

Deloitte.

INTERNET REGULATION SERVICES



TABLE OF CONTENTS

THE CURRENT LANDSCAPE	3-7
OUR PERSPECTIVE	8-11
WHY DELOITTE	12-16
OUR APPROACH	17-22
LET'S TALK	23-25

THE CURRENT LANDSCAPE.

Why Internet Regulation matters

THE CURRENT LANDSCAPE.

THE INTERNET ISN'T A FRONTIER ANYMORE.

For any company with the web at its heart, compliance must be a priority enterprise capability.

Today's Internet is on a journey to be more highly regulated, and from more directions. The financial consequences for non-compliance can be significant. But the discipline it takes to understand and follow new rules remains immature, and the state of the regulatory landscape is volatile.

More importantly, just keeping up with the rules isn't enough. Organizations need to recognize that using the Internet with **trust** is an enterprise-wide imperative. They need to embed the competencies that keep themselves and their users **safe**. And they need the vision and muscle to put compliance at the beginning of the product engineering cycle, not the end, so they can get ahead of the regulatory and **competitive** curve.



Trust

Operating online means asking stakeholders to have confidence in your approach and practices.



Safety

Failure isn't only about compliance actions. You're preventing harm to your company and users.



Competition

The edge that sets you apart is where regulatory risk is greatest. You need confidence to come out ahead.

THE CURRENT LANDSCAPE.

A **GROWING** FOREST OF RULES.

The roster of regulatory structures
is always in motion.

- 
- ✓ EU Digital Services Act
 - ✓ EU Digital Markets Act
 - ✓ EU Artificial Intelligence Act
 - ✓ UK Online Safety Act
 - ✓ UK Digital Markets, Consumers and Competition Act
 - ✓ EU General Data Protection Regulation (GDPR)
 - ✓ California Consumer Privacy Act (CCPA)
 - ✓ Kids Online Safety Act
 - ✓ Utah Social Media Regulation
 - ✓ Ireland Online Safety and Media Regulation Act
 - ✓ AU Online Safety Act
 - ✓ India IT Act

AS GOVERNMENTS TURN THEIR ATTENTION TO INTERNET REGULATION, LEGISLATION INCREASES.

EU

- EU Digital Services Act
- EU Digital Markets Act
- EU AI Act
- EU TCO

UK

- UK Online Safety Act
- UK Digital Markets
- Competition & Consumers Act
- Ireland Online Safety and Media Regulation Act

APAC

- Cyber security Law of the People's Republic of China
- Personal Information Protection Act (PIPA) of South Korea
- Australia Online Safety Act
- India IT Act

