’, still leaving CA and IA less than 2^-50
  - Is it ideal to aim for CA & IA close to 2^-50 as defined in the CRFG document?

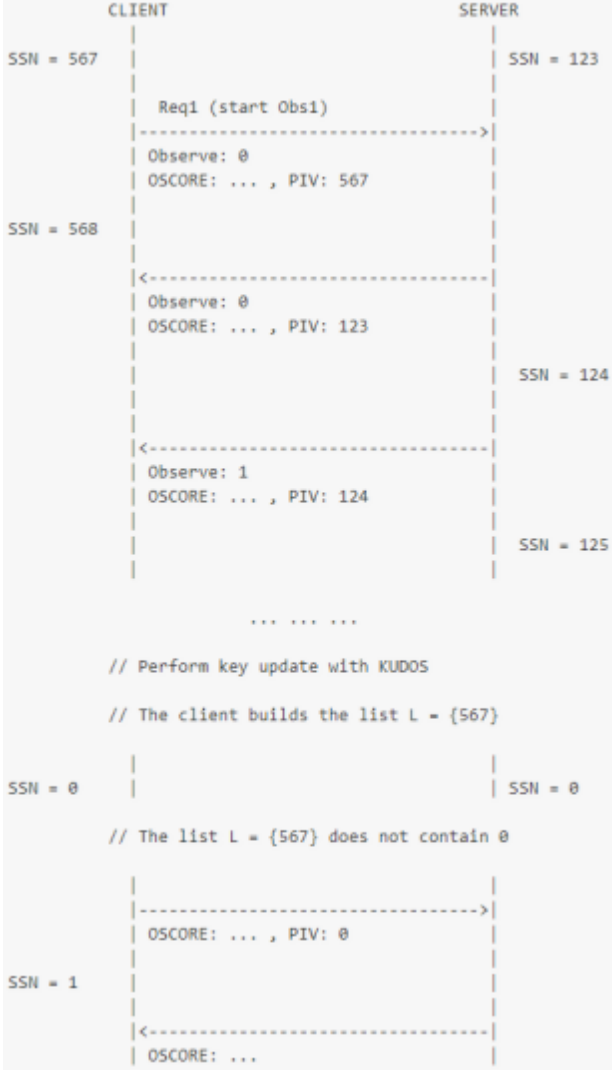
'q', 'v' and 'l'	IA probability	CA probability
q=2^20, v=2^20, l=2^8	2^-44	2^-70
q=2^15, v=2^20, l=2^8	2^-44	2^-80
q=2^10, v=2^20, l=2^8	2^-44	2^-90
q=2^20, v=2^15, l=2^8	2^-49	2^-70
q=2^15, v=2^15, l=2^8	2^-49	2^-80
q=2^10, v=2^15, l=2^8	2^-49	2^-90
q=2^20, v=2^14, l=2^8	2^-50	2^-70
q=2^15, v=2^14, l=2^8	2^-50	2^-80
q=2^10, v=2^14, l=2^8	2^-50	2^-90
q=2^20, v=2^10, l=2^8	2^-54	2^-70
q=2^15, v=2^10, l=2^8	2^-54	2^-80
q=2^10, v=2^10, l=2^8	2^-54	2^-90

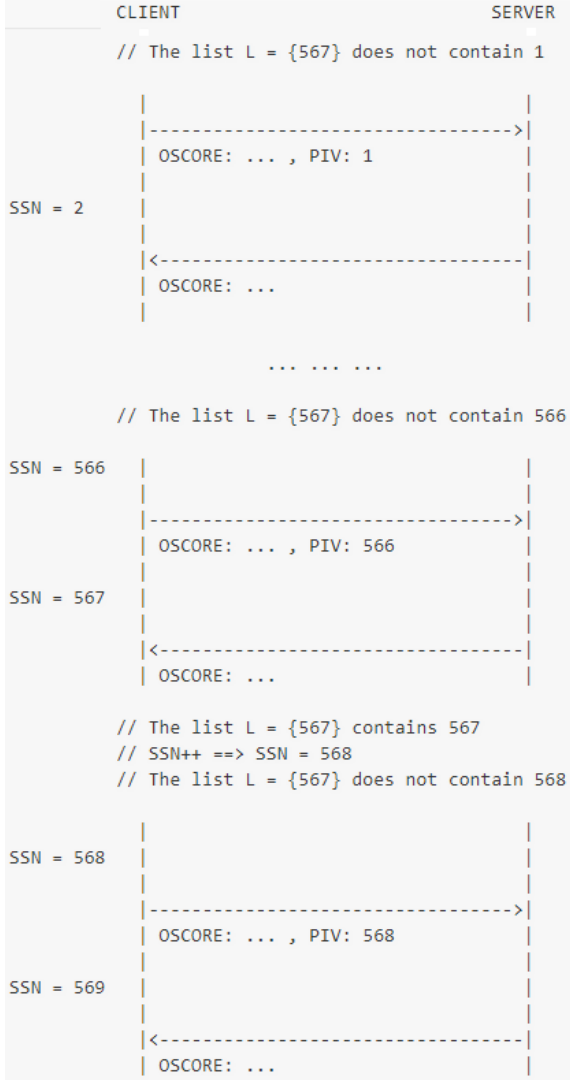
'q', 'v' and 'l'	IA probability	CA probability
q=2^20, v=2^20, l=2^6	2^-44	2^-74
q=2^15, v=2^20, l=2^6	2^-44	2^-84
q=2^10, v=2^20, l=2^6	2^-44	2^-94
q=2^20, v=2^15, l=2^6	2^-49	2^-74
q=2^15, v=2^15, l=2^6	2^-49	2^-84
q=2^10, v=2^15, l=2^6	2^-49	2^-94
q=2^20, v=2^14, l=2^6	2^-50	2^-74
q=2^15, v=2^14, l=2^6	2^-50	2^-84
q=2^10, v=2^14, l=2^6	2^-50	2^-94
q=2^20, v=2^10, l=2^6	2^-54	2^-74
q=2^15, v=2^10, l=2^6	2^-54	2^-84
q=2^10, v=2^10, l=2^6	2^-54	2^-94

“Long-Jumping”



“Skipping”


CLIENT
SERVER
SSN = 567
SSN = 123
Req1 (start Obs1)
Observe: 0
OSCORE: ... , PIV: 567
SSN = 568
Observe: 0
OSCORE: ... , PIV: 123
SSN = 124
Observe: 1
OSCORE: ... , PIV: 124
SSN = 125
... ...
// Perform key update with KUDOS
// The client builds the list L = {567}
SSN = 0
SSN = 0
// The list L = {567} does not contain 0
OSCORE: ... , PIV: 0
SSN = 1
OSCORE: ...


CLIENT
SERVER
// The list L = {567} does not contain 1
OSCORE: ... , PIV: 1
SSN = 2
OSCORE: ...
... ...
// The list L = {567} does not contain 566
SSN = 566
OSCORE: ... , PIV: 566
SSN = 567
OSCORE: ...
// The list L = {567} contains 567
// SSN++ ==> SSN = 568
// The list L = {567} does not contain 568
SSN = 568
OSCORE: ... , PIV: 568
SSN = 569
OSCORE: ...