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Conference Report

The Internet in Latin America: Investigating the Boom

This event was co-hosted by Latin American Newsletters and UNIDO/ICS and held in London on 11th and 12th October 2000. The main objective of the conference was to provide a forum for the analysis of how the region might realise the huge potential offered by the latest developments in information and communications technology and in particular the deployment of electronic commerce via the Internet.

For UNIDO this event marked an important step in the commencement of strategic focus on this new technology and the potential impact and implications it may have for the organisation. The indications are that a new form of working will be need to be adopted in order to facilitate and maximise the potential that can be gleaned across all industry sectors and in all functions of the value chain from optimising supplier networks, controlling costs to improving marketing and distribution efficiency. Whilst this analysis has been conducted in the Latin American context, for UNIDO it is clear that the conclusions may be equally applied to other developing regions of the world.

Representatives from the commercial, government and non-governmental development sectors presented a series of complementary and contrasting viewpoints, which together created a stimulating and productive look at the current situation in the region. A hard look was taken at the core issue of how digital technology and electronic commerce might prove to be an important agent for change within the unique political, social and economic context that constitutes the Latin American region.

SME's

Real transformation and benefit in the region from the deployment of e-commerce may commence when the SME sector is enabled in terms of skills and training, equipment and software availability, and connectivity. The analysis by the representatives of the corporate 'big players' in the region also led to the conclusion that there are significant opportunities for smaller niche markets which local SME's may ultimately be well poised to exploit if sufficient support is provided.

Representatives from all of the sectors were united in counselling that the potential offered by e-commerce in the region was dependent on an adequate regional infrastructure, both in physical terms (communications networks and facilities) and in terms of the creation of a financial and legal framework that fosters e-commerce. All sectors emphasised the critical importance of education and training whether it be in order to create a larger viable market-place, to increase employment and skills levels or to attempt to prevent a future for the region where inequity and exclusion becomes more rather than less pronounced.

Sustainable development

A note of caution emerged from the presentations by both the corporate and the non-commercial representatives. Despite the 'hype' and excitement that surrounds the potential that e-commerce can offer the region: the 'digital divide' runs parallel with the 'off line' social and commercial divide and technology alone will not make a positive impact on this problem.

It was generally agreed that the expansion of a 'new' economy and the diffusion of information and communications technology has a great deal of potential to offer in the region's struggle to create efficient, equitable and sustainable economic and social development. However it was clear that commentators and analysts believe that this is a political question rather than a technical or scientific one. It is how societies decide to integrate these capabilities and technologies into their economic and social strategies that is important along with the strengthening of political reforms and creation of an 'e-ready' infrastructure.

Electronic commerce is not just a technology but a combination of commercial practices, legal and regulatory framework and required level of skills and access within the population.

The corporate sector clearly illustrated that the 'addressable' market in region represents a fraction of the total population. What then is being done to address the problem of the remaining classes of the population: the C2's, C3's, D's and E's?

An notable example of how serious attempts to provide internet access to broader segments of the population came from Peru. A network of *cabinas públicas* has been pioneered by the Red Científica Peruana (RCP). These are centres where the general public can access the internet for very low cost, have their own e-mail address and critically attend training courses on how to use and access the new technologies for appropriate applications.

What became absolutely clear from the array of presentations at the conference, was that the conditions of development have changed. The question of whether the 'new' economy will have a

positive or negative impact on the economic and social problems in Latin America will depend on how government and the private and public sectors react to meet development objectives.

e-Government

The conference heard how important strides had already been made in certain parts of the region. Notable examples of technology applications were illustrated. For example in Brazil nearly half of the 1.84 million tax forms filed this year were received through the Net and also in Brazil, the infrastructure to facilitate electronic voting for all citizens is well advanced. In Argentina it was shown how important developments had been made in providing citizens with access to information about government services and about how the government is performing in terms of public spending, progress with legislation and policy-making etc. via the development of portals such as info.gov.ar and cristal.gov.ar. Venezuela too has not been slow in developing policy to deal with the new technological environment and there is now a proposal that every citizen should have access to the Internet by law. These advances all enable the improved analysis of the economies of the countries in question and provide greater access to information to facilitate the study of companies, enterprises and industrial sectors. Additionally the options for sme's to compete for governmental tenders and new business opportunities will be enhanced.

Regarding the issue of corruption, it was acknowledged that no application of technology alone could prevent it from taking place. It was noted that corruption within government has an important ally: that of secrecy. The innovations in the dissemination and accessibility of official information that are taking place via the Internet and creation of government portals is an exciting and powerful weapon for increasing transparency and fighting corruption in the region and world wide.

In the longer term, the hope was expressed that governments, freed from the heavy and time-consuming demands of bureaucracy by technology, will have the opportunity to expand their imaginations to solve the most urgent economic and social problems of the region.

e-commerce

High-profile corporate management consultants, representatives of business and the development agencies all looked at the opportunities and outlook for the profitable and productive exploitation of e-commerce in the region.

Analysis of the market opportunities for e-commerce in the region viewed through the eyes of corporate consultants showed the region being 'trimmed down' to size from a total population of around 400 million to an 'addressable' market of consumers with levels of disposable income comparable to those in middle-class Europe or USA (A, B and C1 groups) of only around 50 million - a market similar in size to that of Spain. A geographical divide was also clearly apparent with Mexico, Brazil and Argentina being constantly singled out as the countries worth targeting for the B2C and B2B operators. Furthermore, it was demonstrated that the dot.com operators currently active in the region comprehensively under perform in terms of efficiency in management, operations, customer conversion and customer retention. A multitude of factors were acknowledged as playing their part in this failure to flourish amongst the 'new economy' businesses. It was noted that development in particular of effective logistical infrastructure, training, design and management skills was necessary and pre-requisite for the improvement of this situation. These are three specific sectors where many of the integrated programmes of UNIDO are focussed in the region and should be tailored to meet the needs of the development of the 'new' economy.

