



CULLEN

INTERNATIONAL

What balance of rules and incentives for a Regional Digital Market for Latin America?

Innovación en un mundo digital

II Reunión de la Conferencia de ciencia, innovación y TIC de la CEPAL

Costa Rica, September 12, 2016

From the EU Digital Agenda (2010)...

- Commission ICT strategy for 2010-2020
- Problems identified:
 - Lack of investment in networks
 - Rising cybercrime & low trust
 - Fragmented digital markets
 - Lack of interoperability
 - Insufficient R&D
 - Lack of digital skills
 - Missed opportunities in addressing societal challenges
- 132 actions (not completed)

To the EU DSM strategy

A “vision” on digital markets until 2020

Vision

- Make the EU Single Market fit for the digital age

The opportunity

- Political & social:
 - Step forward towards the “EU Single Market”
- Economic:
 - + €415 billion EU GDP per year
 - New jobs for Europeans

How

- *“tearing down legal and regulatory walls”*

EU 2015 Digital Single Market Strategy Structure

Access to online goods and services

- E-Commerce
- Parcel delivery
- Copyright
- VAT
- Geo-blocking
- Consumer protection

Right conditions for network and service expansion

- Telecoms regulation
- Audiovisual regulation
- Platforms /OTTs
- Privacy
- Security

Maximise growth potential of the EU economy

- Interoperability and standardisation
- Big Data, cloud
- Internet of Things
- e-Government

“Right conditions” for network and service expansion in the EU?

Address ‘remaining gaps’ to the Single Market

Telecoms
Single
Market
(adopted)

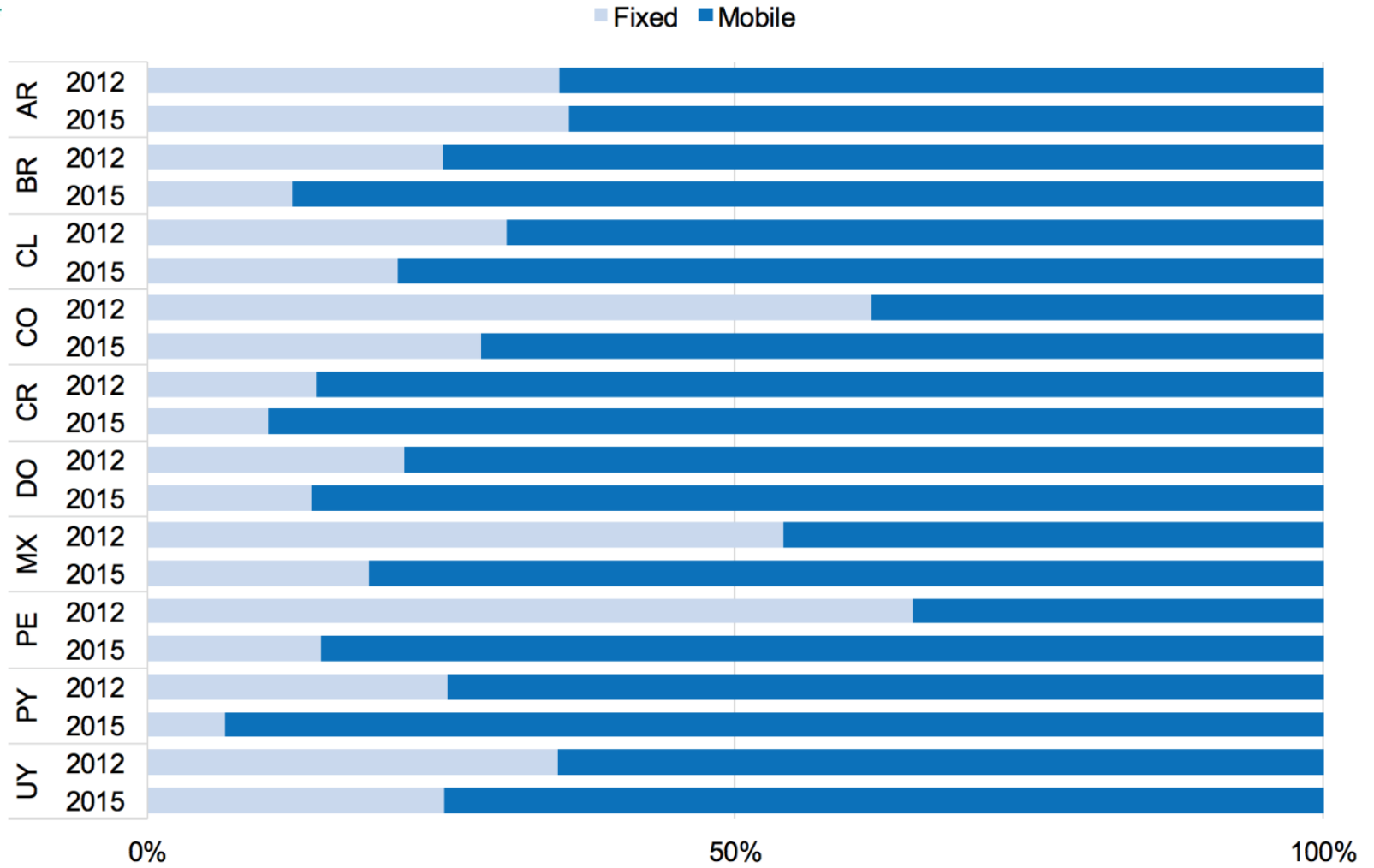
- End of roaming charges (June 2017)
- Net neutrality (April 2016)

