SCANNING THE HORIZON

The Future of
Digital Rights & Resilience
in the Global Majority

GLOBAL NETWORK FOR
Social Justice &
Digital Resilience

digitalresilience.network

This report, written by Juan Ortiz Freuler, was commissioned by the
Global Network for Social Justice and Digital Resilience (DRN) with
the aim of exploring future trends and relevant issues facing the digital
rights and digital resilience ecosystems in the Global South. It does not
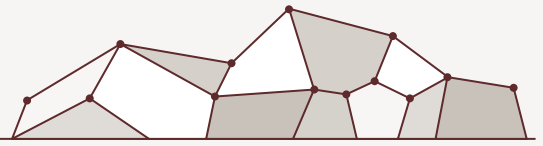necessarily reflect the views and perspectives of the DRN members.

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I.
FOREWORD

Founded in 2021, the **Global Network for Social Justice and Digital Resilience** is composed of ten established partners working collaboratively in the global majority in order to strengthen the digital resilience of the social justice ecosystem. A primary goal of the network is to produce and engage in knowledge sharing and critical thinking processes that build and teach collective ways of strengthening the tech capacity of each of its members and, consequentially, the digital resilience and social justice ecosystem as a whole.

This brief synthesizes and builds on the information and insights collected through interviews with both members of the network and its advisory board from November 2023 to March 2024. The goal of this endeavor was to help the group identify opportunities and challenges that the broader field of digital rights will be facing over the next decade and how these variables will impact the digital rights and digital resilience ecosystems at large. Our shared findings will also serve to develop the network's forward-thinking agenda.

Instead of considering this report as a final and complete vision of future challenges and opportunities for the field, this document was conceived as a foundation for continuing discussion and development. Initially conceptualized as an internal exercise, the network members decided to share their findings with a broader array of stakeholders in an effort to engage in an organic discussion and invite other participants in the ecosystem to reflect and develop on the insights found within.
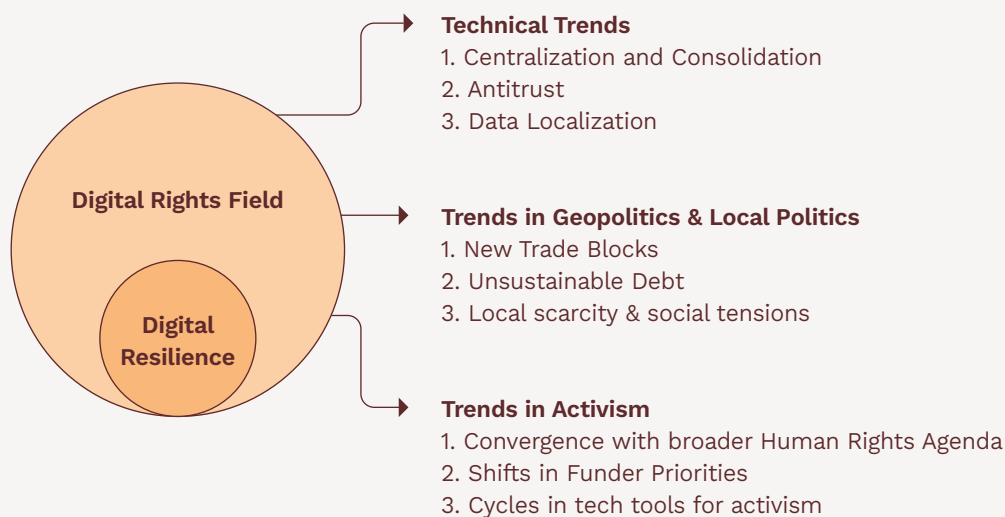
I.
FOREWORD

II.
INTRODUCTION

The future is not only unpredictable, but malleable. Over the past decades, civil society organizations have been successful in shaping public debate, regulation, and the way in which digital technologies operate. A variety of trends affecting this sector over the next decade will have to be considered by such organizations, from the collapse of ecosystems and mass migration of humans, to a shift in the global governance regime and an increasingly digitized world.

This document seeks to catalyze and inform conversations regarding the context in which digital rights and resilience activism will take place in the future. For the purposes of this report, *digital rights* refers to the protection and advancement of human rights in a context in which digital technologies are transforming human life. From a technical perspective, *digital resilience* will be used to refer to the ability of digital technologies to continue operating as safe and useful tools for the social justice activists that rely on them to advance their work[1]. This brief seeks to inform discussions at the intersection of these agendas. In particular, it aims to contribute to these efforts from a Global South perspective and set of values, shedding light on some of the specific environments that organizations within these regions might face in the coming years. The hope is that having such conversations will increase their ability to anticipate risks or benefit from the digital ecosystem and the civil society organizations that are a part of it.

The report builds on interviews with around 20 human rights and digital rights practitioners, as well as desk research and data analysis, to provide a horizon scoping of three key areas: government and geopolitics, technology, and activism.

Technical Trends
1. Centralization and Consolidation
2. Antitrust
3. Data Localization

Digital Rights Field

Digital Resilience

Trends in Geopolitics & Local Politics
1. New Trade Blocks
2. Unsustainable Debt
3. Local scarcity & social tensions

Trends in Activism
1. Convergence with broader Human Rights Agenda
2. Shifts in Funder Priorities
3. Cycles in tech tools for activism

For each pillar outlined above, the brief covers the following:

- key forces shaping the context,
- the ongoing trends that might shape the sector in the years to come, and
- scenarios that might emerge from this process and that might provide common ground towards a shared vision of the future.

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1. For a broader discussion on the definition of digital resilience as approached by the Network, see https://digitalresilience.network/how-do-we-define-digital-resilience/

III.
TRENDS IN GLOBAL GOVERNANCE, GEOPOLITICS, AND NEW LOCAL POLITICAL REALITIES
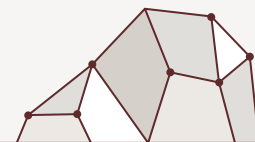
A. SYNTHESIS

● **US-China competition shaping access to technology:** Competition between the US and China might affect the conditions under which the Global South manages to access technologies or technology transfers. This process will shape the degree to which technology will advance or hinder human rights and interests of the peoples of the Global South, and the information sphere within which the debates regarding these challenges take place.

● **Coordination across the peripheries becomes urgent:** High levels of public debt might limit the bargaining power of countries seeking better conditions for their peoples, and how they participate in the global information system and the global economy. Coordination across the peripheries becomes crucial to increase the bargaining power of each actor.

● **Shrinking civic space fueled by economic and social pressures:** Increasingly difficult economic environments are likely to continue undermining trust in government, triggering higher conflictivity and further shrinking civic space. Civil society organizations might encounter new challenges to their daily operations. This calls for revising strategies of public engagement, funding, and other aspects underpinning organizational resilience.

B. CONTEXT

● **The growing gap between power and oversight:** The internet enables near-real time communication at a planetary scale. From poetry to war, teaching to commerce, our communications have converged onto the internet protocol. As such, the internet is a technology that can reshape global governance. However, while commerce and service provision have become globalized, our political systems have not, leaving human rights and freedoms online as a secondary or third order priority while the commerce-centered network keeps growing. Our systems of global governance have not scaled to match the footprint or speed of this globalized market. This growing gap between where power lies and where the institutions designed to hold it accountable reside can explain much of the tensions we are seeing today.

● **The resulting pressure on governance systems:** Within countries, this gap is fuelling tensions and undermining the credibility of public representatives who are perceived as unable to provide answers to local crises, with trust in government dropping consistently across democratic countries over the past years[3]. At the international level, it is highlighting the limitations of the current architecture of global governance[4]. In

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2. Systems of global governance refer to mechanisms by which the people's will might be translated to policy on a global scale.The natural example is the United Nations, but other organizations at a regional level (e.g. African Union, Organization of American States) as well as area specific organizations, such as International Monetary Fund, World Trade Organization also play a role in these processes, for better or worse.

3. Edelman, "2022 Edelman Trust Barometer," Edelman, 2022, https://www.edelman.com/trust/2022-trust-barometer; Manuel Castells, Rupture: The Crisis of Liberal Democracy (Cambridge, UK; Medford, MA: Polity Press, 2018)

4. Stewart Patrick, "Rules of Order: Assessing the State of Global Governance" (Carnegie Endowment for Peace, September 12, 2023), https://carnegieendowment.org/2023/09/12/rules-of-order-assessing-state-of-global-governance-pub-90517.

words of U.N. Sec. General, "the United Nations Charter and the ideals it represents are in jeopardy… we are gridlocked in colossal global dysfunction"[5]. This dysfunction is visible in its failure to keep the powerful countries accountable, but also in its inability to modulate the power being exercised by the increasingly powerful private multinational tech companies[6]. As a result, challenges like climate change and forced migration, but also the management of our global information systems, are becoming particularly difficult to tackle.

● **Tectonic shifts in geopolitics:** The tension between the US and China, the biggest economies, and leaders in tech innovation, is one of the main changes we are experiencing at the global governance layer. The internet took its leap to the global stage during the unipolar world of the 1990s, showing a meteoric rate of adoption to this day. As such, it is difficult for many of us to separate what we expect of this technology from the liberal ethos and *end-of-history* narrative from which it sprouted. While in 1994, US Vice-President Al Gore was referring to it as a "superhighway on which all people will travel"[7], by 2020 former Secretary of State Mike Pompeo was calling for countries to join a *Clean Network*, that would exclude adversaries of the US[8]. The triad of an increasing dependence on information technologies, the US' move away from free trade (neo)liberalism[9], and the continued process towards a bipolar or multipolar world will inevitably shape how we access technologies, share data, and essentially participate in the global governance arenas and economy. As such, three trends require particular attention from actors working on digital rights and resilience.

5. António Guterres, "Secretary-General's Address to the General Assembly" (United Nations, September 20, 2022), https://www.un.org/sg/en/content/sg/speeches/2022-09-20/secretary-generals-address-the-general-assembly.

6. In some cases, these bodies are even elevating the role of the private sector in global discussions and international negotiations, which in turn waters down the role of states and civil society.

7. Al Gore, "VP Remarks at the International Telecommunications Union," 1994, https://web.archive.org/web/20010528184855/https://clinton1.nara.gov/White_House/EOP/OVP/html/telunion.html.

8. US Department of State, "The Clean Network," United States Department of State (blog), August 2020, https://2017-2021.state.gov/the-clean-network/.

9. This is meant to be a description of a context in which there will be a weakened rhetoric for free flow in general: Free flow of goods, free flow of money, free flow of people, free flow of information. For more background on this change, see Matthew Duss and Ganesh Sitaraman, "The Era of Neoliberal U.S. Foreign Policy Is Over," Foreign Policy (blog), December 27, 2023, https://foreignpolicy.com/2023/05/18/neoliberal-foreign-policy-biden-sullivan/; Gary Gerstle, The Rise and Fall of the Neoliberal Order: America and the World in the Free Market Era, 1st ed. (Oxford University Press, 2022), https://doi.org/10.1093/oso/9780197519646.001.0001.