It was generally agreed that the Latin American Internet market is nascent and has yet to transform the economic landscape of the region. Measurements of 'e-readiness' comparing relative conditions of connectivity, e-leadership, information security, human capital and e-business climate both amongst individual Latin American countries and between the emerging markets regions of the world were considered. It was emphasised that the short/medium term prospects show that the likely early commercial adopters and beneficiaries of the penetration of e-commerce in the region were the 'bricks and mortar' incumbents. Moreover the main area of exploitation would be in B2B with primary focus on leveraging the web to improve operational performance, create new business opportunities and redefine traditional business models. B2C was generally seen as a more problematic area and identified as a sector where currently a big shake-out is taking place. It was predicted that the pattern of development in this sector would be to see the dominance of just two or three integrated portals such as UOL, Globo and Terra in Brazil and Esmas, MSN and Terra in Mexico.

Technology Foresight

The conference provided a forum for the introduction and further dissemination of information about UNIDO's Technology Foresight initiatives in Latin America. It was shown how the TF methodology has as its prime objective to identify strategic areas and emergent technologies and focus resources and actions towards the economic benefit and social well-being of nations. With its concentration on the long-term and technological innovation as the prime instrument of industrial sustainable development, it was a subject that aroused a great deal of interest amongst speakers and delegates alike.

Conference conclusions

Indications from the conference proceedings suggest that it is a reality that a 'new' economy and a 'new' democracy can truly emerge from the diffusion of accessibility to the internet and the associated new information and communications technologies.

Equally, confidence was high that profitable new business can and will arise from the proliferation of e-commerce in the region.

The problems of managing the 'digital' divide are in many ways akin to those associated with managing the social and economic divide that has characterised the region for so long. The technologies alone cannot solve these problems.

A significant amount of the region's population - around 260 million people have either limited or no access to the web. Education and skills levels amongst this segment are also low. **With a united and loud voice, representatives from all sectors at the conference called for education and training to given the highest priority by governments in the region.** The co operation of government and the private sector in such initiatives as Argentina's educ.ar programme were applauded.

The effectiveness of UNIDO's development strategies in the region will clearly be increasingly linked to the degree of appropriateness and efficiency that information and communications technologies are harnessed. It is crucial that the international organisations ensure that they have a centralised, dedicated team to look at the impact and applications of ICT on all areas of organisational activities. There is a visible and increasing demand from governments and industries

for help and support with these issues. Failure to develop centralised strategy will undoubtedly result in great inefficiencies and also will hinder UNIDO in their abilities to assist developing nations compete in the global environment of today's world.

It is generally considered that the innovative application of e-commerce has the capability to increase the global competitiveness of nations. It is hoped that, at one level, this may take place in Latin America. However, it was considered to be generally important to increase the capacity of the region to add value to local resources and enterprises, sme's and community-based institutions in order that employment opportunities are created and wealth re-distribution may be targeted at the poorer sectors of society. The role of organisations like UNIDO in helping to raise the 'e-readiness' quotient for the nations of the region will be absolutely critical.

International Press and Media coverage:

The conference was filmed live by CNN. A summary of proceedings was broadcast to Latin America and the main US Cities with Spanish speaking population on the CNN Spanish cable business news service via Atlanta, USA.

Conference speakers were also interviewed live on BBC radio and a roundtable was conducted at the BBC Bush House (see BBC web pages attached).

Various reports were filed regarding the conference to newspapers and wire services covering the region. Media and press representatives were present from all of the following organisations:

ACI Prensa
Agencia Estado
Associated Press
BBC
BBC World Service, Brazilian Section
BBC World Services
BBC World Services (Americas)
Computerwire
Dow Jones Newswires
EFE
Euromoney Publications
Jornal do Brasil
La Nacion
O Estado de Sao Paulo
Oxford Analytica
Página 12
Radio Netherlands
Reuters
The Economist
The Economist Intelligence Unit
Worldlink Publications

Portada Viernes, 13.10.2000.

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Internet y América Latina



De izq. a derecha: José Cervera, Jorge Berrizbeitia, Matías Zibell y Henoch D. Aguiar, en los estudios de la BBC.

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La Internet ya es cosa de todos los días en América Latina. En este año 2000 ya son 10 millones los latinoamericanos que tienen acceso regular a la red de redes.

Lo que se puede calificar de "boom", se hace sentir a todos los niveles de la sociedad, promoviendo el desarrollo tanto de la educación a distancia como del comercio electrónico.

Cuatro especialistas que convergieron en Londres para la conferencia *La Internet en América Latina: investigando el boom*, que organizó la publicación *Latin American Newsletters*, intercambiaron ideas sobre este tema con **Matías Zibell** de la BBC.

Participan: **Henoch D. Aguiar**, Secretario de Comunicaciones de Argentina; **Martín Becerra**, Vicedirector académico de la Universidad Virtual de Quilmes, Argentina; **Jorge Berrizbeitia**, Presidente del Centro Nacional de Tecnología de la Información de Venezuela; y **José Cervera**, Director Editorial de Baquía.com.



Martín Becerra: la educación también tiene su lugar en Internet.

Ellos también respondieron a las preguntas e inquietudes de varios usuarios de **BBC Mundo**.

Opiniones

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Creo que la Internet es un fenómeno que está cambiando la manera de hacer las cosas. Hoy en un seminario escuché decir que representa la tercera revolución industrial.

Si nosotros queremos estar presente en esto debemos tener presente que ya pasó el tiempo en que había capital a destajo para cualquier emprendimiento en Internet, pues muchos inversionistas se dieron cuenta que esto no es para hacerse rico de un pestañazo, sino que se invierte en proyectos que realmente demuestren una rentabilidad.

Héctor Celis, Santiago, Chile.

¿Está preparada la red de redes para penetrar las diferencias socioculturales de América Latina? He aquí la verdadera interrogante de este foro. Toda estrategia educativa pensada y concebida desde afuera sin nutrirse de las experiencias y rasgos propios del contexto al cual se va aplicar está destinada al rotundo fracaso.

Marielba Barboza, Caracas, Venezuela.

