Realizing the Global Promise of the Internet:

The Future of Internet Governance

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August 13, 2008

Executive Summary

Background

The United Nations, under a mandate established in 2005 during the World Summit on the Information Society (WSIS), launched a dialogue on Internet governance. The WSIS is an effort to develop a global information society built upon the assets of the Internet. While not empowered to enact policy changes, proponents hope WSIS will lead to the promotion of successful Internet initiatives. The Internet Governance Forums are one part of the WSIS effort. They are being held annually for five years to explore global policy issues related to the management/deployment of critical Internet resources, ensuring access, safety, security, openness and diversity. The Forums are fostering discussions that could lead to a series of recommendations to WSIS and the United Nations on best practices related to global Internet policy-building. This study surveyed participants at the second Internet Governance Forum in November 2007 in Rio de Janeiro, Brazil, on attitudes about current and likely policy initiatives and their potential to aid in meeting WSIS objectives.

Responses were gathered from 206 IGF attendees (roughly 15 percent of Forum participants) representing more than 60 countries. The data are valuable because they capture a reading of the views of active participants in these forums that might eventually shape WSIS policy.

The findings here should not be taken as a representative cross-section of opinions of those interested in the Forums or, indeed, those who care about the future of the Internet. The IGF attendees most motivated to invest the 20 to 30 minutes of their time that was required to complete this survey were most likely to be stakeholders with vested interests in the issues faced by their individual countries or unique constituencies and rooted in the cultures they represent. Although the study sample was diverse and engaged with the issues addressed, it should not be construed as encompassing the views of all Forum participants. At the same time, while not to be extrapolated to a wider audience, this select, convenience sample of respondents does provide insights that are likely to appear in more-general public discussions as time passes and, in truth, the Internet itself is much like the respondents to this study – widely diverse.

KEY INTERNET GOVERNANCE ISSUES

Sixty percent (60%) of survey participants said they believe the Internet has successfully connected the world. However, globally, just one in five persons has Internet access. It is not surprising, then, that a plurality of respondents to this survey (38%) also said **access** is the single most important issue being addressed by the Internet Governance Forum.

Respondents indicated other top-ranking Internet governance concerns:

- Equitable control of **critical Internet resources** (*infrastructure)*, an issue closely related to access, was described as most important by 17%.

- Internet **security** was seen as the key issue by 14% of respondents.
- Eight percent (8%) said the most important issue is Internet **openness** and 3% said it is **diversity** of Internet content, appeal and design.
- One in five said the most critical Internet issue today is a **combination** of all of the above.

The first Internet Governance Forums were designed to concentrate on five key areas of policy concern: Access, Diversity, Critical Internet Resources, Openness and Security. These categories were each addressed with a question set in the IGF 2007 survey. Following is a brief outline of results.

ACCESS: DIGITAL INCLUSION AND CLOSING THE DIGITAL DIVIDE

Most respondents (51%) agreed that a global solution to Internet access is achievable, and that *cost* is the primary barrier (78%). When asked to rank four possible methods of funding the resources to increase Internet access on a scale from most-effective to least-effective, most respondents indicated that commercial providers should solve this problem with a low-cost access solution for the poor (a rating average of 1.9 out of 4). In their responses to another question, 47% said marketplace competition, rather than regulation is the right means to the end of the access problem.

Some 87% of respondents said their countries will have little future economic success without more access. Most (60%) said they believe global Internet access improves the economy – through the creation of more and better jobs – and they also agreed with the statement that Internet access improves healthcare (74%).

Respondents were asked to express their confidence in current initiatives aimed at access, and most supported Internet diffusion through school-based and public-access programs. The response of participants when asked for the one best method to increase access:

- Internet access and instruction in public schools (49%).
- Public Internet kiosks, hot spots, in public spaces (38%).
- Connectivity through community-access mobile phones (14%).
- Public-private partnerships like the One Laptop Per Child program (12%).

Half of respondents agreed the UN should work with commercial providers to establish a global fund for a universal basic level of Internet access for everyone.

Most respondents (51%) were hopeful that there is a way to provide a global solution to ensure Internet access to those who desire it, and 58% agreed with an assertion that the UN should coordinate a coalition of corporate, government, technology industry, and civil-society stakeholders to achieve the goal of a basic connection for everyone. In addition, 44% agreed with this statement: “Leadership from my country is the only means to ensure all of the people in my country have Internet access.”

Some 77% of IGF survey participants backed an assertion that only open and neutral Internet access can close the digital divide.

In open-ended comments, respondents expressed concerns that the last stages of Internet deployment might be left to commercial broadband monopolies, leaving less-developed countries at a disadvantage. They also argued that democracy will only thrive in countries with Internet access and they said spam may harm the Internet's global promise.

CRITICAL INTERNET RESOURCES: CONTROL OF KEY ARCHITECTURE AND POLICY

Respondents were asked a series of questions about where power over the Internet currently resides. There was no consensus about who runs things on the Internet.

- 47% agreed with the statement "The Internet has no center of gravity – no one concentrated location of central control."
- 36% said the Internet does have a concentrated center of power. Of these respondents, 65% said the center of the Internet's influence or concentrated power is in the United States, and 22% of those who said there is a power center cited the countries of the Northern Hemisphere. A few respondents said IT companies are the center, and 4% indicated users who create content are the "center of gravity" for the Internet.
- 17% of respondents neither agreed nor disagreed with the statement.

The technical reality is that control over decisions about the architecture and operation of the global Internet is dispersed throughout a number of global organizations. One of the most powerful is the Internet Corporation for Assigned Names and Numbers (ICANN), which assigns domain names and Internet Protocol addresses and is in charge of root-server system management. ICANN has provided a critical service to the establishment of a global Internet, however as the Internet has matured the organization's effectiveness has been questioned. Nearly half of stakeholders (45%) agreed with the statement that the organization as it is structured today "is not effective and it should be placed in a more neutral, global control structure."

The IGF survey respondents generally agreed that established institutions, especially governments and corporations, are active participants in today's management of critical Internet resources and, as a result, they influence access to the Internet. Respondents generally supported ideas allowing several representative stakeholder segments of society to make Internet policies. For instance, 77% agreed with the statement that the Internet is a transborder resource and it should be governed globally. They were particularly insistent that significant contributions to governance of the Internet's critical resources should come from the outer edges, including representatives of civil society. In fact, most respondents (69%) favored fewer official policies as a way to keep the Internet innovative and dynamic.

When considering how to establish critical Internet resources in their countries, about one-third of respondents favored support for marketplace solutions, such as encouraging competition. About one-

third said individual countries should provide funding to offer access to those who can't afford it. About one-fourth favored commercial broadband companies establishing a global fund for a level of universal service – a fund much like the one established by telephone and cable companies in the United States.

DIVERSITY: ALLOWING ALL TO PARTICIPATE EQUALLY

Respondents supported the notion that there should be cultural diversity on the Internet. The majority (77%) said the representation of diverse languages on the Internet should be given global priority, however respondents were split on whether the Internet currently enhances or diminishes their local culture. Some 42% said the Internet does foster local culture, while 32% said it does not. In addition, 50% said there should be global policies aimed at fostering multicultural content.

Strong support was also expressed for global policies that establish protocols for disabled users to access the Internet – 47% said that should be a priority.

A majority supported the establishment of global policies to ensure neutral and equitable access to the Internet for all people (52%).

Less support was indicated for global policies related to protecting the free flow of user-generated content (42%) or global provisions that ensure Internet content is accurate (28%). About a third of respondents do not believe that accuracy of Internet content is an Internet governance issue.

OPENNESS: PROTECTING CIVIL LIBERTIES IN CYBERSPACE

Respondents indicated strong support for the establishment of a global Internet users' Bill of Rights. Some 66% agreed with the statement: "A global Internet users' Bill of Rights should be adopted." While many respondents also indicated strong support for freedom of information on the Internet (76%), many expressed doubts that a global policy on Internet content controls can be reached (49%). Three-quarters of survey participants agreed that such a policy is needed to ensure freedom of expression on the Internet; 62% said they believe content controls weaken the Internet.

When asked if their country should retain the right to approve content disseminated to its people via the Internet, about one in four of the respondents (28%) agreed while 59% disagreed. Even more disagreed (63%) that a commercial Internet service provider should have that right.

Nearly half of respondents indicated they believe content regulations cannot be successfully leveraged due to the open nature of the online realm. Some 47% agreed and 34% disagreed with the following assertion: "Policies that regulate content on the Internet are not enforceable because of the borderless nature of the Internet."

In open-ended comments, respondents expressed concerns about achieving the correct balance between civil liberties and a secure Internet. Most see balancing free expression with privacy rights and a secure Internet as the most important future concern in this area of Internet governance. Many fear

government censorship will limit free expression. For example, one respondent wrote, "While difficult to achieve, we can have an open Internet and still prohibit criminal activity like child pornography and cyberterrorism." Another respondent wrote, "Above all, political speech on the Internet should be protected globally."

SECURITY: ASSURING SAFETY, TRUST AND A RELIABLE, SCALING NETWORK

Respondents were asked about Internet and global policymaking related to cybercrime. Most respondents (70%) said the Internet's architecture and the protection of infrastructure should primarily be the responsibility of local governments. Relatively low support was expressed for the establishment of a global Internet police force tasked with protecting the Internet's infrastructure. Just 38% backed the idea. However, there was strong support for creation of a global police force to fight cybercrime – 56% of respondents supported this idea. This finding is not surprising considering the strong support for global protocols for conducting business over the Internet – fully 81% of respondents backed this notion. Half of stakeholders said individual users' rights to privacy outweigh the need for security, while about a third (35%) said security outweighs privacy. Global cooperation is necessary to find a balance between the protection of civil liberties and the maintenance of a secure, trusted Internet.

GOING FORWARD: ADDRESSING GOVERNANCE IN THE FUTURE

The survey data suggest that respondents believe that global policies are desirable and achievable in the Internet governance arena. Most respondents (52%) said the Internet is governable – even thought it is a transborder phenomenon without a primary locus of control. They supported multiple measures for achieving broad user access to the Internet that center around policies at the local and global level. They see value in marketplace approaches to bringing Internet access to those who are still unconnected. They also believe that achieving access is possible through global policies and that this is the key area for policymaking.

Strong support for improving Internet access through schools and education was expressed among stakeholders. The promise of mobile devices to bring the Internet to the unconnected received positive support.

Significant support was also expressed for establishing global protocols to ensure the safe, secure conduct of business over the Internet. This finding suggests that the commercial applications of the Internet are a strong basis for building consensus among global stakeholders on issues of policy. These policies are likely to find a strong level of support, whereas policies related to regulating Internet content will find the least consensus.

If the opinions of these respondents are any indicator, global policymakers will likely find robust debate and little agreement on how to strike a balance between maintaining a safe and secure Internet and protecting users' civil liberties. The answers here suggest that some tensions might be eased by adopting a global Internet Bill of Rights; this concept had strong support – more than 66% of

respondents supported the concept, and only 6% disagreed, suggesting this is an opportunity for IGF. If these respondents had their way, a Bill of Rights might contain statements addressing areas where Internet governance stakeholders are in agreement, such as: the Internet should be accessible to all people of the world, available in their native language and at an affordable cost.

There was an even split of respondents when they were asked whether they see marketplace demand or government-mandated policy as the best likely shaper of the Internet's future.

The multistakeholder model is the policy-setting configuration most survey respondents say they support. This evolutionary, edges-in format is employed by IGF, ICANN, the Internet Society and other organizations that are building the policies and structures underpinning the Internet by combining input from representatives from the realms of business, government, technology and civil society.

While most surveyed stakeholders say a system is most innovative and dynamic if it remains as unregulated as possible (70%), a third say the Internet will not prosper without additional global policies. The majority believes, though, that public policy will always remain a step behind the realities of online life because of accelerating technological development. These are indicators supporting the idea that guiding principles different from those applied to previous communications technologies such as broadcast television or the telephone are necessary to best shape future Internet policy.

Realizing the Global Promise of the Internet: The Future of Internet Governance

INTRODUCTION

During the meeting of the World Summit on the Information Society (WSIS) held in Tunis in 2005, a request was made to the United Nations General Secretariat to establish a series of meetings that would create a global dialogue on Internet governance. These five, annual, multi-stakeholder, transparent meetings were mandated to create ongoing and inclusive global policy discussions on pressing Internet issues related to:

- the establishment of Internet access and the availability of critical Internet resources;
- furthering a safe and secure Internet;
- promoting an open and diverse Internet.

While not directed at creating and implementing policy, the Internet Governance Forums are expected to bring key issues to light and establish a dialogue among government, business leaders, members of the technology community, and activists in civil society so they can leverage this knowledge to foster the objectives above. The first Internet Governance Forum took place in 2006 in Athens, Greece, and the second took place in Rio de Janeiro, Brazil, in 2007. The events draw a diverse sample of Internet stakeholders, from Internet Protocol inventors Vint Cerf and Robert Kahn to youthful advocates in their 20s on hand to fight for access for all. Top leaders from ICANN, ITU, UNESCO, OECD, WIPO, INTERPOL, the Council of Europe, the International Chamber of Commerce, Sun Microsystems and Microsoft attend the meetings on an equal footing with young students being trained about Internet Governance issues through the DiploFoundation and members of civil society.

After each Forum, staff with the IGF Secretariat appointed by the United Nations and members of a Multistakeholder Group on Internet Governance plan the next Forum and release summative reports that build a bridge to the next meeting. Discussion is ongoing as to whether the Forums might ultimately generate a series of recommendations regarding directions to follow in encouraging the positive development of future global policies.

One of the governance breakthroughs to take place at the initial IGFs was the formation of a number of "dynamic coalitions" (DC) that include people with backgrounds in academia, civil society, business, government, the technology industry and key Internet governance organizations such as ICANN and the Internet Society. These ad hoc groups met and joined together as a result of their discussions at IGF. Each IGF DC addresses a specific issue on a continuing basis outside the realm of the Forum as well as during the annual events. Among the 14 dynamic coalitions now active are those covering gender, linguistic diversity, child safety, spam, global warming and the establishment of a bill of rights.

Nearly 1,400 stakeholders in the future of the Internet attended the Brazil meeting, where heated debates surrounding key issues were heard. Researchers with the web-based project Imagining the Internet conducted a global Internet policy survey among attendees. This report details the findings of

that effort, which was supported by the Pew Internet & American Life Project and sponsored by the Imagining the Internet Center at Elon University in Elon, North Carolina.

