
The Internet Society Survey on Policy Issues in Asia-Pacific

Final Report

30 MAY 2014

Disclaimer: The opinions, findings and conclusions in this report reflect the views of the survey participants and not necessarily those of the Internet Society.



Introduction

Developed by the Asia-Pacific (APAC) Regional Bureau, the Internet Society Survey on Policy Issues in Asia-Pacific is a cross-sectional study of the attitudes of Internet Society (ISOC) members toward topical Internet policy concerns. Specifically, it seeks to gain insights on the importance of emerging and existing policy challenges as ranked by Internet users and stakeholders in the region.

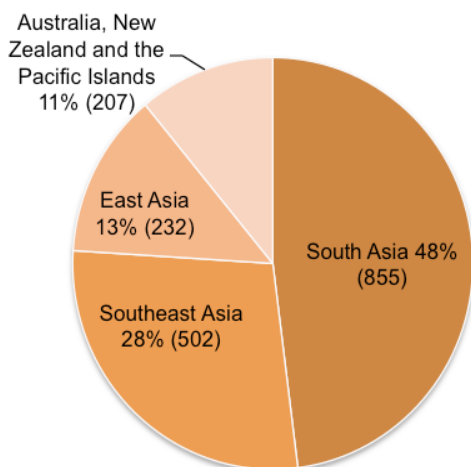
This report will provide an overview of the survey's findings, which are intended to help the ISOC APAC Bureau better understand current perspectives on Internet policy in Asia-Pacific.

Background and methodology

The survey was conducted online using the Survey Monkey platform, and ran from January 20 to February 20, 2014. Unique individual invitations were sent via e-mail to 17,157 Internet Society members in Asia-Pacific as listed in ISOC's membership database. As members and chapters are unevenly scattered across the region, this survey should not be construed as representative of the views of the general population of any particular geographic locality or of all countries in Asia-Pacific.

The survey was administered in English and divided into five sections. The first consisted of questions that aimed to determine the demographic of the sample population; the second gathered information on respondents' immediate policy environment; the third section asked respondents to rank regional policy issues to help the Bureau identify priority areas for stakeholder engagement; the fourth solicited perceptions on the APAC Bureau's regional policy activities; and the fifth comprised of open questions that aimed to solicit important and emerging policy concerns that have not been covered by the previous sections.

Survey participants by sub-region



The survey elicited responses from 1,800 participants, or 10.49% of the total sample population, and had a 99.8% completion rate. Close to half (48%) of the total number of respondents self-identified as residing in or originating from South Asia; 28% were from or in Southeast Asia, and the remaining 24% came from East Asia and the Pacific region.

Almost two-thirds of respondents (69%) were in the 25 to 45 age range. Many identified as belonging to either the technical community, the private sector or academia. Together, these three sectors comprised more than three-fourths (80%) of the total number of survey participants. The remaining 20% identified themselves most closely with government or civil society.

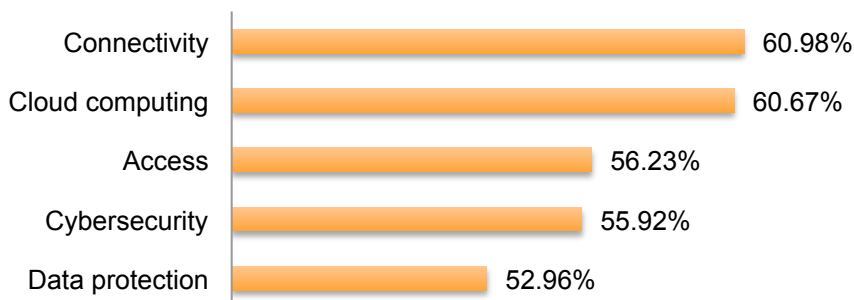
The majority of respondents are active Internet users, with 91% accessing the Internet at least once a day for various purposes—these activities range from information inquiries and email correspondence, to social networking, shopping and multimedia entertainment. An overwhelming majority (94%) likewise believed that they had ‘average’ or ‘above-average’ awareness of Internet-related issues in Asia-Pacific.

