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ZERO-RATING AND THE "MINITELISATION" OF THE INTERNET

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The emergence of Zero Rating (ZR) offerings in numerous countries has triggered a new breed of Net Neutrality debates, focusing on the impact of price discrimination [63]. ZR models are mainly implemented on mobile networks and are based on subsidising a limited set of applications, whose data consumption is not counted against the users' data allowance. To understand the raise of ZR, four factors must be considered.

First, the Internet is increasingly accessed *via* mobile and wireless devices that, by 2020, will generate two-thirds of total IP traffic [64]. Second, service differentiation is becoming a key strategic objective for many operators that are vertically integrating with content and application providers. Third, personal data are the "world's most valuable resource" [65] and, in order to collect them application providers, notably the wealthiest, are becoming ready to sponsor users' access to their applications. ZR models emerge in the context of a "Scramble for Data," [66] where market players struggle to capture users' attention and, consequently, their personal data. Lastly, application providers increasingly aim at "hooking" [67] individuals into their services, through addictive [68] application configurations. Thus, the sponsorship of application increasingly aims at creating user-dependency on such application.

In this context, the purpose of ZR offerings may be to steer users' Internet experience towards the mere use of sponsored services. Particularly, when subsidised access to a few applications is combined with the imposition of limited data caps, Internet users – especially the less wealthy – may have a strong incentive to access only sponsored applications.

By sponsoring a limited selection of applications while foreseeing a payment for open Internet access, there is a tangible risk of "Minitelisation" [69] of the Internet. This phenomenon would consists in the Internet's evolution from a general-purpose network into a predefined-purpose network, where Internet users become passive customers of preselected services, rather than being "prosumers", i.e. individuals free to produce, besides consuming, innovative services and content.

Regulators should scrutinise ZR practices to guarantee they do not reduce Internet openness, competition, innovation and users' rights, which are the fundamental goals of Net Neutrality.

To have a better understanding of the different ZR offerings and of the regulatory and market contexts where they are available, the Dynamic Coalition on Network Neutrality [70] of the UN Internet Governance Forum (IGF) [71] has launched a crowdsourced Zero Rating Map [72],

presented at the IGF 2017 [73]. The Map is a living tool that can be updated by any interested individual and has already allowed collecting information on ZR in 90 countries, including what applications are zero-rated and whether Net Neutrality is regulated in countries where ZR plans are available. The Map allows identifying some interesting elements.

The most zero rated applications are part of the Facebook family with Facebook being the most zero rated application. This is mainly due to Facebook's Free Basic programme and Internet.org initiative that sponsor access to a varying set of applications – amongst which the only constant is Facebook – in many developing countries.

The majority of countries where ZR offerings are available do not have Net Neutrality regulation while some operators combine vertically integrated applications and limited data caps in their ZR plans, even when Net Neutrality regulation is in place.

Given the impact that ZR practices may have, regulators should remain vigilant, refining and expanding the criteria [74] and tools necessary to monitor these practices. The social, political and economic relevance of an open Internet ecosystem is too high to allow its transformation into a collection of Minitels.

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