







Consultations



2022 Interview Locations		
Australia	Macau Special Administrative Region of China	
Bangladesh	Nepal	
Bhutan	New Zealand	
Cambodia	Pakistan	
China	Papua New Guinea	
Fiji	Philippines	
Hong Kong Special Administrative Region of China	Republic of Korea	
India	Sri Lanka	
Indonesia	Taiwan	
Japan	Thailand	
Kiribati	Vanuatu	
Malaysia	Viet Nam	
Mongolia		

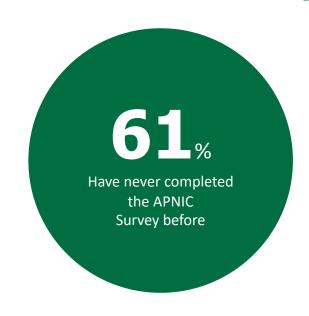
- A total of 37 IDIs were conducted spanning 25 economies.
- A majority of the interviews were conducted with APNIC Members or Account Holders
- Six conducted with Stakeholders within the region
- All seven of the APNIC NIR Members were consulted

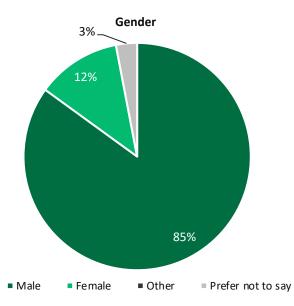
Key Interview Findings

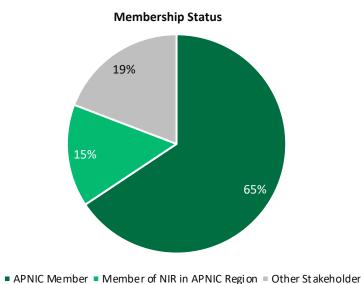
- COVID-19 affected demand, supply chains and workforce
- Internet security, and deploying IPv6 were the major challenges mentioned
- Online meetings, training, conferences, and other forums are no substitute for the "real thing"
- APNIC is consistently described as being highly regarded, trusted, reliable, and professional
- Equal access to the Internet for small and LDEs, and educating the 'next generation' about the Internet are important issues

Quantitative Sample

Region	Count	%
East Asia	269	17%
Oceania	275	17%
South East Asia	454	28%
South Asia	486	30%
Non-APNIC Region	137	8%
Total	1,621	100%











- Members' ratings of the quality and value of APNIC services and membership have improved
- Lack of skilled Internet engineers and Internet security are the biggest challenges

- COVID-19 has had a significant impact on organizations, although confidence about the future is high
- Increased security-focused training courses, collaboration with others, and maintaining a security threat intelligence sharing service are the best ways APNIC can assist

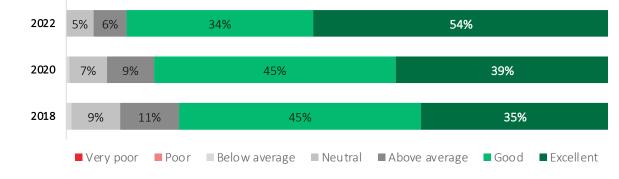
- Despite lower usage of almost all APNIC's services, satisfaction with these has been maintained
- Investment in infrastructure and human resource capacity building are the priority areas for Internet development in the region



