



LA MEJORA REGULATORIA COMO HERRAMIENTA PARA LA PROMOCIÓN DE LA INVERSIÓN EN EL SECTOR DE TELECOMUNICACIONES

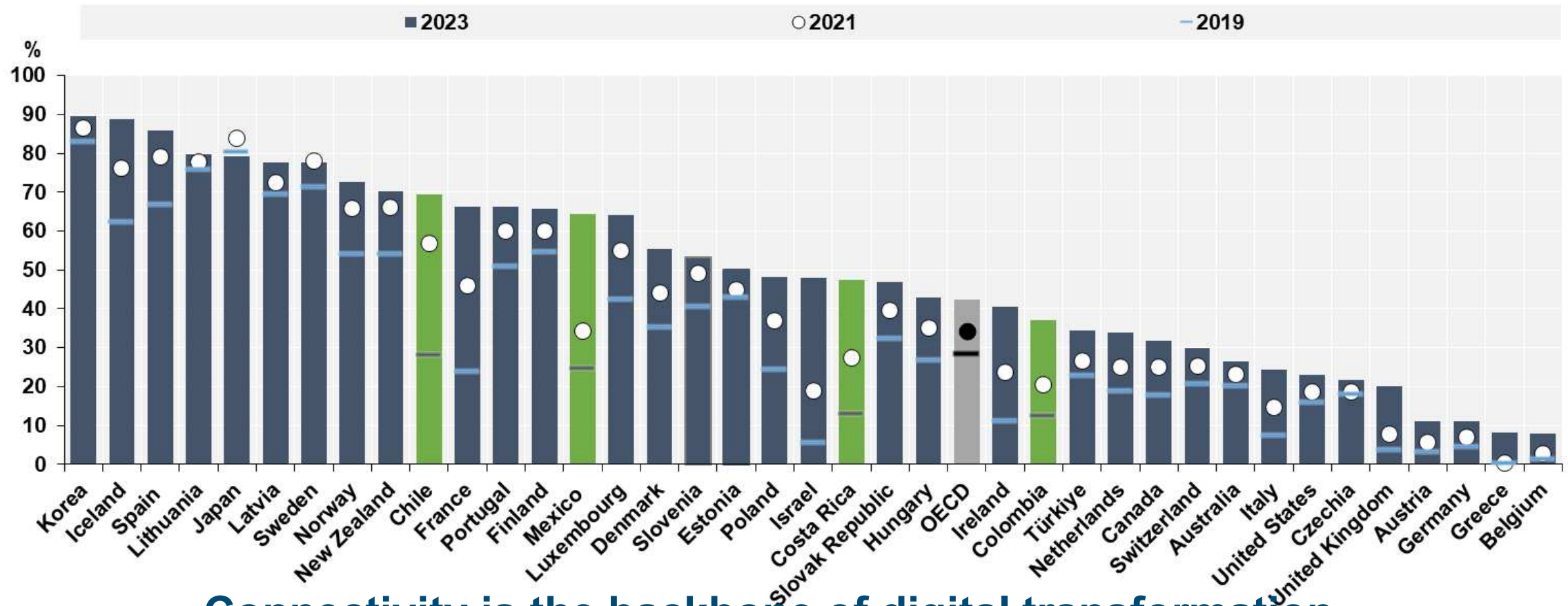
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Connectivity: Key for an inclusive digital transformation