En lo académico y científico, Internet, particularmente el e-mail, ha cambiado las relaciones entre investigadores, permite el trabajo interdisciplinario a bajo costo. Creo que es una revolución y que tiene un potencial ilimitado. En lo social me parece fantástico el ambiente de libertad en que nos vamos acostumbrando a movernos en la red.

Creo que se debe evitar a toda costa el control político de la red. Las ideas deben ir y venir con total libertad, sólo estaría de acuerdo con restricciones de tipo ético y de derechos humanos, de ninguna manera ideológicas.

Jorge Franco, Montevideo, Uruguay.

Internet es una revolución benéfica para América Latina. Ella permite que desde cualquier comunidad puedan surgir los talentos, sin necesidad de trasladarse hacia las grandes ciudades.

Julio Carreras, Autonomía - Santiago, Argentina.

Como toda innovación tecnológica, Internet puede servir para hacer avanzar a la humanidad o para deshumanizar a las personas. Pienso que actualmente está creando dos categorías de personas: las que tienen acceso y están "conectadas" y el segundo grupo de gente que no puede acceder a estos medios.

En el Perú es una minoría la que puede acceder a esta innovación. Hay una gran mayoría que no accede por razones económicas y por desconocimiento de cómo hacerlo.

Carlos López, Piura, Perú.

¿Qué proyectos existen en el mundo para la democratización de la conexión a la red, lo mismo que para América Latina, la tarifa plana? ¿Qué hay de "internet 2"?

Yesid Lancheros, Bucaramanga, Colombia.

La Internet logró abrir más puertas hacia el mundo. Para mi, hasta ahora es una experiencia inolvidable.

Roberto Alvarez-Galoso, Miami, Florida, EEUU.

La Internet en Latinoamérica puede jugar el rol de nivelador social y ayudar a la consolidación democrática. Esto depende desde luego de la visión "oficial" que se tenga de la Internet, y las acciones que se tomen a este respecto.

Juan Pablo Ordoñez, Bogotá, Colombia.

Internet representa uno de los últimos avances de comunicación y de la unidad de la humanidad, pues por este medio hay oportunidad de dialogar con personas y de conocerse a través de cámaras acopladas. Sobre lo positivo y lo negativo depende del criterio de cada uno y para que lo use.

Vicente Sibrián, Lyckeby, Suecia.

Los cibercompradores latinoamericanos estamos indefensos ante el comercio electrónico internacional.

Enrique Gutiérrez San Miguel, Acapulco, Guerrero, México.

Nota: estos comentarios fueron remitidos por los usuarios de BBC Mundo, y han sido editados y publicados en orden de llegada. Las opiniones vertidas no reflejan el punto de vista de la BBC de Londres.

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Subject: FW: Hacen noticia

-----Original Message-----

From: Nelson Manrique [SMTP:nelson.manrique@terra.com.pe]
Sent: 16 October 2000 07:37
To: Yolanda De Echave; Yolanda.drinot
Subject: Hacen noticia

<color><param>0100,0100,0100</param>Esto ha salido hoy en Noticias Intercom, un boletin sobre nuevas tecnologias al que estoy inscrito.

<bold><color><param>0000,8000,8000</param><FontFamily><param>Verdana</param><bigger>América Latina se mete de lleno a Internet**</bold><color><param>0100,0100,0100</param><FontFamily><param>Times New Roman</param>**

<paraindent><param>left</param><bold></color><FontFamily><param>Verdana</param><smaller>Dirigentes políticos y económicos de varios países latinoamericanos se dieron cita este miércoles en Londres para debatir sobre la revolución que ha supuesto Internet y su potencial empresarial en esa zona del mundo.**</bold><color><param>0100,0100,0100</param><FontFamily><param>Times New Roman</param><bigger>**

</color><FontFamily><param>Verdana</param><smaller>agencias - Figuras como el ex jefe del Gabinete de Ministros de Argentina Rodolfo Terragno y el secretario de Comunicaciones argentino, Henoch Aguiar, inauguraron las dos jornadas de conferencias organizadas en Londres por la revista Latin American Newsletters.

El debate cuenta con la colaboración de UNIDO, la Organización de Naciones Unidas para el Desarrollo Industrial, y varias empresas líderes en las tecnologías de la información, como Atlante e Indra.

Los debates se centrarán en cuestiones como los retos futuros de América Latina dentro de Internet o el papel que deberán jugar, por un lado, los gobiernos y, por otro, las empresas, tanto públicas como privadas.

También se tratará la conveniencia de liberalizar los mercados de las telecomunicaciones para aumentar la competitividad y, de ese modo, reducir los precios y mejorar la calidad de los servicios, fomentando la investigación y la inversión en nuevos proyectos.

Los innumerables cambios legales que traerá consigo la revolución de Internet y la necesidad de desregularizar los mercados de las telecomunicaciones serán temas que estarán también sobre la mesa durante estas conferencias.

Nadie duda que los rápidos avances en el mundo de las

tecnologías hacen inevitable la aparición de sustanciales transformaciones económicas, sociales, y culturales, sin embargo, existen distintas opiniones sobre cómo encauzar los cambios.

Durante su intervención, Rodolfo Terragno destacó la relevancia de Internet como vía de interconexión entre los ciudadanos y los gobiernos y como fórmula para agilizar los procesos administrativos y abolir las trabas burocráticas en los países.

Como ex jefe del Gabinete de Argentina, Terragno habló de los progresos de su país en el desarrollo de proyectos de Internet, pese a que precisó que era demasiado bajo aún el número de usuarios.

"La Red mejora la relación entre el ciudadano y el Gobierno, y las autoridades deberían, sin duda, explotar el potencial que ofrece Internet", precisó Terragno.

Con las nuevas tecnologías, añadió, los gobiernos tienen "una gran oportunidad de expandir su imaginación a la hora de buscar nuevas soluciones a los mayores problemas del mundo".

Reconoció que existe aún "una gran jungla en la Red" y que deben definirse y consolidarse multitud de "caminos" que faciliten al usuario la búsqueda de información.