C. TRENDS

EMERGING TRADE BLOCS AND THEIR IMPACT ON GLOBAL GOVERNANCE

While exporting much of the key raw materials, many countries in the South import the technologies necessary to engage in the digital environment. As shown in Fig 1 , below, much of the colonial and neocolonial relationships between the north and south continue to hold. Few countries have a neighbor as their primary trade partner, while Europe remains the key trade partner of most of Africa, and the US remains the key influence in Central and the northern part of South America[10].

● **The emergence of BRICS:** The BRICS (Brazil, Russia, India, China and South Africa) are becoming increasingly relevant. While the smaller partners, like Brazil and South Africa showcase their regional influence, China has become a key trading partner for many countries across the Global South, becoming the main source of imports for most South American and Asian countries. Furthermore, the expansion of BRICS to include key energy exporting countries like Saudi Arabia, the United Arab Emirates and Iran (as well as Egypt and Ethiopia) could increase the influence of BRICS members in the MENA region[11], its ability to shape international trade more broadly,[12] and reduce dominance of the US dollar in such international trade[13]. This development has the potential to unbalance global commercial dynamics, with reverberations impacting the legal and political systems of BRICS and BRICS-adjacent countries, including the available technology providers, creating novel challenges and opportunities for the advancement of human rights.

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10. To see how the main trading partners evolved over the past decades, see https://twitter.com/sundellviz/status/1488596964208001026.

11. Alkesh Sharma, "Saudi Arabia and China Sign Deals Worth $25bn to Boost Economic Ties," The National, December 12, 2023, https://www.thenationalnews.com/business/economy/2023/12/12/saudi-arabia-and-china-sign-deals-worth-25bn-to-boost-economic-ties/.

12. Sumayya Ismail, "'A Wall of BRICS': The Significance of Adding Six New Members to the Bloc," Al Jazeera, August 24, 2023, https://www.aljazeera.com/news/2023/8/24/analysis-wall-of-brics-the-significance-of-adding-six-new-members; Julian Borger, "Brics to More than Double with Admission of Six New Countries," The Guardian, August 24, 2023, sec. Business, https://www.theguardian.com/business/2023/aug/24/five-brics-nations-announce-admission-of-six-new-countries-to-bloc.

13. Rachel Savage and Rachel Savage, "What Is a BRICS Currency and Is the U.S. Dollar in Trouble?," Reuters, August 24, 2023, sec. Currencies, https://www.reuters.com/markets/currencies/what-is-brics-currency-could-one-be-adopted-2023-08-23/; Robert Greene, "The Difficult Realities of the BRICS' Dedollarization Efforts—and the Renminbi's Role," Carnegie Endowment for International Peace (blog), December 5, 2023, https://carnegieendowment.org/2023/12/05/difficult-realities-of-brics-dedollarization-efforts-and-renminbi-s-role-pub-91173.

Fig. 1. Number one source of imports and exports for different countries across the world (2022)[14]

Imports from

Exports to

#1 export/import market
- Brazil
- Russia
- India
- China
- South Africa
- European Union
- United States

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14. Source: Created by the author based on data from the World Trade Organization. Interactive version available here. Note: In February 2024 it was announced that the US now has Mexico as its main source of imports. https://www.npr.org/2024/02/08/1229965009/mexico-has-overtaken-china-as-the-leading-source-of-goods-imported-to-the-u-s.

- **The US-China decoupling and its reverberations on digital resilience:** Although the US and China have created an intertwined network of industrial production over the past decades[15], politicians in the US are increasing pressures on companies and other countries to decouple from China. In the area of digital technologies, this took the form of the *Clean Network* promoted by former Sec. of State Mike Pompeo during Trump's administration[16], and was cemented into state policy during the Biden administration through the Chips Act[17] and the friendshoring policies being advocated by Sec. of Treasury Janet Yellen[18], which followed a string of sanctions on key Chinese companies like Huawei[19]. As such, the US has openly pressured governments to reject Huawei in Europe, Latin America[20], Africa and elsewhere[21], while the US invests in creating alternative 5G infrastructure[22] to catch up.

This trend can lead to limitations in access to alternative technology providers (and open avenues for the deployment of more extractive business models), but also perhaps greater technology transfers from the centers of power as they compete for influence in the South. Increasing the bargaining power of small and medium economies through strategically coordinating negotiation positions will become crucial to advance local and regional agendas.

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15. Richard Baldwin, Rebecca Freeman, and Angelos Theodorakopoulos, "Hidden Exposure: Measuring U.S. Supply Chain Reliance" (Brookings Institute, September 2023), https://www.brookings.edu/wp-content/uploads/2023/09/2_Baldwin-et-al_unembargoed.pdf; Anshu Siripurapu and Noah Berman, "The Contentious U.S.-China Trade Relationship," Council on Foreign Relations (blog), September 26, 2023, https://www.cfr.org/backgrounder/contentious-us-china-trade-relationship.

16. US Department of State, "The Clean Network."

17. White House, "FACT SHEET: CHIPS and Science Act," The White House (blog), August 9, 2022, https://www.whitehouse.gov/briefing-room/statements-releases/2022/08/09/fact-sheet-chips-and-science-act-will-lower-costs-create-jobs-strengthen-supply-chains-and-counter-china/.

18. Janet Yellen, "Remarks by Secretary of the Treasury Janet L. Yellen at Microsoft in New Delhi, India" (US Department of the Treasury, November 11, 2022), https://home.treasury.gov/news/press-releases/jy1096.

19. Ana Swanson, "U.S. Delivers Another Blow to Huawei With New Tech Restrictions," The New York Times, May 15, 2020, sec. Business, https://www.nytimes.com/2020/05/15/business/economy/commerce-department-huawei.html.

20. Andres Schipani, Jude Webber, and Benedict Mander, "Latin America Resists US Pressure to Exclude Huawei," FT.Com, 2019, https://search.proquest.com/docview/2237413242?pq-origsite=primo.

21. Mathieu Pollet and John Hendel, "The West Is on a World Tour against Huawei," POLITICO, November 28, 2023, https://www.politico.eu/article/west-world-tour-huawei-china-telecom/.

22. Ina Fried, "U.S. to Spend $1.5 Billion to Jumpstart Alternatives to Huawei," Axios, December 7, 2022, https://www.axios.com/2022/12/07/huawei-alternatives-5g-cellural-equipment-oran.

1. PUBLIC DEBT IS LIMITING BARGAINING POWER

A key element shaping bargaining power is the ability of an actor to wait for the right conditions to emerge. When a country can take debt, it does not need to rely on commerce to access the hard currencies needed to import technology and other products that cannot be locally sourced. However, a key challenge facing many countries on this matter is high levels of public debt.

- **Debt levels are increasingly high in relation to GDP:** A way of measuring the sustainability of debt is comparing it to a country's Gross Domestic Product (GDP), which measures the market value of all goods and services produced in a country during a specific period, typically a year[23]. Global public debt has tripled since the 1970s, and by the end of 2022 it had reached 92% of GDP[24].

Fig. 2. Debt as a percentage of GDP (2023 or latest available estimate)[25]

General government gr..

-2,8   261,3

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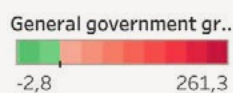
23. There are relevant intermediating factors that shape the ability of a country to accrue further debt, which is essentially defined by the trust others would have in its ability to return the debt, or in the strategic role the sustainability of an economic program might have for third countries. A more in depth analysis of debt sustainability would look at the interplay over time of debt to GDP, government revenues and expenditures, and trade balance. More in-depth analysis is available through the references section IMF, "Global Debt Monitor," 2022, https://www.imf.org/-/media/Files/Conferences/2022/12/2022-12-12-global-debt-monitor.ashx; Neil R. Mehrotra and Dmitriy Sergeyev, "Debt Sustainability in a Low Interest Rate World," Journal of Monetary Economics, The Real Interest Rate and the MarginalProduct of Capital in the XXIst CenturyOctober 15-16, 2020, 124 (November 1, 2021): S1–18, https://doi.org/10.1016/j.jmoneco.2021.09.001; Nouriel Roubini, "Debt Sustainability: How to Assess Whether a Country Is Insolvent" (NYU Stern School of Business, 2001).

24. IMF, "Global Debt Is Returning to Its Rising Trend," IMF, September 13, 2023, https://www.imf.org/en/Blogs/Articles/2023/09/13/global-debt-is-returning-to-its-rising-trend.

25. Source: Created by the author based on data from CIA Factbook. Data corresponds to the latest available estimates, typically from 2023. Interactive version available by clicking on the map.

As shown by figure 2 (above), most countries have surpassed the 50% mark (in red), while countries like India, Brazil, Argentina, Venezuela, Zimbabwe, Egypt and many more, have public debt's that have surpassed 80% of their GDP. As discussed in the next subsection, beyond limiting their bargaining power in global markets, and therefore their ability to access technologies fairly, high levels of public debt can increase socio-economic tensions within countries.

2. LOCAL POLITICS IN A CONTEXT OF SCARCITY: GROWING FRAGILITY AND ABUSES

As central banks are enacting a record increases to the interest rates as a way to combat inflation, the periphery see foreign investment dwindle and hard currencies getting funneled out of their countries and into US Treasury bonds and other assets that are perceived as safer investments, as their yields are relatively increasing[26].

As a result of this combination of a lack of access to loans and lack of foreign investment, debt ridden countries turn to shock austerity policies that include cuts in public expenditure, often leaving large swathes of the people without access to basic goods and services, such as food, education, healthcare, pensions, medicine, and more[27]. A study from 2022, estimated that within 12 months, 85% of the world's population living in 143 countries would be living under austerity measures[28].

As a consequence of austerity policies, inequality increases and large portions of the population are left feeling unable to participate fully or fairly in public life, fueling mistrust in government[29], protests[30], and in some cases repression, as political leaders reassert their power in a fragmented arena by undermining the ability of critics to express themselves. As outlined in the map below (Fig. 3), the institutional fragility in much of the global majority is already at very high levels, which means that the ability of governments to navigate the challenges outlined in this brief are already quite limited.

26. Anna Cooban, "Why You Should Care about the Global Rout in Government Bonds | CNN Business," CNN, October 4, 2023, https://www.cnn.com/2023/10/04/business/global-bond-market-sell-off-explainer/index.html; Tobias Adrian, "Higher-for-Longer Interest Rate Environment Is Squeezing More Borrowers," IMF (blog), October 10, 2023, https://www.imf.org/en/Blogs/Articles/2023/10/10/higher-for-longer-interest-rate-environment-is-squeezing-more-borrowers.

27. Oxfam, "The 2022 Commitment to Reducing Inequality (CRI) Index," Oxfam International, October 19, 2022, https://www.oxfam.org/en/research/2022-commitment-reducing-inequality-cri-index.

28. Matti Kohonen and Isabel Ortiz, "Austerity: A Raging Storm for the Developing World That Can Be Avoided," Inter Press Service, October 24, 2022, sec. Economy & Trade, https://www.ipsnews.net/2022/10/austerity-raging-storm-developing-world-can-avoided/.

