



SPECIAL REPORT

The present and future of the Internet in Latin America

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1. INTRODUCTION

Gutenberg's printing press triggered a "revolution" in communication that marked the evolution of man from the 15th to the 20th centuries, when first cinema and the radio, and later television, appeared. Over the last couple of decades we have seen a new revolution in communications centred on the Internet. As argued by the sociologist and expert in the new information and communication technologies, Manuel Castells "the impact of the new information and communication technologies (ICTs), and the emergence and mass-adoption of the Internet, have changed relationships and communication in all areas of human life, marking a new age in the development of our societies: the information age".

Indeed, the Internet has many applications beyond mere communication which affect personal and commercial areas, as well as geo-political and geo-strategic areas, since it represents a decisive tool for the development and competitiveness of nations. It has enormous potential to stimulate the economy and, in fact, **according to the World Bank, for every 10% increase in Internet penetration, the national GDP of the emerging countries could grow by between 1.21% and 1.38%.**

Given this panorama, it is worth asking where Latin America is starting from and how it will tackle the world of the Internet. What challenges will it face and what obstacles will it have to overcome? We can also analyse the directions that the Internet may take in the near future and the role that the state may have.

2. CHARACTERISTICS OF THE INTERNET IN LATIN AMERICA

Latin America is one of the regions of the world where the Internet has the highest growth forecasts in the near future (to 2020). This is due to various factors:

- It is starting, at the current time, from a **lower presence** (just over 40% of the inhabitants of Latin America is an Internet user, while in the OECD as a whole around 80% have access). Therefore, there is a larger base from which to develop.

In fact, according to data from Comscore (Internet market research company), **Latin America is the region with the fastest growth over the last year (2012-2013)** in terms of Internet users (12%). Over the last five years, the penetration of mobile broadband in Latin America has increased at an annual rate of 127% and Cisco's figures suggest that the number of subscriptions could increase five-fold in just three years, to reach more than 300 million in 2015.

- In addition, **the market for the Internet is growing in the region** thanks to the growth of the middle class in these countries. They have greater purchasing power, which is going to allow for an expanding market and for more of the population having access to the Internet. The economic boom experienced by the region not only contributes

to the consolidation of these middle classes but also to the extension of the phenomenon of the Internet.

- **The Internet market in the region has, due to its young consumers, a bright future.** The profile of the Latin American Internet user, as set out in the Comscore report "Latin America Digital Future 2013", is that of a young man (60% aged between 15 and 34, compared to 53% in the rest of the world), with Venezuela and Colombia standing out since almost 50% of users are 24 years old or under.

A use that, given this age, is focussed above all on the social networks (with consumption of 10 hours) and on sites such as Facebook, in particular, followed at a significant distance by LinkedIn, Twitter, Ask and Orkut. In fact, five of the markets most involved globally in the social networks are to be found in Latin America (Brazil which leads the rankings ahead of Russia, Argentina, which occupies third place ahead of Turkey, Peru in seventh position and Mexico and Chile in ninth and tenth). After the social networks, the most followed and consulted are portals (4.50 hours), services (4.18) and entertainment (4.10).

In addition, the profile of the Internet consumer in Latin America is not just a young person, highly involved in the social networks, but also a user

“The market for the Internet is growing in the region thanks to the growth of the middle class”

“The digital divide in supply creates serious obstacles that make it difficult to transform this latent demand into real new users”

interested in current affairs (85% consult news sites) and consumption (online purchases have increased: 74% of the Latin American population on the Internet visits e-commerce websites and the number has increased by 16% in one year).

However, what other characteristics are associated with the Internet in Latin America?

The main characteristics are strong growth in the audience, but still with low and heterogeneous penetration and a digital divide in both demand and supply which leads to a slow connection to the Internet.

Rapid growth of users, with low penetration

According to the aforementioned report by ComScore, the Internet audience in Latin America grew by 12% between March 2012 and March 2013. This penetration was greater for Internet access through mobile telephones, which has grown by more than 100% over recent years, and lower for Internet broadband. All of this leaves Latin America in first place in terms of the growth of Internet users. It is followed by the Asia-Pacific region with 7%, Europe with 5%, the Middle East-Africa with 3% and the United States and Canada with 1%.

However, at the same time, it only represents 9% of the global audience around the world (41% is in Asia, 27% in Europe, 14% in North America). The figure of 147 million

Latin American users is a long way from the 644 million in Asia, the 412 million in Europe, the 216 million in North America, and only exceeds the 134 million in Africa.