Key Findings

Major areas of concern

Asked to identify policy areas that have captured their interest in the past year, more than half of respondents reported that they have been closely monitoring news around connectivity¹ (61%), cloud computing (61%), access (56%), cybersecurity (56%) and data protection (53%).

The 5 most monitored Internet policy areas



¹ The area of connectivity, for the purposes of this survey, refers to policies that facilitate the provision and development of infrastructural and technical capacity to enable groups and individuals to easily access information, services and applications on the Internet

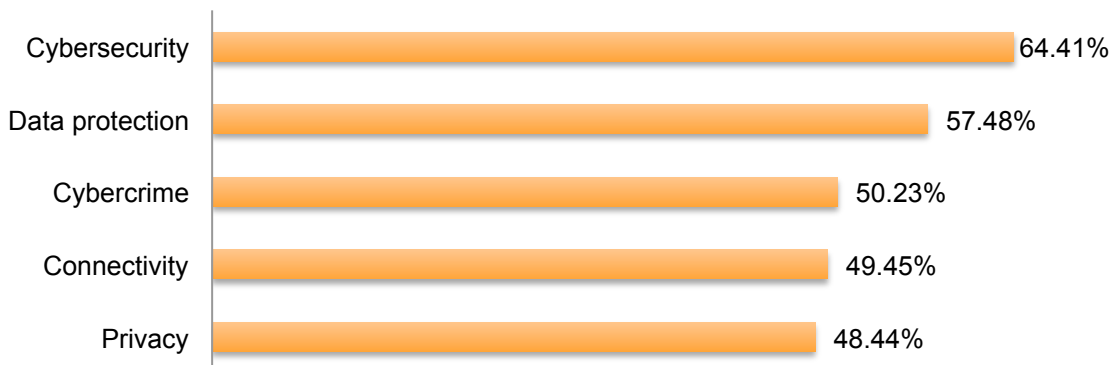
Close to half were tracking regional developments around privacy (47%) and cybercrime (44%), while more than a third were following news around freedom of expression (38%), censorship (36%), the Internet of Things (37%), standards (35%), and government and commercial surveillance (33%). The least-monitored topic was over-the-top (OTT) services, which only 8.5% of respondents were keeping tabs on in the past year.

Other Internet policy areas monitored by respondents

Theme	%	Theme	%
E-commerce	50%	Filtering	23%
Privacy	47%	Online behaviour & code of conduct	22%
Cybercrime	44%	Local content creation	21%
Freedom of expression	38%	Critical Internet Resources	20%
Internet of Things	37%	Law enforcement	19%
Censorship	36%	Net neutrality	19%
Standards	35%	Interoperability	17%
Gov't & commercial surveillance	33%	Converging media & regulation	15%
Intellectual property	30%	Cross-border & multilateral treaties	14%
Internet economy	29%	Internet fragmentation	14%
Internet service transparency	27%	Over-the-top services	8%

These findings suggest that access and connectivity issues have been high on the radar of ISOC members in Asia-Pacific. Just as important however is the close attention being paid to concerns that touch upon online security, which have taken precedence over other regionally topical policy issues like local content development and cross-border agreements on cyberspace. Indeed, when asked to choose among different Internet policy areas, cybersecurity (64%), data protection (58%), and cybercrime (50%) emerged as the top three concerns that respondents felt should be made a priority for policy engagement.

