Future Internet Scenarios Update

June 2016

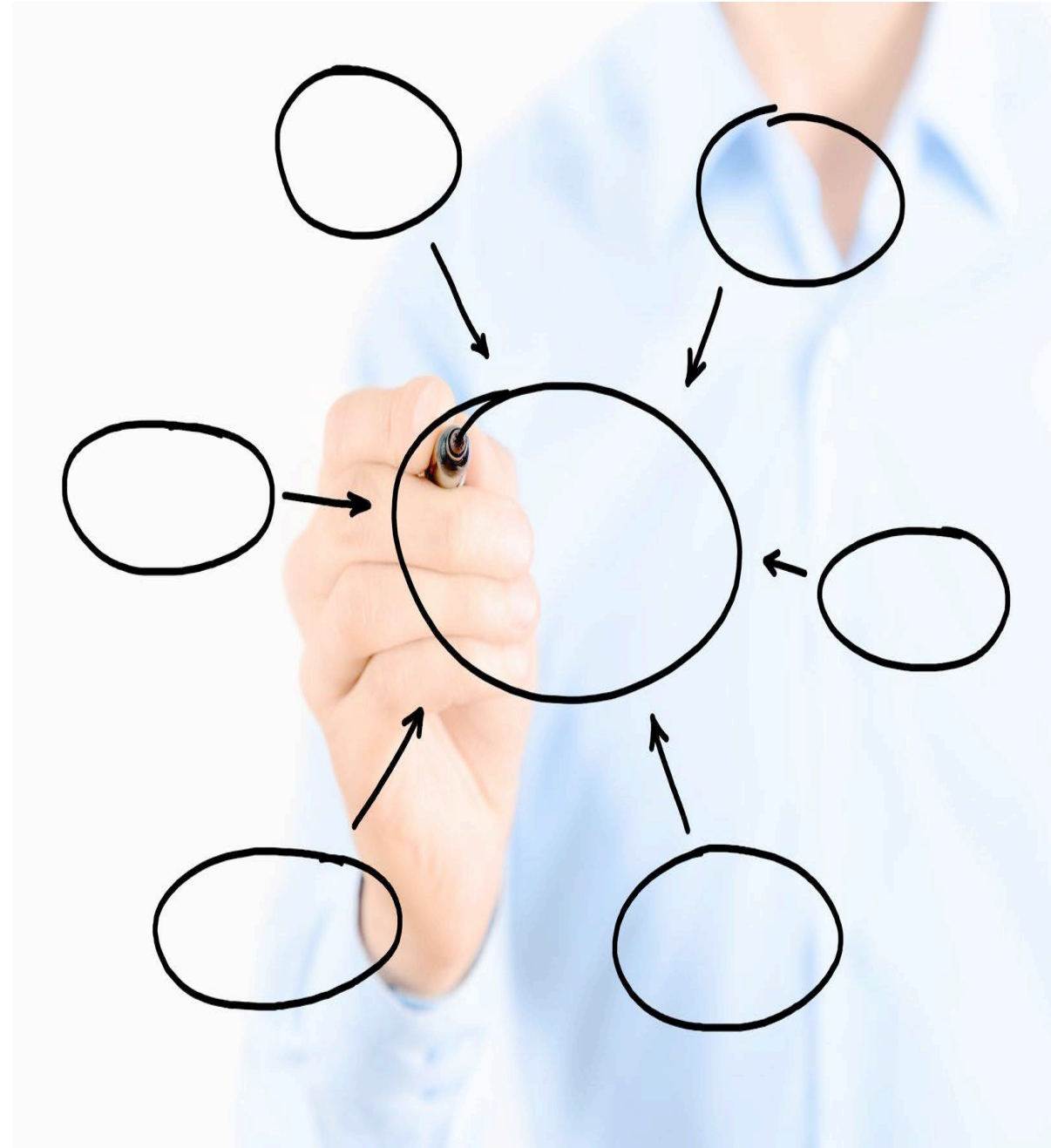# Future Internet Scenarios Project

- Collaborative "future-casting" project, drawing on input from ISOC's community and network of global experts

- Objectives:

  - Advance ISOC Thought-Leadership

  - Highlight Possible Paths for the Internet's Future and Influence Direction

  - Provide Forward-looking Context for Today's Important Challenges

  - Prepare for Our Future

Where are we now?