Figure 1

***72. We ask the UN Secretary-General**, in an open and inclusive process, to convene, by the second quarter of 2006, a meeting of the new forum for multi-stakeholder policy dialogue—called the Internet Governance Forum (IGF).The mandate of the Forum is to:*

a. *Discuss public policy issues related to key elements of Internet governance in order to foster the sustainability, robustness, security, stability and development of the Internet;*
b. *Facilitate discourse between bodies dealing with different cross-cutting international public policies regarding the Internet and discuss issues that do not fall within the scope of any existing body;*
c. *Interface with appropriate inter-governmental organizations and other institutions on matters under their purview;*
d. *Facilitate the exchange of information and best practices, and in this regard make full use of the expertise of the academic, scientific and technical communities;*
e. *Advise all stakeholders in proposing ways and means to accelerate the availability and affordability of the Internet in the developing world;*
f. *Strengthen and enhance the engagement of stakeholders in existing and/or future Internet governance mechanisms, particularly those from developing countries;*
g. *Identify emerging issues, bring them to the attention of the relevant bodies and the general public, and, where appropriate, make recommendations;*
h. *Contribute to capacity building for Internet governance in developing countries, drawing fully on local sources of knowledge and expertise;*
i. *Promote and assess, on an ongoing basis, the embodiment of WSIS principles in Internet governance processes;*
j. *Discuss, inter alia, issues relating to critical Internet resources;*
k. *Help to find solutions to the issues arising from the use and misuse of the Internet, of particular concern to everyday users;*
l. *Publish its proceedings*

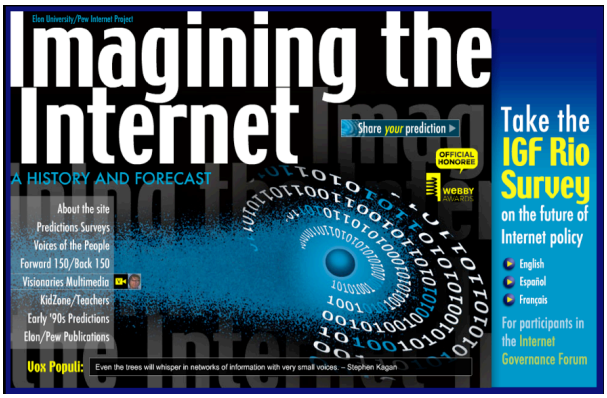
WSIS Mandate to Establish the Internet Governance Forum (IGF)

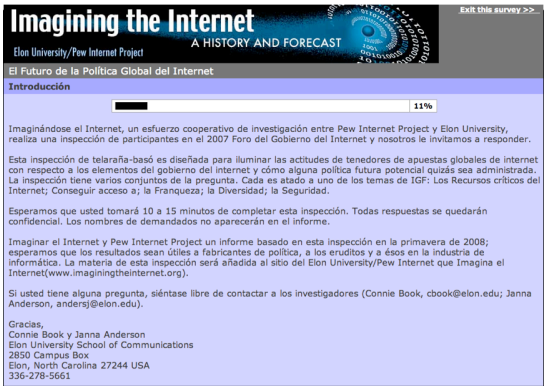
METHODOLOGY

Imaging the Internet's online survey was designed to address the key areas being tackled by IGF participants and was administered on-site in Brazil November 12-15, 2007. The questions were crafted after a review of the key issues in each of the areas to be addressed at the IGF meeting. The areas of policy discussion are: access, diversity, openness, critical Internet resources and security. Each policy area is comprised of its own core concepts, and questions were devised to test views about those concepts. Areas in which global policy might be implemented were also explored. The review of related literature found tension between global authority, state authority and local authority. This tension and the role of each of the stakeholders were explored in the survey. Additionally, respondents were asked to weigh in on regulatory models that are being discussed around the globe and the marketplace approach to Internet governance. Survey topics ranged from user-generated content to the controversial issue of control of domain names and the inability to capture native languages. In all, the

survey presented 33 questions to respondents.[1]

Figure 2
Screen Captures of IGF online study





IGF planners established a town-square environment at the Rio de Janeiro meeting venue that offered attendees approximately 60 public computers with Internet access available for use. Representatives of Imagining the Internet set up a table in the town square and intercepted attendees and asked them to participate in the survey of global Internet policy issues. The survey was web-based, and participants took it online. The survey was offered in three languages, English, Spanish and French. The majority of respondents (67%) took the survey in English, 19% took it in Spanish and 14% took the survey in French.

RESPONDING SAMPLE[2]

The IGF organizers report the Brazil meeting was attended by 1,363 participants from 109 countries. In all, 206 attendees completed our survey. That represents about 15% of conference registrants. Respondents came from 65 different countries or 60% of the countries in attendance. Brazilians comprised 27% of conference attendees and were similarly represented in this study. Other countries frequently represented: the United States (7%), India (3%), United Kingdom (3%), Australia (3%) and China (2%).

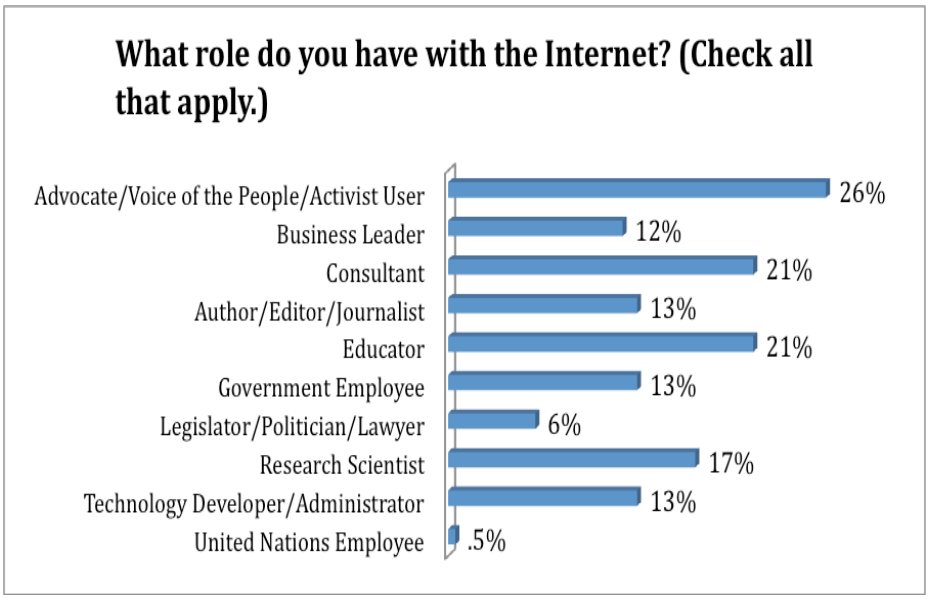
One in four respondents were women, and respondents ranged from 19 years old to 73 years old, with the average age 41 years old.

The majority of respondents described their role with the Internet as an advocate/voice of the people/activist user (26%). This was followed by "educator" and "consultant" both making up 21% of the sample. Research scientists were 17% of the sample, author/editor journalists and technology

[1] Seven of the questions posed were open-ended. These responses were coded by four independent coders and common themes collapsed for presentation in this report. Every 10th open coded comment was checked for intercoder reliability. Using Cohen's kappa, intercoder reliability against 10% of the sample, *k* was found to be .89, a very good rate of agreement.

[2] Full summaries of the survey findings and demographics are available at the close of this report.

developer/administrator each comprised 13% of the sample. Business leaders comprised 12% of respondents and legislators/politicians/lawyers made up 6%. The respondents participated in a convenience sample – anyone who chose to respond to our invitation was allowed to participate. Thus, this is not a representative survey of attendees of the Forum or of the larger community of stakeholders in future Internet policy-making and there is no margin of error to report. The survey does have value as a reading of a large and diverse number of participants in this Internet Governance Forum.

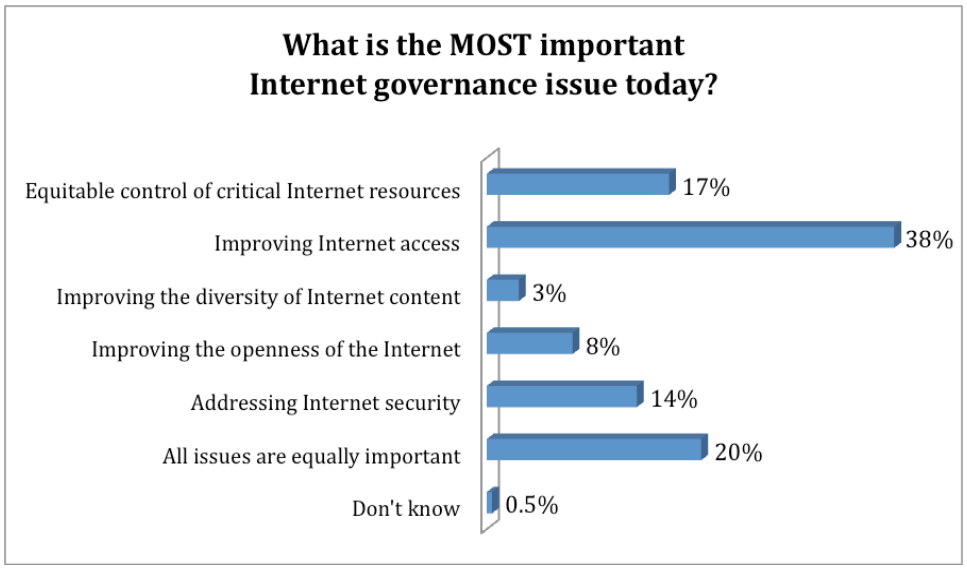


When respondents were asked what type of organization they represented in their Internet work, most indicated they worked with a non-profit organization (36%). The other most-frequent responses were a college or university (19%) or a government agency (16%). This make-up of respondents is consistent with the attendees at the conference, which represent a broad spectrum of Internet stakeholders.

FINDINGS

What is the MOST important Internet governance issue today?

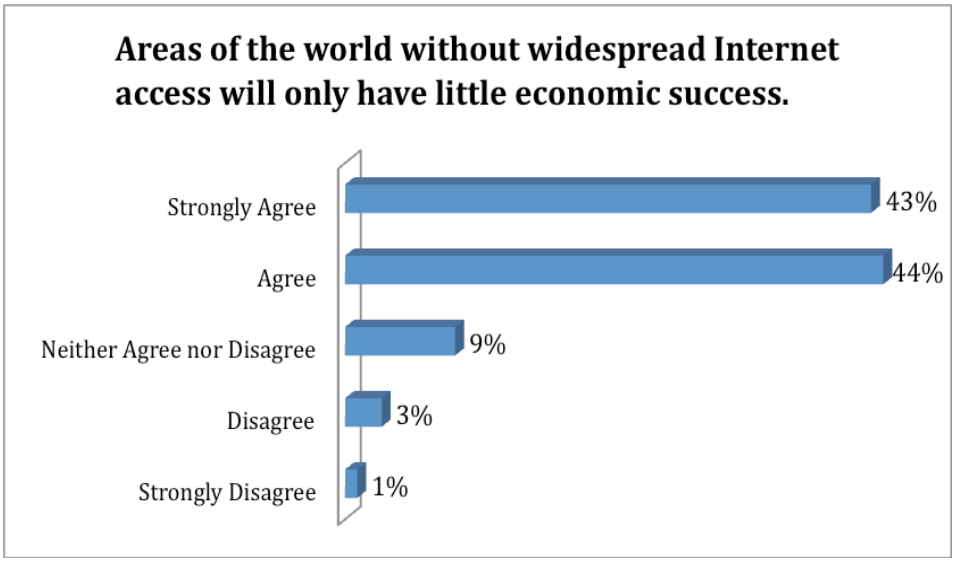
The five key areas being addressed by the Internet Governance Forums were tested to see which one would lead as being the most important. Ranking first among respondents was "improving Internet access" (38%). This was followed by 1 in 5 respondents' indication that all issues being discussed at IGF forums are equally important. Seventeen percent (17%) indicated that "equitable control of critical Internet resources" is the MOST important Internet governance issue today.



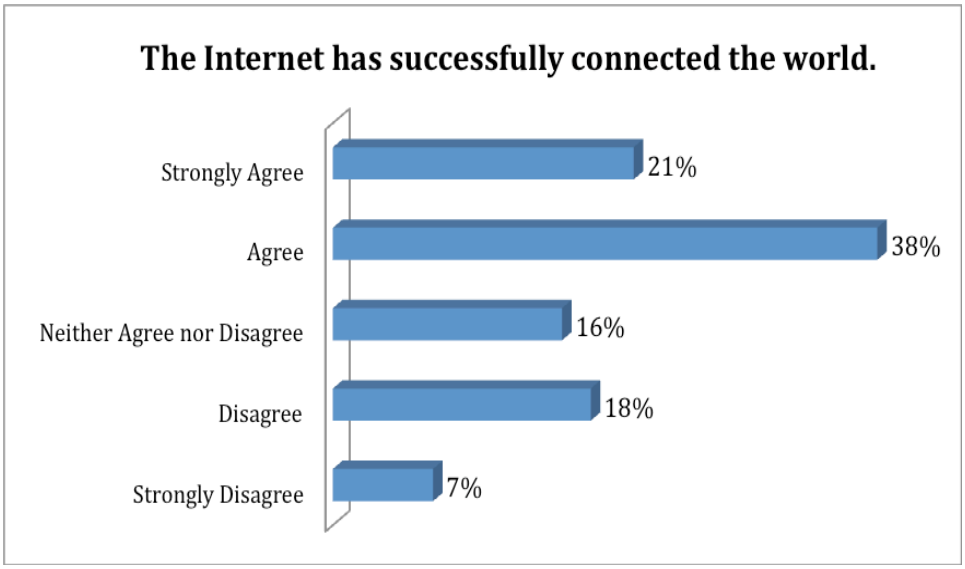
In the "other" category, respondents indicated that ensuring child protection and safety is the most important issue facing Internet governance today. Other respondents indicated the lack of global governance and transborder agreements is the most important issue.

The Internet and Critical Resources

Respondents were asked a series of questions about critical Internet resources, the establishment of infrastructure and end-user devices that brings the Internet to the people, and the role these resources play in their communities. The vast majority (87%) agreed that areas of the world without widespread Internet access will only have limited economic success.

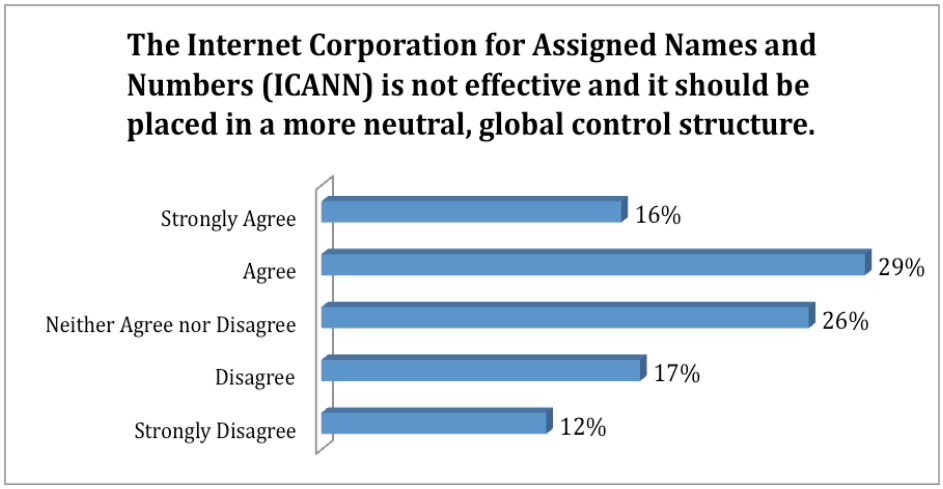


Respondents were split when asked if they agreed that the Internet has successfully connected the world. While the majority agreed with the statement (59%), one in four disagreed.



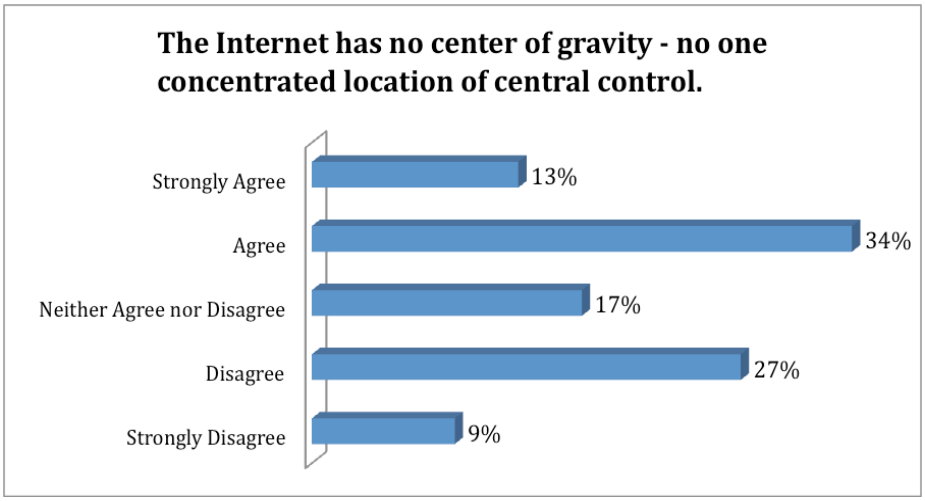
The Internet Corporation for Assigned Names and Numbers is a large, international, multistakeholder group that manages Internet root servers and assigns domain names and Internet Protocol addresses. Despite the fact that it has been scaling and adjusting its operations to keep up with the growth of the Internet, ICANN has been at the center of some Internet governance controversy in recent years. While it is a global organization with global leadership, ICANN was established and is headquartered in the United States and operates under an agreement with the US Commerce Department. ICANN's US-centered origins and that country's continuing influence, the fact that key root servers are located in the US and the fact that the core language of the Internet's domain-name system is English are just a few of the issues under challenge. ICANN leaders have been making progress toward a new internationalized domain-name system, and the organization introduced it in a beta format at IGF in Brazil, at a location in the public square not far from the kiosks at which survey participants offered their answers for this web-based study.

