



# APNIC Survey 2016

## Executive Council Response

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### Introduction

Member-driven organizations stay relevant by delivering high quality services efficiently and responding to Members. To this end, the APNIC Executive Council (EC) commissions the APNIC Survey every two years, to monitor community opinion and expectations of APNIC services and performance.

The survey gathers information from Members and stakeholders about their needs, challenges and priorities in relation to the provision of APNIC services and programs. Results are used to plan and prioritise APNIC's activities for the next two years to ensure they best meet the changing demands of its Members and stakeholders.

The APNIC Survey is a vital planning tool and an essential activity of the Secretariat. The EC is committed to providing the Secretariat with the oversight and guidance necessary to make APNIC the best possible organisation it can be.

### Increased rigour

The EC aims for continuous improvement of the survey process and this year we commissioned a new organisation, 'Survey Matters', to perform the survey. Survey Matters have extensive experience running surveys for organisations with similar mandates. Their brief was to conduct the 2016 survey, while reviewing the processes used and suggesting improvements where possible.

Survey Matters recommended some changes, in line with recognized best practice in research, to the survey process, and these were accepted by the EC. These included:

- Recruitment of a randomized selection of APNIC Members as participants for the focus groups
- Use of audio recordings of the focus groups to increase accuracy of reporting
- Trial of an online focus group
- Design of the online survey questionnaire by Survey Matters with review by the EC and APNIC Secretariat
- Support from EC members for the focus group activity but no direct involvement in the sessions

### Method

An independent facilitator conducted focus groups with APNIC Members and held individual interviews with key stakeholders. Sixteen focus groups were held in 13 locations across the region from 8 April-11 May 2016. The focus group and individual interview report informed the online survey questionnaire that was developed covering seven topics:

- Participation and Service Satisfaction

- Respondents' Challenges
- IPv6 Readiness
- Training
- Policy Development
- Resource Allocation, External Relations and New Services
- Member Engagement

Questions were tailored for the two primary respondent groups: APNIC Members/Account Holders, and Members of an NIR/Other stakeholders. The online survey was conducted between 5th July and 5th August 2016. [Survey results](#) were presented at APNIC 42 on Monday, 3 October 2016.

At all times in this extensive process, including interview and focus groups, confidentiality and anonymity of the responses was maintained.

We are pleased to see a 13% increase in the number of responses from 1,039 in 2014 to 1,175 (after data cleansing) in 2016. Most responses were from APNIC Account Holders and Members (68%). Credit is due to the Secretariat who played an important role in promoting the survey, including making available translated copies of the survey questions for the first time. Amid an environment of information overload and time constraints, it's challenging to increase response rates to online surveys, and the EC is pleased and encouraged with the level of responses.

## EC Response

The EC has closely reviewed the 2016 APNIC Survey report. Our response is structured around the topics of the survey report.

### Services and Participation

The EC expects high standards for service delivery to support APNIC's community and reputation. We are pleased to see that overall satisfaction with delivery, quality and value of APNIC services was very high, with over 90% of Members rating the core services positively.

With a few exceptions, the mean scores for satisfaction in 2016 compare favourably with those for 2014. We are satisfied with these results while noting that high expectations are difficult to sustain and require continuous improvement of service quality by the Secretariat. The APNIC website and core Internet resource management services continue to be the most used APNIC services.

### Challenges

Security issues are now the number one challenge reported by Members, followed by transitioning to IPv6. Survey results show that DDoS, phishing, spam, routing and network security incidents pose an increasing threat and are ranked the top challenge faced by 40% of Members. Many believe APNIC has a role to play in dealing with phishing and spam (50%) and DDoS attacks (53%). Overall, Members felt that APNIC could best help them by offering more information, knowledge sharing and training.

The EC is happy that a majority of Members believe that the Secretariat and EC understand the challenges they face. We feel that APNIC is obliged to support Members with increased information, knowledge sharing and training as requested. However, while network security training and promotion of security industry best practice is certainly part of APNIC's remit, not all aspects of security are. For example – APNIC's role in preventing phishing and spam is extremely limited.

The 'secure Internet' part of APNIC's vision statement may imply APNIC's role in security is larger than it is to some in the community. While the EC supports an increasing investment in security outreach and support, such as promoting RPKI, sharing routing security best practices, and ensuring registry data accuracy, we also believe it is in the Secretariat's interests to clearly communicate the limits of APNIC's role in relation to security.

## IPv6 Readiness

The EC sees that transition to IPv6 is still one of the biggest challenges facing Members, with clear differences in IPv6 readiness around the region. Reasons such as lack of demand, legacy systems, and 'no clear technical or business advantages' were commonly cited as barriers. Lack of training and skill shortages were of greater concern in LDEs.

The EC is aware that the Secretariat has promoted the transition to IPv6 for a long time through a broad range of activities. The EC notes that Members believe the most important ways APNIC can help is by providing *more* (and translated) information (for example - case studies and best practices) and advanced training on IPv6. Specific information and outreach for particular stakeholder groups, including management and decision makers (39%) is also important.

The EC requests the Secretariat continue to develop and improve IPv6 support materials. It is provided on the website, as presentation materials and through other promotional activities. We agree that outreach towards key decision makers to further promote IPv6 deployment in the region needs to be prioritized.