US

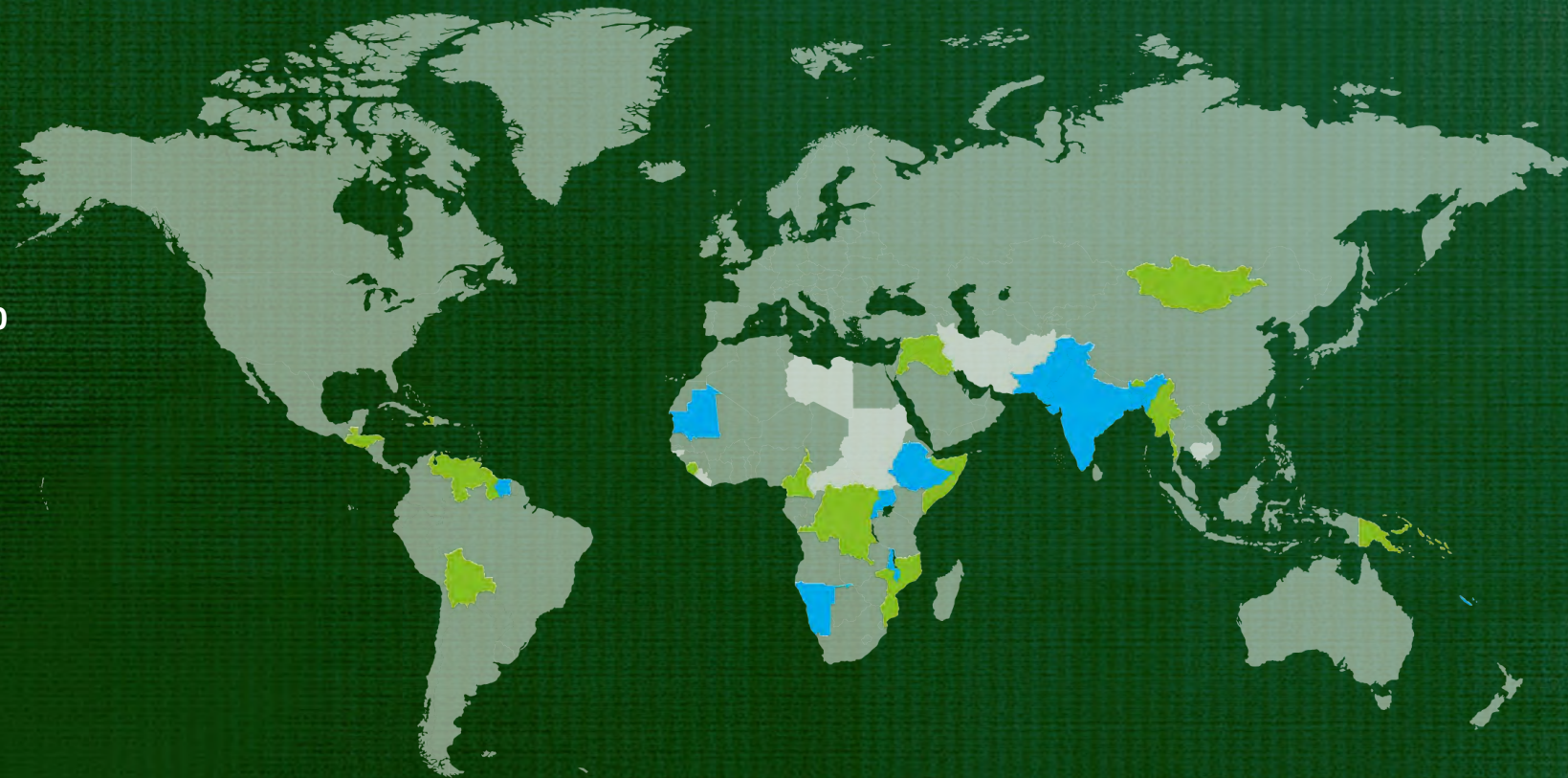
- Proposed Algorithm Accountability Act
- Kids Online Safety Act
- Utah Social Media Regulation

THE CURRENT LANDSCAPE.

THE NUMBERS DON'T LIE.

Regulation of digital technologies are on the rise. For example, as it relates to Privacy regulatory domain, since the EU GDPR in 2018, more than 120 countries have enacted international data protection laws.*

- No legislation
- Legislation
- Draft legislation
- No data



* Thales: *Beyond GDPR: Data protection around the world*, May 2021

OUR PERSPECTIVE.

Driving value through compliance

OUR PERSPECTIVE.

OUR PERSPECTIVE: INNOVATE, DIFFERENTIATE, AND CREATE NEW VALUE

Regulation is risk management. Organizations should manage risk to make bold steps possible, not to avoid them.

In taking stock of Internet Regulation, the stakes are high. Missteps can lead to fines and reputational damage. But it's a mistake to see only challenges. There are opportunities as well. If you understand the implications, this is a chance to find positive outcomes. After all, using the Internet was once a challenge—one you've met. Now it's time for your compliance capabilities to meet the same standard.

Like the Internet itself, regulation has grown more complex. It applies in more ways, in more places. It's partly a question of strategy, but also a matter of attitude. With the right perspective, integration, and collaboration between the business and compliance teams, you can build a culture in which complying with Internet Regulations is everyone's job, and embed the competencies that help them carry it out. The result can be a net positive for a company, its stakeholders, its users, and society.



See complexity.

Every element of the Internet brings both value and risk, and technology is only one factor.



See the big picture.

The Internet is about connection. Compliance needs are connected too. Watch for overlap—and contradiction.



See the world.

Internet Regulation is global. Your approach needs to be global as well.