Telecoms
regulation
review
(in progress)

- Harmonise radio spectrum
- Universal service
- Level playing field with OTTs

Latin America Connectivity

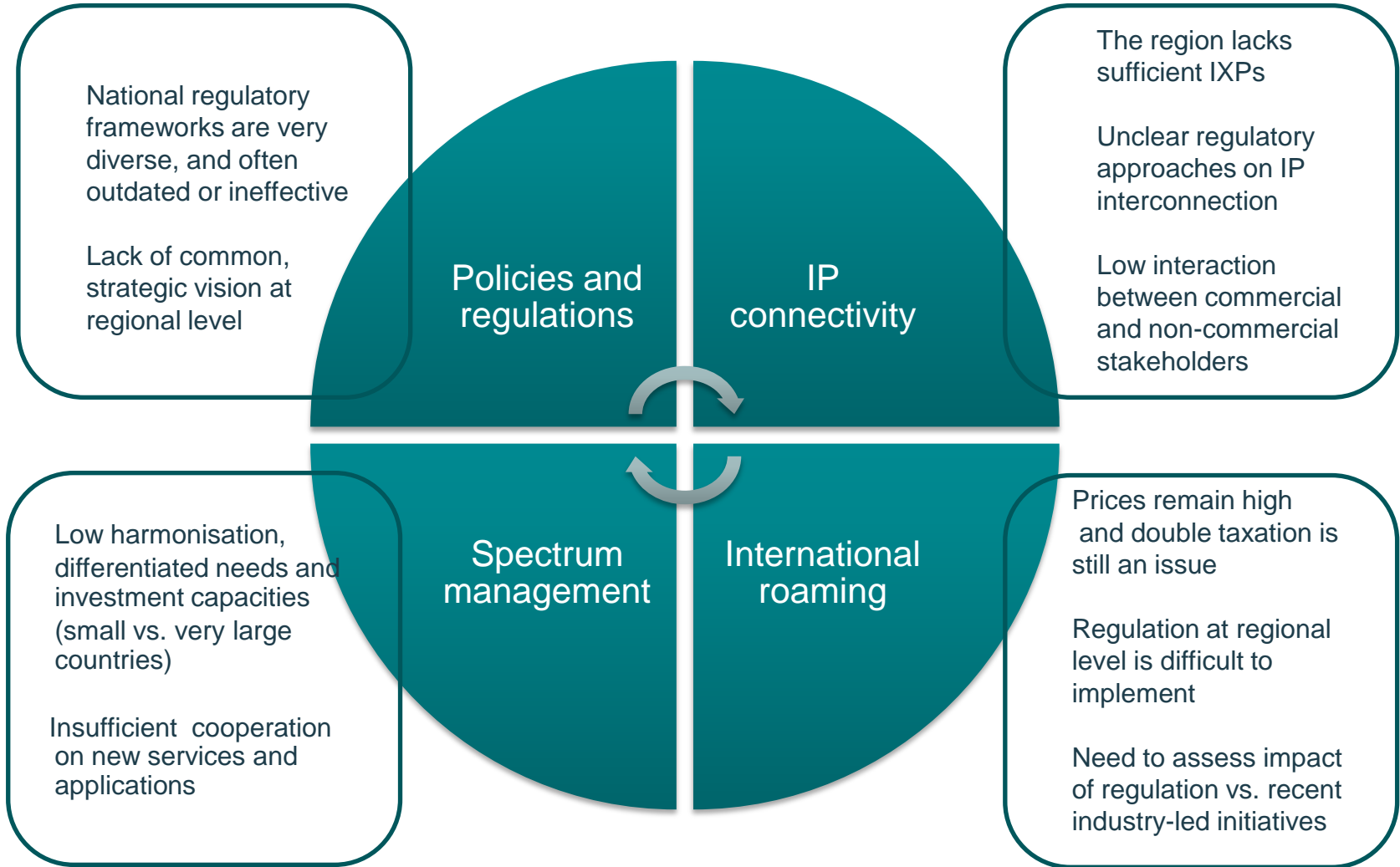
Huge gaps to be bridged, variation across countries



Share of fixed and mobile broadband, as a % of total accesses in selected LATAM countries (Cullen International based on ITU and regulators' data)

Latin America Connectivity

Main obstacles identified



An regional digital market in LATAM?