Además del problema de la falta de consolidación de Internet, los precios de conexión que tienen que soportar los argentinos son aún demasiado altos, precisó posteriormente Henoch Aguiar.

Como dato pintoresco, dijo que sólo un dos por ciento de la población de su país era usuaria de Internet pese a que el 50 por ciento de los contenidos en español los redactaban argentinos.

Las conferencias durarán hasta el jueves y serán clausuradas por el director general de UNIDO, Carlos Magariños, que hablará del papel de las nuevas tecnologías en las economías de desarrollo sostenible.

En nombre de UNIDO, Latin American Newsletters lanzó hoy un servicio gratuito en Internet de información sobre el desarrollo de nuevos proyectos en América Latina y la evolución de los distintos marcos legales. <color><param>0100,0100,0100</param><FontFamily><param>Times New Roman</param><bigger></paraindent>

<paraindent><param>left</param></color><FontFamily><param>Verdana</param><smaller><smaller>Lunes, 16 de Octubre de 2000</bold><color><param>0100,0100,0100</param><FontFamily><param>Times New Roman</param><bigger><bigger></paraindent>

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Terça-feira, 17 de outubro de 2000

ECONOMIA

O ESTADO DE S. PAULO

País terá apenas 50 provedores depois de 2003

JOÃO CAMINOTO

LONDRES - O segmento de provedores de acesso à Internet no Brasil vive uma forte consolidação que deve continuar nos próximos anos. Essa é uma das conclusões do encontro Internet na América Latina, investigando o boom, que ocorreu na semana passada em Londres, com cerca de cem participantes.

O Brasil, na avaliação de analistas e empresários que participaram do evento, é o país com maior possibilidades de continuar atraindo investidores estrangeiros interessados em oportunidades no setor de negócios e comércio eletrônico na região. A consolidação em curso no Brasil entre os provedores de acesso à Internet (ISPs) foi um dos assuntos sublinhados por um dos palestrantes, Tadao Takahashi, coordenador geral do Programa Sociedade da Informação (Socinfo), do Ministério da Ciência e Tecnologia. Segundo ele, em 1997 o Brasil tinha cerca de 600 ISPs.

A partir de 98, esse número começou a diminuir rapidamente. "No final deste ano deveremos ter menos de cem ISPs no país", disse Takahashi. "Acredito que em 2003 o total não passará de 50, sendo 10 grandes provedores e os restantes concentrados em segmentos de mercado." (AE)

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**COPY OF ARTICLE TO BE PUBLISHED:
LATIN AMERICAN WEEKLY REPORT, ISSUE 41, 2000
BLOOMBERG: LATIN AMERICAN NETWORK, OCT 17, 2000**

REGION: INTERNET

After the hype, a more sober appraisal
THE BIGGEST PROBLEM IS OVERCOMING THE 'DIGITAL DIVIDE'

On the business side, Latin America's Internet boom is likely to continue for some time, but the real market for e-commerce is considerably smaller than many imagine: major expansion will focus on only a few countries, and there will be far greater growth in the business-to-business (B2B) bracket than in the business-to-consumer (B2C) one.

Market forces alone will not do much to breach the 'digital divide' in the region, which is a mirror-reflection of income-distribution patterns. However, the expansion of the Internet will not only take place in the area of e-commerce: existing initiatives are showing its potential as a tool of governance, education and coordination of development efforts. Development of these areas rely heavily on government action, alone or in combination with the private and non-governmental sectors.

These were some of the main conclusions drawn from the conference on *The Internet in Latin America: Investigating the Boom*, organised by Latin American Newsletters with the co-sponsorship of Unido and held in London on 11-12 October*.

The real market. Perhaps most striking was the 'reality check' provided by several of the speakers, particularly regarding the real 'addressable market' for e-commerce and the performance and prospects of existing e-ventures.

The start with, the development of e-commerce has concentrated largely in three countries: Brazil, Mexico and Argentina. And within them, it has been making inroads chiefly in the top three income brackets (A, B and C1).

Projecting current trends, by 2003 this translates into an 'addressable market' of perhaps 50-60m people (out of the region's entire population of about 400m). In money terms, this represents a market of US\$8.5bn-US\$16bn, of which the more visible B2C segment will account for only US\$1.5bn-US\$3bn.

So far, the performance of e-commerce ventures in Latin America has been poor compared with that of their peers elsewhere in the world: they have to spend much more to attract visitors, they do not manage to convert as many visitors into customers (or to keep as many as repeat purchasers), and Latin American customers do not spend as much.

Some of the reasons for this are temporary: the young age of regional e-commerce ventures (on average, 1.4 years) and the limitations imposed by the high cost of access (en route to be remedied through the de-regulation of telecommunications in major markets).

Others are harder to surmount, such as the absence of efficient offline delivery systems and poor infrastructure generally and the incomes divide which determines the size of the addressable market.

Indeed, the latter suggests that within two or three years, penetration of Latin America's individual addressable markets will be approaching a plateau, and that will, on the one hand, slow down the rate of expansion and force consolidation of ISPs and major portals. Brazil seems already to have left the peak of ISP proliferation behind: analysts expect only three or four major portals those attractive enough for investment by transnationals to survive.

There will remain, however, a number of niches, too small to merit the attention of the big players, which will offer considerable scope for the development of local ventures.

The digital divide. Several speakers underlined that pushing back the 'digital divide' extending Internet access beyond the top three income groups has a strong political component. Indeed, one of the driving forces in this direction is what has come to be known as 'e-government'.

The term covers a broad range of activities, starting with the straight provision of information on government services and activities (and this includes 'transparency' initiatives such as Argentina's cristal.gov.ar, which enables the taxpayers to monitor how their monies are being spent), through acting as a vehicle for government procurement, to enabling the citizen to perform some duties online.

Perhaps the most dramatic example of the latter is provided by Brazil, where it has been possible to file income tax declarations via the Internet since 1997: this year the government expects to receive 80% of all declarations in this manner.