Percentage of fibre connections in total fixed broadband, December 2023



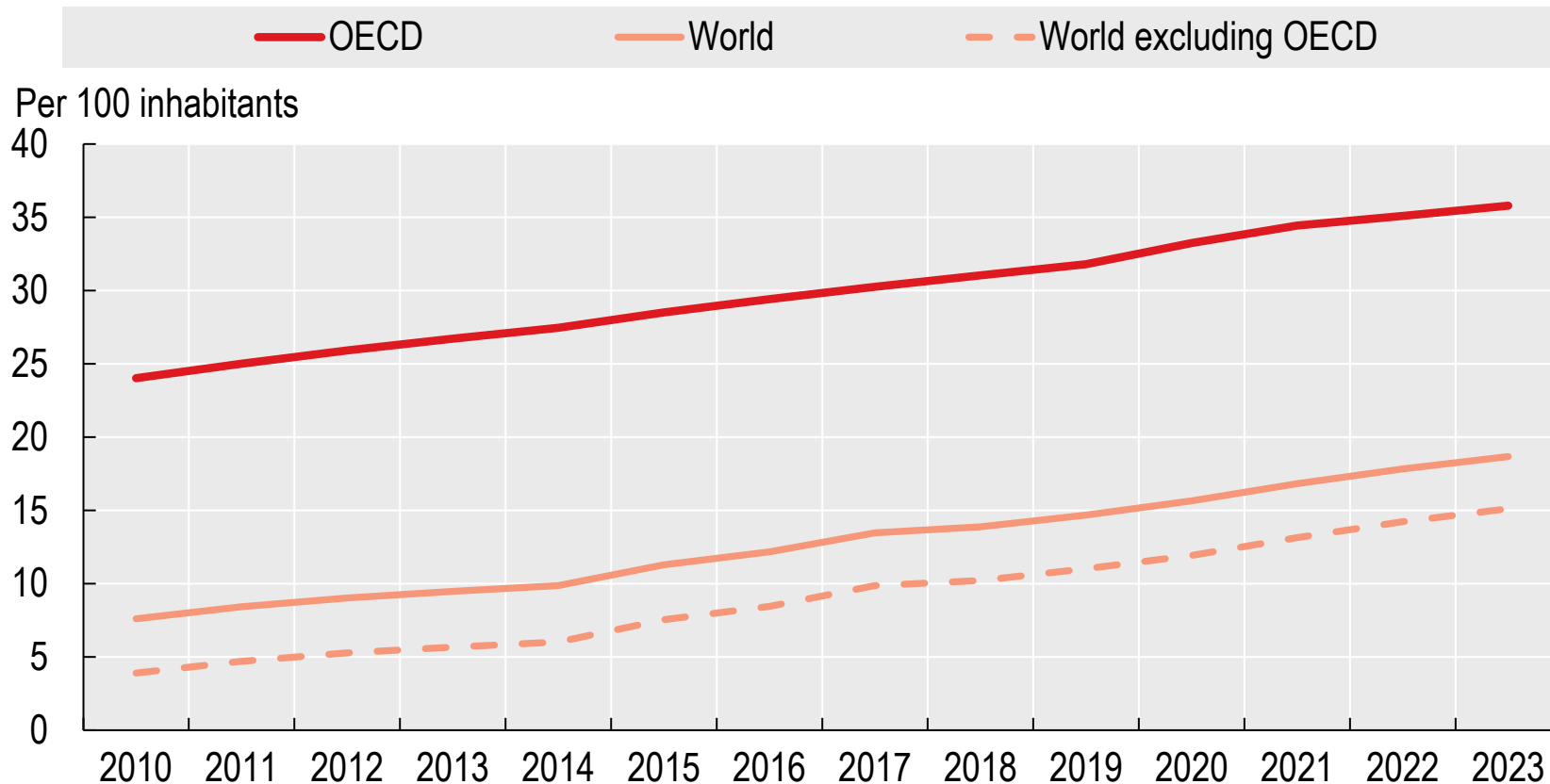
Connectivity is the backbone of digital transformation...