Key questions

Opportunities?

- Economic growth
- Huge potential (600m people, common language, internet access increases)

Obstacles? Way forward?

- Lack of common institutional framework with binding powers
- Political commitment



THANK YOU!

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Examples of some of the regional entities involved

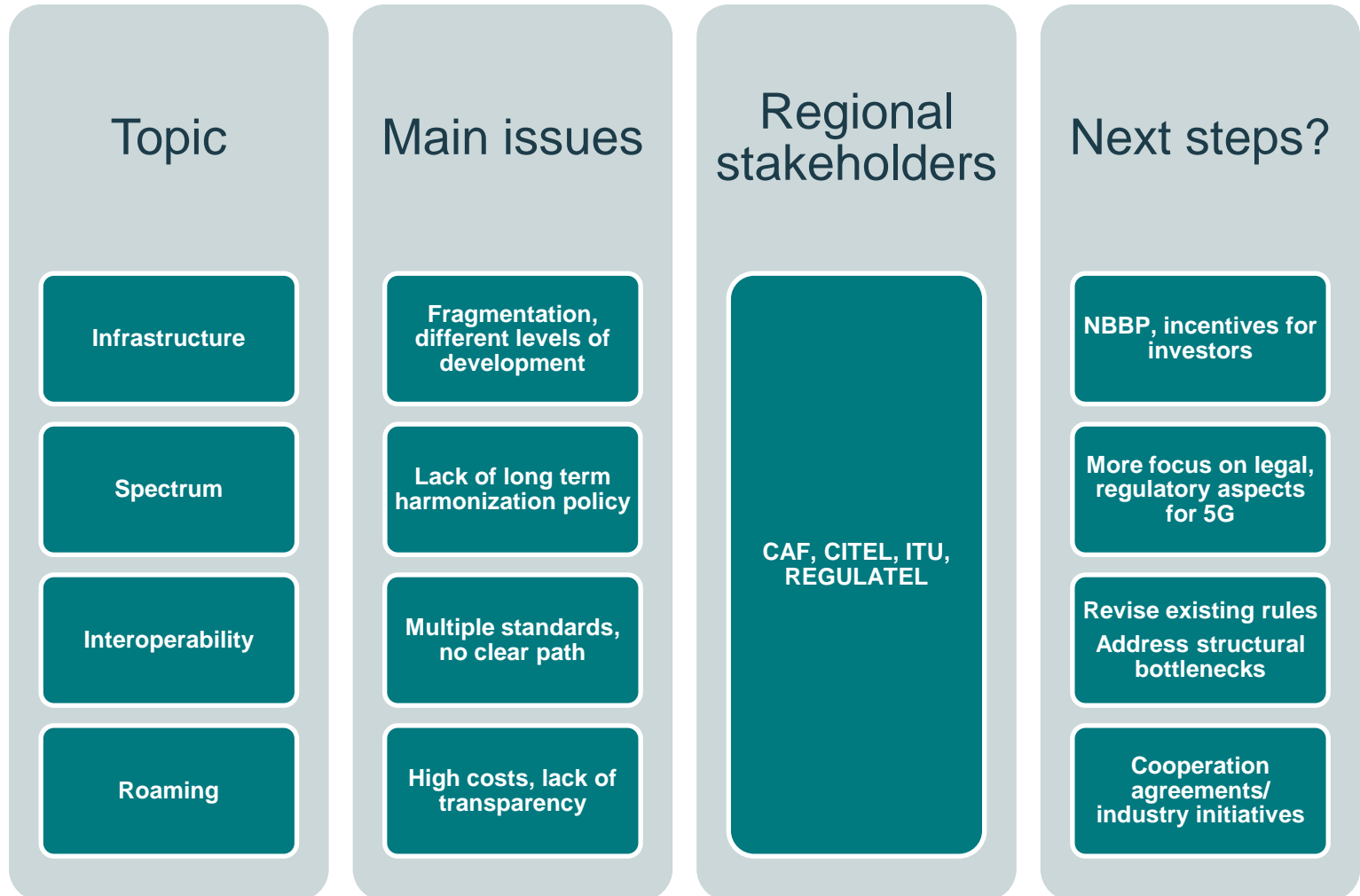
	ITU	OAS	CITEL	Regulate!
Spectrum harmonization	●●●●		●	●●
Standardization, interoperability	●●●●			
International roaming	●●●		●●	●●
Infrastructure development	●●●			●●
Net neutrality				●●
Copyright	●●			
Fight against piracy		●		
Taxation				●
e-commerce (trust, contracts)		●●●		
Data protection		●●●●		
Cybersecurity	●●●	●●●		