The Brazilian government has already embarked on a far more ambitious scheme: to enable electronic voting. The target is to make this universal in time for the next presidential elections, in 2002.

Several governments in the region are already engaged in linking up their school systems to the Internet. A pioneer case is Argentina's educ.ar, which is already being studied as a model by other countries. Argentina has also pioneered the establishment of a fully-fledged online university (that of the Universidad Nacional de Quilmes), which is already serving students from throughout the country, other Latin American nations and even as far afield as the US and Japan.

Universal access. Taking the Internet to the people was the objective of Peru's Red Científica Peruana (RCP) with its *cabinas*: the establishment of public Internet booths, each equipped with a small number of PCs, providing low-cost access. Based on a franchise model, the network now has more than 1,000 *cabinas* and accounts for about 40% of all Internet use in the country (albeit largely confined to e-mail). This same system is currently being introduced, with RCP assistance, in El Salvador.

A different approach is in the pipeline in Brazil. It involves using neighbourhood newsstands and convenience stores as 'virtual merchants', linking up all public libraries over the coming two years, establishing at least one linked-up community centre per country, and providing facilities for authenticated e-mail at every post office.

It is worth adding that a number of governments have in the pipeline draft legislation which will provide for systems of certification of electronic signatures, not only as a requisite for legal transactions with government, but also to overcome the widespread fears concerning the security of online commercial transactions.



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conference programme

*11 and 12 October 2000
The Conference Forum, London E1 8DX, England*

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Day one - October 11, 2000

9.30am: Welcome and opening remarks, Eduardo Crawley, *Editor*, latin american newsletters

9.45am: **keynote speech**
Rodolfo Terragno, ex Jefe del Gabinete de Ministros, Argentina
E-government in Latin America

session 1 the internet in the region: the next five years **the view of government:**

10.15am: **Argentina:** Henoah D. Aguiar, *Communications Secretary, Ministerio de Economía*

10.45am: Coffee

11.15am: **Venezuela:** Jorge Berrizbeitia, *President, National Information Technology Centre (CNTI)*

11.45am: Questions to government speakers, moderator: eduardo crawley

12.15pm: Lunch

session 2 content: the question of global vs regional

1.30pm: Content evolution - what does the future hold?
Michael Elliott, Editor-in-Chief, eCountries.com

2.00pm: The Net as content, the content as Net.
José Cervera, Founder & Editorial Director, Baquía.com

2.30pm: Questions to content panel followed by tea

session 3 the internet in the region: the next five years **the view of the key players.**

3.15pm: The performance of Latin American Internet Companies – a comparison with global best practice. *Christophe Bénichou, Partner, McKinsey*

3.45pm: Realising the potential of global e-commerce – challenges and opportunities for Latin America and the Caribbean. *Danilo Piaggese, Chief, Information Technology for Development Unit, Inter-American Development Bank*

4.15pm: Developing internet-based businesses in Latin America – Opportunities and Challenges. *Jorge Forteza, Senior VP, Booz, Allen & Hamilton*

4.45pm: Questions to panel followed by close for the day.

Day two - October 12, 2000

9.20am: Welcome and opening remarks, Eduardo Crawley, *Editor*, latin american newsletters

session 1 the internet in the region: the next five years **the view of government and international organisations**

9.30am: **Brazil:** Tadao Takahashi, *General Coordinator, Brazil Information Society Programme, Ministry of Science and Technology.*

10.00am: ICTs and the Internet – the price of leapfrogging.
Francisco Sercovich, Senior Policy Advisor, UNIDO

session 2 education and the internet

10.30am: Higher education in virtual environments – case study of UVQ in Argentina.
Martín Alfredo Becerra, Academic Vice-Director, Virtual University of Quilmes Programme, National University of Quilmes

11.00am: Questions followed by coffee

**session 3 the internet in the region: the next five years
the view of the key players**

11.30am: What lies ahead – a new investment model.
Beatrice E. Rangel, Senior Advisor to the Chairman, Cisneros Group of Companies

12.00pm: The role of e-builders. *Andrés Blanco, Director, Atlante (Indra Group)*

12.30pm: Questions followed by lunch

session 4 e-commerce in the region: the new environment

1.45pm: Investment and the added value of an incubator. *Maximillian Gottschalk, Head of Capital Markets and Co-founder, Worldcap Internet Solutions*

2.15pm: Building a Telematics Bridge between Europe and Latin America: Towards the First Ibero-American Hub. *Juan Eduardo Barrera Cortez, General Secretary, CommerceNet*

2.45pm: Identifying the key players in Venezuela's digital marketplace.
Maritza Escalona, Vice-President, Venezuelan Chamber of e-Commerce

3.15pm: Questions followed by tea

3.40pm: e-, m-, and t-commerce in Latin America: *Rik Turner, European Editor, Computerwire*

4.20pm: Eduardo Crawley, *Latin American Newsletters*, introduces the LAN Millenium lecture

**4.30pm: Carlos Magariños, Director General, UNIDO
The Latin America Lecture 2000***

The role of new technology in sustainable development.

*Latin American Newsletters (LAN) has instituted an annual Latin America Lecture, to be addressed each year by a Latin American leader of standing who will be asked to deal with a subject of paramount significance for the region. This year - for the Millenium Lecture - LAN has invited Dr. Carlos Magariños, Director General of UNIDO to speak about the role of new technology in sustainable development for the region.

For reasons beyond the control of the conference organisers, it may be necessary to alter the content and timing of the programme or the identity of the speakers.



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Carlos Magariños

Director General, UNIDO

The youngest Director General in the history of the United Nations, he has implemented an aggressive reform programme in UNIDO that has earned widespread acclaim within the international community for its accomplishment and foresight. As Director General of UNIDO, he has a seat on the United Nations Administrative Committee on Coordination led by the Secretary General, which comprises all of the United Nations system's heads of agencies and includes the World Bank, the International Monetary Fund and the World Trade Organisation.