Enabling applications across all economic sectors



However, persistent connectivity divides across and within countries

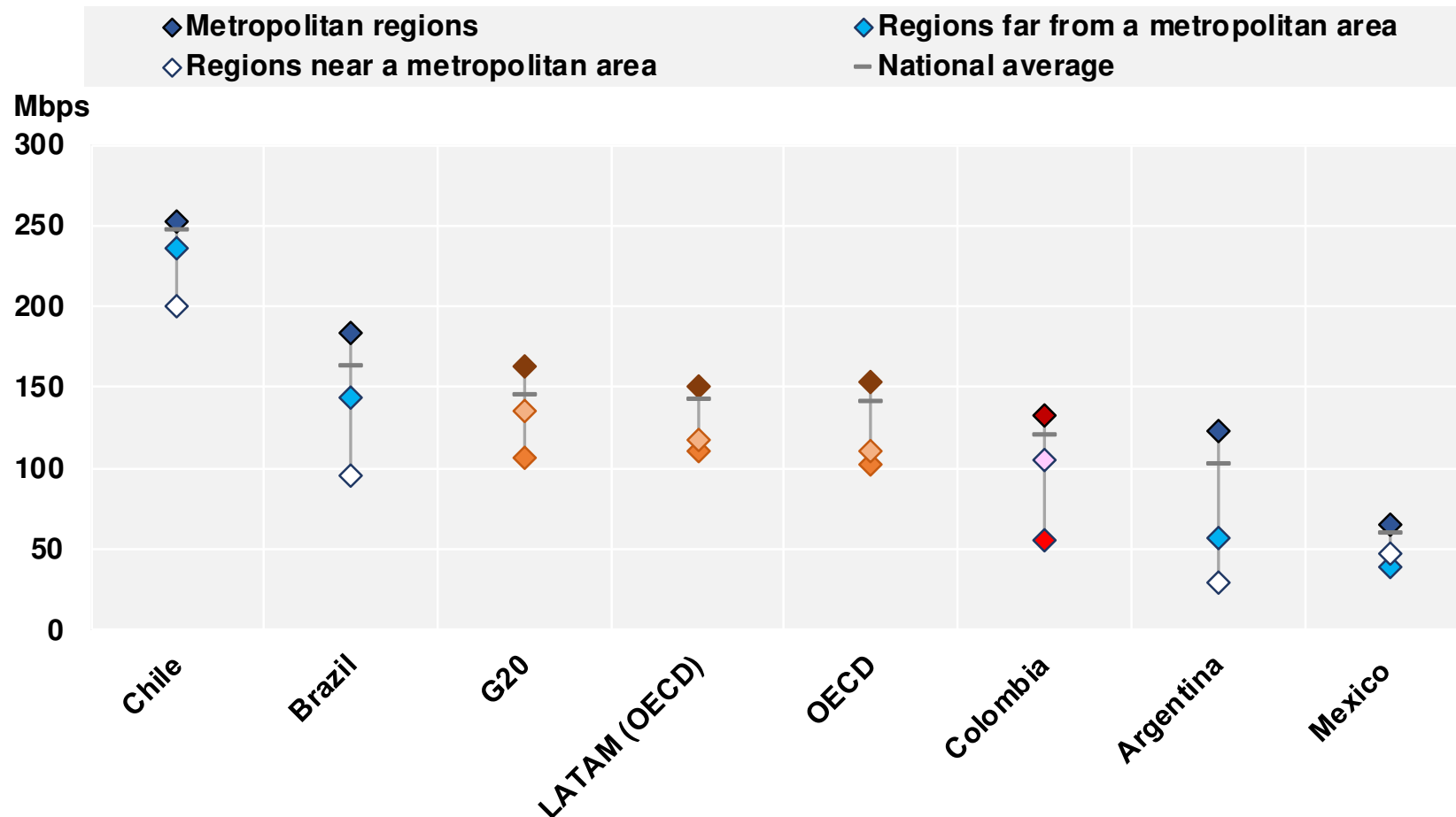
Evolution of fixed broadband penetration, 2010-2023





Broadband performance: Spatial connectivity divides for fixed broadband speeds exist within OECD countries

Median fixed broadband download speeds experienced by users in OECD, LATAM and G20 countries, Q4 2023, TL3 (small regions) and DEGURBA classifications, Ookla