When queried about the work of the Internet Corporation for Assigned Names and Numbers (ICANN), 45% of respondents agreed with the statement that ICANN "is not effective and should be placed in a more neutral, global control structure." Twenty-nine percent (29%) disagreed with that statement and 26% remained neutral on the issue.



The Internet's Center of Gravity

Since some Internet governance stakeholders say control of the critical resources of the Internet is too US-centric despite the efforts of ICANN, the Internet Society, civil-society groups and other governance organizations to internationalize, IGF attendees were asked if there is one concentrated location of central control over the Internet. Forty-seven percent (47%) or nearly half agreed "the Internet has no center of gravity"; 36% disagreed.

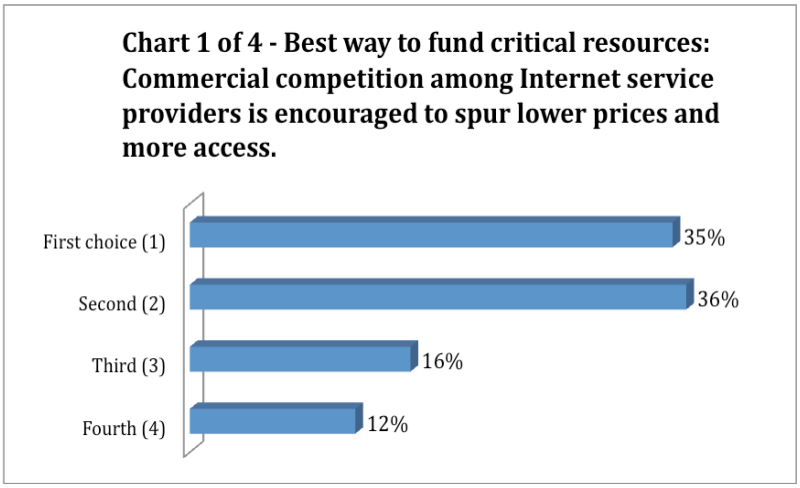


Those whose response indicated there *is* a center of gravity were asked to follow up by filling in the blank, "The Internet has a center of gravity and it is located _____." Fifty-four (N=54) respondents filled in the blank. The majority indicated the center of gravity of the Internet is in the United States (65%). Other "centers" of Internet control included the Global West and North of the

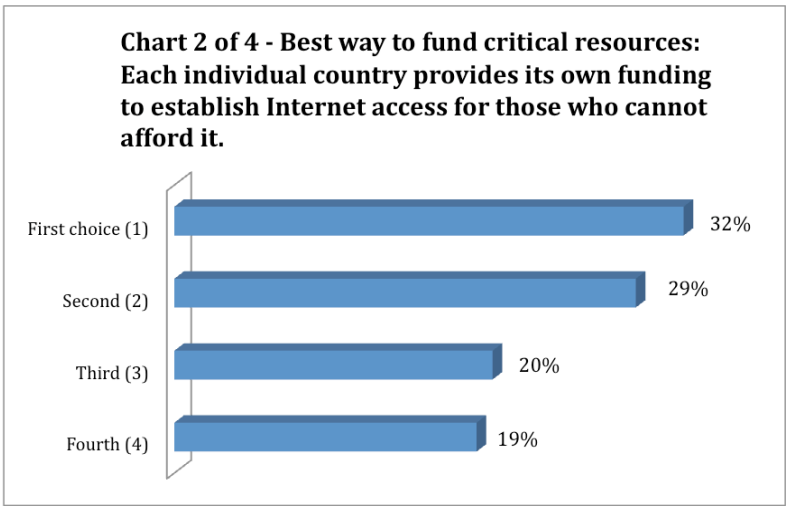
Equator, as well as major IT companies. Four percent (4%) indicated that users who create content are the "center of gravity" for the Internet.

Funding to Establish Critical Internet Resources

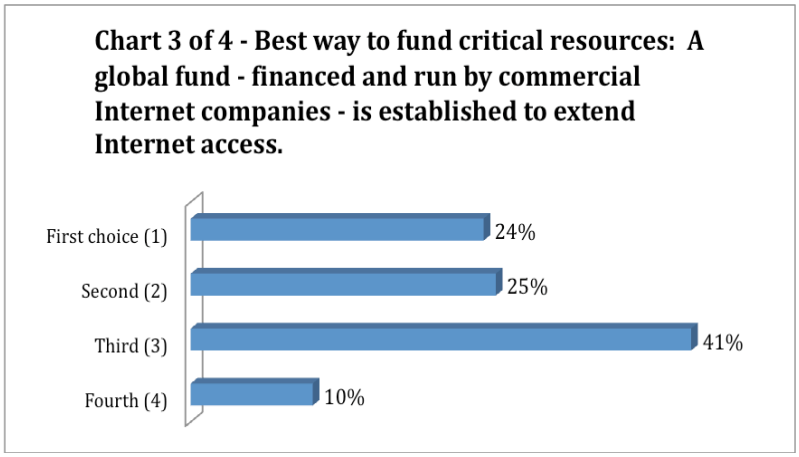
Different models for funding critical Internet resources (infrastructure deployment and hardware such as the routers and servers that are the architecture of the Internet) being discussed in the global community were tested. Receiving the most support was the encouragement of commercial competition as a means to lower prices and create more access; 35% ranked this option first.



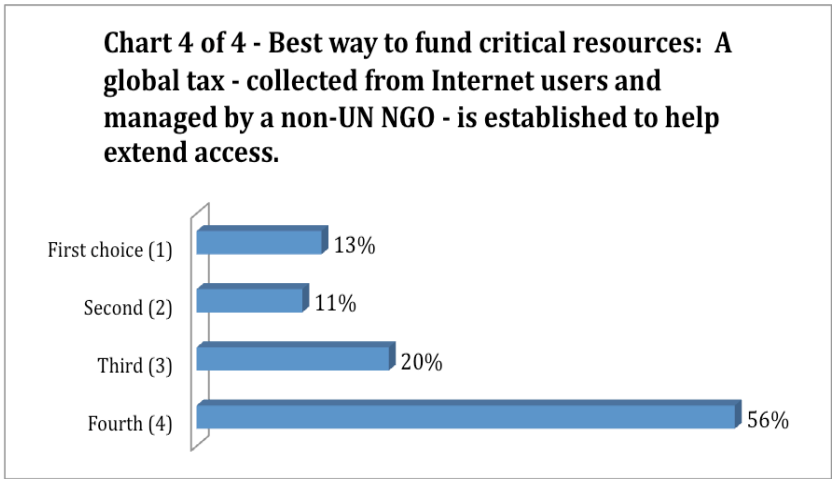
The second-most-frequent choice for funding critical Internet resources was that each individual country provide its own funding to establish Internet access for those who cannot afford it (32% ranking it first as a funding option).



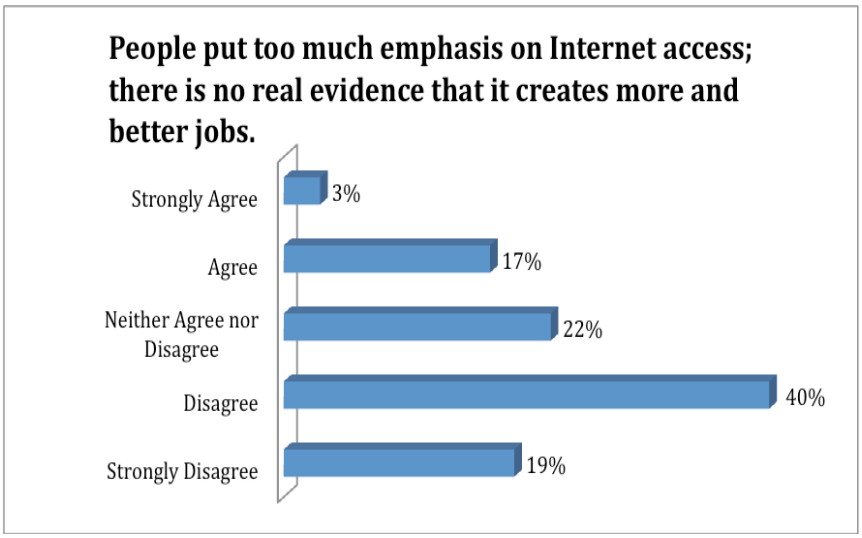
One in four respondents ranked first the establishment of a global fund, financed and run by commercial Internet companies, much like the universal service fund established by telephone and cable companies in the United States.



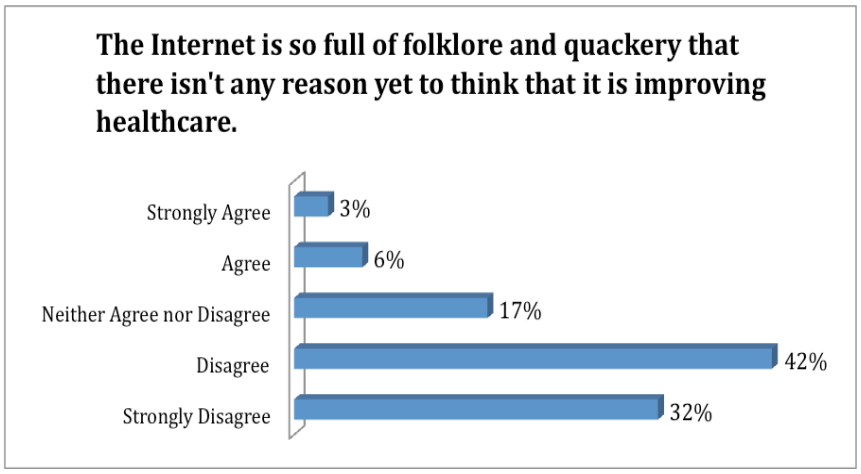
Least popular among respondents was the establishment of a global tax, collected from Internet users and managed by a non-UN non-governmental organization (NGO).



Respondents were asked to consider a series of statements about the impact of critical Internet resources on economic and physical health, and 3 in 4 agreed that Internet access reduces poverty and creates more and better jobs. Respondents rejected the statement that there is no real evidence that the Internet impacts these areas.



Three in four (74%) disagreed with the observation that the Internet is "so full of folklore and quackery that there isn't any reason yet to think that it is improving healthcare." This finding suggests the global legitimacy of Internet content.



Survey participants were provided an opportunity to list the most important concerns they have about the future of critical Internet resources and Internet governance, and 112 respondents – just about half – did so. The top three future concerns included:

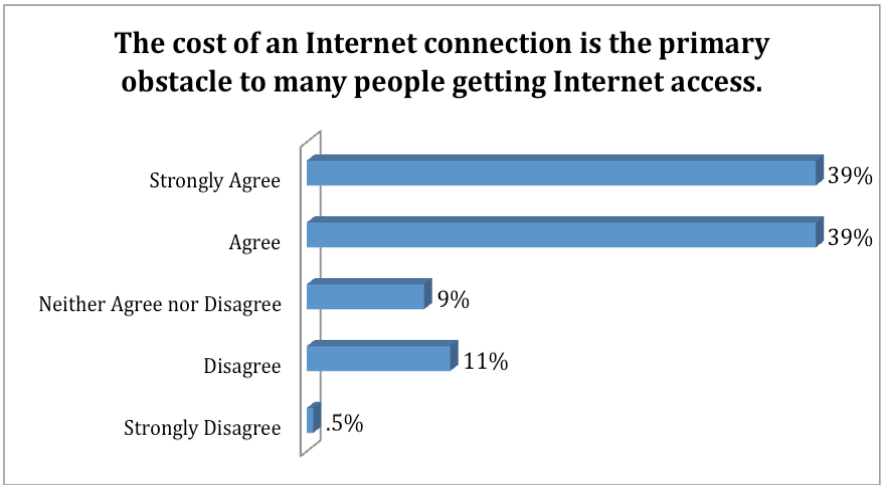
- That broadband providers existing as monopolies in their countries will control the final stages of Internet diffusion and create a dependency in developing nations on these companies, several of which were described as having their own political agenda.

- The importance of critical Internet resources to developing and maintaining inclusive, humanistic political systems.

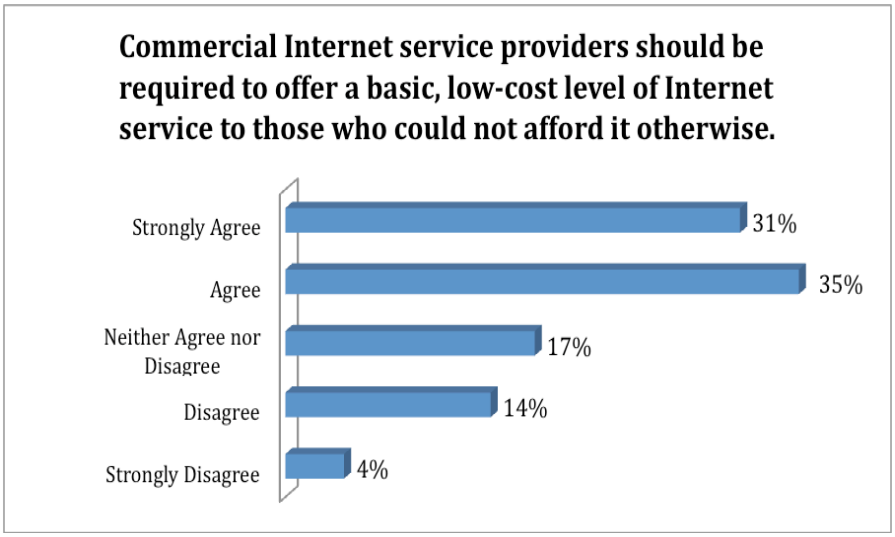
- Creating a secure Internet with strong controls for spam, child pornography and sexual solicitation, privacy protections and transactional security when conducting business over the Internet.

Issues Related to Internet ACCESS

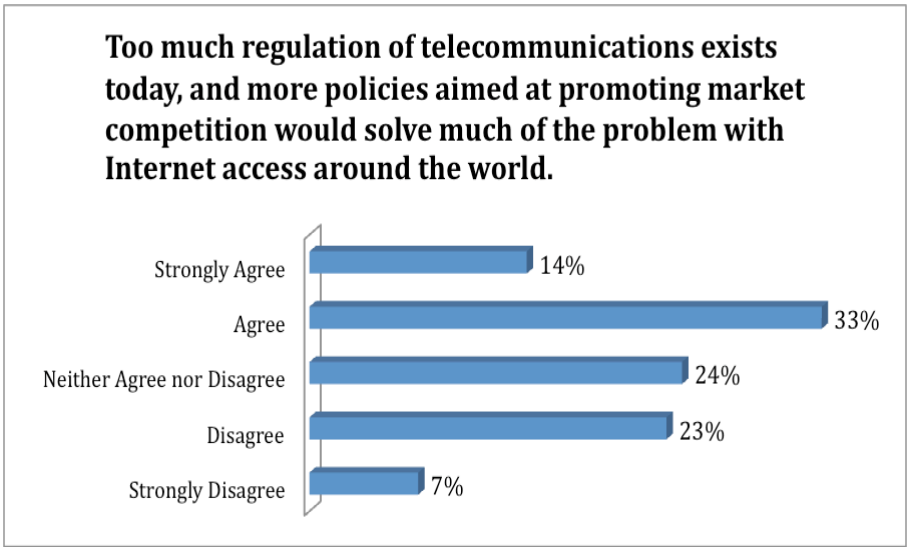
Most respondents to the Internet governance survey agreed that the primary obstacle to Internet access for many people across the globe is the cost of the service – about 78% of the stakeholders responding – with just 11% in disagreement with the statement.