Presence of a double digital divide

This contrast between strong growth in the number of users year-on-year and the still low penetration is due to the existence and persistence of two divides that are still holding back the region: A **digital divide in supply** and another **digital divide in demand**, which lead to the number of users being considerably below its potential.

- **The digital divide in supply** creates serious obstacles that make it difficult to transform this latent demand into real new users.

This is due to various factors:

Supply is very deficient due to the scant availability of fixed networks because of the lack of infrastructure and the shortage of fixed networks in place, which are vital for the development of this service.

As argued by the academics Raúl L. Katz and Hernán Galperin in the CEPAL report “public policies to stimulate mass access are pointless without the parallel development of the infrastructures. In fact, the current delay in the connexion of fixed broadband lines is due to a lack of investment in infrastructure”. In addition, the lack of suitable and sufficient

“Uruguay stands out for being the country in Latin America in the best position in terms of the speed at which people can browse the Internet”

infrastructures is behind the slow arrival of the 3G and 4G systems in the region.

This divide in supply due to a lack of sufficient infrastructures causes another of the serious problems for the Internet in the region, the slow connection speed. In Latin America the average broadband speed is three megabits per second, while in the Organisation for Economic Cooperation and Development (OECD) countries it is 20 megas and in South Korea 100 megas.

Uruguay stands out for being the country in Latin America in the best position in terms of the speed at which people can browse the Internet. According to the Net Index tool from the company Ookla, Uruguay is the country in the whole of Latin America with the greatest average speed, being ranked in 57th position globally, ahead of Chile (58), Mexico (71) and Brazil (75).

The average regional connection speed hides large disparities between the different countries. According to NetIndex, a consultancy firm that carries out studies on speed, in Uruguay the average connection speed is 15.5 Mbps. In next place is Chile, with an average speed of 8.8 Mbps.

Along with Uruguay and Chile, Brazil and Mexico head the regional rankings. Both countries also have high percentages of Internet penetration among

their population. In Mexico, this figure stands at 52 million inhabitants, 46% according to data from the Monterrey Institute of Technology. Brazil is the fifth ranked country in the world in terms of the largest number of connections (94.2 million users, 80 million of which access through broadband).

Paraguay and Colombia are both in the range of 4 to 5 Mbps, Peru at 3.35 Mbps and Ecuador at an average of 5.88 Mbps.

At the other extreme we have Bolivia, one of the least connected countries on the continent, where 34.2% have access to the Internet and the average connection speed is 1.58 Mbps.

Venezuela shares with Bolivia the low speed of its connections. At 1.94 Mbps it is in last place in terms of the quality of browsing.

Another striking case in the region is Argentina, which has a high penetration of 68% and a low speed of 4.61 Mbps.

- **Digital divide in demand**

In addition to the digital divide in supply, which we have focussed on to this point, there is also a digital divide in demand, due to the low income of much of the population and their minimal education and preparation.

The fact that this is a clear divide in demand can be seen from it reaching 50

“Since 2010, the price of the connection has fallen and the quality of the service has improved”

percentage points for the Latin American countries: **less than half of households in Latin America are covered by a fixed broadband service**. In the mobile Internet segment, the divide in demand is even greater, reaching, according to CEPAL, 63 percentage points.

The main causes of this divide in demand are related to:

» **La asequibilidad del servicio**

The **socio-economic divide shows that Internet connections are very expensive given the level of household income** or require the purchase of other goods, such as computers or mobile telephones, whose cost is also high.

The economic variables, therefore, explain the demand divide in the countries in the region, although **there has been a gradual reduction in this divide in penetration according to socio-economic level**. This is due to the economic boom experienced by the region since 2003 and to the increase in the middle class with its greater purchasing power in some countries such as Brazil, Costa Rica, Chile and Uruguay. In contrast, in Mexico the trend reveals a consolidation

of the divides according to income level.

In addition, since 2010 the price of the connection has fallen and the quality of the service has improved. At the end of the last decade the region had very deficient access to the Internet and this was up to 20 times as expensive as in the developed countries. In four years the price per mega fell by 47% in Argentina, and this fall exceeded 80% in Uruguay, Brazil and Ecuador.

The reduction in cost is due to an increase in competition between the service providers, to government programmes to promote access in schools and rural areas, which have stimulated demand, and to improvements in the regulatory framework.

In any event, a study carried out by the Technology and Innovation Centre (TIC) at CEPAL, which contains a comparison of the cost of broadband between countries in Europe and Latin America, concluded that the service in Europe is still much cheaper.

The study found that Panama has the lowest price at an average of US\$ 10.23. Uruguay is the second ranked country

“The greater the education, the greater the adoption of the Internet and broadband”

in terms of the lowest price at an average of US\$ 12.31, which is equivalent to 1.23% of GDP. In Europe the prices are considerably lower (US\$ 4.53 on average in Spain, 0.18% of GDP, and in France the price is US\$ 2.07, equivalent to 0.06% of GDP).