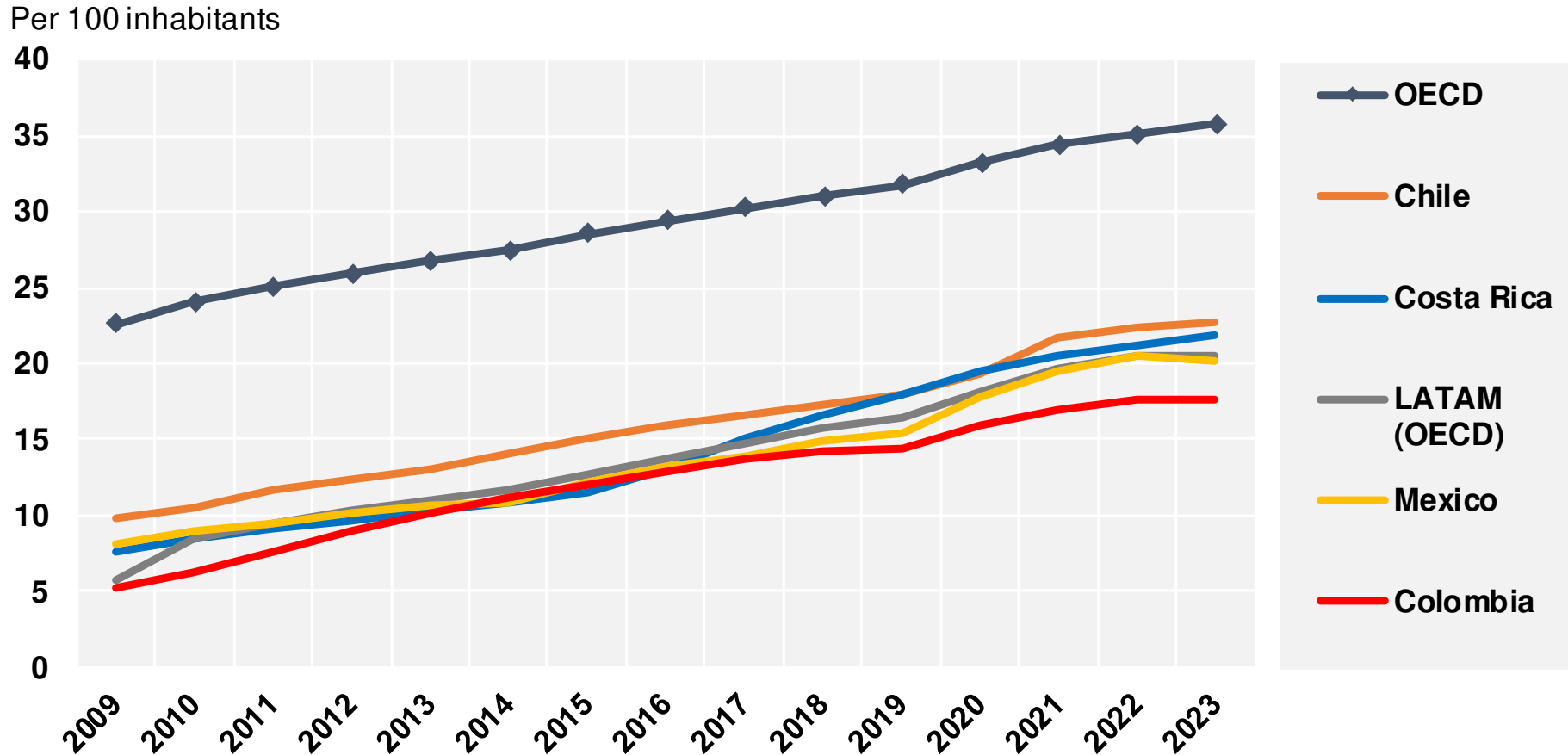


Note : LAC (C
Source: Speedtest® by Ookla® Global, Fixed and Mobile Network Performance Maps.
Restricted Use - A usage restraint



Fixed broadband is increasing, but lower fixed broadband penetration in LAC countries vs. OECD average