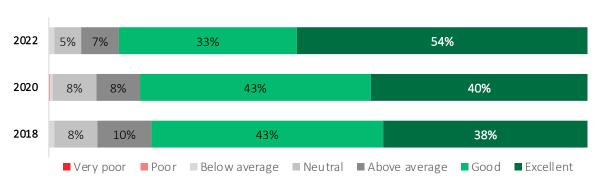


Service Satisfaction

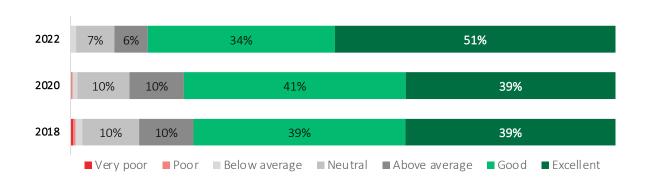
Quality of services



Value of services



Value of membership



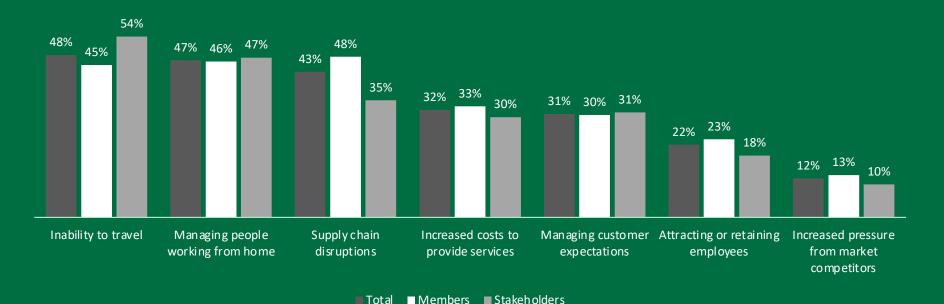
Impacts of COVID-19

49%

30%

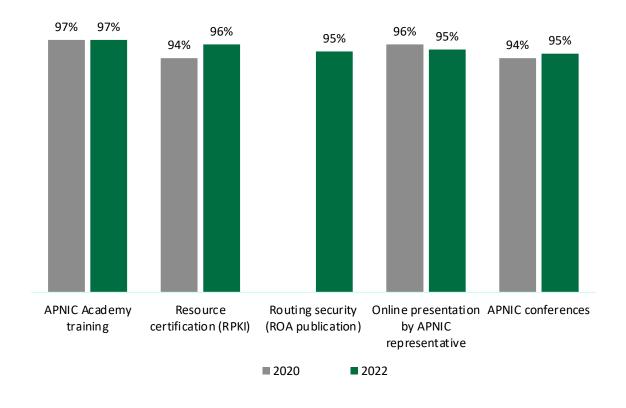
of respondents say demand for services **increased**

of respondents say demand for services **decreased**



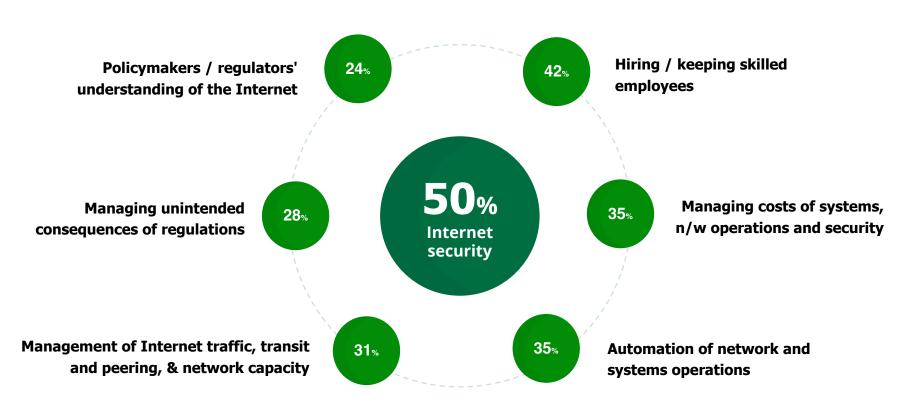


Despite lower usage across some services due to COVID-19, satisfaction remains high



Biggest strategic and operational

challenges



How can APNIC help?

Overwhelmingly Members talked about continued provision of training and education as the best form of assistance



Training

35% mentioned training, including advanced training in IPv6

Case studies

11% want case studies, best practice videos and blogs

Security

8% mentioned Internet security training, including how to mitigate against attacks

Awareness

6% called for better education / awareness to governments about the Internet

Internet Development Priorities for Investment

Investment in internet infrastructure, particularly in backbone networks or undersea cables is important to many.

Technical training for new or emerging network engineers is also important to Members.



Infrastructure Investment

Of those, 46% want to see investment in backbone networks, while 43% prioritise peering, and 37% neutral IXPs



Human Resource Capacity Building

Investment in more technical training for network engineers is the priority for 59% of Members. Others would prefer scholarships or internships at APNIC (38%) or fellowships for the next generation of network engineers (35%)



Conclusion



- In a difficult two years, Members and Stakeholders satisfaction with the quality and value of services remains very high
- Members challenges have become more complex, and will need monitored over time
- Ability to provide QoS management of capacity and bandwidth are issues for many with the increased demand for Internet access
- A lack of skilled IT resources in the region is also problematic
- Continued training, including more advanced training, and hands-on workshops or forums is desired
- Expanding training to include the 'next generation' of network engineers will also help