» **Minimal interest and a lack of skills**

The minimal interest and the lack of skills are linked directly to education levels and age, which influence this demand divide. The greater the education, the greater the adoption of the Internet and broadband.

The data on Internet use suggest the existence of a threshold of around 30 years old, from which age the level of adoption of this technology reduces significantly, both inside and outside the home.

In summary, some authors, such as Raúl L. Katz and Hernán Galperín, argue that “without denying that there is a certain causal relationship between investment and the divide, it is important to highlight that one of the fundamental variables that explain the digital divide is not found in supply but in demand... to the level of income,

the education level reached by the individual or head of household, and the age of the individual or the age composition of the household as the main predictors of the adoption of such services (Hauge and Prieger, 2010).

Several studies suggest that other factors are also involved, in many cases specific to different countries or regions. For example, Navarro and Sánchez (2011) show that *ceteris paribus* being a woman reduces the probability of using the Internet by 6% in Latin America.

In the United States, several studies show the importance of factors such as ethnic group and the ability to speak English (Ono and Zavodny, 2008, NTIA, 2011). Other factors such as geographical location (rural vs. urban), the presence of children of school age and the rate of penetration in the geographical location of the individual or household (mostly the network effect) are also identified in the academic literature as determining factors in the adoption of the Internet (Chaudhuri and Flamm, 2005; Vicente and López, 2006; Grazzi and Vergara, 2011)”.

“Argentina, Chile and Uruguay head the list in terms of Internet penetration in Latin America”

- **Degree of Penetration by Country**

In Latin America in 2013 there are around **255 million Internet users**, which represents 43% of the population. The use of the Internet is growing quickly and, according to statistical information from eMarketer, penetration will exceed 53% in 2016, compared to the figure of 37% for 2011. This represents growth of 13% a year, significantly higher than that seen in any other region in the world.

However, this figure hides very different situations across the region, with Argentina, Chile and Uruguay heading the list in terms of Internet penetration in Latin America.

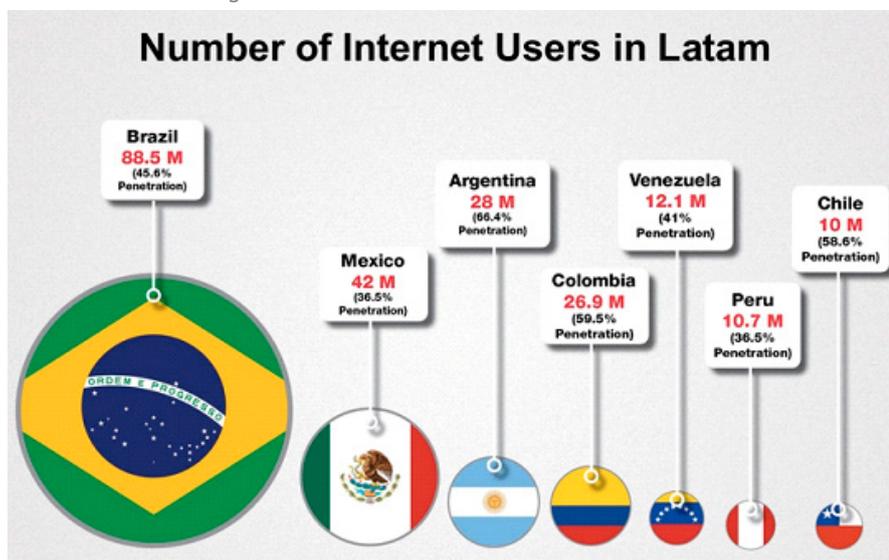
According to statistical information from eMarketer, Argentina is the country with the highest penetration in the

region, and here 66.4% of the population is an Internet user. This is followed by Colombia with 59.5%, Chile with 58.6% and Uruguay with 51.4%.

In reality, the Internet population in Latin America is in proportion to the number of inhabitants each country has. So, of the 255 million users in the region, 88 million are in the country with the highest population (Brazil), followed by Mexico with 42 million, Argentina with 28, Colombia with 26, and Venezuela, Chile and Peru with more than 10 million.

In terms of broadband, Chile has the highest penetration rate in Latin America for broadband Internet of two megabytes or over in fixed and mobile connections, according to the report “Cisco Broadband Barometer 2.0”. In 2012, 11.3% of the population of Chile had access to broadband, followed by Argentina with 7.5%, Brazil (5.6%) and Colombia (4.1%).