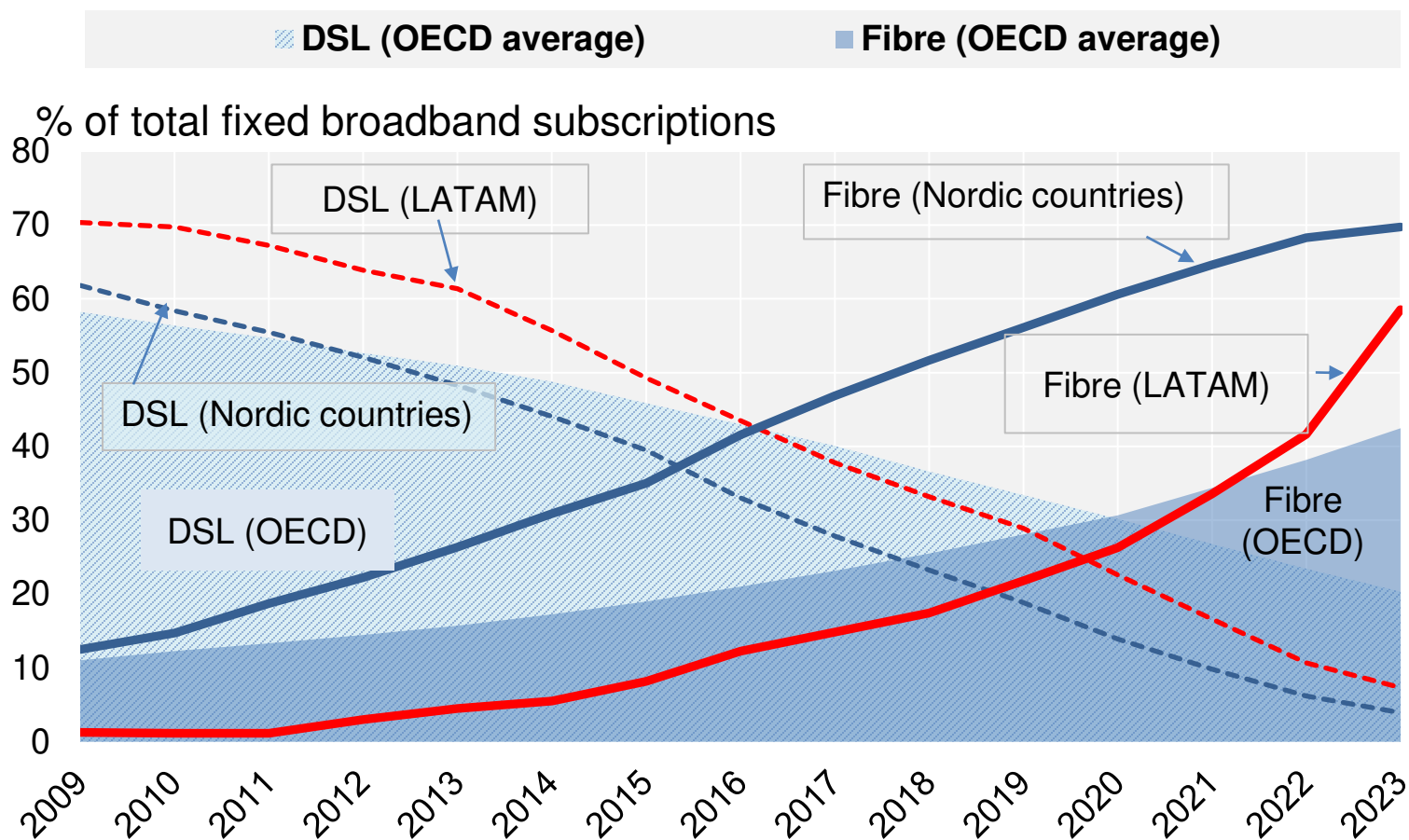
Total fixed broadband subscriptions per 100 inhabitants





OECD Latin American countries experienced important growth in the share of fibre in total fixed broadband subs.