OUR PERSPECTIVE.

WHERE DOES INTERNET REGULATION TOUCH YOUR BUSINESS? **EVERYWHERE.**

The Internet doesn't live in a niche office anymore. Using it responsibly is now an enterprise-wide strategic imperative.

Technology transformation & disruption

The flow of information among systems has higher stakes than ever before: fines, reputation, and trust. Rapid change calls for extra awareness.

Growth & competitive advantage

Executing an enterprise Internet strategy is a value-driver, not a box-check. Using the Internet to compete effectively depends on using it responsibly.

Operational efficiency & productivity

Adhering to the rules and operating effectively are two sides of the same coin. When you make the Internet safer for everyone else, it's safer and more useful for you.

Sustainability, climate & equity

The evolution from "right thing" to "smart thing" is both physical and digital. Bias and inequity can be just as damaging when they happen online.

Regulation, security & risk

Regulatory performance is the first defense against threats and liabilities. It is also the tool that protects your stakeholders and their data.

OUR PERSPECTIVE.

MEETING THE CHALLENGES

Wherever and whenever your organization operates, Internet Regulation is foundational to your effectiveness. Let the first beneficiary of compliance be you.



Societal challenges

affecting the ways we interact with each other

Competition

The laws that predate the Internet are still in force. With data-sharing and transparency, they matter in new ways.

Politics

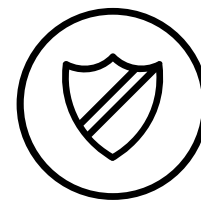
From election integrity to social justice, Internet use has implications for the public.

Rights

The Internet can make expression freer and be a force against bias and hatred—or the opposite.

Access

Innovations don't reach everyone at once. Inclusion, sovereignty, and archives help determine whether outcomes are fair.



Corporate challenge

affecting organizations that serve users

Integrity

The Internet shapes brand reputation, trust, and consumer confidence.

Ownership

With new varieties of IP, such as NFTs, come new challenges over rights, transfers, and distribution.

Taxation

Digital services are subject to tax, as are some metrics of consumption and trade—often across borders.

Security

Cybersecurity threats target Internet systems. Frauds and crimes use them as tools. Protection has a new frontier.



Individual challenges

affecting people personally

Privacy & AI

Identity, consent, and autonomy are all in play when Internet systems collect, store, and use information.

Behaviour

The Internet can spread harassment and bullying—and by itself, it can fuel addiction and health issues.

Children

Age-appropriate content, exploitation, and in-app purchases represent some of the potential dangers to address.

Content

Harmful, conspiratorial, and illegal content is harder to moderate and control online.

WHY DELOITTE?

Our services and value.

WHY DELOITTE?

THE SUPPORT THAT MAKES THE DIFFERENCE.

Internet Regulation affects every organization and industry, because today every company is an Internet company.

Deloitte's global team of advisors and technology professionals can help organizations complement their own core capabilities.

Our specialized tools and holistic approach helps keep them informed, aligned, and compliant with the rules of the digital road.

ALMOST EVERY MAJOR SECTOR TOUCHES INTERNET REGULATION



**Technology,
Media &
Telecommunications**



**Government
& Public Services**



Financial Services



Consumer



**Energy, Resources
& Industrials**



**Life Sciences
& Health Care**

WHY DELOITTE?

BASED ON INDUSTRY TRENDS, DELOITTE FOCUSES ON THESE FOUR MAJOR SECTORS



Technology, Media & Telecommunications

Companies that host or convey content need to know exactly what's expected of them.

Deloitte takes the uncertainty out of charting new regulations, adapting to current ones, and refining processes so compliance is part of performance, not a speed bump along the way.



Government & Public Services

Public sector entities not only promulgate Internet Regulations, but must abide by them as well, often across other governments' jurisdictions.

That puts a premium on Deloitte's ability to help manage complexity and translate fast-changing external requirements into reliable internal practices.



Financial Services

Payment and finance organizations are responsible not only for safeguarding assets, but also for the ways they handle sensitive and private information.

Deloitte's tools and experience with secure Internet operations help keep organizations not only compliant, but trustworthy in a marketplace with no room for error.