Source: Wireless Intelligence



While in Latin America and the world the main point of access to the Internet continues to be the desktop or laptop computer, in Mexico we can see the opposite phenomenon. According to the data provided by the market analyst company ComScore, in that country most connectivity takes place through mobile phones. In Mexico, 9.4% of the 42 million Internet users connect to the Internet through a smartphone while in Brazil the figure is

“One of the challenges for the Latin American economies, in the medium term, is the need to diversify, modernise and improve its competitiveness, reducing costs”

4.4% of the population, in Argentina 5% and in Chile 8.2%, according to the data provided by the analyst.

- **Operating systems**

In relation to the operating systems, it should be noted that Android is the most popular in Latin America, with the sole exception of Mexico. Apple (iOS) leads the market in Mexico with 40.5%, while devices that operate with Android have a 40% penetration in the country.

This battle is not seen in other countries in the region of Latin America. For example, in Chile Android leads with 61%, compared to 30.7% for iOS. In Argentina, Android has 52.4% and iOS 19.3%. In Brazil, Android has 42.5% penetration of the mobile market, while iOS has 40.8%.

Another figure that is worth highlighting is the type of mobile device most frequently used to access the Internet. While in Mexico the most widely used are Apple devices, in the rest of the region it is more common to use devices with the Android operating system.

3. CONCLUSIONS: THE FUTURE OF THE INTERNET IN LATIN AMERICA

The future of the Internet in Latin America will involve healing the digital divides

discussed which are currently affecting its take-up.

It is clear that one of the challenges for the Latin American economies, over the medium term, is the need to diversify, modernise and improve their competitiveness, reducing costs. This modernisation and greater competitiveness will involve, among other things, encouraging the new technologies and the use of the Internet in areas such as commerce, industrial processes and politics.

So, in the short term, in Latin America we should see:

More public policies

To put an end to the digital divide discussed above it is necessary to put in place, in the short term, a set of public policies that provide an incentive and stimulus for the roll-out of broadband to the entire population.

It has been demonstrated, in various academic studies, that the use of the Internet has clear economic effects (it contributes to generating employment, increasing productivity, bringing new sectors of the population into the market and stimulating the tertiary sector) and social effects (it increases the average income of households, reducing the poverty levels; CEPAL argues that an increase of one percentage point in regional broadband penetration leads to a 2.96% increase in average household income).

As argued by Raúl Katz “the greater the penetration of broadband, the

“Everything indicates that the universalisation of broadband will be principally through mobile platforms”

greater will be the impact of its expansion on the growth of GDP... the maximisation of the economic impact of broadband depends on a significant increase in its penetration....an increase of 1% in the penetration of broadband contributes 0.0158 percent to GDP growth”.

These public policies must also be designed to encourage the growth of qualified labour (a 1% increase in qualified labour increases GDP by 1.15%) and to stimulate infrastructures to achieve a reduction in the price since, as argued by CEPAL, “a reduction of 10% in broadband prices would increase penetration by more than 21%”.

In short, Hernán Galperin, Judith Mariscal and María Fernanda

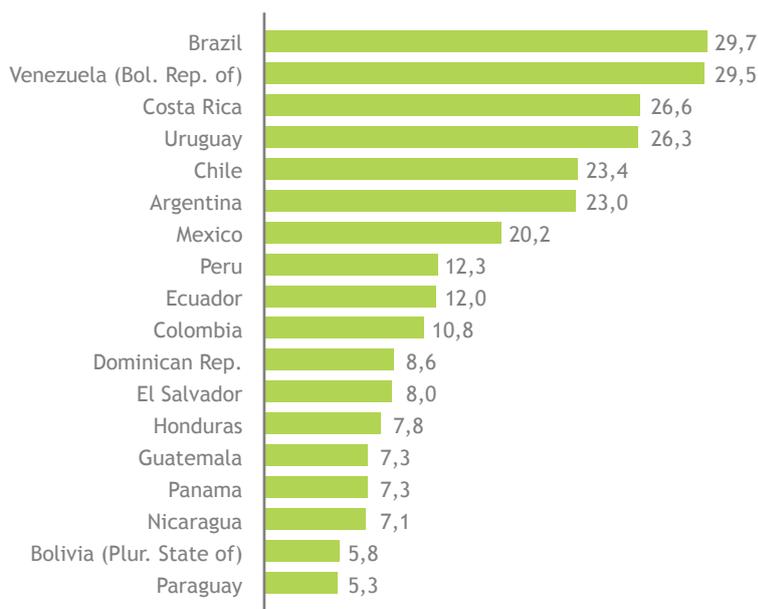
Viezens, in the aforementioned CEPAL report, argue that “as the state played a key role in the development of electricity networks, transport systems and the telecommunications network up to the eighties, the new consensus calls for governments to take on a similar role in modernising the infrastructure of telecommunications in the 21st century”.