Top 5 priority areas for policy engagement



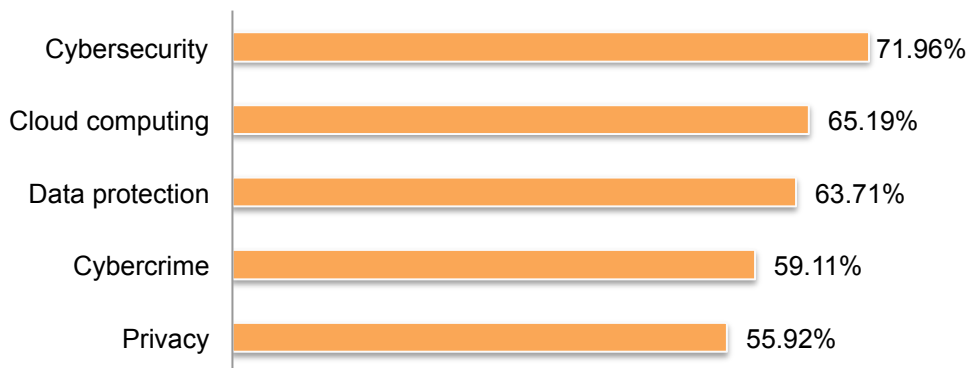
Broken down by sector, survey results reveal different priorities among stakeholder groups. Cloud computing is the area most closely monitored by those identifying with the private sector and the technical community; freedom of expression by civil society; and connectivity by respondents in academia and government.

Respondents across all four sectors were found to be least occupied with over-the-top services, the converging media and regulatory environment, Internet fragmentation and interoperability—themes that pertain to the maintenance of an open and global Internet—as targets for policy engagement. Issues related to content and service provision, such as network neutrality, censorship, filtering and intellectual property also emerged as secondary areas of concern for respondents.

“Respondents ranked cybersecurity as the most significant issue for policy engagement”

Cybersecurity likewise came on top as the most significant policy issue in the near future: Seventy-two percent of respondents think that security-related concerns will grow in importance over the next three years. More than half also viewed cloud computing (65%), data protection (64%), cybercrime (59%), privacy (56%), connectivity (55%), and e-commerce (52%) as issues that will be increasingly prominent in the regional policy landscape by 2015.

Top 5 issues of increasing importance



Specific areas of concern

Access

Answers to the survey’s open questions suggest that respondents were concerned specifically with poor Internet penetration in remote and rural areas, especially in developing countries. Where access is available, respondents expressed concern over the lack of reliable connections despite high costs of access.

These suggest a demand for policies that tackle inclusion, quality of service, affordability and the persisting digital divide in the region. A number of respondents likewise suggested advocating free or low cost Internet access in public spaces, as well as in educational and government institutions.

While they did not stand out as priorities for members who participated in the survey, content development, filtering and censorship were often linked with access-related issues. Of particular concern was the translation to and availability of online content and services in multiple languages, which they viewed as key to increased Internet adoption among local communities. In a number of ways, respondents also stressed the need for more user-friendly, open source platforms that would enable the development of social applications and free educational courses for people in the region.

It is important to note that survey participants were also found to be similarly concerned with the lack of content controls, specifically those that aim to curb the proliferation of sexually explicit and violent images, as well as online advertisements that may be culturally offensive.

Cybersecurity

Cybersecurity and data protection were the top emerging issues that respondents think should be on the APAC Bureau's radar this year. Expecting heightened public backlash as a result of the NSA-related surveillance in Asia-Pacific, respondents expressed their desire for more stringent policies to protect citizens and consumers from pervasive monitoring, online threats and the negligent practices of content and service providers. Indonesia was cited as an example of a country whose weak cyberlaw enforcement has caused it to be a major source of spam and botnets.

Intermediaries are seen to have a role in detecting and mitigating cybercrime such as online fraud, illegal prostitution and data breaches. Respondents found privacy laws particularly crucial amidst the increased take-up of Internet-enabled mobile and wearable devices, cloud computing and the proliferation of big data, especially those that are in the hands of Internet giants like popular social media firms.

Indeed several respondents expressed unease with the insecurity of social media sites, free email services, e-commerce transactions and of Internet traffic itself, and similarly called for provisions to penalise Internet companies for unscrupulous data mining, unrestrained data sharing and for failing to secure users' online identities and personal information.