The majority agreed that to overcome cost issues slowing the diffusion of the Internet commercial Internet providers should be required to offer a basic, low-cost level of Internet service to those who cannot afford the service otherwise.

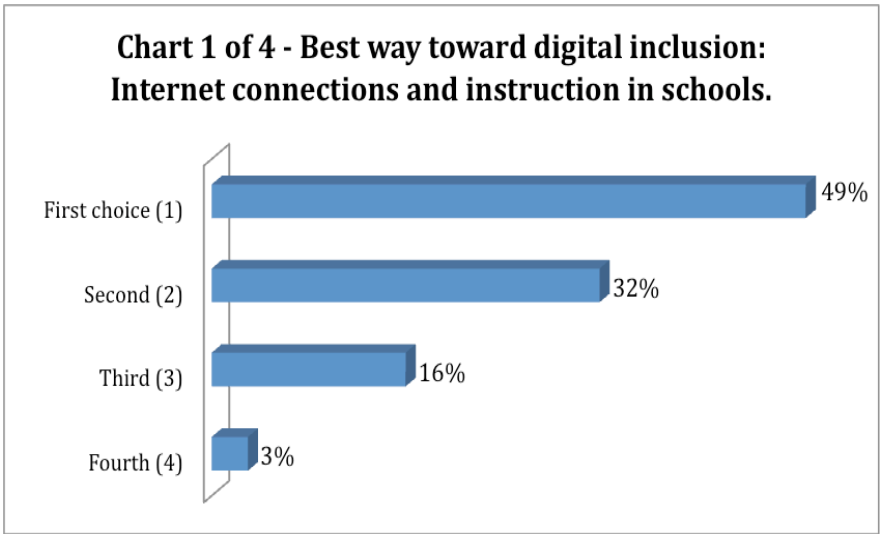


Respondents were split over the amount of telecommunications regulation in force today. While 47% agreed that "too much regulation exists today" – roughly one in three (30%) disagreed with that description.

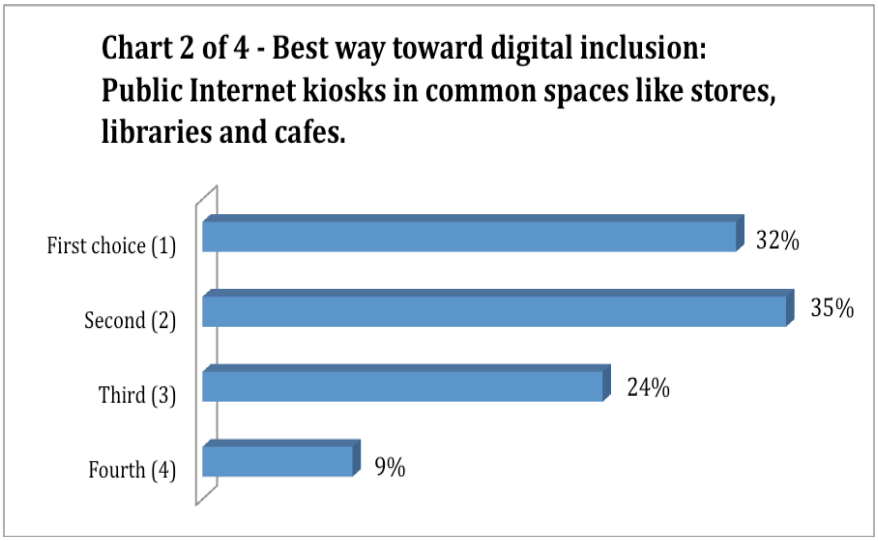


Closing the Digital Divide

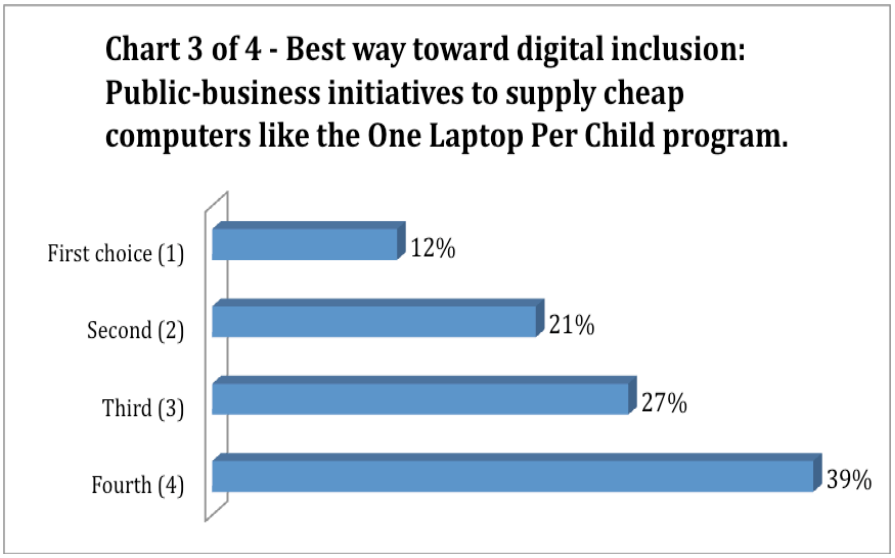
A series of questions was asked about current measures to provide entry points to encourage digital inclusion and close the digital divide. Internet connections and instruction in schools on how to use such connections were ranked first by 49% of respondents as the best means to provide access and digital opportunity.

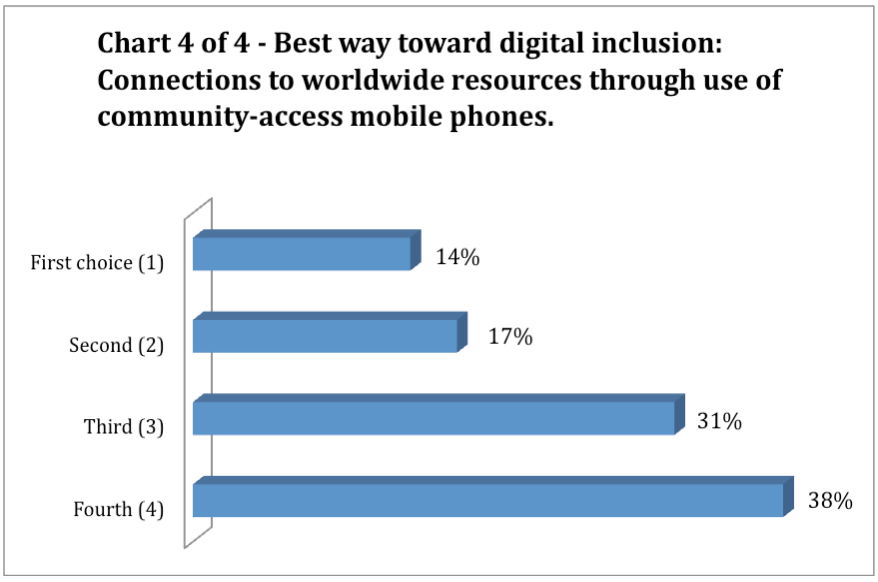


Public Internet kiosks were ranked behind that, with 32% of respondents giving them first-choice status as a means to increase digital inclusion.



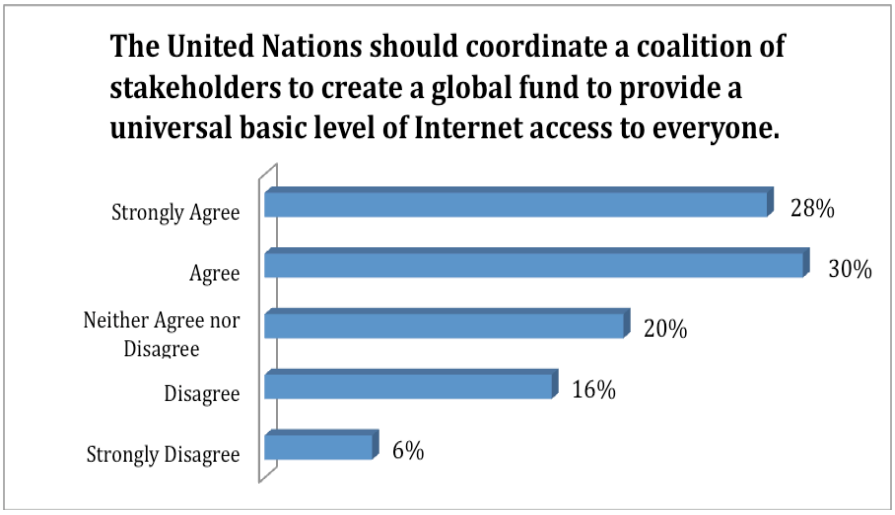
Public-private partnerships to provide low-cost hardware like the One Laptop Per Child program and community-access mobile phones were the least likely to be ranked first, chosen by 12 to 14% of respondents as a first-choice option for increasing digital inclusion.



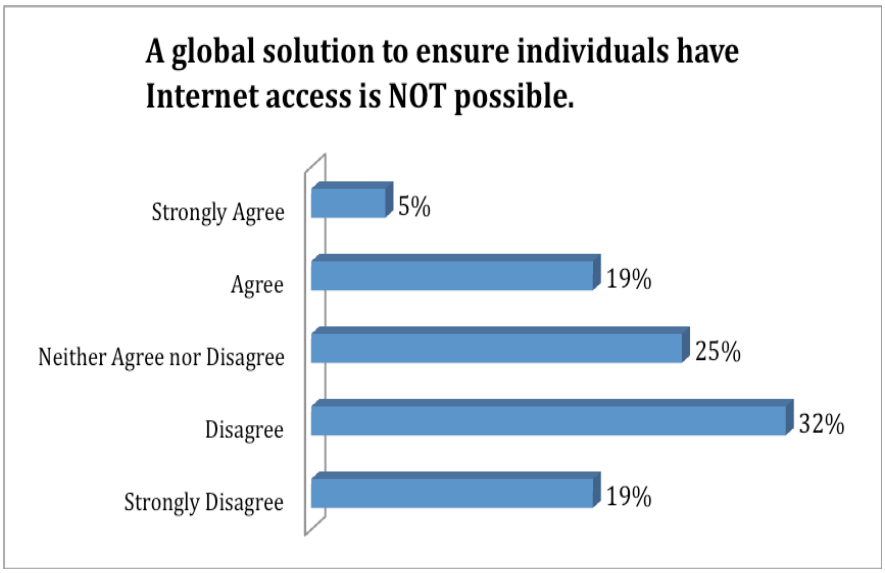


The United Nations' Role and Global Initiatives to Improve ACCESS

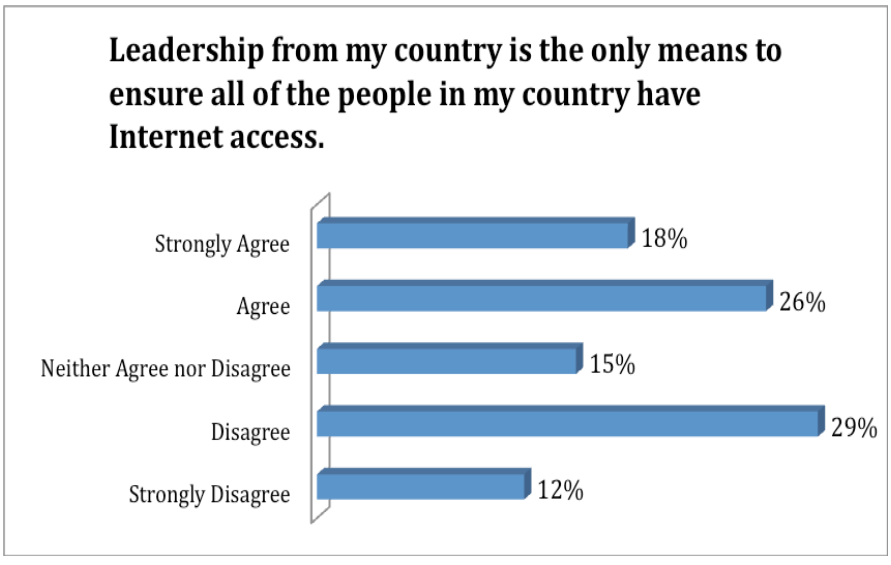
Potential methods for improving digital inclusion discussed by IGF participants and in the news media were tested to gauge IGF participants' support. When asked if the United Nations should coordinate a coalition of stakeholders to create a global fund to provide a universal basic level of Internet access to everyone, most agreed (58%) and just 1 in 5 disagreed with this concept.



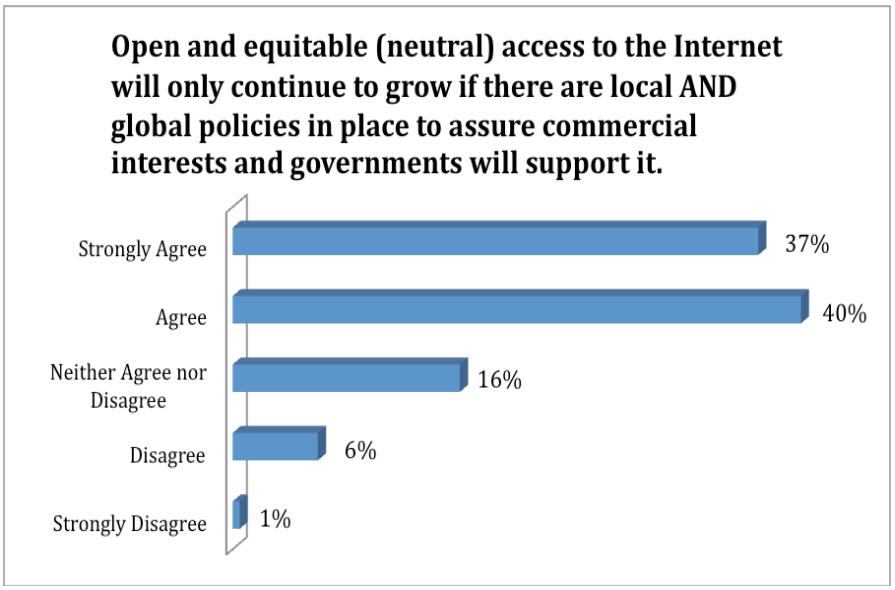
Additionally, most respondents indicated they are confident that this can be accomplished, with the same number supporting the measure disagreeing with the statement, "A global solution to ensure individuals have Internet access is NOT possible."



Most respondents also agreed that any global initiative would require support from their own countries. Forty-four percent (44%) agreed with the observation that leadership from their country "is the only means to ensure all of the people in my country have Internet access."



The majority (77%) said digital inclusion will expand significantly only if open and neutral cooperative effort between local and global policies is in place to assure that commercial interests and governments support the initiative.



Respondents were asked to list the most important future concerns about access and Internet governance, and 67 respondents did so. The top three responses:

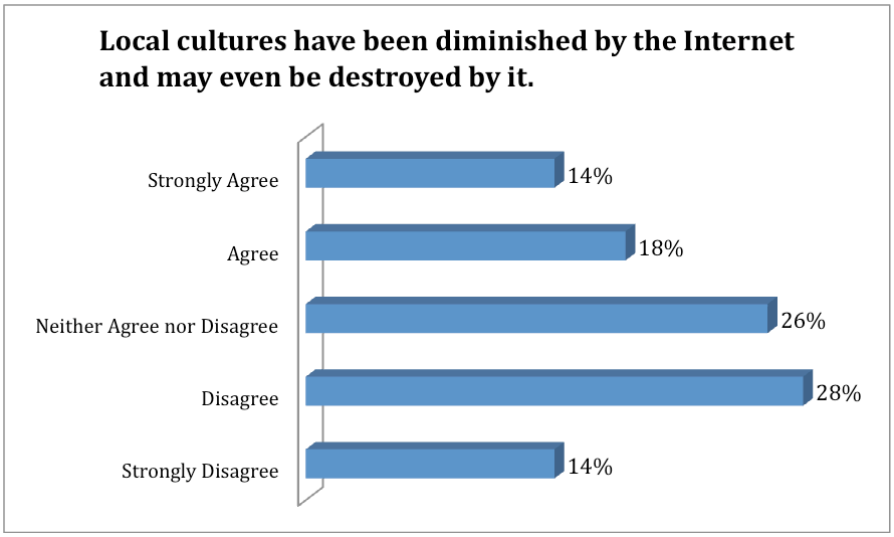
- Education about the Internet would help expand access by improving people's "capacity" to understand its uses and how to use it.
- Government intervention is necessary to establish final points of Internet access.
- Policies about the Internet should keep it a neutral network.