Consumer

Where money changes hands, trust and confidence are always at a premium.

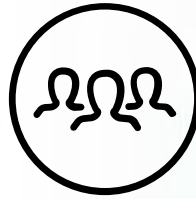
With Deloitte's help, consumer-facing organizations can build a culture and structure that thrives on responsible Internet connections.

WHY DELOITTE?

OUR SUPPORT MAKES THE DIFFERENCE.

As a leading provider of Internet Regulation services, Deloitte provides a multi-disciplinary team of risk, compliance, economic and legal specialists to support you and your partners across the regulatory lifecycle.

Our experience can help you identify and solve immediate, short- and long-term Internet Regulation challenges. So the Internet—and the rules that surround it—**work for you.**



People

Deloitte has advisory teams that span the globe, with direct industry experience, knit into a multi-disciplinary model that operates as a coherent whole.



Tools

Monitoring and reporting are only the beginning of what Internet Regulation requires. We also tackle analysis, risk mapping, and controls—all with purpose-built technologies.



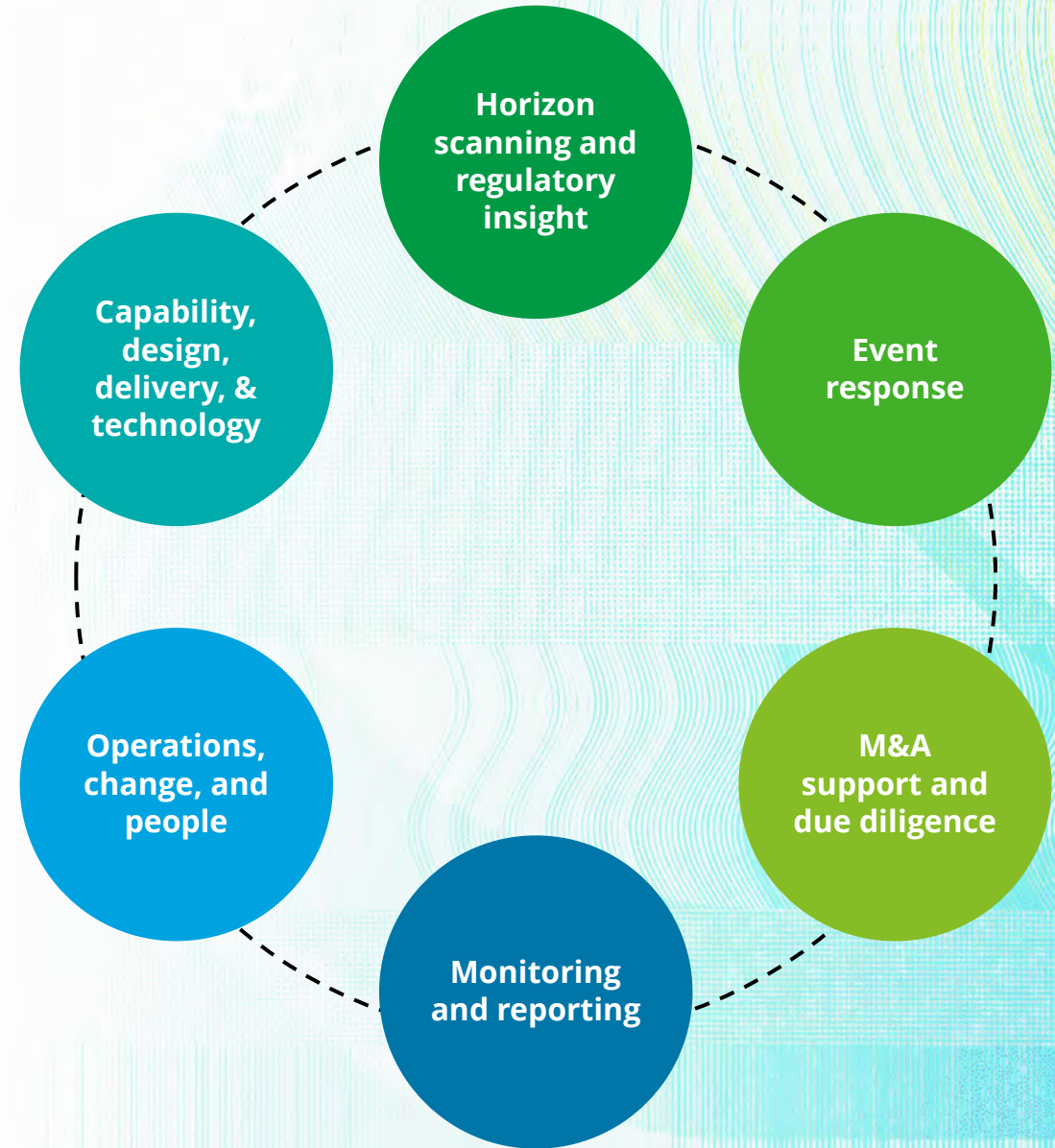
Strategy

If something affects Internet use, it affects the enterprise. This is a business imperative, not just a technology one. So leadership, organization structure, governance, change management, and training all play a part in the mix.

WHY DELOITTE?

OUR SERVICES.

The critical capabilities that companies need to sense, interpret, and navigate the regulatory landscape repeat and reinforce in a continuous loop of awareness and improvement.



OUR APPROACH.

Coordinating an enterprise-wide
Internet Regulation agenda

OUR APPROACH.

HOW DELOITTE TACKLES THE CHALLENGE.

We've been there

Experience and support that identifies and solves immediate, short- and long-term Internet Regulation challenges across the entire regulation lifecycle.

We do that

The power of a global multi-disciplinary model that comprises premium advisory, operating model transformation and delivery, and ongoing assurance—to take on the impact of current and potential regulations that will affect interconnected stakeholders at every level.