User-awareness

Moving on from computer literacy, respondents stressed the need for policies that promulgate safeguards that enable users to protect themselves against surveillance, and what was deemed as the careless sharing of personal information on social networking sites. Some respondents suggested incorporating digital literacy modules into the school curriculum, with an emphasis on guiding minors and young users on proper online conduct. Indeed, 'netiquette' was viewed as a key factor in curbing extremism and other dangerous behaviour such as cyberbullying, and thus in creating a safe online environment, particularly for children.

Infrastructure and services

Consumer protection was similarly raised in the context of oligopolies and the lack of competition among telecommunications firms, content providers, and Internet service providers (ISPs) in areas like the Pacific Islands. Enterprise monopoly, according to many respondents, can be lessened through the application of anti-trust laws, quality of service mandates, and through state-initiated infrastructure deployment, as exemplified by the rollout of national broadband networks. States in the region were also seen to have a role

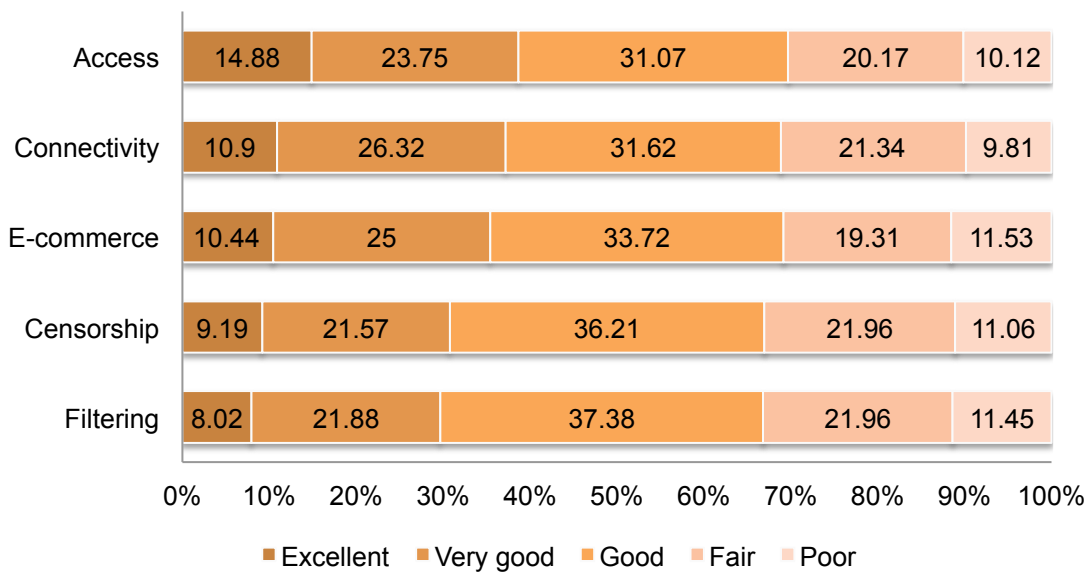
in fostering the establishment of hardware manufacturers and software developers to rival Western, mostly US-based ones. Respondents viewed the availability of local technical capacity as crucial to ensuring network resilience amidst natural disasters and emergency situations, and to supporting the growth of the Internet and of users in Asia-Pacific in the coming decade.

Stakeholder interest in policy issues

Overall, the majority of survey respondents think that Internet-related policy issues receive a good amount of attention from governments, end-users and the private sector in Asia-Pacific.

On a scale of one to five, with 1 being excellent and 5 being poor, over or close to a third of respondents felt that Internet-related policy concerns receive a good amount of attention from the government, the private sector and end-users in their country. Across all Internet policy themes enumerated in the survey, more than 30% of respondents likewise felt that these receive 'very good' or 'excellent' attention from all three stakeholder groups.