## Training

Training continues to be an important APNIC service, rated highly. More training, and advanced training, is a consistent theme in response to how APNIC can help. APNIC training services are used much more by LDEs (44%) than developed economies (9%), reflecting their need for assistance with skill development and capacity building.

Affordability and accessibility of training was an issue for LDEs; 92% believe APNIC should subsidize training, while 72% overall believe APNIC should seek additional external funding and resources for training activities. The APNIC EC believes the APNIC Foundation will help support the expansion of training and the technical assistance program to meet these demands.

We also note that the 2015 Training Needs Survey suggested the development of certified, self-paced online learning. While not replacing face-to-face training delivery, the EC urges the Secretariat to continue this development work in order to provide greater accessibility to potential trainees.

The EC feels that the Secretariat should continue to develop course materials relevant to APNIC's core business as the regional Internet registry, such as; Internet resource management, Internet Routing Registry, DNS/DNSSEC, IPv6, and Network operations and security.

## Policy Development

Participation in the policy development process and the SIGs has traditionally been lower than the membership engagement with the core technical services, such as resource allocation and registration. Survey results show participation and awareness by respondents was very low from

developed economies (3%) and Oceania (2%), while only marginally higher in LDEs (5%). Not knowing enough about the process was suggested as the main barrier.

The EC feels that increased Secretariat and community effort is required to improve engagement in the APNIC policy process through improvement to the PDP, raising awareness, bridging language and cultural barriers and encouraging interesting discussions on Internet number management. The EC considers this an important focus area. The credibility and trust of the RIR system is reliant on active, bottom up participation by Members and stakeholders to make policies that meet the needs of the community.

## **Resource Allocation**

'Serving Members' continues to be the priority for allocation of APNIC resources, with the order of priorities for budget allocation unchanged from 2014. Serving Members (33%) is the first priority for allocation of APNIC resources, followed by 'Regional Development and Outreach' (27%) and lastly 'Global Cooperation' (20%). These figures correspond closely to the existing APNIC budget and appear to support similar allocations in future.

Support was strong in LDEs (77%) and South Asia (81%) for some services to be delivered locally. Suggestions included training, promoting awareness and knowledge of APNIC, facilitating information sharing and local community building.

The EC believes that APNIC should investigate how to respond to this need in an efficient and effective manner.

## **External relations**

Based on feedback in the 2014 survey, APNIC enhanced its co-operation and support to technical Internet organizations (IETF, ICANN and ISOC). In 2016, outreach and support to NOGs was rated the most important focus, followed by continued liaison with global Internet technical organizations and outreach to Asia Pacific technical organizations. The EC urges the Secretariat to continue its outreach program in line with this year's priority list.

## **New Services**

There was a sizable level of interest (43%) for APNIC to collect data regarding regional trends benchmarking, and also interest (37%) in further discussion about such a service. Confidentiality and privacy of such data was of concern to those who wanted more information. The EC suggests further exploration of this possibility through community discussions, and urges the Secretariat to ensure that data protection and privacy remain top priority.

## **Member Engagement**

APNIC membership conveys credibility and enhances reputation, particularly in LDEs and in South Asia. Forty-three percent (43%) of Members speak highly of APNIC. Slightly more Members (48%) were neutral when speaking about APNIC and only 10% were critical.

The EC understands that these 'net promoter' scores can be important measures of community support for APNIC, though they are hard to read in isolation. We believe it will be useful to monitor changes of these ratings in future survey results for correlation with service, satisfaction and value ratings.

## Concluding thoughts

In concluding our review of the 2016 Survey report, the EC has three comments:

- The EC is delighted to see that the survey report confirms that APNIC is a respected, trusted and valued organization. While APNIC strives for excellence, sustaining such high ratings will be a challenge for the Secretariat. Your ongoing feedback is absolutely essential to ensure the Secretariat has every chance to do this.
- Helping Members by facilitating collaboration, information exchange and knowledge sharing is a key theme throughout the survey. The EC believes there is an opportunity for APNIC to respond to this demand by expanding its public statistics services to strengthen its role as the trusted and respected 'Network Information Centre' in the Asia Pacific region.
- Survey results highlighted clear differences between the needs of economies and those of sub-regions, particularly with respect to the need for training and services. The EC believes APNIC should review where resources could be more effectively allocated to target the delivery of its services, information and activities across different economies and sub-regions. We believe the APNIC Foundation can play a critical role in finding and allocating external resources to those in the most need.

## Next steps

The EC thanks all those who gave their time to participate in this year's focus groups, individual interviews and online survey. The 2016 survey report provides APNIC with a wealth of information from Members and stakeholders. The APNIC EC and the Secretariat are fully committed to using the results to improve its services and programs for Members and stakeholders. The EC affirms it will provide responsible fiscal and budgetary oversight with the use of Member funds in the interests of serving the Members.

The EC requests the Secretariat keep Members and stakeholders well informed of the changes to come. This includes updating the [Survey Response Tracker](#) and providing information on the progress of planned initiatives and activities.

We welcome feedback or questions about this commentary. You can reach the EC by email at [exec-sec@apnic.net](mailto:exec-sec@apnic.net) or through the EC feedback form on MyAPNIC. We look forward to hearing from you.

Thank you for your support.



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Chair,  
For and on behalf of the APNIC Executive Council