% of fibre subscriptions in total fixed broadband, 2009-2023

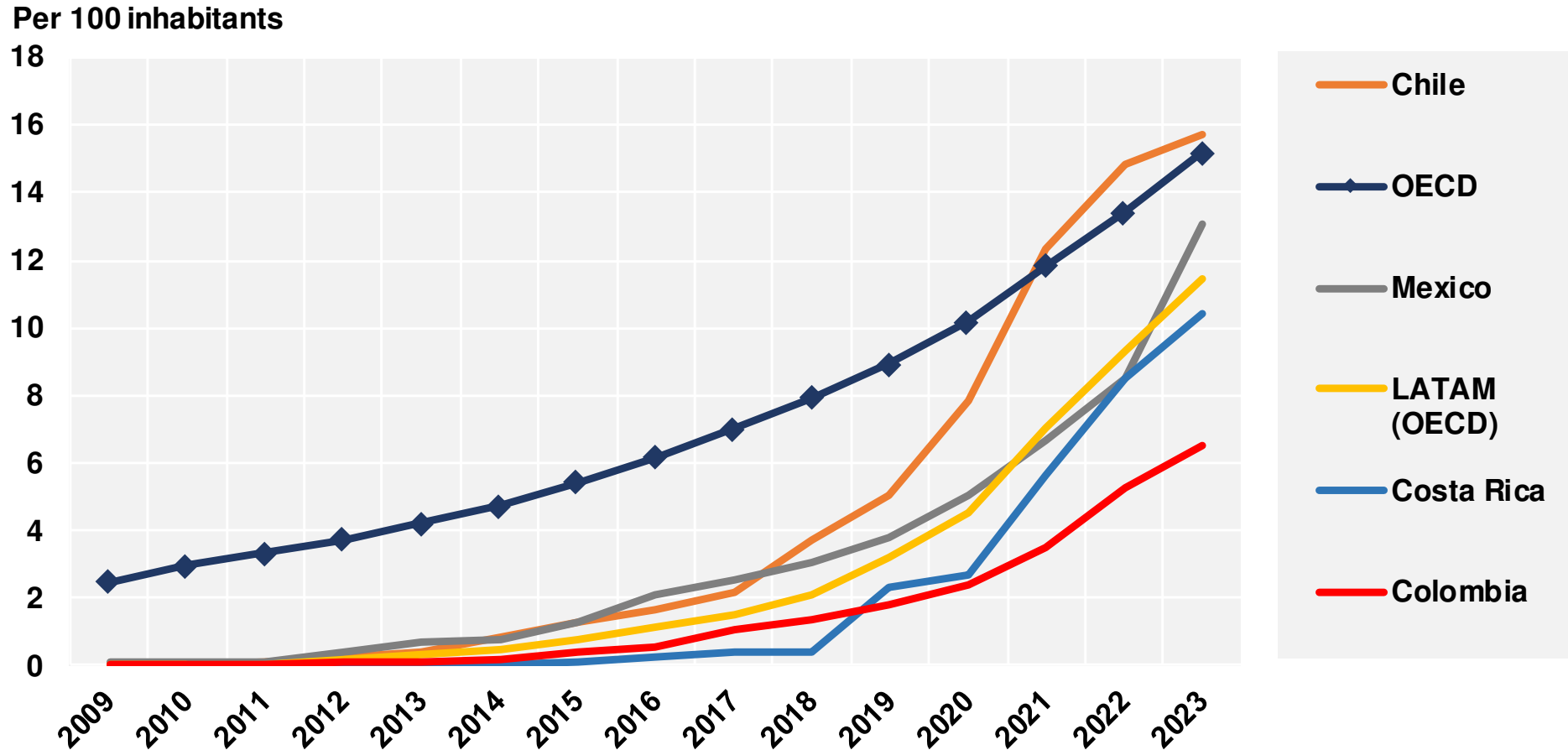


See our latest [Broadband Statistics](#) release on 24 July 2024.



On the plus side, Latin American countries experienced important growth in fibre penetration