29. Edelman, "2022 Edelman Trust Barometer".

30. Abubakr Al-Shamahi, "How Economic Hardship Fuelled the Arab Spring 10 Years Ago," Al Jazeera, 2022, https://www.aljazeera.com/news/2020/12/17/bread-and-gas-economic-boost-needed-after-arab-spring.

Fig. 3. Fragile States Index[31]
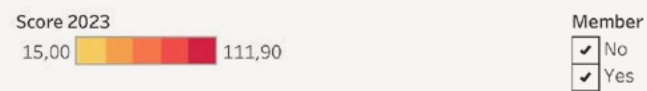
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Member

☑ No
☑ Yes

As noted by the Fund for Peace, the middle income countries are showing similar patterns as in the aftermath of the 2008 financial crisis, with food prices rising over the past four years, over a quarter billion people in 58 countries facing acute food insecurity in 2022, and over 90 countries experiencing fuel riots[32]. Beyond overwhelming nonprofit organizations with added administrative, personal, and professional challenges, these tensions might lead to an increase in government abuse of digital technologies to undermine basic human rights, such as freedom of expression and assembly.

For example:

● **Growing number of internet shutdowns:** in 2022 we saw a record-breaking 35 countries enacting internet shutdowns, with the total number of shutdowns reaching 187[33].

● **Widespread surveillance:** We are also seeing the deployment of surveillance techniques that leverage the ubiquity of mobile devices to access the most intimate spaces. In 2021, a leak placed the number of phones of interest to clients of a single spyware vendor, NSO Group, at 50,000[34]. This trend is also referenced in the module on activism, which underlines the fragility of some of the basic tools that have become essential for organizing and campaigning for change.

The combination of these conditions and trends point to a varied set of possible futures that civil society organizations working to advance digital rights and digital resilience should consider as they project their work into the next decade.

32. Fund for Peace, "Fragile States Index 2023," 2023, https://fragilestatesindex.org/wp-content/uploads/2023/06/FSI-2023-Report_final.pdf.

33. Zach Rosson et al., "Internet Shutdowns in 2022: The #KeepItOn Report," Access Now (blog), February 28, 2023, https://www.accessnow.org/internet-shutdowns-2022/.

34. Stephanie Kirchgaessner et al., "Revealed: Leak Uncovers Global Abuse of Cyber-Surveillance Weapon," The Guardian, July 18, 2021, sec. World news, https://www.theguardian.com/world/2021/jul/18/revealed-leak-uncovers-global-abuse-of-cyber-surveillance-weapon-nso-group-pegasus.

D. FUTURE SCENARIOS

The overarching trend outlined in this module is a shift in global governance, which might result in a movement towards:

- **A more multipolar world:** The US is moving away from liberalism (becoming less eager to support the free movement of goods, money, people and data) and China (with a more state-driven approach to politics and economics) is gaining clout in the international arena by forging agreements with regional leaders, such as through the BRICS alliance, and by increasing its influence over bodies such as the UN[35]. As a result, we might move towards a more multipolar world with more variance in policy and plurality in information ecosystems even as cyber-conflict increases.

- **A Bipolar world:** If there is a failure of BRICS[36] and other existing[37] (and future) attempts to rearrange how global governance operates, we might end in a more bipolar world, where China and the US enact tighter control on the information and technologies circulating within their respective spheres of influence. If so, the peripheries might become testing grounds for the deployment of technologies, cyberweapons and other tactics to influence the political agenda in some countries.

- **Unipolar world:** Alternatively, we might continue or further entrench global governance into a unipolar world arrangement. This could lead to less conflictivity, but also less autonomy across the periphery and more homogeneity when it comes to technologies and information.

- **More under-governed world:** Lastly, we could envision that the challenges of governing an ever more connected planet overwhelm even the possibility of a unipolar world and we have a scenario where mechanisms and existing fora of global governance collapse, leading to more variance in terms of policy, less enforceability of rules at a global level, and an increase in cyberconflictivity across and within regions.

35. Jeffrey Feltman, "China's Expanding Influence at the United Nations — and How the United States Should React" (Brookings Institute, 2020), https://www.brookings.edu/wp-content/uploads/2020/09/FP_20200914_china_united_nations_feltman.pdf.

36. Niall Duggan et al., "Introduction: 'The BRICS, Global Governance, and Challenges for South–South Cooperation in a Post-Western World,'" International Political Science Review 43, no. 4 (September 1, 2022): 469–80, https://doi.org/10.1177/01925121211052211.

37. David Adler, "The West v Russia: Why the Global South Isn't Taking Sides," The Guardian, March 28, 2022, sec. Opinion, https://www.theguardian.com/commentisfree/2022/mar/10/russia-ukraine-west-global-south-sanctions-war; Marco A. Vieira, "Understanding Resilience in International Relations: The Non-Aligned Movement and Ontological Security," International Studies Review 18, no. 2 (2016): 290–311, https://www.jstor.org/stable/24758593.

Of particular relevance to digital resilience is the question of how the global rule-making processes that underlie what is currently a global information system will evolve over the coming decade.