- Work is progressing well

- Conducted first round interviews and survey:
    - ~75 countries, 250 expert inputs, over 1,500 data points

- Released 2nd Round community survey in Early June

- Conducting additional interviews in Asia, Europe, and Latin America

- July Board retreat a useful time to provide update and discuss mid-project findings

July Board Retreat

Planning a ½ Day Session:

- **Interactive exercise to elicit Board vision of the future of the Internet**

- **Discuss Internet trends and uncertainties emerging from the work**

- **Contribute to framework for future Internet scenarios for further staff development and community review**

- **Confirm next steps and timeline**

Internet Society

1st Round Interview and Survey Statistics

Regional Distribution

- **North America**
- **Latin America/Caribbean**
- **Europe**
- **Africa & Middle East**
- **Asia**

Map markers:
- 26% (North America)
- 15% (Latin America/Caribbean)
- 21% (Europe)
- 23% (Africa & Middle East)
- 15% (Asia)
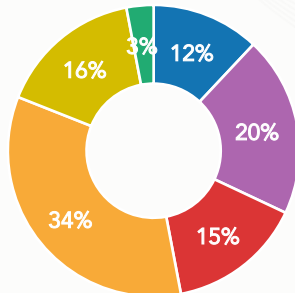
1st Round Base Statistics

220 Expert Interviews / Substantive Survey Responses resulting in over **1,500 data points** on Internet trends and uncertainties

~75 Countries

Member Responses from ~55 Chapters

Additional interviews underway for Latin America/Caribbean, Asia and Europe, and to fill out stakeholder group representation

By Areas of Expertise

Pie chart:
- 12%
- 20%
- 15%
- 34%
- 16%
- 3%

- **Business/ Corporate**
- **Civil Society/ Rights/ Development**
- **Public Policy/ Diplomacy**
- **Technical/ Technologist**
- **Think Tank/ Analyst/ Academic**
- **Other**

Roundtables/Focus Group Calls

| Chapter Focus Group Calls | 05 |

(Europe, Latin America, Chapter AC, Africa (English), Africa (French)

| Policy/SME Roundtables | 01 |

Latin America Policy Makers (BA IETF)

Early Emerging Themes from Round 1

Evolving Internet Benefits and Risks

For many, the growth and ubiquity of the Internet is a beacon of empowerment and opportunity -- especially in the developing world. Others, however, have expressed concern that perceived risks related to the Internet are growing and may cause some to question if the benefits outweigh the risks. Concerns expressed include cyber-bulling of women and minorities, invasion of privacy, surveillance, crime and illegal behaviour, cyber-attacks/security, and negative social and interpersonal impacts.

Growth of Internet Regulation

Across all regions of the world, many see strong forces driving governments to regulate and legislate more at the national level, and many see increased government involvement as an inevitability. Some see increased regulation as a cause for concern in its own right, as well as the potential for policy fragmentation along national lines. Others, however, view the potential for increased regulation as a positive trend, helping to protect citizens and societies from perceived risks.

Growing Connectivity but Changing Nature of the Digital Divide

Respondents agree that there is a trend towards growing connectivity around the world. Some suggest, however, that lack of political will in some countries, low economic incentives to serve hard to reach areas, and lack of suitable content will result in slower growth than expected. Further, some see the nature of the "digital divide" changing and growing in some areas. In particular, the poor, those with access only through smartphones, and regions with lagging Internet skillsets and advanced infrastructure, may fall behind in their ability to use the Internet for opportunity and advancement compared to the wealthy in countries and more developed regions as a whole.

Convergence of the Internet and Physical Infrastructure

Many respondents note the growing convergence between the Internet and the physical world, including in the growth of IoT applications. This will have a range of implications in the next 5-7 years. On the positive side, many note it brings exciting opportunities for new innovations, efficiencies, and economic growth. At the same time, others indicate concern about a further erosion of privacy and increased risk of loss of physical assets or life due to Internet-connected devices. In addition to possible social backlash against an "always on" world, some note that it raises the stakes for government Internet involvement.

Future of the End-to-End, "Public," Global Internet and Open Standards

A number of commentators globally (including technologists, academics, and business stakeholders) have indicated that pressure is being placed on the model of the end-to-end, global Internet and that in 5-7 years time the Internet as we know it may be very different. Some indicate that there are growing incentives to deploy private IP-networks for key services rather than using the global Internet and that it may be difficult for the "best effort" Internet to keep up with technical innovations and demands. Further, some indicated that there is a trend away from using open standards and that may fewer entities may be interested in investing in open standards and industry collaboration.

Fragmentation & Consolidation of the Internet Experience

Commentators indicated a potential growing trend towards growth in siloed service offerings and architecture choices - both in terms of infrastructure and applications. Some express concern that consolidation will result in less independence, less incentives to innovate, and slower Internet development, as well as the focus innovation taking place on top or within walled garden platforms rather than the open Internet itself.