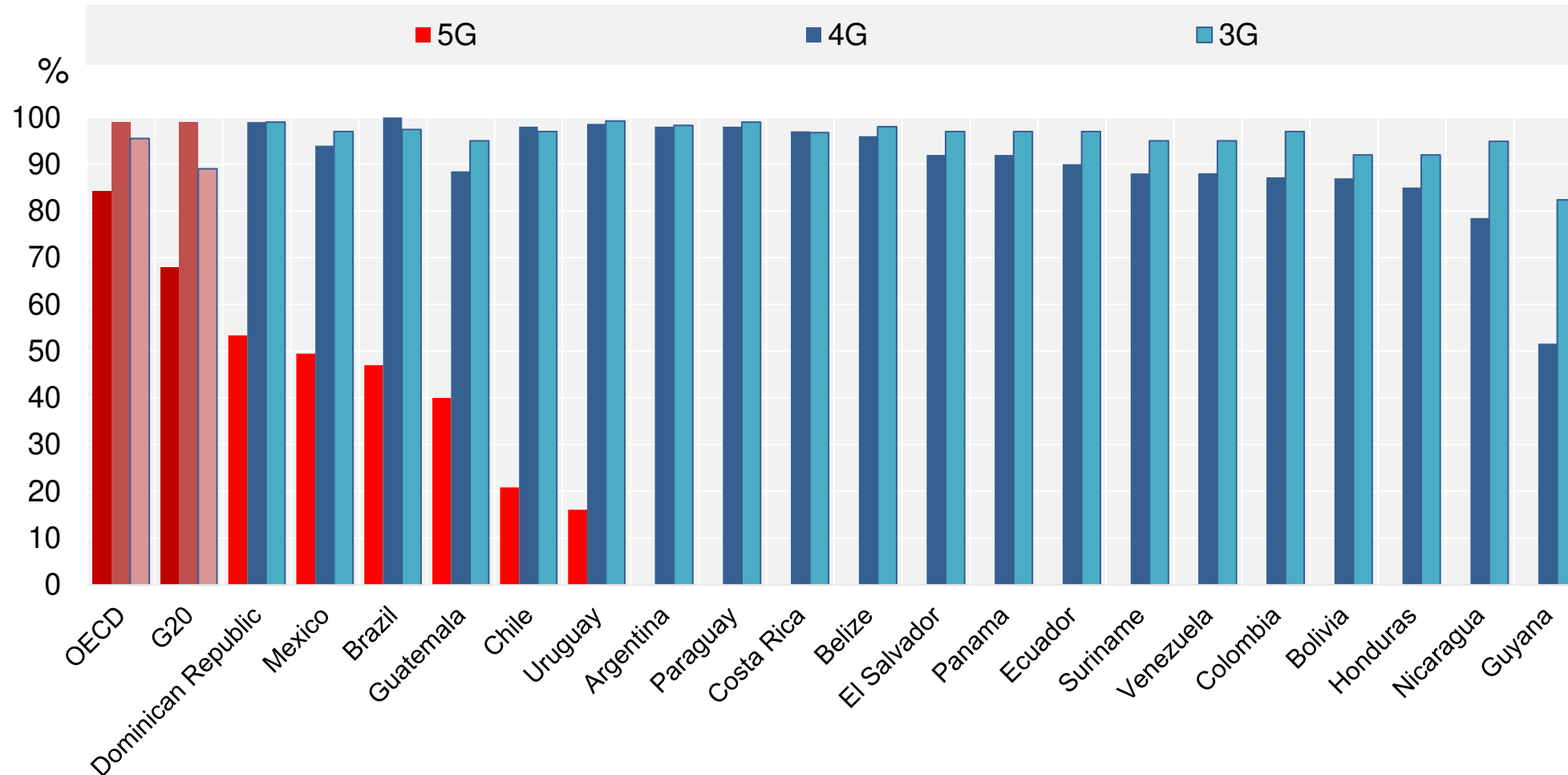
Fibre subscriptions per 100 inhabitants





Broadband availability: 3G and 4G networks reach more people beyond the OECD, although 5G population coverage is growing

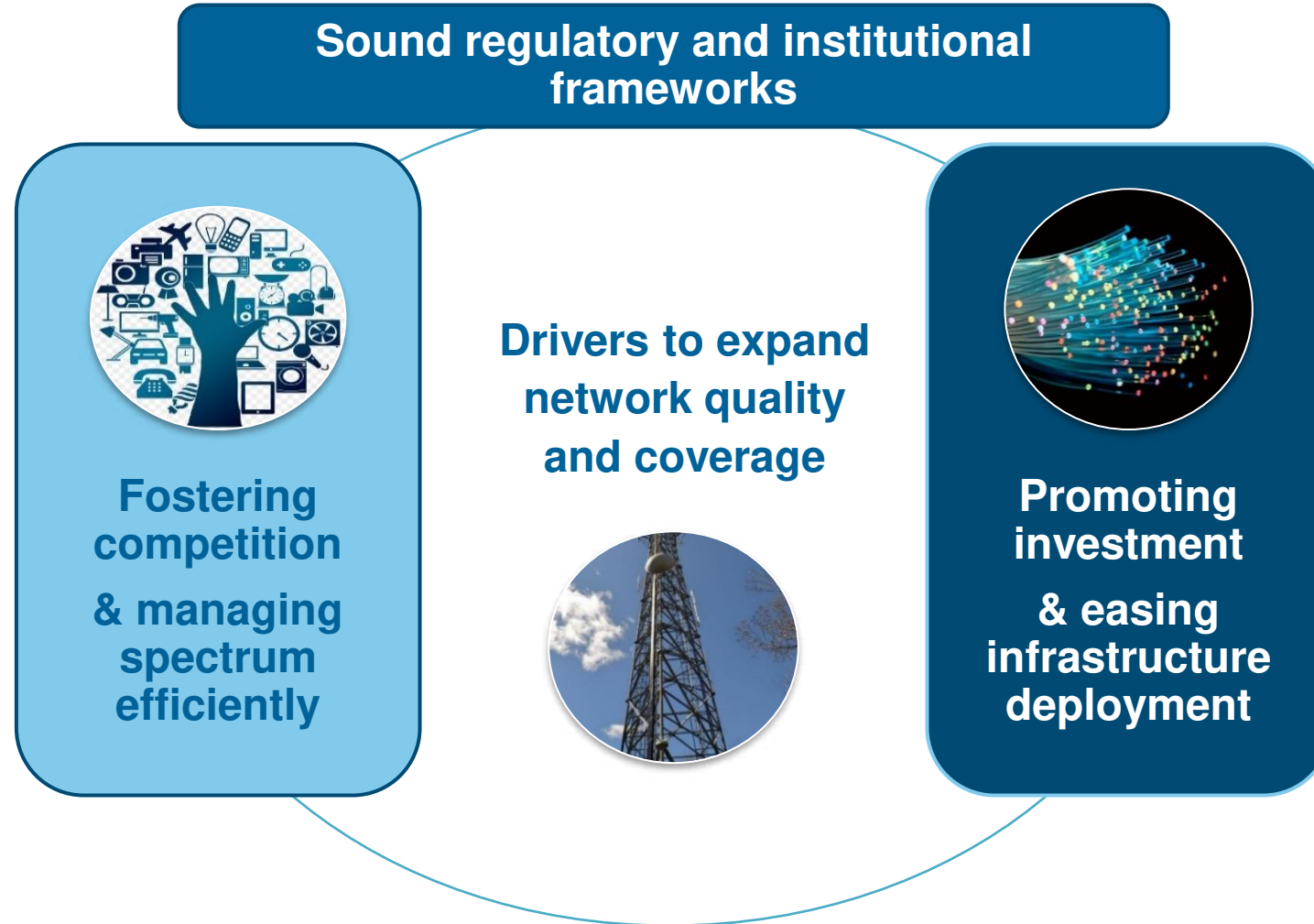
GSMAi: Population coverage by mobile technology in 2023 in select LAC partner economies