We see broadly

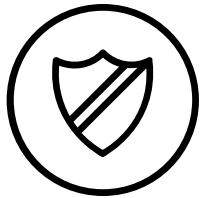
A holistic framework that spans the broad range of business-critical services to achieve and maintain compliance—all in one ecosystem.

We work globally

Global experience to advise, guide and transform your business with advisory from Legal teams, economic teams, risk and compliance teams, and human capital and transformation teams.

OUR APPROACH.

WHAT DELOITTE CAN MAKE HAPPEN.



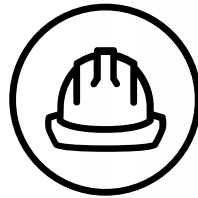
Safe

Future-ready protection against business change in a time of uncertainty.



Covered

Help maintain regulatory compliance through reporting.



Strong

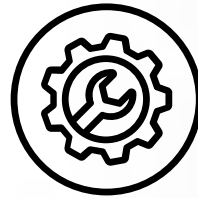
Business resilience and certainty in partnership with Deloitte's multi-disciplinary team of risk, compliance, economic and legal specialists.

OUR APPROACH.

THE DELOITTE DIFFERENCE.

Internet Regulation is about more than checking boxes. The challenge before you involves trust, safety, and competition—priorities that sometimes align, sometimes collide, and always matter. We equip you to bring a positive, holistic outlook to Internet Regulation—precisely because that describes our own approach to the same challenge.

As an organization, you're either ahead of or behind of the regulatory curve. Taking proactive steps to today's requirements is better—but working to predict, understand, and align with future regulations is the real key to an effective program.



A team of advisors

- Across geographies
- Across industries
- Across disciplines

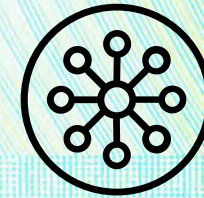
A multi-disciplinary model



Sophisticated technology enablement

- Built for the specific needs of policy, process, and control
- Close monitoring of regulations, risks, and relationships

Dedicated tools that extend beyond compliance



Holistic strategy and operating model

- Leadership
- Strategy
- Accountability
- Culture and training

Support for the business changes that must surround regulatory performance

OUR APPROACH.

**DON'T BE SATISFIED
WITH MITIGATING RISK.
FIND OPPORTUNITY
AND SEIZE IT.**

OUR APPROACH.

GLOBAL REACH. DEEP EXPERIENCE.