The possibilities could be sketched as follows.

```
                          Reach
                            +
                            
                          Global
                            ↑
                            |
                            |
Degree of                   |                          Degree of
goverment        ←——————————|——————————→               goverment
power                    Regional                       power
              Corporate     Multi-stakeholder   Multilateral
              self-regulation
                            |
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                          Local
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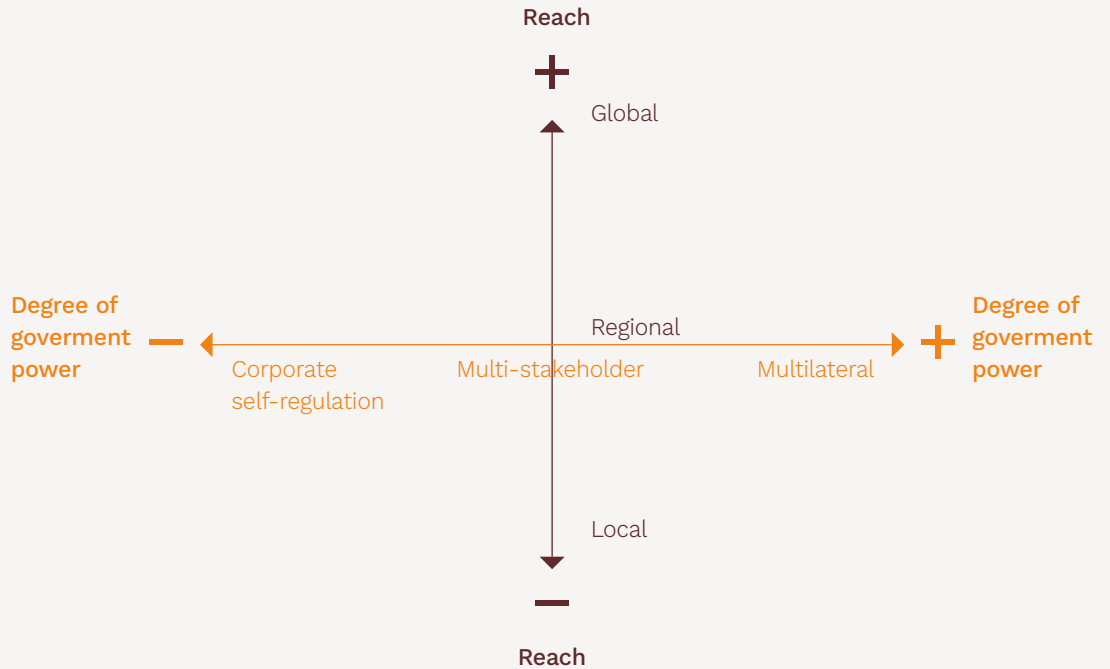
A useful exercise for readers and their teams might be to discuss where we stand on the proposed map today, where current trends might have us land ten years from now, and what implications that shift would have:

1. *How would it impact technologies and societies at large?*

2. *What types of activities might the field need to engage in now to advance the scenario that is best suited to secure digital and human rights at large?*

3. *How will strategies, mission statements, and overall organizational resilience be affected by such changes?*

IV.
TECH TRENDS
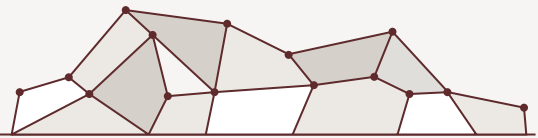
A. SYNTHESIS

- **Power is increasingly consolidated in a handful of companies:** The process of consolidation can further limit the ability of activists, governments, and the international governance system to effectively monitor and ensure technologies uphold human rights and advance the public interest.

- **Antitrust in central countries offers hope of change:** Several ongoing investigations in the US, China, and elsewhere offer a glimpse of hope, and could radically change the landscape of tech players.

- **Data localization policies are likely going to become widespread:** Governments concerned with privacy, sovereignty, and the lack of mechanisms to hold foreign companies accountable are forcing multinational companies to root datacenters and other assets within their territory.

B. CONTEXT

A variety of technologies have garnered significant public attention, including artificial intelligence, virtual reality, blockchain, quantum computing, and satellite provision of internet services, among others. Rather than trying to expand on the vast research regarding the cycles of hype and disillusionment towards new technologies[38], throughout this section I will focus on the underlying issue of power, which permeates all of the upcoming technology by defining who will get to shape it and benefit from it.

Social media as an example of corporate power grab: To illustrate how a technology provider can exercise and increase its power over the information sphere, let's consider social networks. These are platforms most of us have used daily for over a decade, and which were transformational enough to be branded as web 2.0. Although these social media companies have (mostly) kept their original names, the features and characteristics of these platforms have radically changed over the years, allowing their managers to exercise an ever-increasing amount of power over our information spheres, shaping our ability to exercise our right to express ourselves and access knowledge to a degree that has no parallel in history. Changes that, taken together, illustrate an aggressive power grab.

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38. Gartner, "4 Exciting New Trends in the Gartner Emerging Technologies Hype Cycle," Gartner (blog), August 23, 2023, https://www.gartner.com/en/articles/what-s-new-in-the-2023-gartner-hype-cycle-for-emerging-technologies.

Table 1. The growing power exercised by social media companies over our information sphere

STAGE	KEY PLATFORM FEATURES	MARGIN OF DISCRETION OF ADMINISTRATORS	IMPACT OF PLATFORM DISCRETION	POWER EXERCISED BY PLATFORMS
2004 – 2006	Contact list with profiles. **Publishing content on the web is made easier**. "Democratization" of blogs.	**Limited:** They remove content and profiles that violate the terms and conditions.	**Low:** Few users who – on average – spend little time online.	Low
2006 – 2009	The content each user publishes on their own profile generates a copy that becomes visible to the network of contacts in a **centralized space** where the content is organized in chronological order. The need for active scrolling by the user is reduced.	**Limited:** remove content and profiles that violate the terms and conditions of the service.	**Low:** Less than 1 billion users, who – on average – spend little time online.	Low
2009 – 2017	The chronological order of publication in the centralized space is gradually replaced by **algorithmic curation** that follows secret criteria (Facebook in 2009; Instagram and Twitter in 2016).	**Medium:** Content is reorganized according to secret algorithms. Surveys suggest that users were largely unaware of curation.	**Medium:** Number of global users reaches 2.46 billion in 2017. On average, users spend 128 minutes a day on social networks.	Medium
2017 – 2020	Gradual exposure to content that is not created or shared by the people the user chooses to follow: It is enough for someone to have reacted to the content (a Twitter or Facebook "like", instead of *Share* or *Retweet*). Snapchat "Stories" model expands: the **platforms automate user movement** to the next story after a set number of seconds.	**Broad:** Algorithms gain discretion, operating on a vaster universe of content. In turn, the space subject to algorithmic curation within the platform increases, and administrators gain control over the time dimension.	**High:** Number of users reaches 2.9 billion. On average, each user spends 145 minutes a day on social networks.	High
2020 – Today	**Users are exposed to content generated by any user of the platform**. With the growth of the TikTok model, automatic scrolling of content gains even more space.	**Very broad:** The universe of content from which algorithms select what to show each user is no longer limited by the network of people each user decides to follow.	**Very high:** Number of users reaches 4.7 billion (2022). On average, each user spends 147 minutes a day on social networks.	Very High

Source: Developed by the author based on a variety of sources.

This description of the growing power being exercised by social media companies over our planetary information sphere is a particularly vivid example of a broader process of consolidation of power within the digital environment. In turn, the consolidation of power in the corporate sector is part of a broader trend whereby many relevant decisions that traditionally fell in the hands of democratically elected officials are now in the hands of a small and unaccountable group of private companies.

Growing and unconstrained corporate power: The current technological environment is increasingly opaque, with high technological complexity being seasoned with abusive interpretations of the existing intellectual property protections and excessive use of non-disclosure agreements. This context radically undermines the ability of many of our existing institutions and mechanisms to achieve their goal of ensuring the public interest and people's rights are advanced by economic and technological developments.

This changing scenario might require civil society organizations to revise the ways in which they interact with government agencies and companies. In particular, it calls for greater care and attention to the degree to which corporate funding shapes the digital rights debate and agenda over the years to come.

C. TRENDS

1. Consolidation at every layer of the internet stack
The internet, email, and the web were designed to run over an open protocol. This enabled a decentralized information system to emerge and remain resilient and innovative. Over the past decades, several key layers of these systems have become increasingly centralized. The outcome is an ecosystem that is less innovative, more prone to create large scale problems in the face of failure, and easier to control by new and old power holders, be they the multinational companies themselves, or the governments that protect their positions of market dominance.

Fig. 4 Sketch of the architecture of a network (based on Baran, 1962)

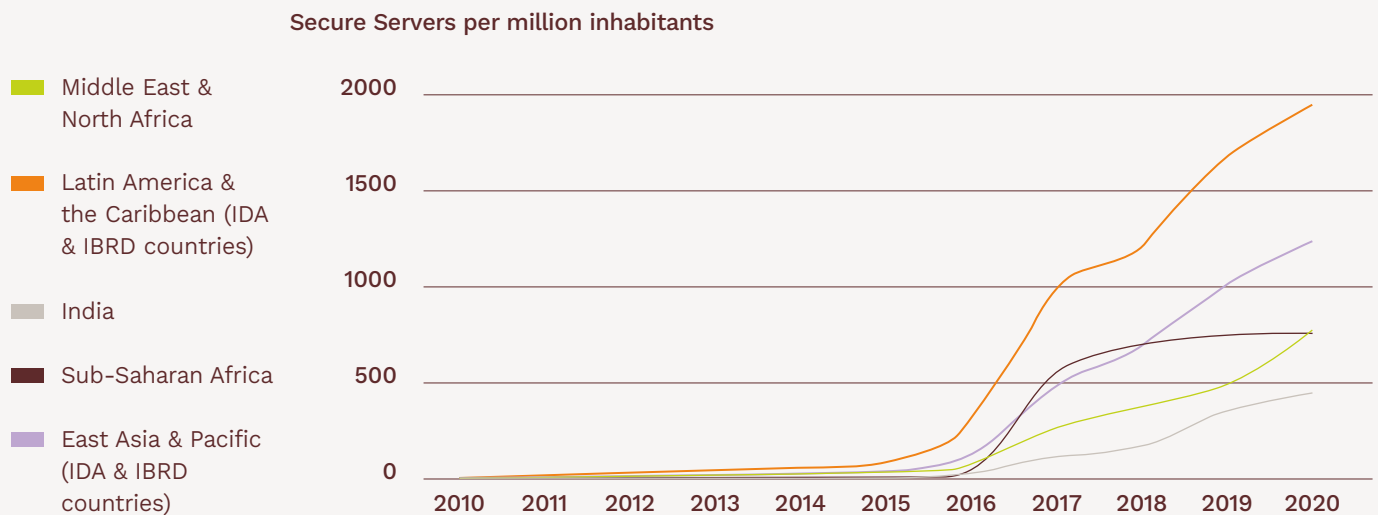Centralized   Decentralized   Distributed
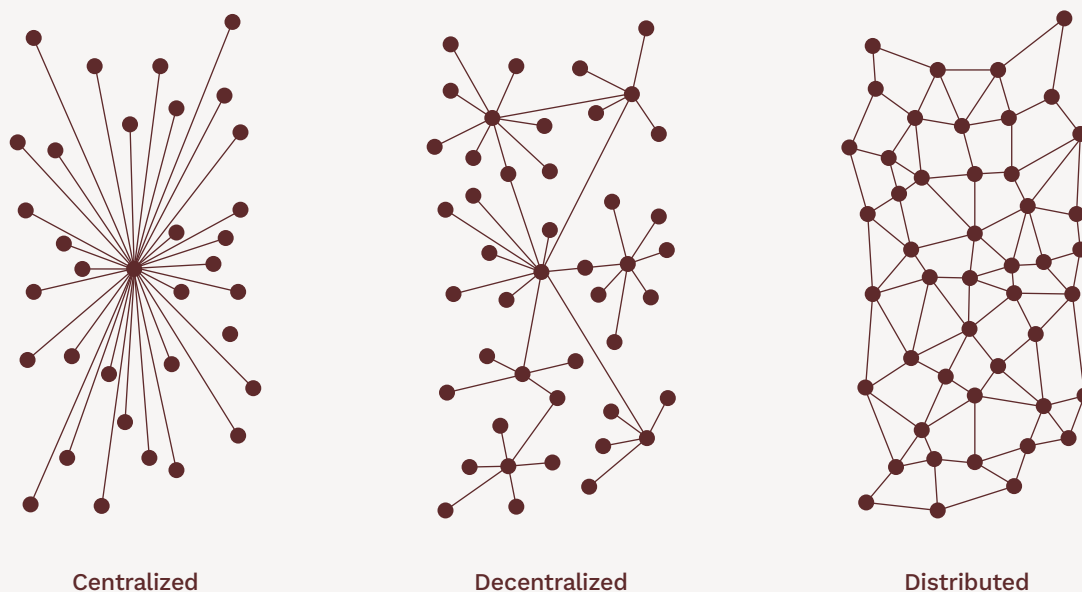
Note: In your mind, incline the images 30 degrees and replicate each vertically so as to construct a variety of stacked layers. Imagine the different variants that might occur by combining different designs at different layers as if they were layers of a cake.

<u>Consolidation at the storage and data processing layer:</u> Amazon, Microsoft, and Google currently control over 65% of the cloud computing market[39]. The number of cloud-based services is increasing, and the growing integration of AI add-ons (which require large datasets to train on, and a lot of computing power to process) is likely going to deepen this trend. This process is placing us back into the early phases of computing, where processing power was held in a central location and the average user managed a relatively dumb terminal. It is also deepening geographic inequalities: Whereas only 43% of international traffic from a European country goes to the US, with the rest going to another european country, the proportion of international traffic going to the US reaches 73% in the case of Latin America, while in Africa 32% of international traffic is going to servers in Europe and 56% ends in the US[40].

Another way of assessing server infrastructure deployment is looking at secure servers per million people. Secure servers can operate as a proxy for the breadth of hosting infrastructure available in a country or region. As the graph below shows, most of the Global South has been increasing its capacity over the years, with the exception of Sub-Saharan Africa, which has seen this growth stagnate between 2017-2020. Relative to the central countries, this growth is quite insignificant, however, and might explain and entrench the trend outlined above. The gap between the US/EU and the rest is so big that including these two in a graph renders the regions of the Global South invisible.[41] For such reasons, they are excluded from the graph below. For reference, whereas Latin America and the Caribbean (leading in the graph below), was identified as having 1,969 secure servers per million people in 2020, the 50,266 for the EU and 140,804 for the US for the same year.

Fig. 5 Secure servers per million people[42]

Secure Servers per million inhabitants

Legend:
- Middle East & North Africa
- Latin America & the Caribbean (IDA & IBRD countries)
- India
- Sub-Saharan Africa
- East Asia & Pacific (IDA & IBRD countries)

Source: Created by the author based on data from netcraft.com and World Bank population estimates.

39. Mark Haranas, "AWS, Microsoft, Google's Cloud Market Share Q1 2023," CRN (blog), May 4, 2023, https://www.crn.com/news/cloud/aws-microsoft-google-s-cloud-market-share-q1-2023.

40. Telegeography, "Global Internet Map Map 2018," 2018, https://global-internet-map-2018.telegeography.com/. For data on MENA region, see https://store.rationalstat.com/store/middle-east-north-africa-data-center-market-analysis-forecast/.

41. See https://data.worldbank.org/indicator/IT.NET.SECR.P6?locations=ZQ-EU-ZJ-IN-ZG-Z4-US.