Top 5 areas of concern for governments, as rated by respondents



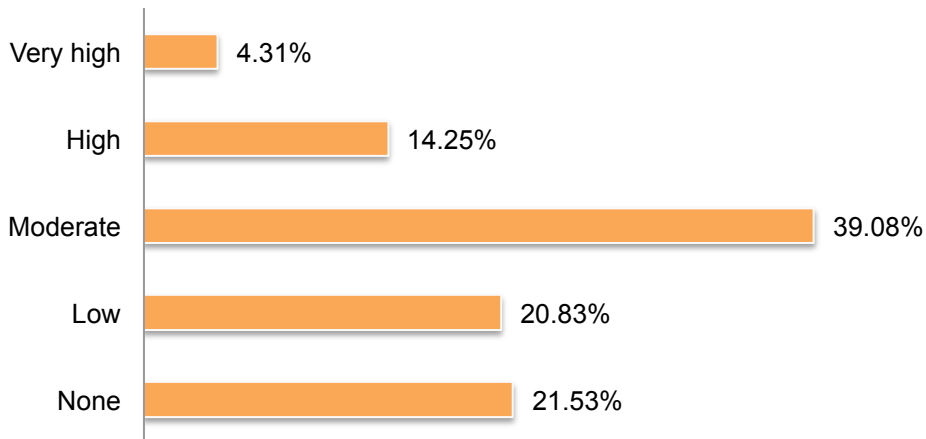
Access and connectivity consistently ranked among the top three areas of interest for government, end-users and the private sector. Additionally, government and the private sector were viewed as paying close attention to e-commerce; and end-users to freedom of expression. Areas that ranked as the most neglected by stakeholders were Internet service transparency, Internet fragmentation, network neutrality, cross-border agreements and the converging media and regulatory landscape.

Policy engagement in APAC

Respondents were divided on the extent to which policymakers in Asia-Pacific attend to Internet-related issues. Opinions were split almost evenly between those who believe that these concerns receive an 'average' amount of attention (36%) to those who felt that they receive 'above average' to 'excellent' (32%), and 'below average' to 'poor' (32%) attention from policymakers in their country. Furthermore, less than half of respondents (47%) believed that their government is receptive to the concept of an 'open Internet,' with the rest believing that their government is either ambivalent or unreceptive to the idea.

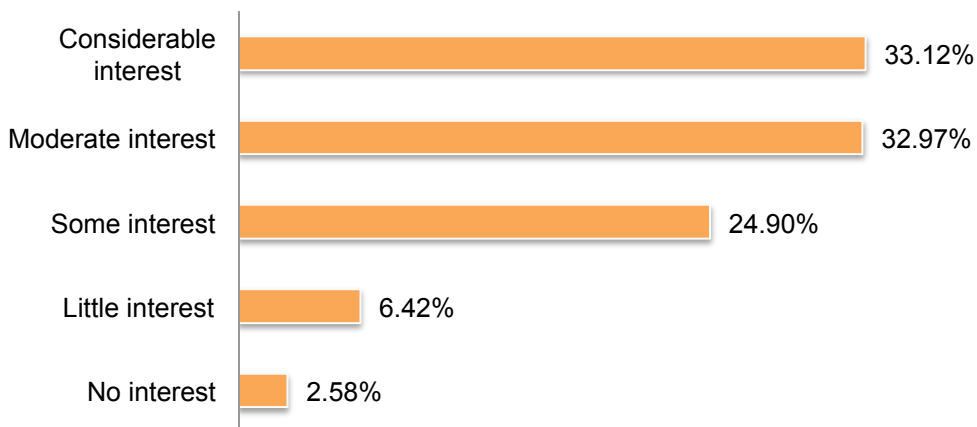
When asked to rank their awareness of the APAC Bureau's policy engagement activities, more than half (58%) indicated that they have at least moderate knowledge of its initiatives in the region. The remaining 42% professed to be either vaguely aware or completely unfamiliar with the Bureau's policy engagements.