Issues Related to Internet DIVERSITY

Potential global policies related to Internet diversity are being debated during the Internet Governance Forums. A series of questions about establishing policies in these areas was tested among respondents.

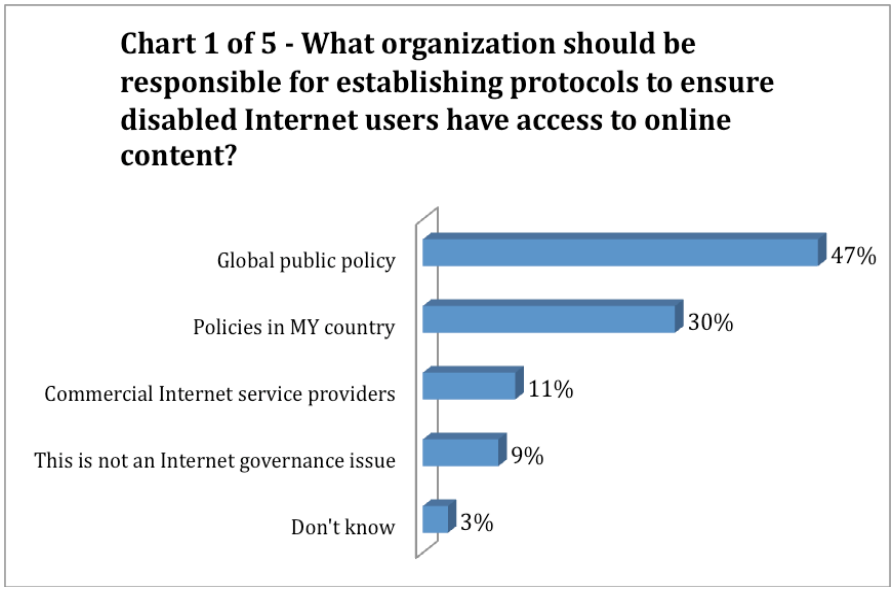
The majority (77%) agreed that global Internet policies should be established to ensure the languages of the world are represented fairly online, and they indicated that the issue should be given more emphasis.

Respondents were split as to whether the Internet enhances their local culture by providing an opportunity to educate others via the Web or whether people's use of the Internet has diminished their local culture. This dichotomy demonstrates the assets and deficiencies of the Internet. A plurality disagreed (42%) that the Internet is having a negative impact on their culture.

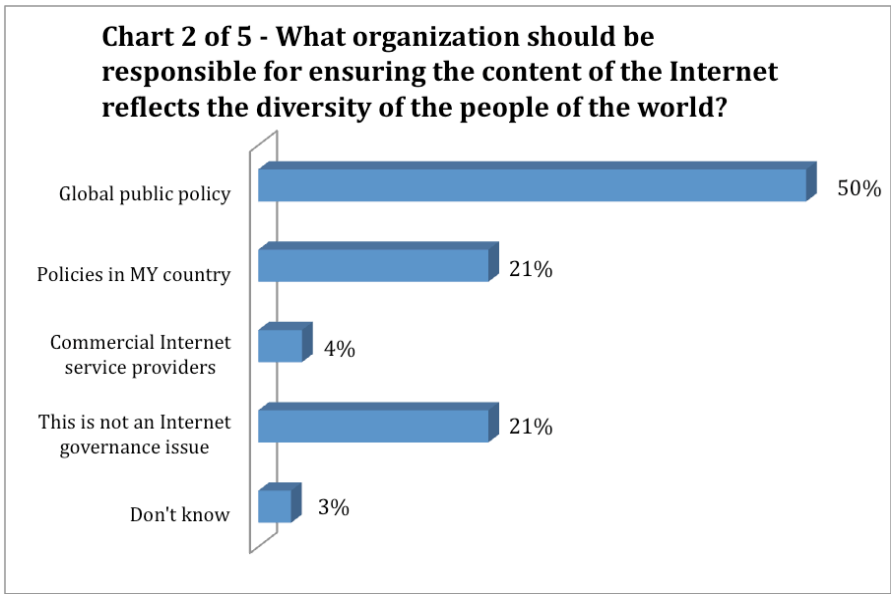


A series of potential policy areas were tested to determine whether global or local policies are most supported by stakeholders as the best method by which to address the issues.

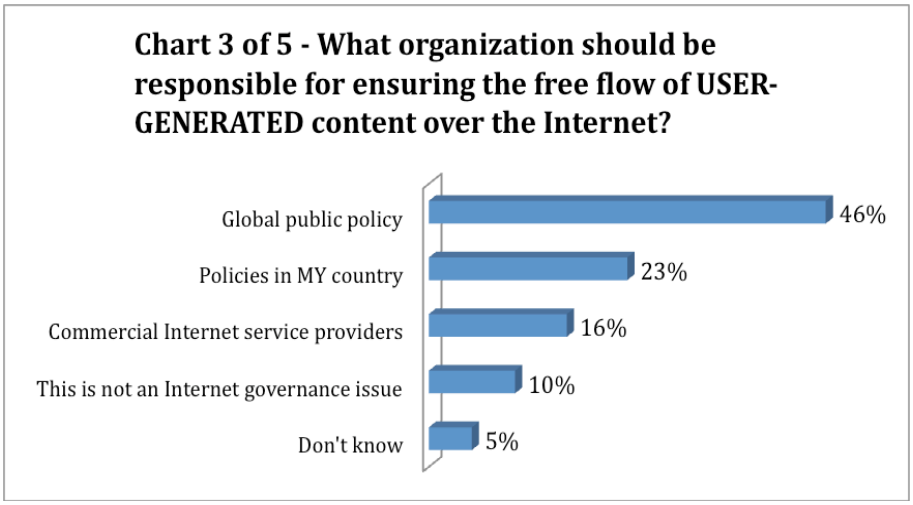
Significant support exists for global policies to establish a set of protocols for Internet design that supports the disabled user (47%).



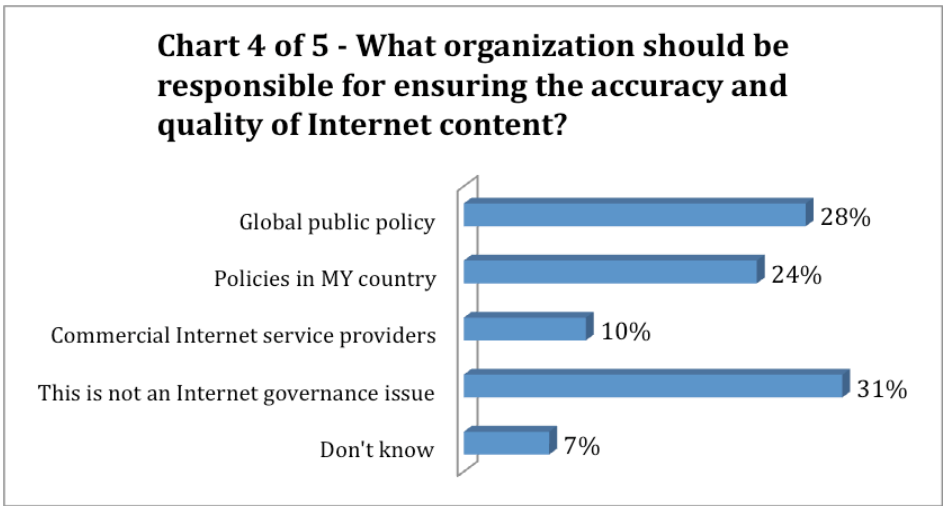
Global public policies to ensure that content reflects the diversity of the people of the world were supported by half of respondents.



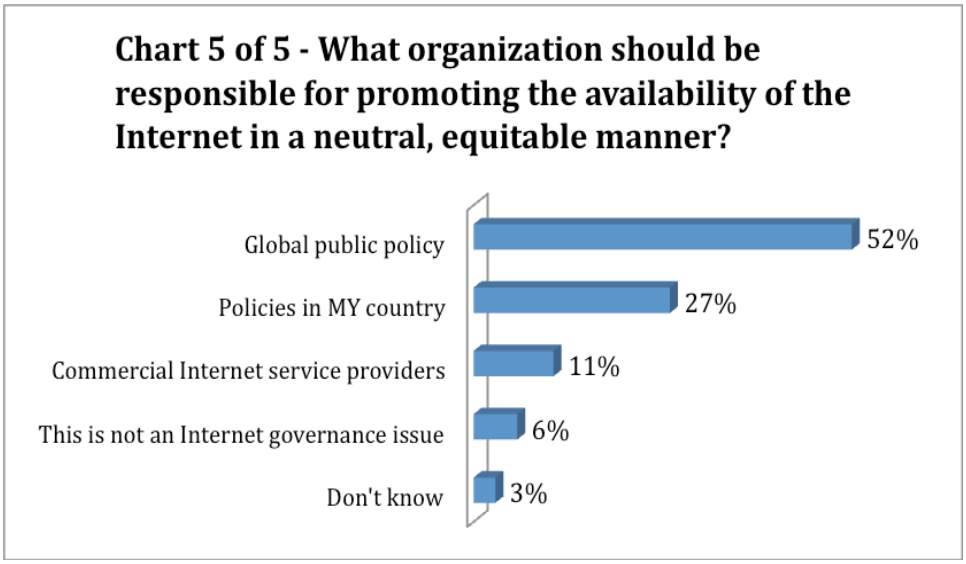
Slightly less support (46%) exists for establishing global public policy related to user-generated content; 39% indicated that local or commercial providers should set policies related to this issue and 10% said it is not an Internet-governance issue.



A plurality of respondents said the quality of Internet content is “not an Internet-governance issue,” although 28% said it should be addressed by global policy and 24% saw it as a local-policy issue.



The majority found that global public policies should be established to promote the availability of the Internet in a neutral, equitable manner.

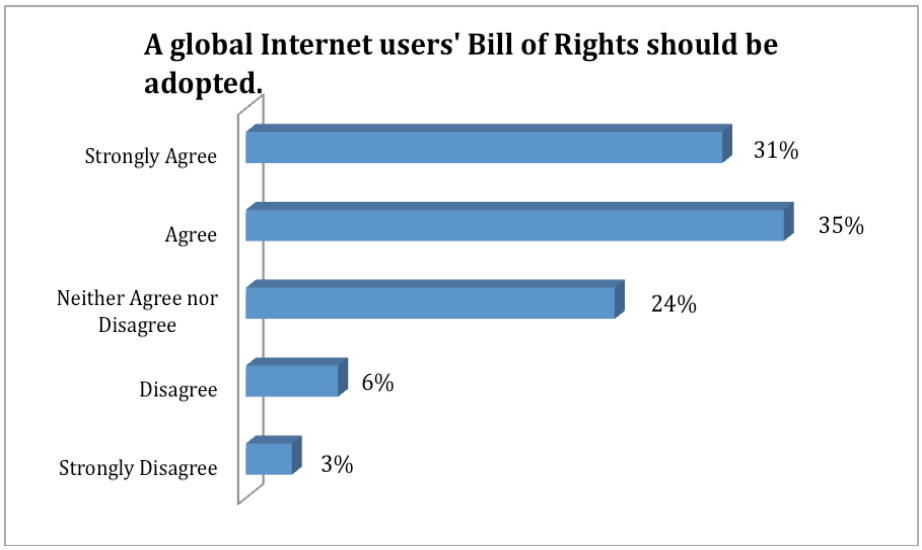


When listing their most important future concerns about DIVERSITY and Internet governance (N=52), most indicated their concerns related to equal access. Most commonly occurring responses:

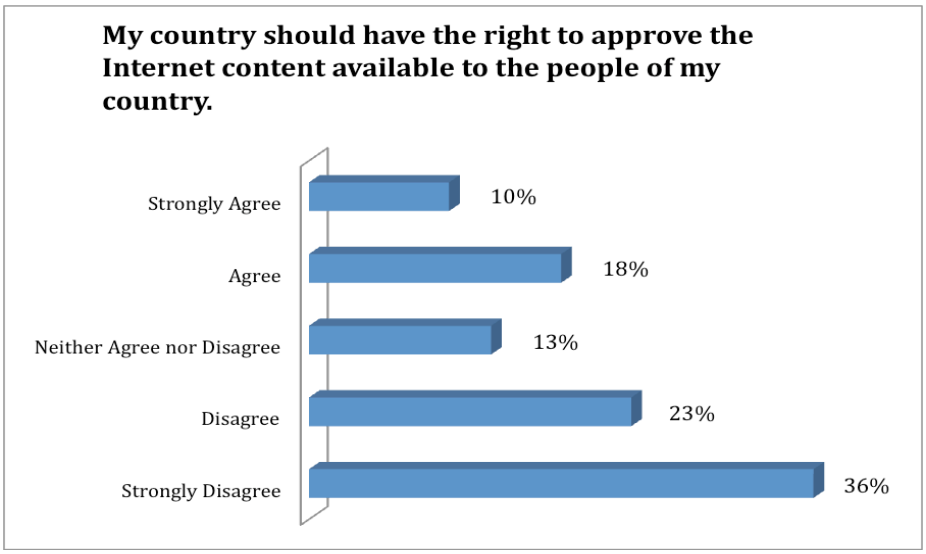
- Equal access to neutral, multi-lingual content and use of root web coding that supports the languages of the world.
- Positive effects on localization and culture preservation.
- Usability and openness to all, including people from developing countries and the disabled.

Issues Related to Internet OPENNESS

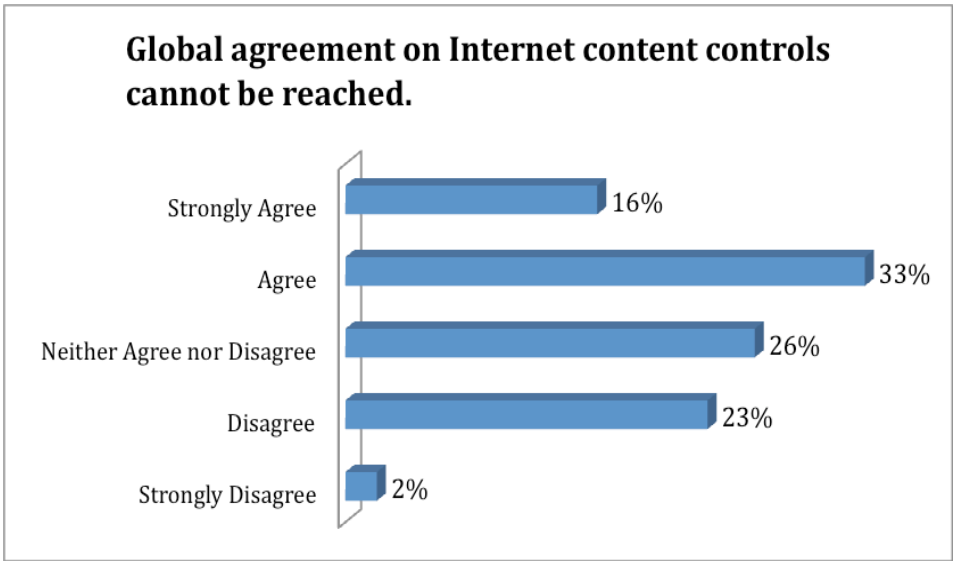
Respondents were posed a series of questions about Internet openness and potential policy areas. The first explored establishing a global Internet users' Bill of Rights; this is the goal of one of the currently established IGF dynamic coalitions. More than 66% of respondents supported the concept, and only 6% disagreed, suggesting this is an opportunity for IGF. The responses to this survey indicate that a Bill of Rights addressing areas where Internet governance stakeholders are in agreement should cover the following concepts: the Internet should be accessible to all people of the world, it should be available in their native language and at an affordable cost. A Bill of Rights, could be the foundation from which other Internet governance policies could be established, such as a global cybercrime-fighting unit (highly supported by most of the respondents in this study).