From 1993 to 1996, he served as State Secretary for Industry in the government of Carlos Menem and was a member of the Economic Cabinet directed by Domingo Cavallo. He was then appointed Economic and Trade Representative of the Argentine Government in Washington DC with the rank of Ambassador and State Secretary where he remained until elected Director General of UNIDO.

Henoch D. Aguiar

Communications Secretary, Argentina

His expertise in the legal and regulatory aspects of telecommunications gave rise to his being appointed to the De la Rúa government in December 1999. Dr Aguiar is known to be a believer in the power of deregulation as a tool to drive down telephone tariffs.

A legal graduate of the University of Grenoble, he completed his postgraduate studies in Economy and Finance in the Institute of Political Studies in Paris. He is a professor of the Universidad de Buenos Aires and completed a Masters in Dirección de Empresas at the Instituto de Altos estudios of the Universidad Austral in Buenos Aires.

Tadao Takahashi

General Coordinator, The Brazil Information Society Programme, Ministry of Science and Technology

A graduate of the Institute of Technology in Tokyo, he is Chair of the Task Group responsible for the planning and launching of the Brazil Information Society Programme. This US\$1.7million initiative of the Brazilian Government is aimed at boosting Internet services and applications across the country. He is also Director of the UNL Centre for Portuguese Language as well as Chair of the Brazilian Chapter of the Internet Society and a member of the Internet Steering Committee in Brazil.

Rodolfo Terragno

ex Jefe del Gabinete de Ministros, Argentina

A graduate of Law from the University of Buenos Aires, Dr Terragno followed a distinguished career in journalism and is the author of a number of influential books including *Memorias del presente*, *La Argentina del Siglo 21* and *The Challenge of Real Development*. He was appointed to the government in 1987 as Ministro de Obras y Servicios Públicos de la Nación and later played a key role in the formation of the Alliance between the Unión Cívica Radical and Frepaso. With the electoral victory of the Alliance, he was appointed Jefe del Gabinete de Ministros in 1999.

Michael Elliott

Editor-in-chief, eCountries.com

Graduate in Law from the University of Oxford, he was editor of *Newsweek International* from 1995 until joining eCountries.com in March 2000. He had sole responsibility for the look and content of the three English language editions of *Newsweek International*, for special issues on international affairs and for all foreign coverage in the American edition of *Newsweek*. His extensive background as a writer and presenter of documentary series includes a nine-year tenure at *The Economist*.

Christophe Bénichou

Partner, McKinsey

Chief and location manager of the firm's Rio de Janeiro office. He is a leader of the @McKinsey e-commerce practice and of @ccelerator in the Mercosur office complex, advising clients on business building and other e-commerce-related activities in the region. In the past, he has had numerous clients from the consumer goods industry in Europe, the United States and Latin America and has also assisted clients across various industry sectors on major turnaround and business-building programmes. Before joining McKinsey in 1991, he was a brand manager at Procter & Gamble. He holds an engineering degree and a degree in economics from the University of Karlsruhe, Germany.

Juan Eduardo Barrera Cortez

General Secretary, CommerceNet Spain and Executive Director, CommerceNet Europa

He has more than 20 years' experience of working in diversified and result-oriented international business environments as well as having held a number of high-profile positions in the area of advanced technology in multilateral lending agencies such as the World Bank, the Inter American Development Bank, the UN, the European Bank for Reconstruction & Development and the EC. He has also held posts in major companies such as KAISER and ISCOR, and in various Government departments in Europe and Latin America. On the academic side, he holds a MBA, a PhD and a degree in Engineering. In addition to his positions at CommerceNet, he is also International President of the European Community Telework /Telematics Forum (ECTF).

Jorge Berrizbeitia

President, National Information Technology Centre (CNTI), Venezuela

A graduate in electronic engineering from Simon Bolivar University. He worked as a consultant for a number of domestic organizations including the Venezuelan-American Chamber of Commerce. He has been a precursor of Internet development in Venezuela, providing corporate and application solutions via the net since 1995. In 1999, he joined Venezuela's Ministry of Science and Technology where he was responsible for assisting in the creation of a new plan of how to manage IT development within the Government and also how to promote its use among the general public. The National Centre of Information Technology was founded recently as part of this new vision.

Beatrice E. Rangel

Senior Advisor to the Chairman, Cisneros Group of Companies

She holds a degree in International Affairs from Universidad Central de Venezuela as well as a Masters in Development Economics (Boston University) and an MA in Public Administration (Harvard University). Her career with the Cisneros Group of Companies began in 1983. As Senior VP of Corporate Strategies for the Group, she played a major role in expanding the company's market penetration in Latin America and helped to secure a number of world-class strategic partnerships and acquisitions. From 1972 to 1992, she held a variety of key positions with the Venezuelan Government. These included Advisor to the Minister of Science and Technology, Foreign Affairs Director and General Director.

Maximillian Gottschalk

Head of Capital Markets and Co-founder, WorldCap Internet Solutions

Prior to co-founding WCIS, he co-founded WorldCap Enterprises. From 1994-98, he worked as a derivatives marketer for Bear Stearns & Co. Inc., New York, and was appointed Vice-President in mid-1997. While at Bear Stearns, he structured and marketed derivative strategies to alternative funds. His coverage of alternative funds spanned fixed income, foreign exchange options, credit derivatives and emerging markets. He has a BA in finance, marketing and international business from the University of Virginia where he graduated with Honours.

Jorge Héctor Forteza

Partner & Senior VP, Booz, Allen & Hamilton

He established himself in Argentina in 1992, after more than ten years' extensive experience in Europe where he led the Consulting Group for Financial Institutions before heading up the Paris office of Booz, Allen & Hamilton. He holds an Honours diploma in Political Economy as well as two Masters degrees in Management and Shipping Management. A Professor of Strategy at the Universidad Católica, Buenos Aires, he also lectures at various other academic centres in the US and Europe. Since joining Booz, Allen & Hamilton, he has specialised in strategy development and transformation processes for financial entities, multinational firms and large local concerns. He is a member of the firm's Strategic Leadership Practice, devoted to advising leading international enterprises on issues of organization, leadership, transformation and business revitalisation.