Our Internet Regulation practice




A globally networked team of Internet Regulation leaders and specialists with centers of excellence in the US, Europe and APAC



Experience supporting leading global organizations' compliance with GDPR, India IDMEC, EU New Deal for Consumers, Digital Services Act and Digital Markets Act, UK Online Safety Act, and many other regulations



A multi-disciplinary model that draws on Deloitte teams with specialists in risk, consultative services, legal and financial areas

A dark green world map with the United States, United Kingdom, and European Union highlighted in white. Lines connect these regions to circular callouts labeled 'US', 'UK', and 'EU' respectively.

Deep regulatory experience in the UK, EU, US, and other jurisdictions

LET'S TALK.

How to get started.

LET'S TALK.

CRITICAL CONVERSATIONS, BOLD STEP

Your company has made great strides in harnessing the Internet. Now it's time for your regulatory approach to catch up. Deloitte is ready to help make it happen.

ASSESS

What are your exposures to Internet Regulation—by platform, by law, by jurisdiction? Where does responsibility for that lie inside your company today, and is it consolidated enough to be effective?

ASSAY

How strong are the tools you use today to track, understand, and comply with Internet Regulations in every place they apply to you? What results have you seen? Have there been wins or losses to learn from?

FORCAST

Whatever plans you have to grow, expand, or evolve, the Internet is part of them. How can you start building regulatory awareness into your actions from the start?

LEARN

Deloitte has an array of proprietary tools that can help you make sense of this, gain awareness, and plot a course ahead. We can show you what's possible in your enterprise with your unique needs.

LET'S TALK.

LET'S TALK.



Nick Seeber

Internet Regulation Global Lead

Partner, Deloitte NSE
nseeber@deloitte.co.uk



Sam Parish

US Internet Regulation Lead

Principal, Deloitte Financial Advisory Services LLP
saparish@deloitte.com



Jana Arbanas

Industry Lead

Principal, Deloitte & Touche LLP
jarbanas@deloitte.com



Joanna (Joey) Conway

Internet Regulation Lead (Legal)

Partner, Deloitte NSE
jconway@deloitte.com



Laurie Gilchrist

**Internet Regulation, Governance, Risk
& Compliance Lead**

Director, Deloitte NSE
lgilchrist@deloitte.co.uk



Jennifer McMillan

Internet Regulation

Senior Manager, Deloitte & Touche LLP
jemcmillan@deloitte.com



THANK YOU.

Internet Regulation Services

Deloitte provides industry-leading audit and assurance, tax and legal, consulting, financial advisory, and risk advisory services to nearly 90% of the Fortune Global 500® and thousands of private companies. Our people deliver measurable and lasting results that help reinforce public trust in capital markets, enable clients to transform and thrive, and lead the way toward a stronger economy, a more equitable society, and a sustainable world. Building on its 175-plus year history, Deloitte spans more than 150 countries and territories. Learn how Deloitte's approximately 415,000 people worldwide make an impact that matters at www.deloitte.com

About Deloitte

Deloitte refers to one or more of Deloitte Touche Tohmatsu Limited ("DTTL"), its global network of member firms, and their related entities (collectively, the "Deloitte organization"). DTTL (also referred to as "Deloitte Global") and each of its member firms and related entities are legally separate and independent entities, which cannot obligate or bind each other in respect of third parties. DTTL and each DTTL member firm and related entity is liable only for its own acts and omissions, and not those of each other. DTTL does not provide services to clients. Please see www.deloitte.com/about to learn more.

This communication contains general information only, and none of Deloitte Touche Tohmatsu Limited ("DTTL"), its global network of member firms or their related entities (collectively, the "Deloitte organization") is, by means of this communication, rendering professional advice or services. Before making any decision or taking any action that may affect your finances or your business, you should consult a qualified professional adviser. No representations, warranties or undertakings (express or implied) are given as to the accuracy or completeness of the information in this communication, and none of DTTL, its member firms, related entities, employees or agents shall be liable or responsible for any loss or damage whatsoever arising directly or indirectly in connection with any person relying on this communication. DTTL and each of its member firms, and their related entities, are legally separate and independent entities.

© 2024. For information, contact Deloitte Global.