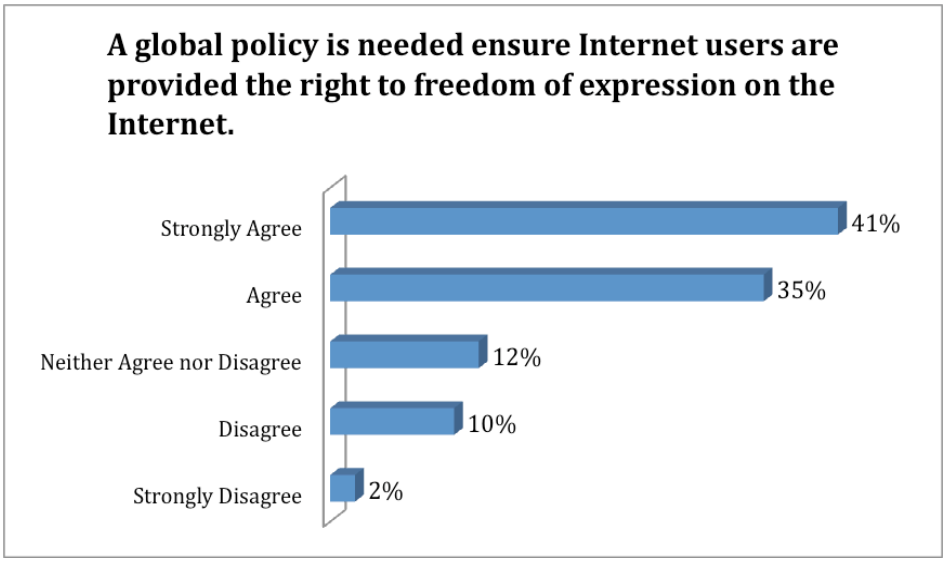
Fifty-nine percent (59%) of respondents disagreed with the statement "My country should have the right to approve the Internet content available to people of my country." Twenty-eight percent agreed.



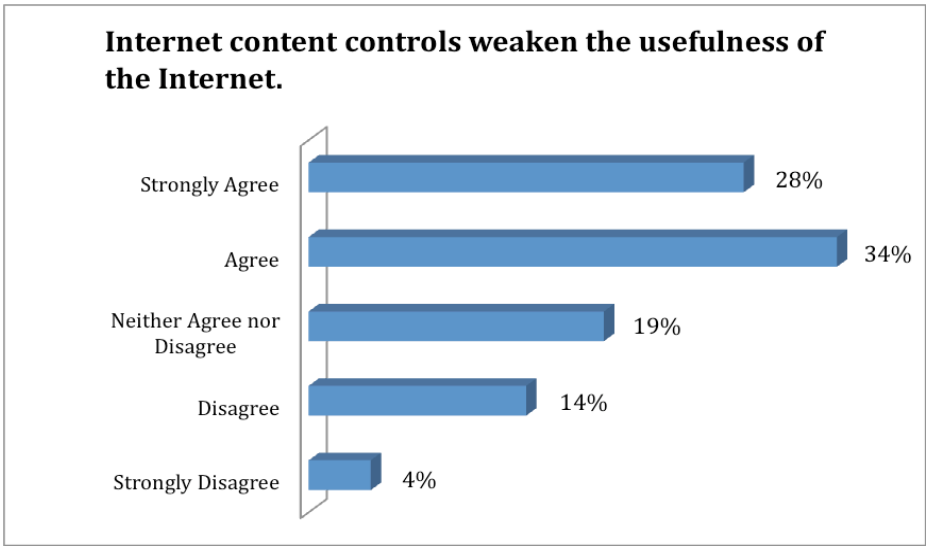
Respondents had mixed reactions to the potential for successfully achieving a global policy on Internet content. One in four said it can be done; 49% said it cannot be accomplished.



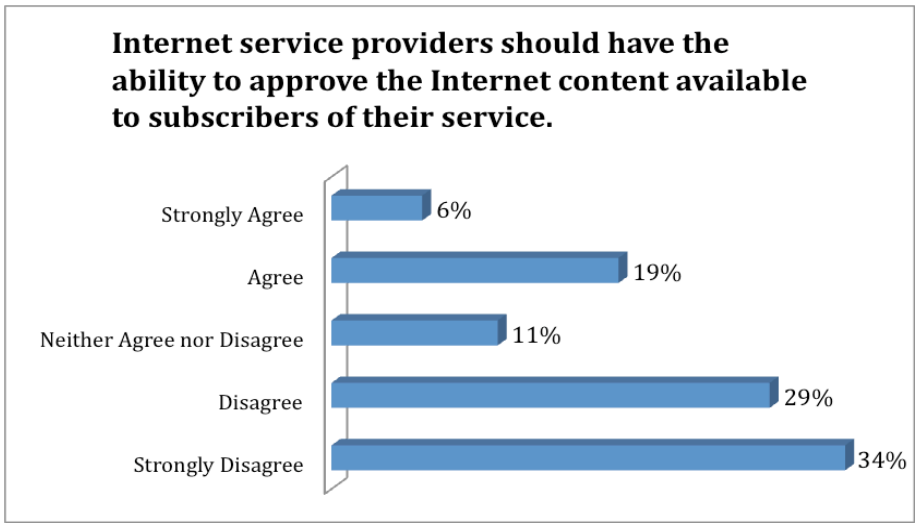
While the confidence in achieving it might be low, the majority felt that global policy is needed to ensure Internet users are provided the right to freedom of expression on the Internet (76%).



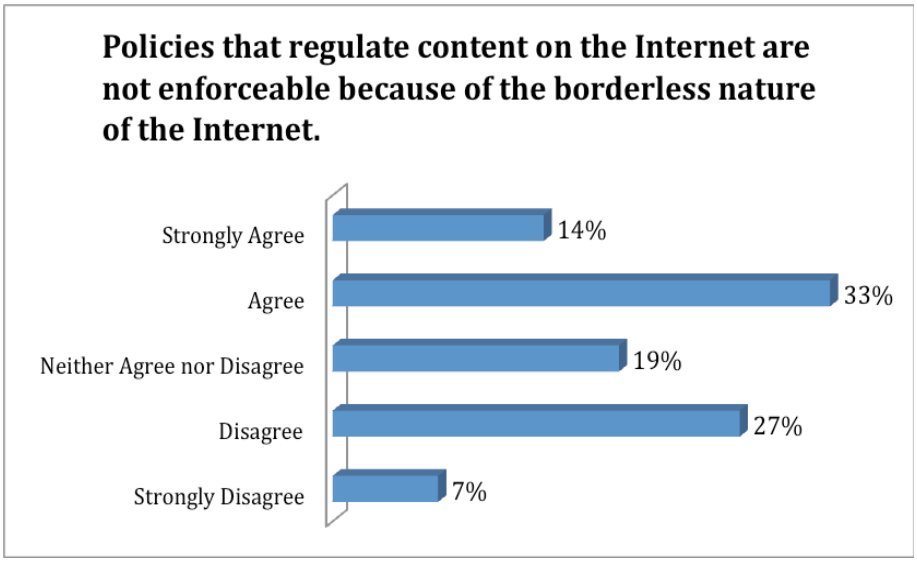
The majority also agreed that content controls weaken the usefulness of the Internet (62%), with just 18% responding in disagreement with the statement.



Even less support exists for the concept that commercial Internet service providers should have the ability to control content. The majority disagreed that content controls should rest with the Internet service commercial providers (63%).



Almost half of respondents indicated that if global policies were somehow developed to apply Internet content regulation, such policies would not be enforceable. About a third of respondents (34%) disagreed with this statement.



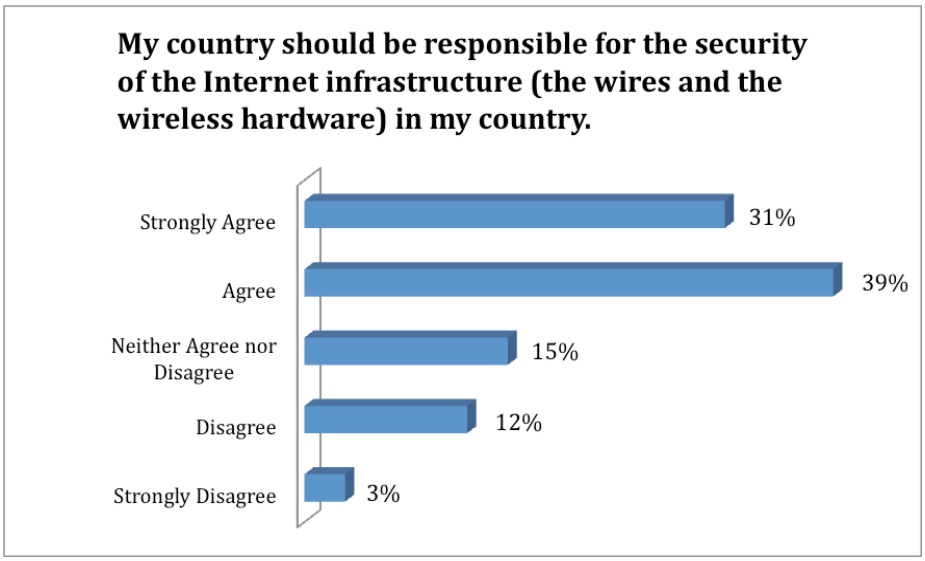
When asked about the most important future concerns about Internet governance and the concept of openness in an open-ended question (N=48), respondents were most likely to mention the need to balance freedom and security. Among the most-often occuring concerns:

- The difficulty in maintaining civil liberties on the Internet while maintaing a secure, cybercrime free Internet (N=19).
- Censorship, free speech and government control.
- Affirmation that self-regulation is the best Internet policy to preserve openness.

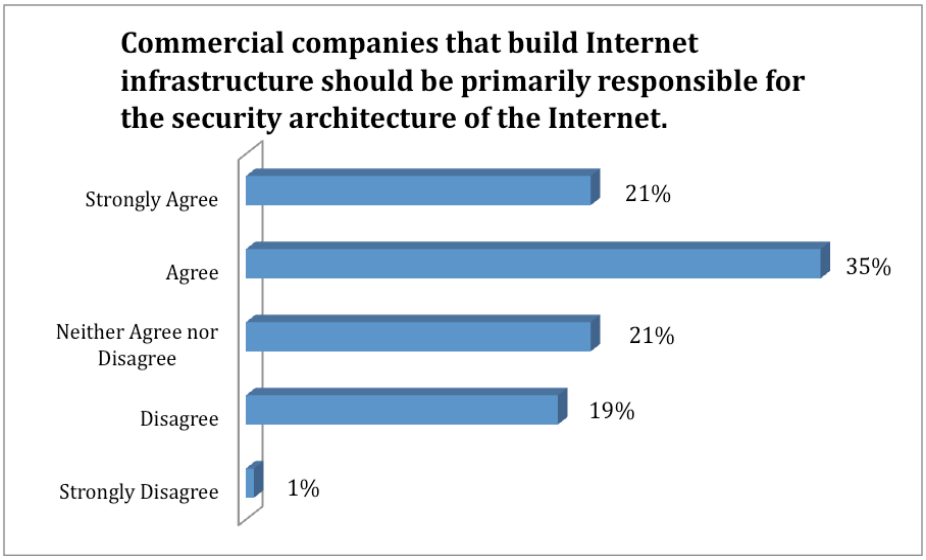
Issues Related to Internet SECURITY

Another area of emphasis at the Internet Governance Forum is Internet security; this is necessary to conduct business and other communications safely and to maintain the integrity of information flow, a requirement for the further positive diffusion of the Internet. Respondents were offered a series of statements about security issues being debated locally and globally and asked to agree to disagree with those statements.

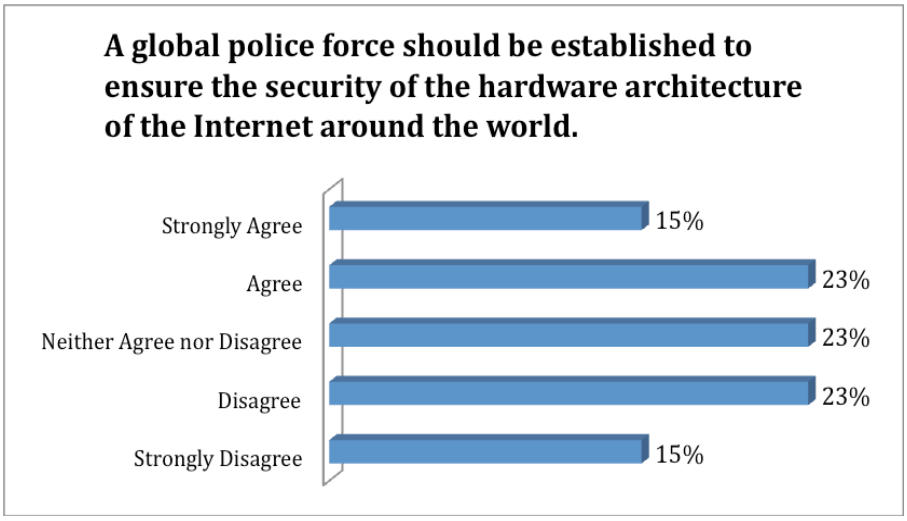
The wide majority (70%) agreed that local governments should be responsible for maintaining a secure Internet infrastructure.



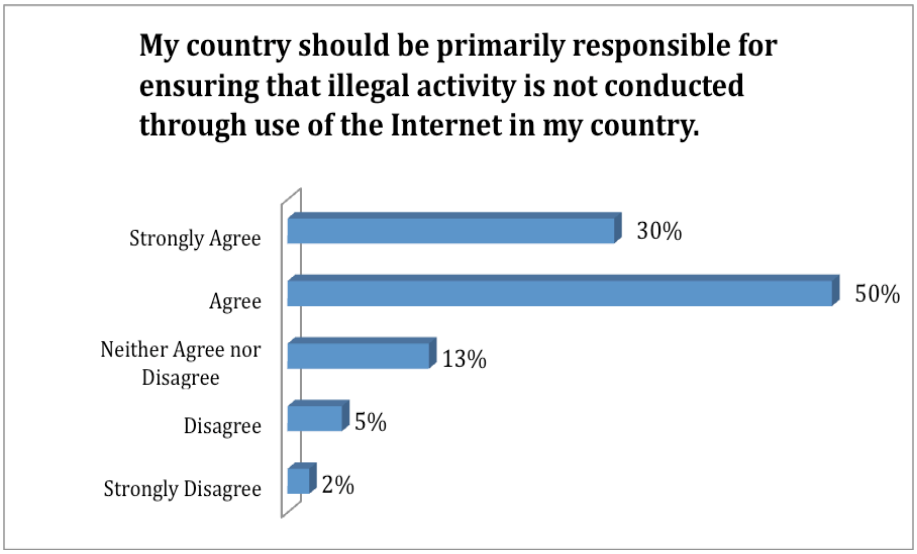
More than half of respondents (56%) agreed with the statement that the responsibility of Internet infrastructure security rests with the companies that build it.