Maritza Escalona

Vice-President, Venezuelan Chamber of e-Commerce (Cavecom-e)

A graduate in electronic engineering dedicated to the management and development of telecommunication companies in Venezuela. Currently the President of Convergence Communications, and IP telecom service company. As well as VP of Cavecom-e, she is a member of the board of Casetel, the Telecommunications Services Industry Chamber.

José Cervera

Founder and Editorial Director, *Baquiá.com*

He is a biology graduate with a PhD in palaeontology. During his subsequent career as a journalist with the Spanish financial newspaper, *Cinco Días*, he covered the telecommunications industry, computer-related issues and the birth of the Internet in Spain as an economic force. His interest in the media was instrumental in his involvement in a number of documentary films on geology, palaeontology and archeology.

Martín Alfredo Becerra

Vice-Academic Director, *Virtual University of Quilmes Programme, National University of Quilmes*

Since 1992, he has lectured on Policy and Planning in Communication at the Universidad de Buenos Aires. His qualifications in Communications Science include a degree from the Universidad de Buenos Aires and a Masters from the Universidad Autónoma de Barcelona, where he has also recently submitted his PhD thesis: "Progress with tolls: the information society. Access and convergence. Analysis of the European Project". Prior to his current position at the Virtual University of Quilmes, he has worked as Editor on various newspapers and magazines in Argentina, including *El Cronista*.

Francisco Sercovich

Senior Policy Advisor, Office of the Director-General, UNIDO

A graduate in Economics (University of Buenos Aires), he holds a Ph.D. in Development Economics (University of Sussex). He has published extensively on innovation, technological change and development policies and performed as senior advisor and consultant to Latin American governments and private sector leaders as well as to international organizations (I.D.B., I.L.O., O.E.C.D., World Bank). His latest book, *Competition and the World Economy – Comparing Industrial Development Policies in the Developing and Transition Economies*, has been jointly published by UNIDO and Elgar (Cheltenham, U.K., 1999 and Northampton, MA, U.S.A., 2000)

Danilo Piaggese

Chief, Information Technology for Development Division, Inter-American Development Bank

Holds an MA in Physics and a diploma in geophysics from the University of Rome. Gained an Executive International Business Certificate from Georgetown University/John Cabot University, Washington D.C. Professional experience in the field of remote sensing includes range and pasture management, digital image processing and analysis, technical cooperation project formulation and appraisal, and telecommunications. He has worked for the UN Food and Agriculture Organisation, Telespazio and Telecom-Italia Group and has also acted as consultant to the EU as evaluator of project proposals for funding in the field of telecommunications and environment.

Andrés Blanco

Director, *Atlante (Indra Group)*

A graduate in telecommunications engineering, he has built his entire career around the telecoms and new technologies industry, both as a management consultant as well as an industry player himself. As Vice-President of AT Kearney, he was responsible for telecommunications and new technologies for the Iberian Peninsula and was also a member of the management committee for the industry on a European level. He has also held key positions in Bossard-Gemini Consulting, Anderson Consulting and in Bull, where he carried out the role of international coordinator for the firm's Networking business unit

Eduardo Crawley (moderator)

Managing Editor, *Latin American Newsletters*

Head of the Latin American Newsletters' editorial team since 1982, his career both sides of the Atlantic has included working on the Latin American edition of *The Economist*, heading the economics section of *La Opinión* in Buenos Aires, editing *Visión*, being managing editor on *South* magazine and creating the *Latin American Annual Review*.