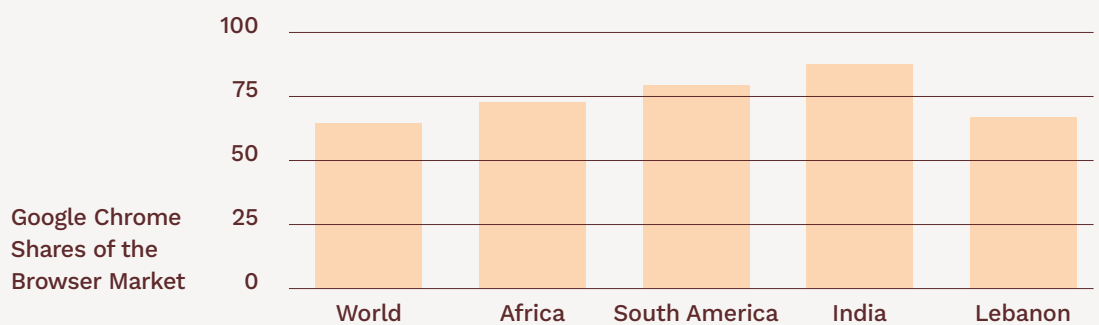**42.** Refers to the number of distinct, publicly-trusted TLS/SSL certificates found in the Netcraft Secure Server Survey. The location is derived from the hosting location of the sites using the certificates (rather than the countries indicated on the certificates themselves.). More information about the methodology at https://data.worldbank.org/indicator/IT.NET.SECR.P6?locations=ZQ-EU-ZJ-IN-ZG-Z4-US.

These numbers underline the lack of storage infrastructure in places like Africa and Latin America, and the existence of a hub and spoke architecture, where the centers of power operate as the locus of information that is then redistributed across the world. Countries across the periphery are mainly connecting through the centers in the EU and US, that acquire gatekeeping powers.[43]
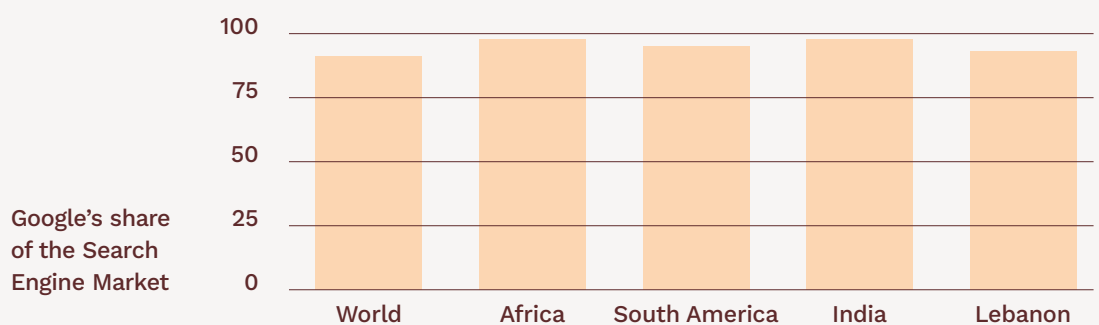
This trend limits the ability of governments of the global majority to effectively shape the regulatory environment, since the lack of infrastructure translates into a deficit in local expertise, insider knowledge, or the tools to ensure rules are effectively enforced. As revealed by Edward Snowden, it also allows for such information chokepoints to be easily exploited for espionage.

Consolidation at the transport layer: Transport refers to the cables connecting the servers across the world. Here we can observe that much of the increase in capacity responds to investment by a handful of private companies that operate content production and management. This underlines that centralization is not merely taking place within layers, but is part of a process of vertical integration as well. In 2019 it was estimated that 70% of the increase in global international bandwidth over the past five years can be attributed directly to content provider companies like Microsoft, Google, Facebook and Amazon, who already controlled over 50% of the international undersea cable bandwidth, often in the shape of exclusive cables.[44]

Consolidation at the content layer: Taking the web as an example of the content layer, we can see that Google has managed to control 65% of the global web browser market through Google Chrome, reaching a share of 74% in Africa, 78% in South America[45] and 87.5% for India[46].

Google Chrome Shares of the Browser Market

	World	Africa	South America	India	Lebanon
Value	~63	~71	~78	~87	~65

Alphabet's Google search engine controls 92% of the market worldwide, reaching a share of 95% in South America,[47] and 98% in both Africa and India[48].

Google's share of the Search Engine Market

	World	Africa	South America	India	Lebanon
Value	~92	~98	~95	~98	~91

43. See https://global-internet-map-2018.telegeography.com/ and https://www.theguardian.com/world/interactive/2013/nov/01/prism-slides-nsa-document.

44. Adam Satariano et al., "How the Internet Travels Across Oceans (Published 2019)," *The New York Times*, March 10, 2019, sec. Technology, https://www.nytimes.com/interactive/2019/03/10/technology/internet-cables-oceans.html.

45. StatCounter, "Browser Market Share Worldwide," StatCounter Global Stats, November 2023, https://gs.statcounter.com/browser-market-share.

46. StatCounter, "Browser Market Share India," StatCounter Global Stats, 2023, https://gs.statcounter.com/browser-market-share/all/india.

Combined with Alphabet's control over the Android operating system, which holds 70% of the market share on mobile worldwide, reaching 83% in South America[49], 85% in Africa, 95% in India[50].

Android share of the Mobile Operating System Market
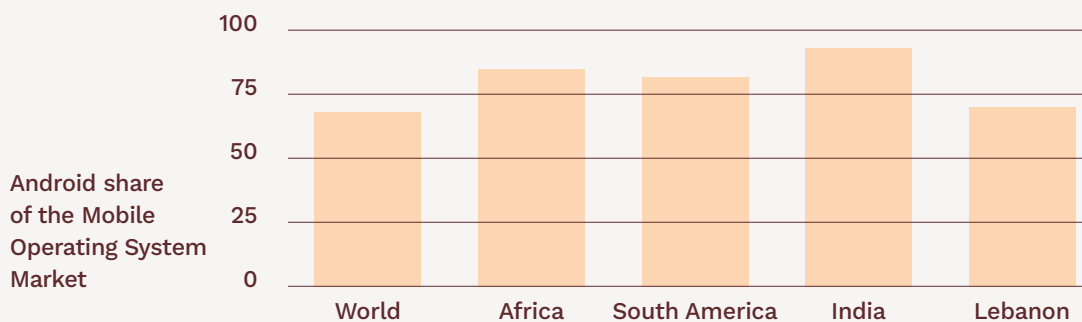
This control places their parent company, Alphabet, in a privileged position from which to observe the full tapestry of connections between pieces of information being created by web users. It also gives them the power to shape market outcomes and information flows. Alphabet has achieved such control over the web that it is estimated that the combined monthly clicks to YouTube and Google outnumber the clicks received by the next 48 most popular websites combined[51]. As such, Alphabet exercises great power over our freedom to access knowledge and express ourselves.

This dependence on infrastructure located and/or from other jurisdictions is likely going to be increasingly leveraged by host countries in the context of broader trade and conflict scenarios, fueling further distrust[52] from governments in the periphery who have seen the combination of dependence and centralization as a risk to their autonomy, trade and national security.[53] As a response to these concerns, two further trends can be observed.

47. StatCounter, "Search Engine Market Share South America," StatCounter Global Stats, November 2023, https://gs.statcounter.com/search-engine-market-share/all/south-america.

48. StatCounter, "Search Engine Market Share India," StatCounter Global Stats, 2023, https://gs.statcounter.com/search-engine-market-share/all/india.

49. StatCounter, "Mobile Operating System Market Share South America," StatCounter Global Stats, November 2023, https://gs.statcounter.com/os-market-share/mobile/south-america.

50. StatCounter, "Operating System Market Share India," StatCounter Global Stats, 2023, https://gs.statcounter.com/os-market-share/mobile/india.

51. Nick Routley, "Ranked: The Top 50 Most Visited Websites in the World," Visual Capitalist, January 24, 2023, https://www.visualcapitalist.com/top-50-most-visited-websites/.

52. Reuters, "Brazil, Europe Plan Undersea Cable to Skirt U.S. Spying | Reuters," February 24, 2014, https://www.reuters.com/article/us-eu-brazil-idUSBREA1N0PL20140224/.

53. Juan Ortiz Freuler, "The Weaponization of Private Corporate Infrastructure: Internet Fragmentation and Coercive Diplomacy in the 21st Century," Global Media and China, November 12, 2022, 20594364221139729, https://doi.org/10.1177/20594364221139729.

2. Antitrust and re-decentralization

In reaction to this trend of consolidation of power by corporations, regulatory agencies in the US, China, and elsewhere[54] have started to take action.

- **US' antitrust activity:** In the US, the Federal Trade Commission (FTC) led by Lina Khan, has openly stated that it considers that consolidation of power in corporate hands constitutes a threat to democracy. Monopolies limit the ability of governments to shape policies and outcomes, while it gives a handful of corporations the ability to shape what products are available, their characteristics, costs, and more.[55] The FTC has launched the first major antitrust investigation into a tech company since Microsoft's bundling practices were scrutinized in the early 2000s,[56] and many agencies at the State level are taking similar action.

- **China's antitrust activity:** In China, similar concerns over companies that were becoming too big to remain responsive[57] led the regulators to mandate greater interoperability across platforms,[58] more effective oversight mechanisms, and a call for resources to be redirected into supporting the achievement of national goals in more fundamental areas, like chip-making, and away from consumer facing products.[59]

These efforts can have the effect of redistributing power across a variety of companies, enabling regulators to better benchmark and compare corporate practices. It could reduce the risks associated with failure and concerns with dependence emerging across the periphery. Lastly, if it leads to a greater plurality of service providers who in turn are more equally distributed across the globe, it might re-invigorate the relevance of global digital rights forums as places for effective policy discussion and coordination around standards.

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54. Reuters, "UK Antitrust Regulator to Take on Big Tech with New Legal Power," Reuters, November 7, 2023, sec. Technology, https://www.reuters.com/technology/uk-antitrust-regulator-take-big-tech-with-new-legal-power-2023-11-07/; Steven Boroweic, "In South Korea, Big Tech's Power Struggle with Regulators Is Way Ahead of the U.S.," Rest of World (blog), December 13, 2021, https://restofworld.org/2021/in-south-korea-big-techs-power-struggle-with-regulators-is-way-ahead-of-the-u-s/; Samuel Stolton, "EU Ushers in Brave New World of Big Tech Regulation," POLITICO (blog), March 25, 2022, https://www.politico.eu/article/eu-landmark-rules-big-tech-anti-trust-digital-markets-act-dma/.

55. Lina Khan, "Amazon's Antitrust Paradox," The Yale Law Journal 126, no. 3 (2017): 710–805.

56. Reuters, "US Wraps up Antitrust Case against Google in Historic Trial," Reuters, November 16, 2023, sec. Legal, https://www.reuters.com/legal/us-wraps-up-antitrust-case-against-google-historic-trial-2023-11-16/.

57. Cory Doctorow, "Ant, Uber, and the True Nature of Money," November 5, 2020, https://pluralistic.net/2020/11/05/gotta-be-a-pony-under-there/; BBC, "China's Tech Giants Fall under Regulator's Pressure," March 16, 2021, https://www.bbc.com/news/business-56410769.

58. Iris Deng, "WeChat Bows to Beijing Pressure and Allows More Direct Links from Rivals," South China Morning Post, November 29, 2021, sec. Tech, https://www.scmp.com/tech/tech-trends/article/3157789/chinas-super-app-wechat-allows-more-direct-links-competitors-under.

59. Jennifer Conrad, "China Cracks Down On Its Tech Giants. Sound Familiar?," Wired, July 29, 2021, https://www.wired.com/story/china-cracks-down-tech-giants-sound-familiar/.

3. Data localization

Another regulatory response to the process of consolidation has been data localization, whereby governments seek to increase their leverage and control over foreign corporations by demanding that service provision within their territories is enacted through data centers located within their territory.

- **The Indian path towards data localization:** India was one of the early countries to demand this type of arrangement. Initially, this received a strong response from US companies and even the US government officials, who saw in this trend a challenge to the existing centralized architecture, and to the financial stability of its homegrown multinational companies.[60] However, the EU and US have since advanced similar positions.

- **The EU path towards data localization:** In the case of the EU, it was through judicial activism and framed around concerns that US companies could not guarantee that the US intelligence agencies were not monitoring data from EU citizens hosted or processed in data centers located in the US.[61] That is, rather than mandating localization, the EU indirectly created strong incentives for companies to reduce legal uncertainties by moving their data centers to the EU. For example, shortly after the last judicial decision, Microsoft's President, Brad Smith, announced that Microsoft Azure clients would not have issues with the ruling since the company was increasing its physical footprint across the EU[62].

- **The US path towards data localization:** In the US, concern over the market power of TikTok, a platform originated in China, led to pressures for the company to create a legal entity independent from its Chinese parent, ByteDance. US authorities also pressured TikTok to store all US data in servers managed by a US company, Oracle[63], which would be allowed to monitor traffic with the servers of the company in China, as well as the moderation and algorithmic curation systems.