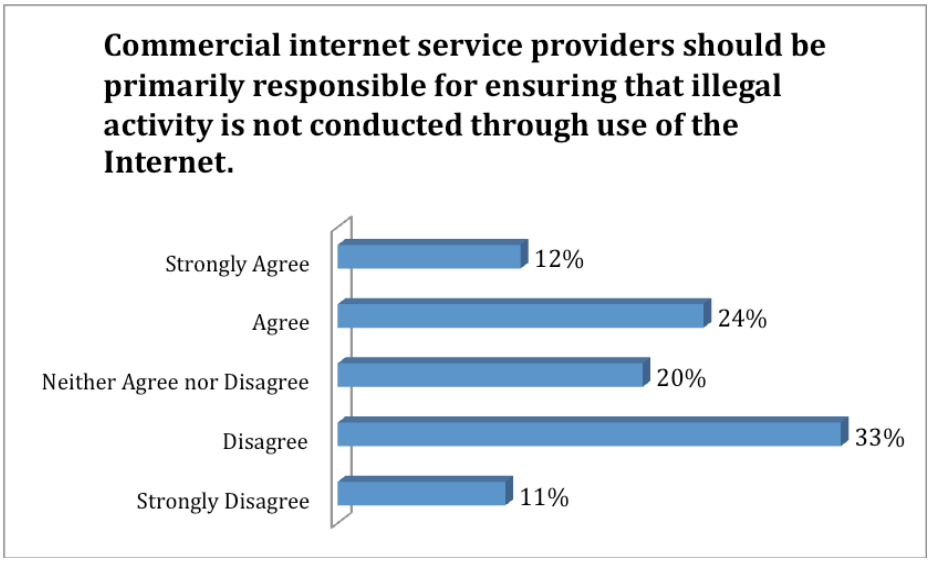
Respondents were evenly split on the notion that a global Internet police force should be established with the specific purpose of protecting the Internet's hardware architecture. Thirty-eight percent (38%) agreed with that concept, while an equal number disagreed. One in four remained neutral on the idea.



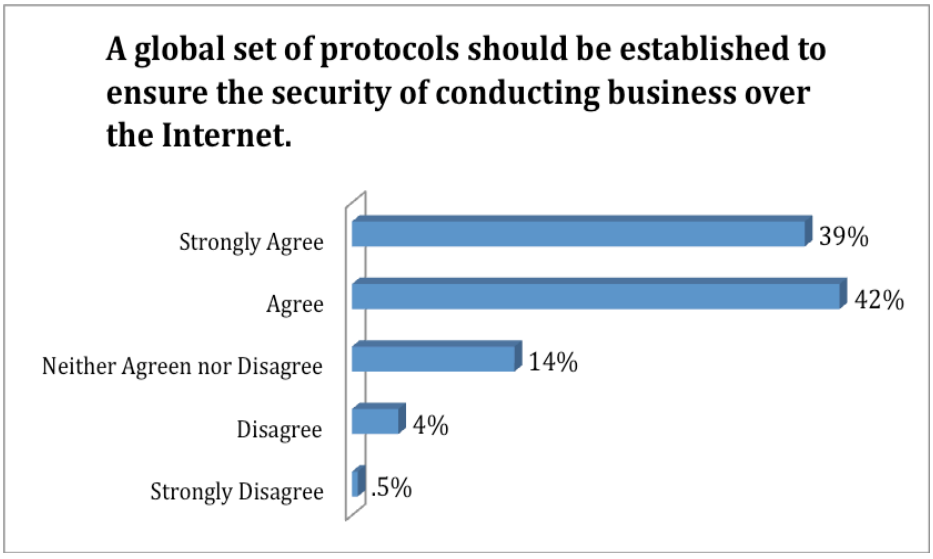
Cybercrime was more aggressively considered by respondents as an area in need of policing. Eighty percent (80%) of respondents agreed that their country should be responsible for ensuring that illegal activity is not being transacted through the use of the Internet.



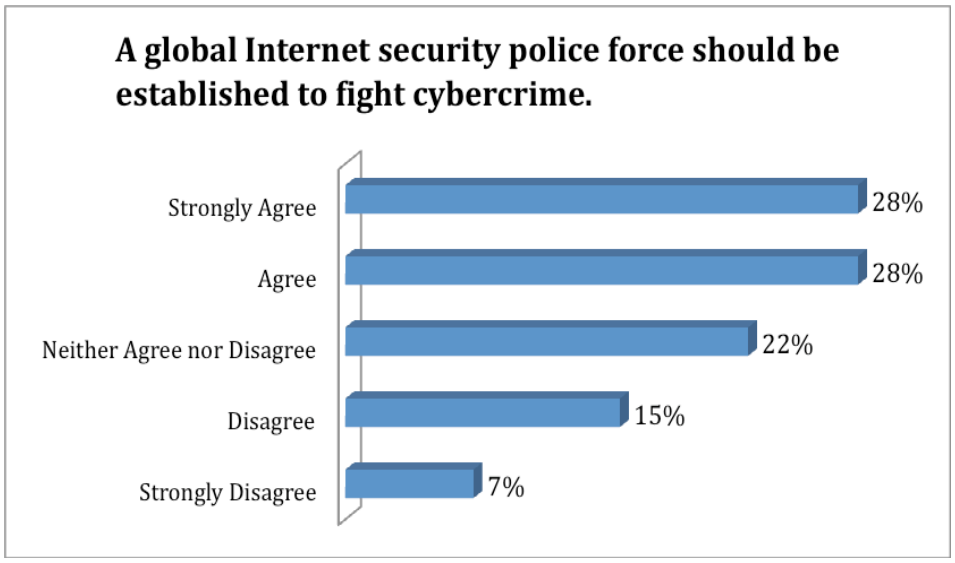
One in three (36%) agreed that commercial Internet service providers should also police this activity, while the majority disagreed 44% that it is the responsibility of the Internet service provider.



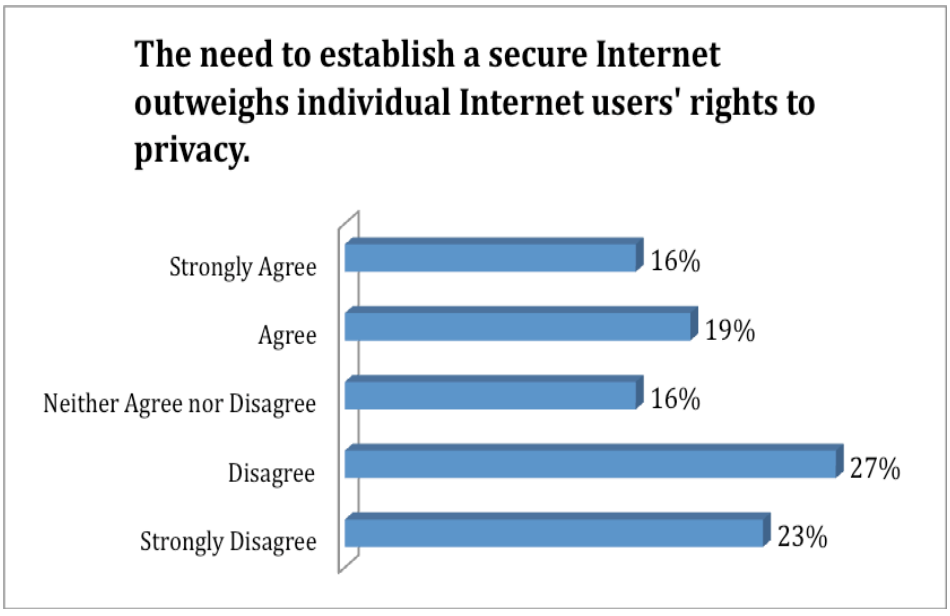
Global protocols for business transactions were heavily supported by respondents, with 81% in agreement and very little disagreement (4%). This overwhlemingly positive response suggests that the commercial transactional nature of the Internet could be one of the leading energies behind global policies.



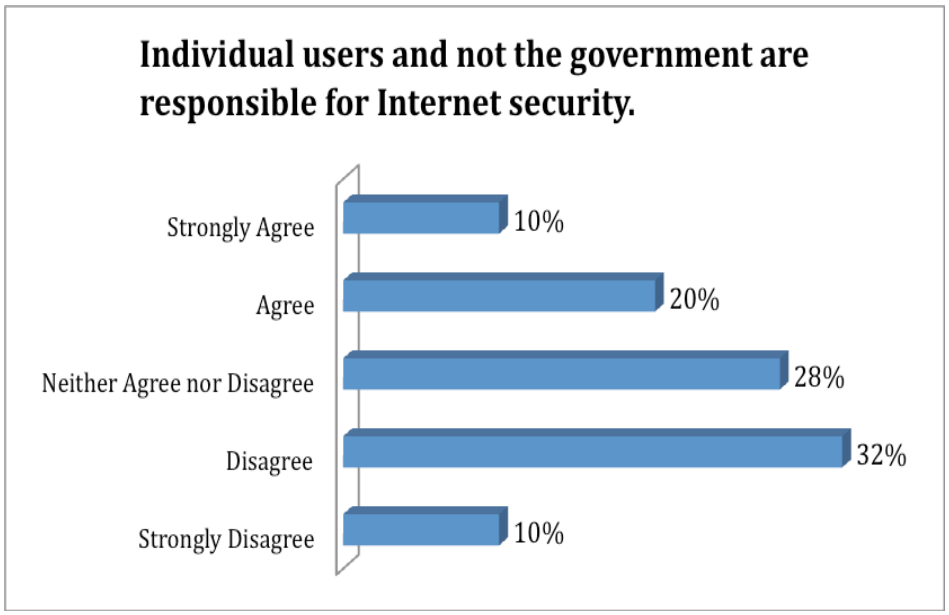
Respondents were also inclined to support (58%) a global Internet security police force, established for the purposes of fighting cybercrime. One in five (22%) disagreed with the notion.



When assessing the difficult balance between security and privacy, respondents were most likely to support the individual Internet users' right to privacy. Fifty percent (50%) disagreed with the notion that security measures outweigh the individual user's rights. Thirty-five percent (35%), or roughly 1 in 3, felt that it does.



While there remains a good deal of uncertainty where the ultimate responsibility for Internet security rests – the individual user versus the government – most respondents were likely to say it is the "government's responsibility" (42%), and 30% supported the idea that it is the individual user's responsibility.



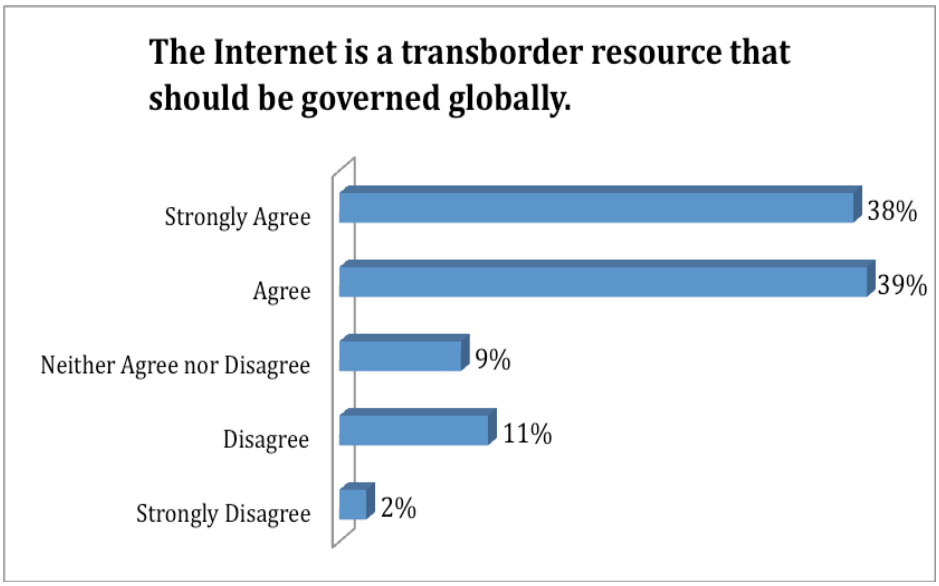
When asked in open-ended fashion about the most important future concerns about Internet governance and security, responses (N=52) were varied, with an emphasis on the individual and cybercrime. The top three concerns:

- Balancing civil liberties and the maintenance of a secure Internet for all people.
- Fighting cybercrime.
- Global cooperation in security initiatives.

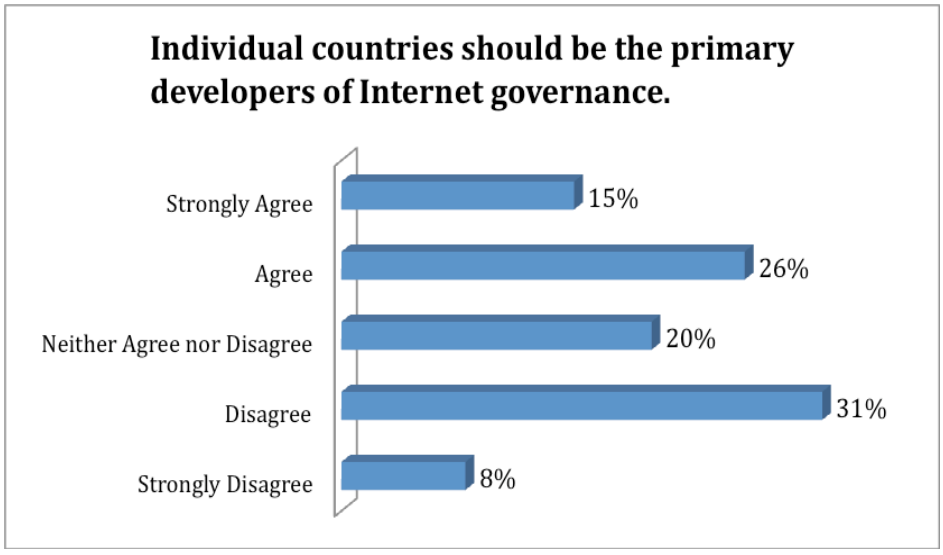
Future Global Internet Policies

General thoughts on Internet policies were also presented to respondents to gauge where they stood on the role of global governance and the potential of the Internet Governance Forum to foster effective policies. Respondents were asked a series of questions about global policymaking and its potential.

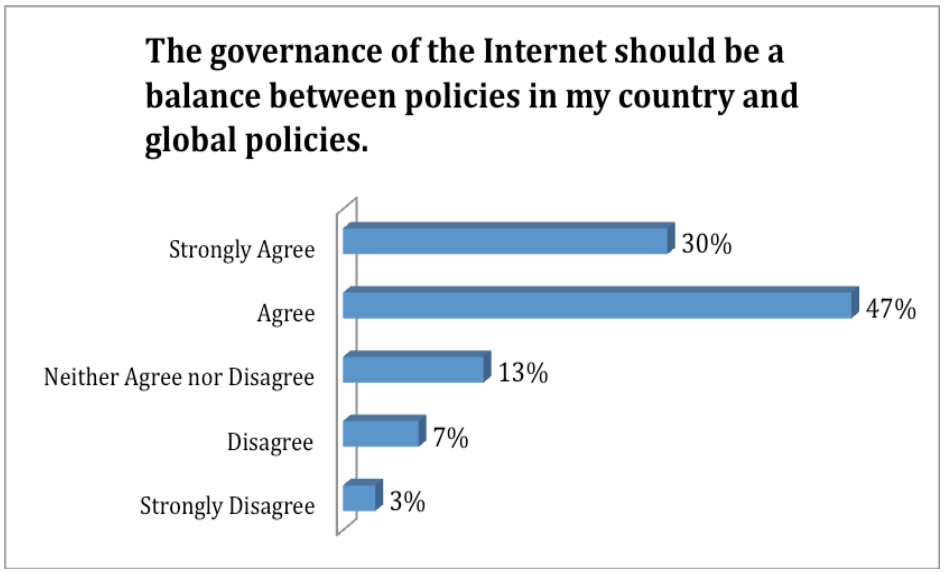
The majority of respondents (77%) agree that the Internet is a transborder resource that should be governed globally. Thirteen percent (13%) disagreed with this statement, and the remainder were uncertain.