Chapters' and members' awareness of the APAC Bureau's policy related activities



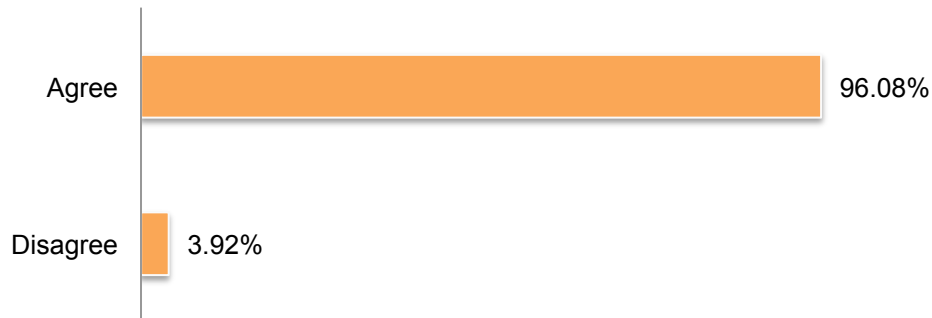
Encouragingly, the vast majority of respondents (81%) expressed interest in actively supporting the APAC Bureau's policy activities, with only 2.6% of respondents having no interest at all in helping the Bureau reach its policy goals.

Chapters' and members' interest in supporting APAC Bureau policy initiatives



Ninety-six percent of survey participants likewise agreed that the APAC Bureau should engage more with policymakers in the region.

Chapters' and members' view on whether the APAC Bureau should intensify its policy engagements in Asia-Pacific



When probed further, a large proportion of respondents concurred that the APAC Bureau should deepen its engagement with all stakeholder groups to increase its impact on regional Internet policy. Members in APAC are keen to have the Bureau engage more with national governments (80%), the private sector (73%), technical expert groups (71%) and intergovernmental organisations (69%). More than half (60%) also thought that the Bureau should reach out more to civil society groups.

When asked to name other sectors for policy engagement, 2% of respondents likewise expressed the need to reach out to academic and research groups, while 1% felt that end-users should also be a target for policy engagement initiatives.

In keeping with the policy priorities they identified, respondents feel that regional cybersecurity affairs, as well as state measures to rein in Internet freedom, are likely to impact on the APAC Bureau's policy activities for 2014-2015. These pertain to steps to legalise mass and warrantless surveillance; politically motivated censorship under the guise of new licensing laws; increased crackdown on intellectual property violators; and intergovernmental treaties concerning data use and surveillance.

The ASEAN integration, pegged to begin in 2015, as well as the Trans-Pacific Partnership, are ongoing developments that respondents felt will also influence the Bureau's policy priorities. Moreover, several respondents mentioned the recent parliamentary elections in India, as well as the events and meetings leading up to the ITU Plenipotentiary Conference in Busan, South Korea later this year as potential game-changers. In the Pacific region, respondents think that the rollout of the national broadband network in Australia, the deployment of new undersea cables to Pacific island countries, and the liberalisation of the telecommunications industry in the Federated States of Micronesia may also prompt targeted shifts in the Bureau's policy initiatives.

Conclusion

The results of the survey suggest that policy issues around connectivity and cybersecurity are top of mind for ISOC members in Asia-Pacific. These include sub-themes like access, privacy, data protection, cloud computing and cybercrime. Cybersecurity was also identified as an emerging concern across the spectrum of Internet stakeholders, and one that respondents felt should be a priority area for policy engagement.

While a minority of respondents remains unfamiliar with the APAC Bureau's policy initiatives, an overwhelming majority welcomed the idea of actively supporting its activities, and indeed believed that the Bureau should deepen its engagements with policymakers to increase its impact in Asia-Pacific.

Please send all comments and feedback to:

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