Since the US and EU are now directly or indirectly requiring companies to localize data within their territories, it is likely that this practice will become more widespread, increasing incentives for regional powers to promote common legal standards that will allow them to become regional localizers of data centers for multinational companies. This might create opportunities to shape legislation and corporate practices at the local and regional level in ways that have not been possible over these past decades. Meanwhile, it might also empower local government officials to increase information controls and surveillance over issues and actors that foreign companies and governments might not have been interested in.

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60. Sandhya Sharma, "US Pressure Threatens to Weaken Data-Localisation Mandate in India's Landmark Data-Protection Bill," The Economic Times, 2019, https://economictimes.indiatimes.com/prime/technology-and-startups/us-pressure-threatens-to-weaken-data-localisation-mandate-in-indias-landmark-data-protection-bill/primearticleshow/70730415.cms; Aditya Kalra and Manoj Kumar, "India to Review Data Storage Rules That Irked U.S. Tech Firms," Reuters, June 18, 2019, sec. World, https://www.reuters.com/article/idUSKCN1TJ0IB/.

61. Joshua Meltzer, "The Court of Justice of the European Union in Schrems II: The Impact of GDPR on Data Flows and National Security," Brookings (blog), August 5, 2020, https://www.brookings.edu/articles/the-court-of-justice-of-the-european-union-in-schrems-ii-the-impact-of-gdpr-on-data-flows-and-national-security/; BBC, "EU-US Privacy Shield for Data Struck down by Court," July 16, 2020, https://www.bbc.com/news/technology-53418898.

62. Brad Smith, "Answering Europe's Call: Storing and Processing EU Data in the EU," EU Policy Blog, May 6, 2021, https://blogs.microsoft.com/eupolicy/2021/05/06/eu-data-boundary/.

63. Brian Fung, "TikTok Moves US Users' Data to Oracle Servers to Address Security Concerns | CNN Business," CNN, June 17, 2022, https://www.cnn.com/2022/06/17/tech/tiktok-user-data-oracle/index.html.

D. FUTURE SCENARIOS

As described throughout this section, the architecture underlying our information system is being pressured from a variety of directions, and the final outcome is uncertain. The trends do not provide clarity as to where the locus of power will have shifted towards throughout the next decade. This offers an opportunity to reflect on possible future scenarios, the key actors capable of shaping the landscape, and those that might emerge as power-brokers in each possible future scenario, as well as the challenges that might emerge in each.

Greater centralization around incumbent companies	Data localization spurs regional hubs of infrastructure and policy
Antitrust activist regulators re-decentralize the information system reassuring peripheries they will participate fairly	Country-level firewalls and localization create more isolated information spheres

We can envision, for example, that a deepening of centralization might enable quicker development in areas such as AI, which currently benefit from centralized processing power, like the one Microsoft is providing OpenAI, and which only a handful of companies can provide today. On the other hand, such developments would allow Microsoft (and others) to further entrench its market share and its outsized power over our lives. Meanwhile, a scenario of regional hubs emulating the procedure carried out by the EU could help increase the availability of more technical jobs in the peripheries, while increasing the control that -sometimes accountable- political leaders exercise over information flows[64].

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64. For example, at the datacenter level, we are already seeing some deployment of data centers to some key cities (see https://blog.telegeography.com/where-are-the-worlds-cloud-data-centers-and-who-is-using-them and https://www.cloudinfrastructuremap.com/) as well as the development of regional offices by Big Tech (e.g. metacareers.com/locations and google.com/about/careers/applications/locations/) which are developing local talent and lobbyists tasked with reducing administrative overhead and reducing legal risks.

V.
TRENDS IMPACTING ACTIVISM
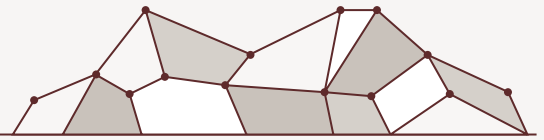
A. SYNTHESIS

- **Convergence of agendas:** Digital Rights is increasingly perceived as an agenda that underpins the broader human rights agenda. This represents a challenge and an opportunity. The challenge is to their own sustainability as their work overlaps with larger and more established organizations in the human rights field. The opportunity is an audience that is broadening, and which calls for changes in research and communications practices in order to be more inclusive and receptive.

- **Shifts in funding landscape:** As the broader context changes, we can expect the funding landscape to change with it. Organizations need to prepare rainy day funds and explore new avenues of funding that might come from partnering with organizations operating in the broader rights field.

- **Technological dependence and hygiene:** As the basic tools upon which digital rights activists become the vector for increasingly pervasive forms of espionage, canrisk assessments and regular training are necessary to protect staff, partners, and sources.

B. CONTEXT

Over the past decades professionalized **civil society organizations have become central to political processes across the globe**:

- In the United States alone, the government has registered over 1.5 million nonprofit organizations.

- A global study from 2010, based on surveys across 42 countries, estimated that approximately 56 million people worked as full time nonprofit volunteers, and that the operating expenditures of the nonprofit sector represents $2.2 trillion USD globally, placing it above the GDP of all but 6 countries.[65]

- The number of international NGOs increased from 832 in 1950 to over 40,000 by 2014.[66]

Over the last two decades, we have also seen the **digital rights sector consolidate an identity of its own**, with area-specific conferences growing consistently over time:

At the global level:
- RightsCon growing from around 400 participants in the year 2011 to over 8,000 participants from 170 countries in 2023.[67]

- UN's Internet Governance Forum (IGF) conference had over 11,000 registered participants from across 170 countries in 2023, compared to 3,000 participants from 140 countries in 2018.[68]

65. Colin C. Williams and Anjula Gurtoo, eds., Routledge Handbook of Entrepreneurship in Developing Economies (London; New York: Routledge, Taylor & Francis Group, 2017).

66. Williams and Gurtoo.

67. RightsCon, "About RightsCon," RightsCon Summit Series, 2023, https://www.rightscon.org/about-and-contact/.

68. IGF, "IGF 2018 Attendance & Programme Statistics | Internet Governance Forum," 2018, https://www.intgovforum.org/en/content/igf-2018-attendance-programme-statistics; IGF, "IGF 2023 Participation & Programme Statistics," 2023, https://www.intgovforum.org/en/content/igf-2023-participation-and-programme-statistics.

At a regional level:

- Bread and Net (organized by SMEX in Lebanon), which started in 2017 with 200 participants amassed over 400 active attendees and 800 registrations in 2022.[69]

- FIFAfrica (organized by CIPESA), has managed to attract over 1,000 participants from 47 countries (offline and online) in 2023.[70]

Despite this sustained growth, the **challenges** described in the previous two sections, combined with a series of practices and culture within the field itself are **sowing the seeds of distrust**[71]:

O   criticism of the actual representativity of global multi stakeholder forums[72]

O   questions regarding the very nature of multistakeholderism and the role of nonprofits in global governance[73]

O   undue influence by funders[74]

O   questions regarding legitimacy of nonprofits within the local political system[75]

O   lack of accountability of the organizations and their funders to the public they claim to benefit[76].

69. Nourhane Kazak, "Bread&Net 2022 Wrap Up: Five Years On," SMEX (blog), November 30, 2022, https://smex.org/breadnet-2022-wrap-up-five-years-on/.

70. FIFAfrica, "Gear Up! The 2023 Forum on Internet Freedom in Africa (FIFAfrica) Is Heading to Tanzania!," OpenNet Africa, April 26, 2023, https://www.opennetafrica.org/gear-up-the-2023-forum-on-internet-freedom-in-africa-fifafrica-is-heading-to-tanzania.

71. Trust in NGOs has declined in 17 out of the 27 countries surveyed by the Edelman Barometer in 2023. See pg. 42 https://www.edelman.com/sites/g/files/aatuss191/files/2023-03/2023%20 Edelman%20Trust%20Barometer%20Global%20Report%20FINAL.pdf.

72. Rohan Grover, "The Geopolitics of Digital Rights Activism: Evaluating Civil Society's Role in the Promises of Multistakeholder Internet Governance," Telecommunications Policy 46, no. 10 (November 1, 2022): 102437, https://doi.org/10.1016/j.telpol.2022.102437.

73. Harris Gleckman, "Multi-Stakeholderism: A Corporate Push for a New Form of Global Governance," Transnational Institute, January 19, 2016, https://www.tni.org/en/publication/multi-stakeholderism-a-corporate-push-for-a-new-form-of-global-governance; Harris Gleckman, Multistakeholder Governance and Democracy: A Global Challenge (London: Routledge, 2018), https://doi.org/10.4324/9781315144740.

74. Jake Goldenfein and Monique Mann, "Tech Money in Civil Society: Whose Interests Do Digital Rights Organisations Represent?," Cultural Studies 37, no. 1 (January 2, 2023): 88–122, https://doi.org/10.1080/09502386.2022.2042582; Juan Ortiz Freuler, Will Orr, and Ana Brandusescu, "How Do Funders Shape the Digital Rights Agenda? Notes from the Field (Part I)," OpenGlobalRights (blog), August 5, 2022, https://www.openglobalrights.org/how-do-funders-shape-the-digital-rights-agenda-part-i/.

75. Almut Rochowanski, "We Need to Talk about 'Foreign Agent' Laws," openDemocracy (blog), March 29, 2023, https://www.opendemocracy.net/en/odr/foreign-agents-laws/; Délber Andrade Lage and Leonardo Nemer Caldeira Brant, "The Growing Influence of Non-Governmental Organizations: Chances and Risks," Anuario Brasileiro de Direito Internacional 1 (2008).

76. Nives Dolsak and Aseem Prakash, "NGOs Are Great at Demanding Transparency. They're Not so Hot at Providing It.," Washington Post, December 7, 2021, https://www.washingtonpost.com/news/monkey-cage/wp/2016/02/22/ngos-are-great-at-demanding-transparency-theyre-not-so-hot-at-providing-it/; Saskia Brechenmacher Carothers Thomas, "Examining Civil

These concerns are likely going to become more mainstream as tensions increase within countries, across countries, and with the increasingly powerful multinational tech companies, projecting a more challenging working environment for NGOs in the years to come. Board members across nonprofits and funding bodies should discuss how the organizations can take steps towards increasing public trust and perceptions of legitimacy.

Throughout the next section, the focus is on three challenges that will shape the landscape in the years to come: convergence with the broader human rights field, access to funding, and the impact of changing technologies on daily operations.

C. TRENDS

1. Convergence with Human Rights civil society organizations
Digital technologies have permeated every aspect of human life. Today, they shape not only how we advance the human rights agenda, but also how we exercise our human rights on a daily basis. As such, what used to be a small sector populated by technology experts and programmers is converging with a broader agenda of human rights led by experts and activists with very varied backgrounds.