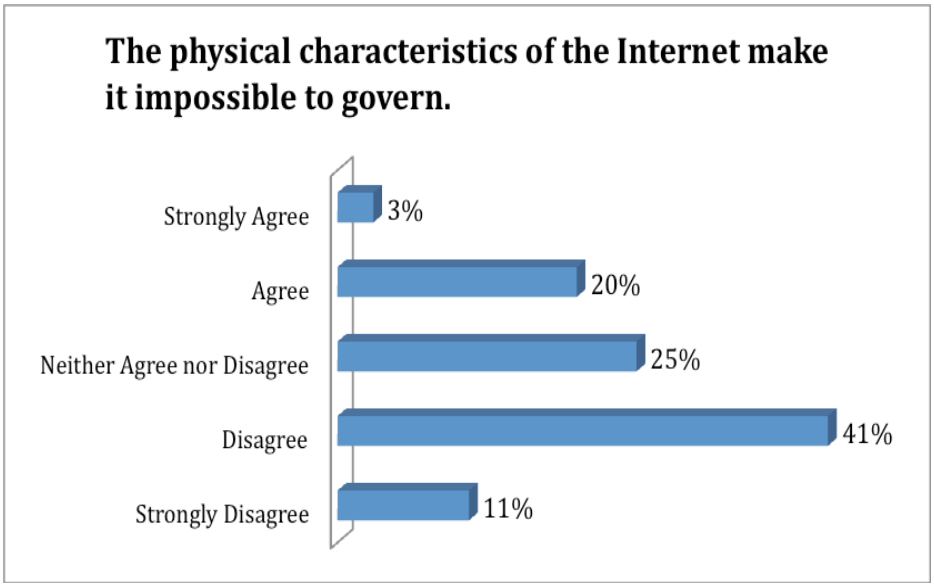
Respondents were split on the idea that individual countries should be the primary developers of Internet governance. Forty-one percent (41%) agreed with the statement and 39% disagreed.



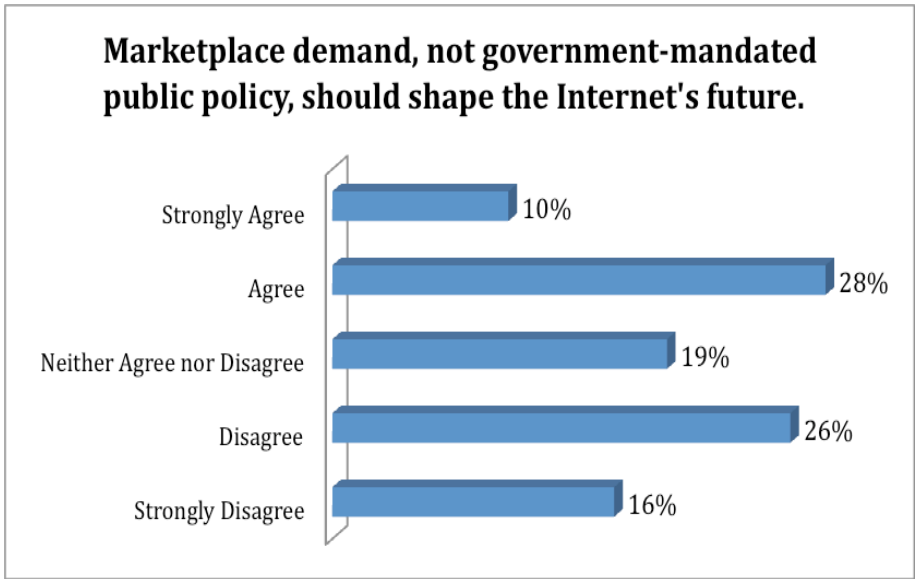
When asked if future Internet governance should be a balance between local and global policymaking, most respondents agreed with the statement (77%).



One in five respondents (23%) agreed that the physical characteristics of the Internet make it impossible to govern. The majority (52%) disagreed with the idea, and 25% neither agreed nor disagreed.



When asked if "marketplace demand and not government-mandated public policy" should be the primary influencer of the Internet's future 42% disagreed. About the same number agreed (38%) and nearly 20% remain neutral on the statement. This finding demonstrates some support for commercial solutions to Internet hurdles.

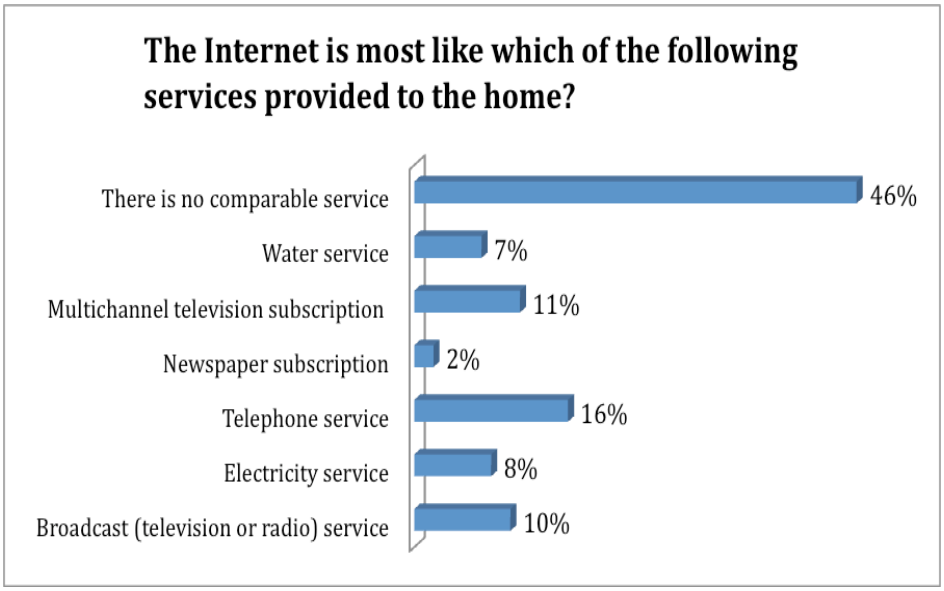


To gauge whether there is some predisposition to treating policymaking about the Internet like other forms of telecommunications, respondents were asked which of the following services to the home the Internet is most like:

- broadcast television or radio service
- electricity service
- telephone service
- newspaper subscriptions
- mutlichannel cable or satellite service
- water service
- there is no comparable service

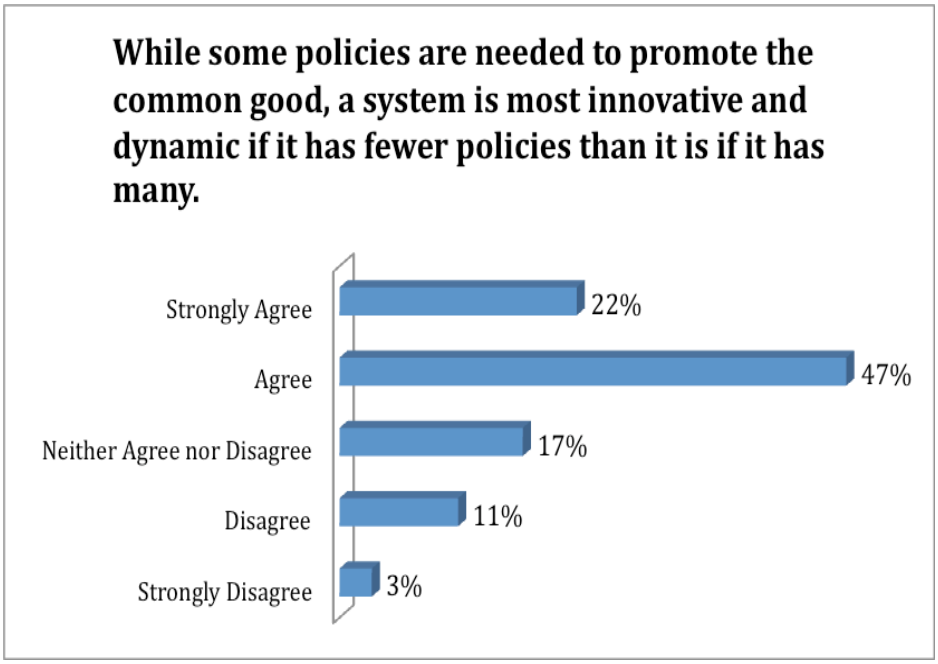
Respondents were most likely to say the Internet isn't like any other service to the home (46%).

The next-most-likely comparison was with telephone service (16%). In the "other" category of the question, which allowed for an open answer, some respondents said the Internet is a combination of "all of the above," others said it is like nothing we have ever known before and one said it is like a "sewer system" in that what you put in, you get out.

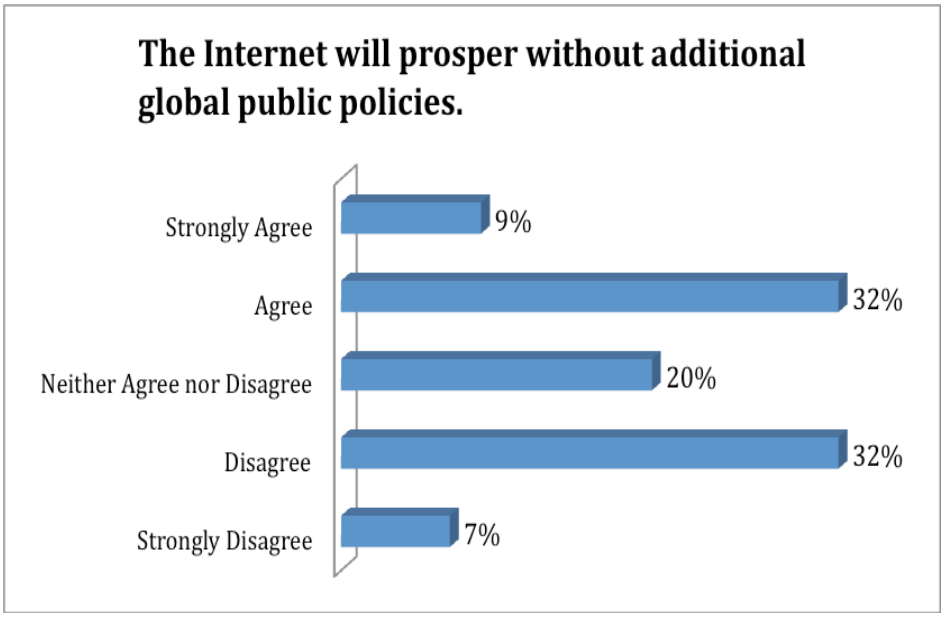


These findings suggest that future Internet policies will be unique and only some elements might be successfully based on previous telecommunications policy models.

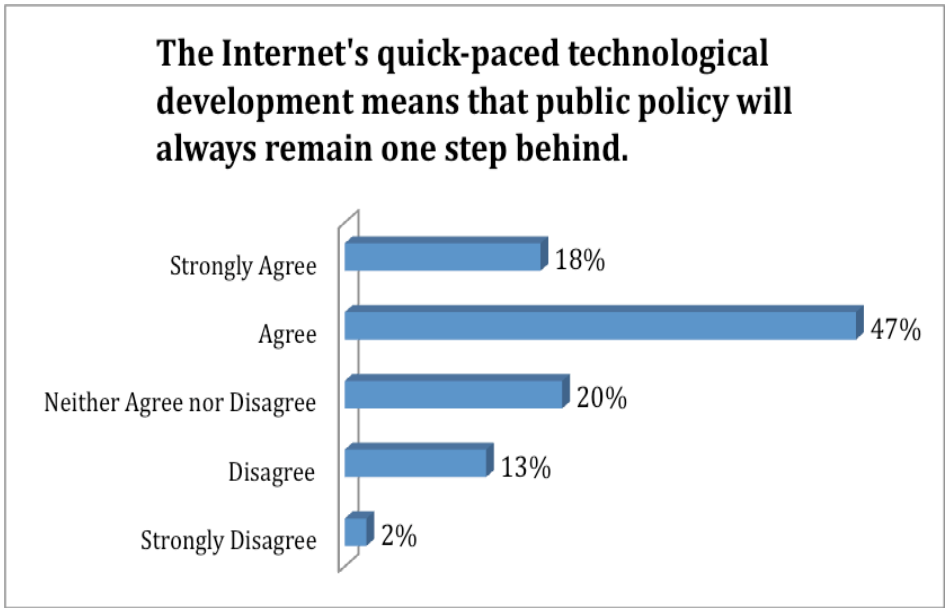
When asked to react to the statement that "a system is most innovative and dynamic if it has fewer policies than it is if it has many," respondents were most likely to agree that fewer policies create a more innovative and dynamic system (69%).



However, respondents indicate some uncertainty as to how far the Internet will be able to prosper without additional global policies. Forty-one percent (41%) agreed that the Internet will still prosper without global policies, while 39% disagreed and one in five remained uncertain.



The stakeholders surveyed also said that policy responses will continue to lag due to the rapid evolution of the Internet; 65% said public policy will be "one step behind development" because of the Internet's quick-paced innovation and expansion.



Closing Questions

Respondents were asked in open-ended fashion about the one most immediate public policy facing the Internet (N=125). The majority of respondents reinforced previously mentioned ideas about the importance of establishing access for all (N=29). This was closely followed by the need for a safe and secure Internet (22) and a desire for a "less is better" approach to global policymaking (N=15).

When asked about emerging concerns for future Internet public policy (N=121), respondents were mostly likely to stress establishing a safe and secure Internet environment (N=24), striking the balance between privacy and government intervention (N=19) and the need for affordable and easier accessibility for all (N=17).

In the final question, respondents were asked if there was anything that wasn't asked in the survey that they would like to share. Fifty-five (N=55) respondents provided additional information. Most asked how the IGF can create non-binding policies to govern the Internet, how technical and financial hurdles of Internet deployment can be overcome to bring the service to all people and if global nations at different stages of Internet deployment can come together at the IGF and have a capacity-building exercise.

Concluding Observations

Although the responding stakeholders would prefer as little regulation as possible and they say policy will always tend to lag behind the Internet's rapid evolution, they agree that some global policies are desired and achievable in the Internet governance arena. Most say the Internet is governable – the physical characteristics have developed to the point now at which such controls are already being exercised.

Access continues to be the area with the most global energy for potential policymaking. The majority of stakeholders indicated they prefer a multiple-measures approach for achieving access that centers around policies at the local and global level. Most support reasonable, fair marketplace approaches to bring Internet access to those still unconnected.

Stakeholders responding to this Internet governance survey believe accelerated diffusion and digital inclusion can be achieved through global policies and that this is the key area for policymaking. Strong support for improving access through schools and education was expressed among stakeholders.

Significant support was also expressed for establishing global protocols to ensure the safety of business transactions on the Internet. This finding suggests that the commercial applications of the Internet are a strong basis for building consensus among global stakeholders on issues of policy. These policies are likely to find a strong level of support, whereas policies related to regulation of Internet content will find the least consensus.

Global policymakers will likely find strong debate around the balance between maintaining a safe and secure Internet and protecting users' civil liberties. These tensions might be eased by adopting a global Internet Bill of Rights, a concept that has strong support among stakeholders.

When respondents were asked which of two traditional forces should shape the Internet's future – marketplace demand or government-mandated policy, the vote was split fairly evenly. In addition, when respondents were asked which previous technology the Internet most resembles they said it is unique. These are indicators supporting the idea that a governance format different from those applied to previous communications technologies is necessary to best shape future Internet policy. The multistakeholder model, an edges-in format, is employed by IGF, ICANN, the Internet Society and other organizations that are building the policies and structures underpinning the Internet by combining input from representatives from the realms of business, technology, NGOs, academia and civil society – the edges.

While most surveyed stakeholders say a system is most innovative and dynamic if it remains as unregulated as possible (70%), a third say the Internet will not prosper without additional global policies. Unfortunately, the majority also believes public policy will always remain a step behind due to accelerating technological development. This makes it more important now than ever before for engaged stakeholders to work to anticipate future needs and concerns in order to achieve positive outcomes as they scale the Internet upward to meet the needs of billions more users while retaining an open, safe environment for innovation, discourse, sharing and connection.