- = agreements, guidelines or recommendations
- = studies, toolkits & information resources
- = capacity building
- = forums of exchange

4 main types of initiatives

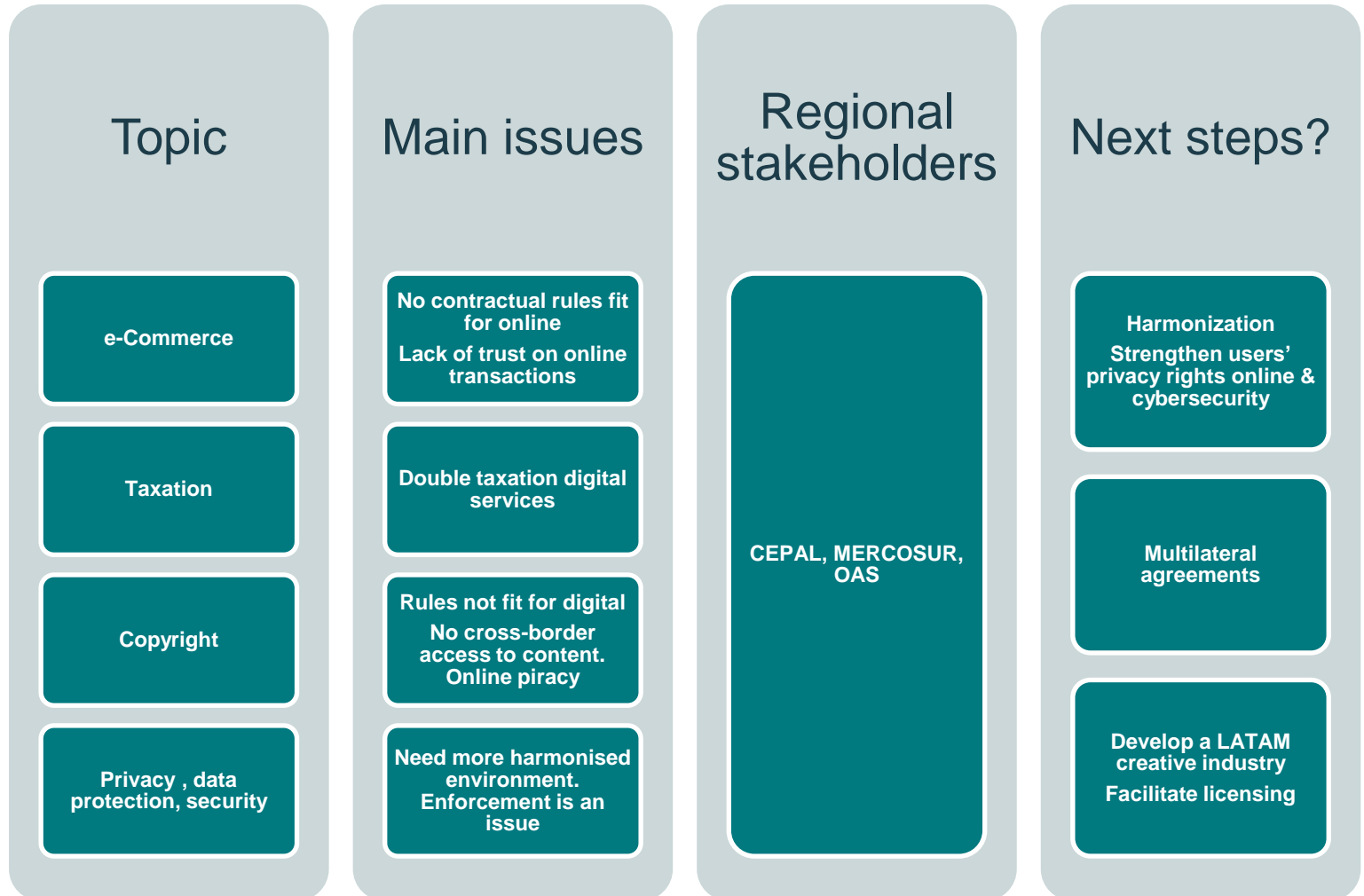
An regional digital market in LATAM?

Connectivity – main issues/way forward?



An regional digital market in LATAM?

Online access – main issues/way forward?





REGULATORY INTELLIGENCE

Telecoms

Media

Digital Economy

Postal

Competition Law

Any questions contact me at ezequiel.dominguez@cullen-international.com