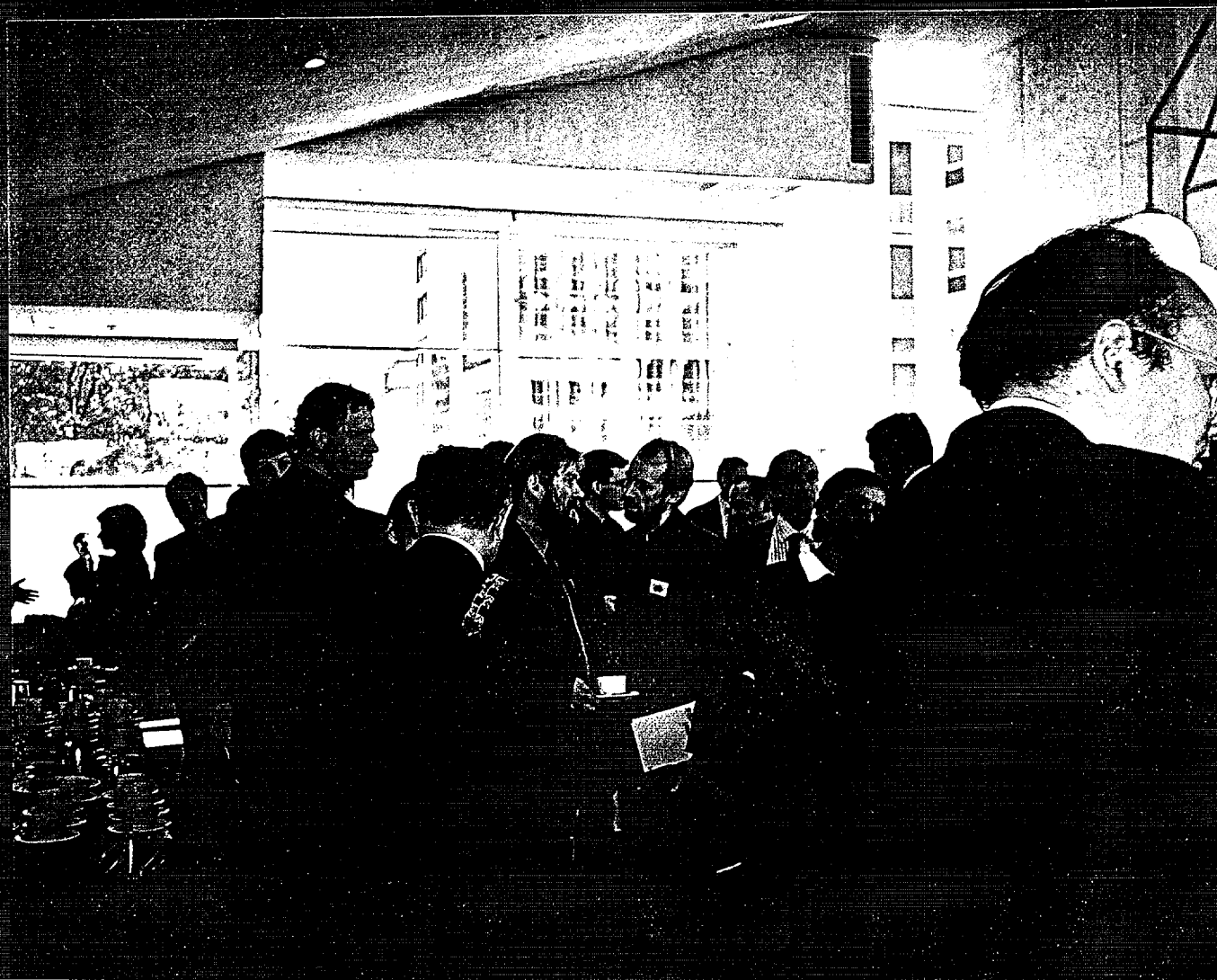
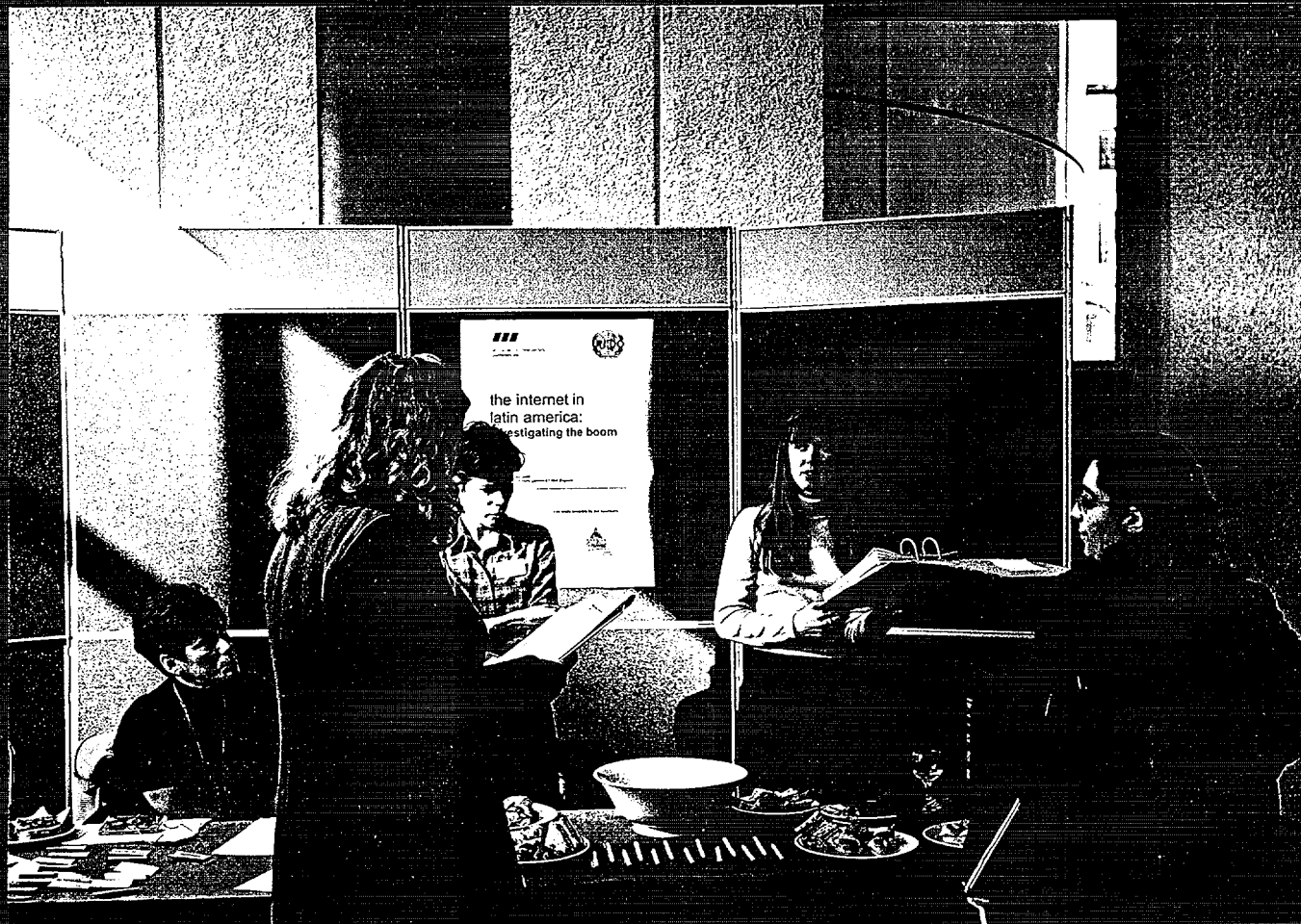
Rik Turner

Editor, *Latinnews NetWatch* and European Industry Editor, *Computer Wire Plc*

After over 10 years of working as a Brazilian and Latin American correspondent for major titles such as Financial Times, The Economist, The Independent and Chemical Week, he joined Westoning House Ltd in 1996 as Editor of the UK-Brazil Corporate Directory. His current position is European Editor of Computer Wire. He holds a First Class Honours degree in Spanish & Portuguese from the University of Newcastle-Upon-Tyne as well as a Masters in Spanish from King's College, London. He is fluent in French, Spanish, Italian, Portuguese, Catalan, German and also speaks Russian, Hindi, Norwegian and Greek.









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