The UN advocating for convergence: The clearest instantiations of this convergence can be found in the UN's Sec General's decision to host a High Level Panel on Digital Cooperation since 2018[77], but also in the slower and less visible work being advanced by the UN's Special Rapporteurs to root discussions around digital rights in existing Human Rights frameworks[78]. This slow shift has implications for how organizations that identify as part of the digital rights field perform their tasks.

A broadening audience: Convergence requires practitioners to understand their audience is becoming broader, calling for changes in communication practices as well as the landscape of alliances that should be considered for the design and execution of research and advocacy projects.

Intersections and overlaps with adjacent fields: The convergence will require digital rights organizations to sketch projects that are intersectional and map specific policies and uses for technologies in a varied range of terrains, such as environment, health, education, and more, as well as programs that more openly frame their outputs to address traditional human rights concerns like freedom of expression, assembly, and others. Advancing this shift will require broadening the expertise within digital rights organizations, but mainly to identify partners with expertise in other areas with whom to collaborate and design joint projects and agendas.

Bigger pond, bigger fish: convergence is likely going to create challenges for those organizations that struggle to adapt to this new context as the space expands and large and well established international organizations, such as Amnesty International[79], Human Rights Watch[80], Greenpeace[81] and many others, begin to participate in the agenda and bid for the same funding sources. This challenge requires established organizations (in both digital rights and adjacent fields) to consider their impact on the sustainability of local and specialized organizations, and for the latter group to develop robust mechanisms to ensure they can engage in lasting and fair partnerships with bigger and/or complementary partners.

77. UN, "Secretary-General's High-Level Panel on Digital Cooperation," United Nations (United Nations, 2018), https://www.un.org/en/sg-digital-cooperation-panel.

78. See the Annex of the Contract for the Web (as from pg 12) for an outline with a varied set of examples https://wfcontract.wpenginepowered.com/wp-content/uploads/Contract-for-the-Web-3.pdf.

79. https://www.amnesty.org/en/tech/.

80. https://www.hrw.org/topic/technology-and-rights.

81. https://www.greenpeace.org/usa/issues/rethinkit/.

2. Shifts in funder agenda and increased challenges to access to funding
A long-lasting challenge for nonprofits in the global majority countries is financial stability. Lacking an ecosystem that can allow organizations to obtain grassroots funding, they typically rely on a relatively small group of donors.

Shifting priorities of private foundations: The big trends outlined throughout this brief are likely going to impact on the priorities of private foundations, for example, many of which have shifted resources to tend to the needs of people affected by military conflict or unexpected climate disasters[82]. Shifts in priorities can also happen due to internal changes within a funding body, as has been the case with several large foundations over the past years, such as Open Society and Omidyar Network[83]. Nonprofit dependence on a small group of funders can increase risks for the sustainability of the grantee nonprofits. Diversification of sources and long-term grants are increasingly important for the resilience of the sector.

New funders? Foundations and corporate funding often appear as a reaction to new technological developments and new liquidity.
O **Crypto:** a breadth of foundations have already sprung out to provide resources that can help advance the ecosystem and agenda, with synergies (such as privacy and decentralization) and possible ideological friction with much of the existing digital rights community on issues such as property[84].
O **Emerging AI companies** or billionaires emerging might follow suit in the coming years[85].
O **Tech billionaires from the Global South** are currently focused on providing resources to low controversy areas like education[86], but these priorities could shift.

Changing perceptions regarding corporate tech funding: Leading technology companies like Meta, Alphabet, and Microsoft are losing their public appeal. Globally, trust in the tech sector has dropped from 77% to 68% from 2012 to 2021, while the drop was even larger in the US, from 78% to 57%[87]. This lack of trust, paired with their increasing power, could put pressure on organizations to reject or stop receiving funding and in-kind benefits from them. This policy has long been upheld by the environmental rights movement, according to which receiving resources from the companies they seek to keep accountable and often consider responsible for grave human rights and environmental rights violations might create a conflict of interest, actual or in the eyes of the public. Convergence between the digital rights and environmental rights movements might lead to such cross-pollination in terms of policies or expectations.

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82. Based on interviews with practitioners in the field.

83. Thalia Beaty, "George Soros' Open Society Foundations Plan to Limit Their Grantmaking until February," AP News, July 20, 2023, sec. Business, https://apnews.com/article/george-soros-open-society-foundations-layoff-72b43137a49395eb144efe39fbee8452; Candid, "Omidyar Network Announces New Approach, Spins Off Initiatives," Philanthropy News Digest (PND), October 24, 2018, https://philanthropynewsdigest.org/news/omidyar-network-announces-new-approach-spins-off-initiatives.

84. "Ethereum Foundation & Community Grant Programs," ethereum.org, accessed December 21, 2023, https://ethereum.org.

85. Google.org recently announced it had disbursed U$20 million for AI policy initiatives https://news.yahoo.com/google-funds-leading-civil-rights-100000292.html. Musk donated around 100 million to non-tech charities in 2021 https://www.vox.com/recode/22394867/elon-musk-foundation-philanthropy-xprize-tesla-spacex. However, back in 2015 Musk donated $10 million to researchers focused on making AI "beneficial to humanity" https://www.bbc.com/news/technology-33425166, which underlines he might take a tech-strategic view to his philanthropic efforts.

86. Information provided by interviewees in India, UK and Brazil.

87. Darrel West, "Techlash Continues to Batter Technology Sector," Brookings, April 2, 2021, https://www.brookings.edu/articles/techlash-continues-to-batter-technology-sector/.

International cooperation in a context of turmoil: Another key source of funding for organizations in the global majority comes from international cooperation, which channels resources from taxpayers in affluent countries in ways that are considered to advance their foreign policy. With the far-right parties gaining momentum in the EU and US[88], it is likely that we will see many key agencies cutting down on their budgets and on their support for nonprofits that advocate for digital and human rights in the periphery[89]. In parallel, as many countries in the global majority go through processes of social upheaval and repression, it is possible that donor agencies might (counterintuitively) suspend the aid to digital rights defenders based in such countries, as part of a broader attempt to pressure governments and rulers who commit abuses.[90]

Local pressures and limits to accessing funds: Mirroring the limitations to access funds from the outside, it is likely that more governments will impose rules to limit the ability to work with certain funders while adding administrative hurdles to working with others. The UN Special Rapporteur on freedom of peaceful assembly and of association (FOAA), Clément Nyaletsossi Voule, has been documenting these developments[91]. These includes crackdowns in India[92] and Russia[93] as well as a growing and varied range of administrative processes, like

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88. Anthony Faiola, Emily Rauhala, and Loveday Morris, "Dutch Election Shows Far Right Rising and Reshaping Europe," *Washington Post*, November 26, 2023, https://www.washingtonpost.com/world/2023/11/25/europe-far-right-netherlands-election/; Ryan Best Wiederkehr Aaron Bycoffe, Ritchie King, Dhrumil Mehta and Anna, "President: General Election Polls," FiveThirtyEight, 2023, https://projects.fivethirtyeight.com/polls/president-general/.

89. Perhaps as an example of how these procedures might unravel, observe how several European funders severed ties with MENA nonprofits that were critical of the Israeli bombardment of Gaza . e.g.https://www.aljazeera.com/news/2023/11/16/western-donors-cut-off-funding-to-arab-groups-amid-israels-bombardment.

90. CAF, "When the Giving Gets Tough: Navigating Risk in Sanctioned Locations," accessed December 4, 2023, https://www.cafamerica.org/wp-content/uploads/CAFAmerica_Sanctions_WP_FINAL-1.pdf. A variant of the process of sanctions, is the more informal process of withholding aid. For example, the World Bank recently cut aid to Uganda over the passing of a law that targets the LGBTQ+ community https://www.reuters.com/world/africa/uganda-president-defiant-after-world-bank-funding-suspended-over-lgbt-law-2023-08-10/.

91. Clement Nyaletsossi Voule, "Access to Resources - A/HRC/50/23" (United Nations Special Rapporteur on the rights to freedom of peaceful assembly and of association, May 10, 2022), https://documents-dds-ny.un.org/doc/UNDOC/GEN/G22/337/82/PDF/G2233782.pdf?OpenElement.

92. For example, the UN's Special Rapporteur on freedom of peaceful assembly and of association notes that regulations introduced in 2020 "reduced the cap on administrative expenses for any foreign funding or grants from 50 percent to 20 per cent, severely affecting civil society organizations' capacity to use resources to pay salaries, professional fees, utility bills, travel, and other operational expenditure", while increasing the ability of government officials to extend suspension of nonprofit's registration from 180 days to 360 days https://documents-dds-ny.un.org/doc/UNDOC/GEN/G22/337/82/PDF/G2233782.pdf?OpenElement.

93. https://www.ohchr.org/en/press-releases/2023/01/russia-un-experts-alarmed-escalation-crackdown-civil-society.

those being developed by consolidated democracies, like the EU[94], UK,[95] and Canada[96]. The breadth of the countries involved in advancing the varied types of regulations suggests that this trend will spread across the globe in the coming years. Civil society organizations would benefit from information sharing towards preparing for and responding to these restrictive and/or burdensome frameworks, while advancing model legislation that provides reassurance to the governments and society with regards to their legitimate concerns of foreign interference, while minimizing the administrative overhead for organizations[97]. The UN Special Rapporteur's FOAA offers a set of guiding principles that are a useful starting point[98].

3. New challenges and opportunities for tech-dependent activism