The future of Internet connection in Latin America will be via mobile phones

Everything indicates that the **universalisation of broadband will be principally through mobile platforms**. One must not forget that 85% of the population of South America and 84% of the population of Central America has a mobile telephone.

PENETRATION OF 3G SERVICES AS OF JUNE 2012

(Access per 100 inhabitants)



Source: Wireless Intelligence

The academic specialising in new information technologies, Ernesto M. Flores-Roux, argues that “at the end of 1995, Latin America had in operation only 3.6 million mobile terminals, or in other words, a penetration of 0.77%. The United States and the European Union had 33.8 million (12.7%) and 22.1 million (4.6%) respectively, a penetration 16 and 6 times greater than in the Latin America region. Fifteen years later, this difference no longer exists. In fact, Latin America has, per 100 inhabitants, more mobile telephones than the United States... the convergence in the levels of penetration is a phenomenon of the last six years”.

Many experts consider that “in its day the mobile phone served

“The future will not be found so much in 3G technology but rather in the following stage, 4G”

in Latin America to bring voice telephony to everyone. Now, in this second decade of the 21st century, mobile broadband will play a similar role in making access to “the global web of information and knowledge” more universal.”

However, for that to occur the connection to mobile broadband networks (3G and 4G) which grew from 2.4 million connections in the first half of 2007 to 117 million in 2012 (a compound annual growth rate of an impressive 92%) must increase because the countries with the greatest penetration (Brazil and Venezuela) still struggle to reach 30%.

As can be seen from the table on the previous page, there is still great heterogeneity in relation to the adoption of 3G technology in the different countries and this seems to have an explanation that goes beyond the levels of wealth.

Some authors argue that “a significant part of the growth in the penetration rate is not explained by per capita income, but by the time for which the networks have existed. In addition, penetration explained by time increases with the age of the networks, which is to be expected during the adoption period for the technology. In other words, an earlier launch guarantees an earlier and faster adoption, independently of how rich is the country or how developed is the previous technology”.

However, the future will not be found so much in 3G technology, but rather in the following stage, 4G.

The 4G LTE networks started in Puerto Rico and Brazil in the year 2011 and in 2013 in total there are 12 countries with 4G networks operating in Latin America, according to 4G Americas. This growth is combined with the increase in the sale of smartphones and tablets by 34%, according to the consultancy firm IDC. Cisco estimates that the traffic through mobile networks will increase thirteen-fold over the next five years.

The penetration of 4G technology is less than 1% in Latin America, around 250 thousand subscriptions, compared to North America which is the world leader in this area with a penetration of 18.3%.

Of all the mobile subscriptions in Latin America at the end of 2012, around 80% correspond to voice and 17% to data (3G). For 2017, the forecast is for voice to only represent 30% of mobile subscriptions, and for the other 70% to be largely 3G and 4G.

E-commerce in the future is going to be very focussed on retail, which between 2012 and 2013 increased by 16% with an audience of 109 million, reaching 74% of the potential market, compared to more than 94% in the United States. There is therefore a broad terrain from which to grow and develop.

The Internet and politics

Lastly, moving away from the economy, we can already see that Twitter and Facebook are having a clear impact on the political world, the so-called Cyberpolitics (or

“Politics 2.0 has increasingly become a new tool for running electoral campaigns”

Politics 2.0). Presidents offer their opinions almost instantaneously through Twitter and have followers on the social networks.

The political scientist Gabriel R. Otazo says that “it can be argued that the political leaders have been influenced by these transformations, which require them to deploy new coping strategies: greater speed and opportunity in the management of information, the creation of increasingly segmented messages (or in other words, suitable for the specific needs of an increasingly diverse electorate) and the development of new skills in managing public dialogue (Lanza, 2010). Latin America is not immune to this phenomenon: Politics 2.0 has increasingly become a new tool for running electoral campaigns”.

In fact, we have already seen protests in Latin America organised through “sms” and we have been able to instantly discover the opinions of leaders such as Cristina Kirchner, or the late Hugo Chávez, via Twitter.

So, in the near future (2014-2018) we are going to see in Latin America an increase and standardisation in the use of the Internet to mimic the position in the rest of the world, supported by the economic improvement and upward social mobility of part of the population. Some sectors are going to use 4G mobile connections to access the Internet, which is going to stimulate and further centralise electronic commerce over the Internet, making the economy of the region more competitive.

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