



2022 APNIC Survey Executive Council Response

Introduction

The APNIC Executive Council (EC) commissions the [APNIC Survey](#) every two years to regularly assess APNIC's performance, to understand the changing needs of Members, and to help set priorities for the coming period.

The latest Survey was conducted during June-July 2022 by independent researcher, Survey Matters (Australia). The Survey Report was [published](#) in September and [presented](#) to the community during APNIC 54 in Singapore on 15 September 2022.

There were 1,622 valid responses, with 29% of responses in a non-English language. Sixty-one per cent of respondents said this was their first time they had ever participated in an APNIC Survey, but in spite of this the results are remarkably consistent with the prior survey (2020), but also more positive in most respects.

APNIC's Performance

The results of the 2022 APNIC Survey are very positive regarding the performance of the APNIC Secretariat. Member satisfaction is higher than in 2020 and 2018, with quality of services (94% positive), value of services (94%) and value of membership (92%) all at record levels. The breakdown of those figures showed strong growth in the "excellent" ratings since the previous survey; from 39% (2020) to 54% (2022) for service quality, 40% to 54% for service value, and 39% to 51% for membership value. It should be noted that larger Member organizations rated the value of APNIC membership more highly than smaller, in most cases.

Member satisfaction with APNIC's transparency remained high at 89%.

There were many useful comments and improvement suggestions provided in the survey results, and the EC asks the Secretariat to consider these carefully. Overall, however, congratulations are in order for an excellent result.

Member Challenges and demand for APNIC Services

After the uncertainty of the past two years due to the COVID pandemic, APNIC Members cited a mix of new and old challenges to their operations. For the majority of Members, the pandemic increased demand for services (50%) but introduced challenges including travel restrictions (45%), managing staff working from home (46%), supply chain issues (48%) and increasing costs (33%).

However, many long-standing challenges remain.

Internet Security

Internet security remains the top operational concern and Members are looking to APNIC for help in specific areas. More security-focused training courses was the top priority for Members, followed by

encouraging community collaboration to share information and best practice, and maintaining a security threat service. The EC acknowledges these activities remain a priority for APNIC to continue to deliver.

Skills shortages

Hiring and retaining skilled employees was selected by survey respondents as the biggest strategic challenge facing their organization, with a lack of suitably qualified technical people cited as the third biggest operational challenge. Members also selected human capacity building as the one of the top two priorities for APNIC to focus its development activities.

It is clear to the EC that strong demand for training and fellowships in the region has not slowed, and continued investment in training (both online and face-to-face) will remain a focus for APNIC. The EC also notes the success of the fellowship program which should continue to bring more newcomers into the APNIC community.

Face-to-face engagements

Members asked for more face-to-face training now that pandemic travel restrictions have lifted, and indicated a commitment to greater participation in face-to-face events (39% said they would attend more face-to-face than pre-pandemic, a statistic that was borne out at the recent APNIC 54 conference).

The EC recognises there is extra community demand for face-to-face engagements after two years of little travel. However, it must be noted that travel, staffing and conference costs have also increased in 2022 and look to remain elevated during 2023, so budget pressure will be unavoidable. Continuing to engage Community Trainers in the region to assist will also help meet demand while containing costs.

IPv6 and RPKI Deployment

Both RPKI deployment and IPv6 deployment remain priority issues. IPv6 is becoming less of a challenge according to Members (from 34% in 2020 down to 26% in 2022) but support for the transition is still needed as IPv4 scarcity increases (the top IPv4 availability challenges were cost (30%) and finding addresses (27%)). Again, training was chosen as the most important activity APNIC could do to encourage IPv6 adoption.

Sixty per cent of respondents indicated their organization had not deployed RPKI, and of those, 38% said they did not have the knowledge and expertise to deploy it. APNIC should continue to supply training, technical assistance, case studies and knowledge sharing support. The registry also requires continued investment to meet the architecture, availability, and robustness requirements of RPKI.

Infrastructure development

Infrastructure development was chosen as the number one priority for APNIC's development investments, with support for peering and neutral IXPs also at the top of the survey list (outside of establishing backbone networks, an activity in which APNIC is not involved). DNS root server support was ranked fifth.

In light of these results, the EC recommends continuing support for IXP deployment and the peering community (including sponsorship, training and event support) and exploring ways to expand cooperation with APIX and the community. The EC also notes APNIC's past success in establishing many root servers around the region, and suggests limiting future support to the cooperation on M-root distribution.

Governments and the Internet

An emerging strategic challenge was Member concern with government understanding of the Internet (3rd highest challenge) and managing unintended consequences of government regulation (4th highest challenge).

While APNIC already plays a role in working with governments to build understanding and capacity around Internet issues, the EC acknowledges the community demand for government outreach and asks the Secretariat to examine ways to reach elected decision-makers across the region.

Next Steps

After two years of COVID restrictions around the region, the survey indicates strong demand for APNIC's core services remains, and rebounding demand for those services delivered face-to-face, such as training and conferences. Maintaining availability and robustness of registry services such as RPKI also requires greater investment.

A significant change in the recent year has been a new high-inflation environment, which means that the cost of delivering APNIC services has risen, and will continue to rise. The APNIC EC will consider how to manage these budgetary pressures in the coming months as APNIC's 2023 Activity Plan is finalised.

The EC thanks everyone in the community who invested time and effort in responding to the 2022 survey. The results are invaluable in helping APNIC to serve you better; they not only contribute to the 2023 Activity Plan, but the survey is also a key input for the 2024-2027 Strategic Plan to be developed next year.

Once adopted by the EC, the plan and budget will be published online, along with an online tracker of activities allowing Members to see the progress made against the priorities identified.

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

Thank you again for your support.



Gaurab Raj Upadhaya

Chair

For and on behalf of the APNIC Executive Council