Digital rights organizations do not only focus on advancing rights, but are often heavy users of digital technologies in their daily activities of outreach, organizing, advocacy, and internal planning. As such, they are on the front lines of the broader cycles of birth, dependence, and death of different platforms (from Email to Whatsapp; from MSN to Facebook, Twitter, Instagram, and now TikTok!). From the hope ignited during the so-called Arab Spring that these technologies could strengthen government accountability to fears that their corporate managers have amassed too much power. Many of us have advocated for the adoption of tools that failed us, and partnership with companies that have come to have a problematic track record. Being able to document these learnings for the next generation of leaders in the digital rights movement (and leaders in adjacent fields who are now entering these debates[99]) is of crucial importance.

Tech dependence and the outreach risks: The issues of opacity and centralization are also raising questions regarding the tools used for advocacy and the long-term sustainability of the resources organizations pour into them. For example, as Palestinian activists have repeatedly claimed, opaque moderation and translation systems put into place by platforms can arbitrarily limit circulation of key messages[100] or reframe them in problematic ways[101].

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94. Politico, "EU 'Foreign Agents' Law Spooks NGOs," POLITICO (blog), March 13, 2023, https://www.politico.eu/article/eu-ursula-von-der-leyen-ngo-qatargate-foreign-agents-law-disturbs-ngos/.

95. UK Gov, "Foreign Interference: National Security Bill Factsheet," GOV.UK, July 13, 2023, https://www.gov.uk/government/publications/national-security-bill-factsheets/foreign-interference-national-security-bill-factsheet.

96. Steve Scherer, "Canada Starts Setting up Foreign Agent Registry amid Reports of Chinese Election Meddling," Reuters, March 10, 2023, sec. World, https://www.reuters.com/world/canada-starts-setting-up-foreign-agent-registry-amid-reports-chinese-election-2023-03-10/.

97. Rochowanski, "We Need to Talk about 'Foreign Agent' Laws".

98. Clement Nyaletsossi Voule, "General Principles and Guidelines on Ensuring the Right of Civil Society Organizations to Have Access to Resources - A/HRC/53/38/Add." (United Nations Special Rapporteur on the rights to freedom of peaceful assembly and of association, June 23, 2023), https://documents-dds-ny.un.org/doc/UNDOC/GEN/G23/127/97/PDF/G2312797.pdf?OpenElement.

99. For example, some digital rights activists in Brazil expressed concern with how the prospects of a Starlink internet provision in the Amazon would revamp old, and seemingly resolved, discussions on net neutrality.

100. Suhail Taha, "The Cyber Occupation of Palestine; Suppressing Digital Activism and Shrinking the Virtual Sphere" (Global Campus: Arab World, 2020), https://repository.gchumanrights.org/server/api/core/bitstreams/cdc7ea07-bb61-41f0-9a13-785aadb54b97/content; Morgan Sung, "Meta Has a Moderation Bias Problem, Not Just a 'Bug,' That's Suppressing Palestinian Voices," TechCrunch (blog), October 19, 2023, https://techcrunch.com/2023/10/19/meta-instagram-palestine-israel-shadowban-censorship-moderation-bias/.

101. BBC, "Instagram Sorry for Adding 'terrorist' to Some Palestinian User Bios," October 20, 2023, https://www.bbc.com/news/technology-67169228.

Internet shutdowns have also proven to be effective in limiting the circulation of evidence of crimes being committed on the ground[102].

Tech dependence as an administrative risk: The context of dependence also calls for closer coordination among activists and regulators across the global majority to protect the technological infrastructure upon which their work relies. The effective global campaign against an abusive change in Whatsapp's Terms of Service (aimed at enabling greater data sharing with the parent company, Meta[103]), shows the value and potential of transnational cooperation among activists to place limits on abusive behavior by multinational companies. These companies seem to classify each individual country of the global majority as a market too insignificant to merit any concessions, but have shown to be responsive when coordination across these countries increases the stakes.

Tech dependence as a security risk: the dependence on digital tools for communications is also creating space for pervasive government surveillance of activists and their work[104]. This jeopardizes their effectiveness and curtails their rights to organize, but also often puts the life of members of the community and journalists at risk[105], which creates further chilling effects across the broader community of activists[106]. The lack of accountability of corporations developing these systems is paired with weak institutional oversight of how such tools are used by government officials, leading to widespread abuse[107]. Meanwhile, the international reach of these tools is reshaping notions of sovereignty and making evident the growing gaps in the international system[108]. Risk assessments and training in how to manage communications within organizations and with partners, as well as broader digital hygiene, are becoming a must for all activists. Coordinating and pooling resources across civil society organizations to achieve higher security and privacy standards in terms of software and hardware is likely going to become a trend in the coming decade.

102. SMEX, "Palestine Unplugged: How Israel Disrupts Gaza's Internet," SMEX (blog), November 10, 2023, https://smex.org/palestine-unplugged-how-israel-disrupts-gazas-internet/.

103. Zak Doffman, "WhatsApp Backtrack Is Good News For 2 Billion Users," Forbes, June 5, 2021, https://www.forbes.com/sites/zakdoffman/2021/06/05/apple-iphone-and-google-android-users-given-huge-new-reason-to-keep-whatsapp/.

104. James Fredrick, "Mexico's Government Is Accused Of Targeting Journalists And Activists With Spyware," NPR, June 20, 2017, sec. Parallels, https://www.npr.org/sections/parallels/2017/06/20/533682738/mexicos-government-is-accused-of-targeting-journalists-and-activists-with-spywar; smexadmin, "Beirut-Based Global Cyber-Espionage Campaign a Threat to Local Freedoms," SMEX (blog), January 20, 2018, https://smex.org/beirut-based-global-cyber-espionage-campaign-a-threat-to-local-freedoms/.

105. John Scott-Railton et al., "Reckless VII: Wife of Journalist Slain in Cartel-Linked Killing Targeted with NSO Group's Spyware" (University of Toronto, March 20, 2019), https://citizenlab.ca/2019/03/nso-spyware-slain-journalists-wife/.

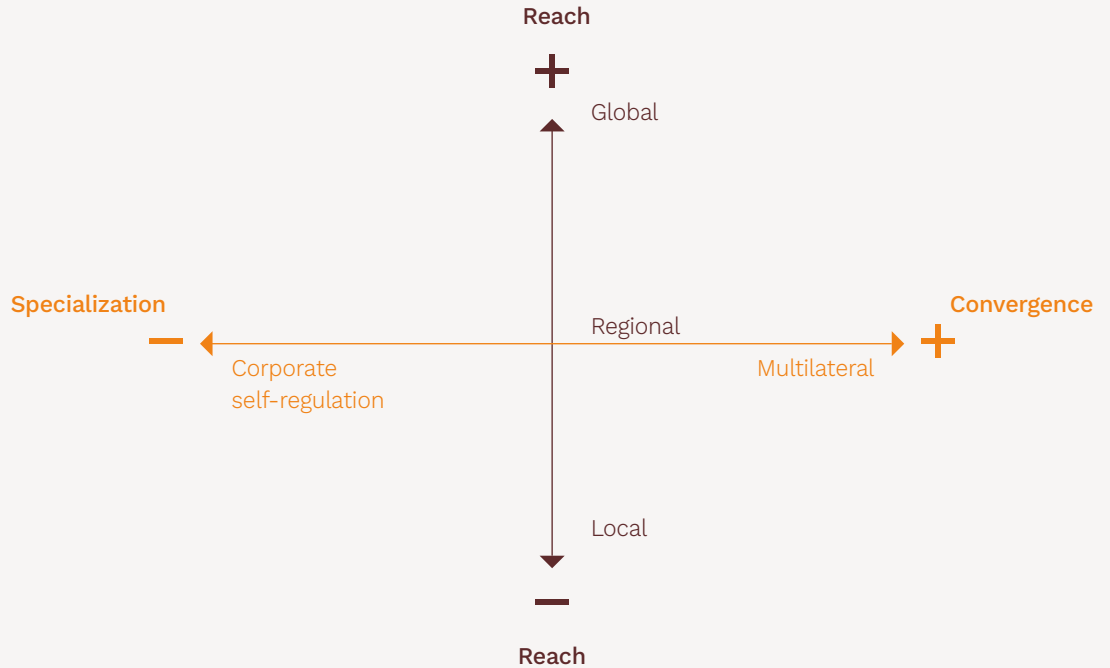106. "Takeaways from the Pegasus Project," Washington Post, July 18, 2021, https://www.washingtonpost.com/investigations/2021/07/18/takeaways-nso-pegasus-project/; Siena Anstis et al., "The Dangerous Effects of Unregulated Commercial Spyware" (Citizen Lab, University of Toronto, June 24, 2019), https://citizenlab.ca/2019/06/the-dangerous-effects-of-unregulated-commercial-spyware/.

107. David Pegg et al., "FT Editor among 180 Journalists Identified by Clients of Spyware Firm," The Guardian, July 20, 2021, sec. World news, https://www.theguardian.com/world/2021/jul/18/ft-editor-roula-khalaf-among-180-journalists-targeted-nso-spyware; Ronan Farrow, "How Democracies Spy on Their Citizens," The New Yorker, April 18, 2022, https://www.newyorker.com/magazine/2022/04/25/how-democracies-spy-on-their-citizens.

108. Siena Anstis, Noura Al-Jizawi, and Ron Deibert, "TRANSNATIONAL REPRESSION AND THE DIFFERENT FACES OF SOVEREIGNTY," Temple Law Review, July 3, 2023, https://www.templelawreview.org/essay/transnational-repression-and-the-different-faces-of-sovereignty/.

D. FUTURE SCENARIOS

The digital landscape is in rapid flux. As outlined in this brief, geopolitics, regulators, companies, and the broader human rights field are all putting pressure on the existing boundaries of the digital rights field. Thus, it is likely that a decade from now, some of the strategies being deployed by digital rights organizations might become less effective. A key transformation reflected in the trends is that of breadth: breadth of the issues, as reflected by convergence with the human rights agenda, and breadth of the impacts, as reflected by the global footprint of some of the key technology providers.

Reach

+

Global

Specialization   Regional   **Convergence**

—   **+**

Corporate self-regulation   Multilateral

Local

—

Reach

Digital rights organizations might therefore benefit from reflecting on where the issues they work on today stand on this spectrum, and where their agenda might require them to stand in the next decade. This process of introspection can then help plan subsequent changes to an organization's strategy and mission, the partnerships that might need to be struck, the hiring and geographic footprint of human resources that might secure the organization's standing and effectiveness for the years to come.

VI.
CONCLUSION
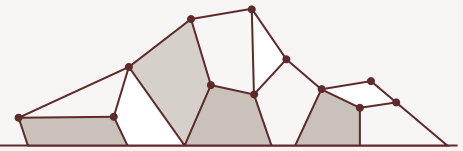
As we navigate the dynamic landscape of rights in the Global South, it becomes evident that significant shifts are on the horizon for nonprofits operating in this sector. The trends in global governance, geopolitics, and local political realities highlighted in this brief underline the pressing need for collaboration, strategic coordination, and networked action.

The emergence of new trade blocs, challenges posed by public debt, and the growing fragility of local politics in a context of scarcity demand a united front from organizations working across the globe to provide resilience to the local partners facing pressures, securing an environment for public discussion to take place, and resources to ensure their ability to operate.

Looking ahead, the tech trends identified in the brief unveil a forking path. The growing consolidation at every layer of the internet stack underlined the growing power of a few incumbent multinational companies, which is only going to increase with the interest and dependence on data intensive technologies, such as generative AI. Meanwhile, antitrust measures in central countries might create space for a new round of innovation, where companies in the Global South might have a chance of gaining access to a global market. In parallel, the trend towards data localization is seemingly being fueled by a distrust in how data is managed by third countries and suggests a shift towards more local or regional internets, potentially giving local authorities more control over information flows. This last element might shift the dynamics in which local organizations operate, requiring a broader network or footprint in order to grasp the changes taking place and adapt the operational strategies accordingly.

Lastly, the activist field will face a challenge and opportunity with the convergence that is taking place as human rights organizations acknowledge the impact of digital technologies and incorporate it into their agendas. This trend might create financial strain on the one hand, while underlining the importance of digital resilience to the broader community of actors, creating the conditions for sustained partnerships aimed at protecting and advancing the work of activists everywhere.

In light of these considerations, the network approach emerges as a strategic imperative for Global South digital rights nonprofits. Such networks could serve as catalysts for coordinated efforts, enabling these organizations to collectively address the challenges posed by evolving trends and contribute to shaping a more inclusive, resilient, and rights-respecting digital landscape. Hopefully this brief contributes to that goal.

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