



APNIC Survey 2018

Executive Council Response

Introduction

The APNIC Survey is commissioned every two years by the Executive Council (EC), as part of APNIC's regular planning process. It gathers feedback from Members and the community about APNIC's performance, priorities and future activities.

The survey is conducted independently by Survey Matters (Australia), who guarantee the anonymity of respondents and the impartiality of their report. The 2018 survey was the 10th since the first in 1999, and the largest in terms of response.

The details of all APNIC Surveys can be found here:

<http://www.apnic.net/survey>

Methodology

The 2018 survey followed a similar methodology to the last (2016), starting with a series of face-to-face 'focus group' discussions to guide development of the online survey. These were conducted by Survey Matters in fifteen economies, along with eleven face-face individual interviews, and five online focus groups targeting another five economies.

The online survey form was then developed in consultation with APNIC staff and EC, with questions under the headings of Participation and satisfaction, Network operations, Network security, IPv4 scarcity, IPv6 readiness, Training, APNIC services, and APNIC governance.

The online survey was open from 5 June to 2 July 2018 and received 1,241 valid responses, from developed economies (19%), developing economies (54%) and least developed countries (24%). Sub-regional representation was well-balanced, from South Asia (29%), South-East Asia (21%), East Asia (27%), Oceania (20%), and from outside the APNIC region (3%). APNIC Members provided 73% of responses, while other stakeholders provided 27%.

The final report of the 2018 survey was prepared by Survey Matters, [published](#) on the APNIC website on 11 September 2018, and presented to the community at APNIC 46 (in Noumea) on 13 September 2018.

Executive Council Response

The APNIC EC finds that the overall results of the 2018 APNIC Survey are very positive. Compared with 2016, Member satisfaction either increased or remained strong on all measures of APNIC performance and value (Q6, Q8).

When asked how they spoke about APNIC to others (Q38), 56% of respondents said they spoke highly (2016: 41%), while 6% said they spoke critically of APNIC (2016: 12%). Ninety-three per cent agreed that APNIC was respected in the community (Q35).

There were various free text suggestions from Members relating to service delivery, and the EC asks that the Secretariat examine these comments carefully for improvement opportunities, along with the report of the 2018 focus groups.

Network Security

Network security was identified as the biggest challenge for Members in 2018 (Q9). More specifically, Members asked APNIC to assist in training and knowledge sharing, to collaborate with partners in the Internet technical community, and to engage with governments and CERTs on security matters (Q11).

The EC suggests in response that the Secretariat should continue to build its security capabilities, and prioritise work on relevant security issues including whois accuracy, RPKI and routing security, training and technical assistance, and information sharing.

Transition from IPv4 to IPv6

Dealing with the scarcity of IPv4 addresses, and the transition to IPv6 were the two highest ranked challenges for Members (Q9). Deployment of IPv6 is planned or underway by 55% of respondents, an increase from 50% in 2016 (Q15), while 30% still have no plan in place, a decrease from 35% in 2016. At least 50% of respondents supported APNIC's role in promoting IPv6 deployment through training, sharing best practice, and building awareness (Q18); and these activities should clearly continue.

Not all organizations are ready to deploy IPv6, therefore even while promoting IPv6 deployment, APNIC must continue to support access to IPv4 address space. In considering how APNIC can do so (Q14), Members gave highest priority to reclamation of unused IPv4 address space (57%), and the EC asks the Secretariat to identify and implement viable options for this during 2019.

Training

The importance of training was clear in the 2018 survey. Hiring and keeping skilled employees was the equal third largest challenge for Members (Q9), and training was the highest-ranked activity in support of both improved security (Q11) and adoption of IPv6 (Q18).

There is a clear requirement for a variety of training delivery methods (Q20) including both online options and face-to-face training. The Secretariat should continue work on the online learning platform, APNIC Academy, and on development of community trainers to assist in on-the-ground training delivery.

The most popular training topics included IPv6, network security, routing, and new networking technologies, including NFV/SDN (Q21). These priorities are recognised, and should be refined by ongoing feedback received from the community.

Information Services

The survey showed there is ongoing support for APNIC as a 'network information centre' on topics of security, network infrastructure, critical technologies, and number resource distribution (Q28). The EC notes that APNIC Conference sessions have been held and trial information products developed by the Secretariat; and suggests to continue this activity at its current level.

APNIC Conferences

APNIC Conferences are rated very highly by survey respondents (Q6), but more highly by those in Least Developed Economies (LDEs) and Developing Economies; who were also more likely to have attended, at 50% and 23%, compared with developed economies at 5%(Q5).

Regarding conference length, a three-day event was the most popular single option (30%), followed by four days (19%), and five days (12%). The EC asks that the Secretariat focus on building a strong 3-day conference program, to satisfy the interests of more APNIC Members according to meeting location.

Policy

Since the survey of 2016, the Secretariat has worked to increase participation in the Policy Development Process (PDP) but the survey shows there is still room for improvement (Q33). The EC believes that the work on increasing participation has been successful and should continue, but also encourages community members to engage actively in this important activity.

Governance

Regarding governance, 87% of Members agreed that APNIC was open and transparent, an increase from 74% in 2016 (Q35). The EC and Secretariat have continued to strengthen transparency measures since 2015, and this effort appears to be appreciated.

A large majority of Members (73%) agreed that the APNIC Survey should be held every two years (Q31), while another 19% felt that it should be held more often. This confirms the desire for a survey at least every two years in future.

Regarding APNIC's capital reserve, the largest number of Members agreed to maintaining the current target of 18 months of operational expenditure (35%), followed by increasing it to 24 months (24%), and reducing it to 12 months (13%). The EC will continue to maintain the current target through the budgeting process.

Other

Based on Focus Group feedback, this survey was provided in Bengali, Chinese (Simplified and Traditional), Indonesian (Bahasa), Japanese, Korean, Mongolian and Thai (in addition to English), and nearly one third of responses were submitted in one of those languages. The EC regards this as a very successful initiative which should continue in future surveys.

Next Steps

The APNIC EC thanks all who invested time and effort in responding to the 2018 survey, because these results are invaluable in helping APNIC to better serve the community.

Based on this response, the APNIC Secretariat and EC will work together to produce the Activity Plan and Budget for 2019. Once adopted by the EC, the plan and budget will be published online,

along with an online tracker of deliverables allowing Members to see at a glance the progress made against the priorities identified.

Feedback from the membership and community is always [welcomed by the EC](#).

Thank you for your support.

A handwritten signature in blue ink that reads "Gaurab Raj" followed by a horizontal line and "Upadhaya".

Gaurab Raj Upadhaya
Chair
For and on behalf of the APNIC Executive Council