Source: GSMA Intelligence database.

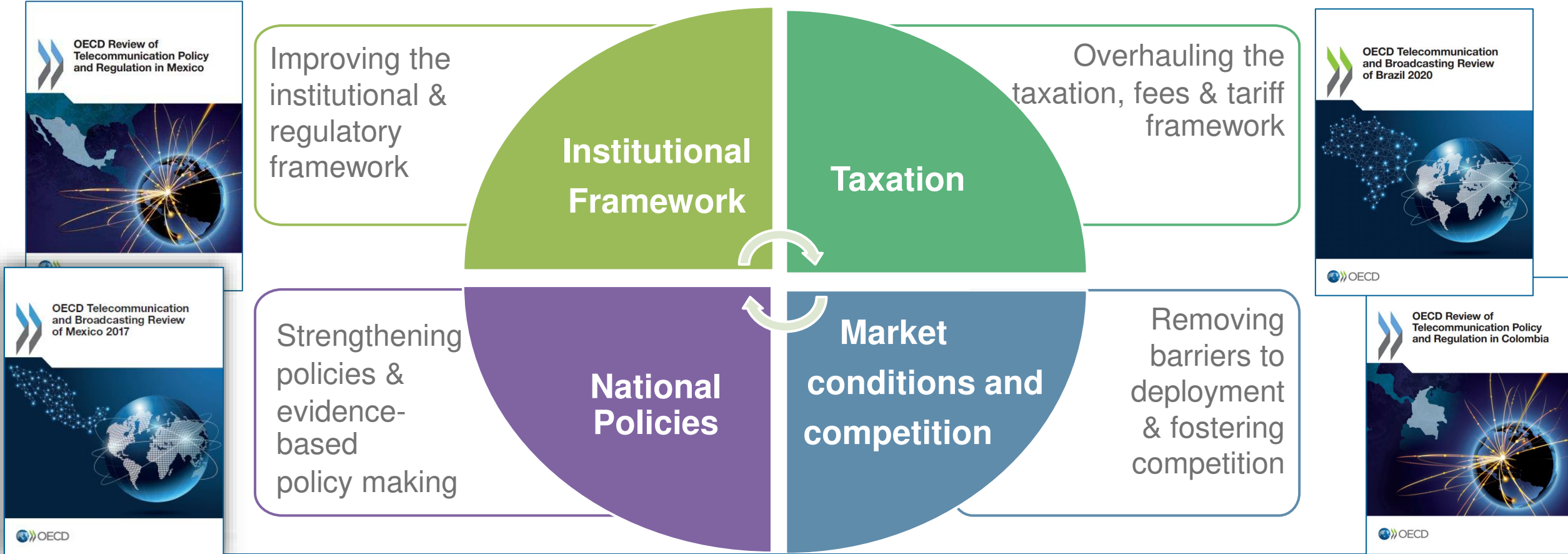


Policies to bridge digital divides: Main overarching approaches





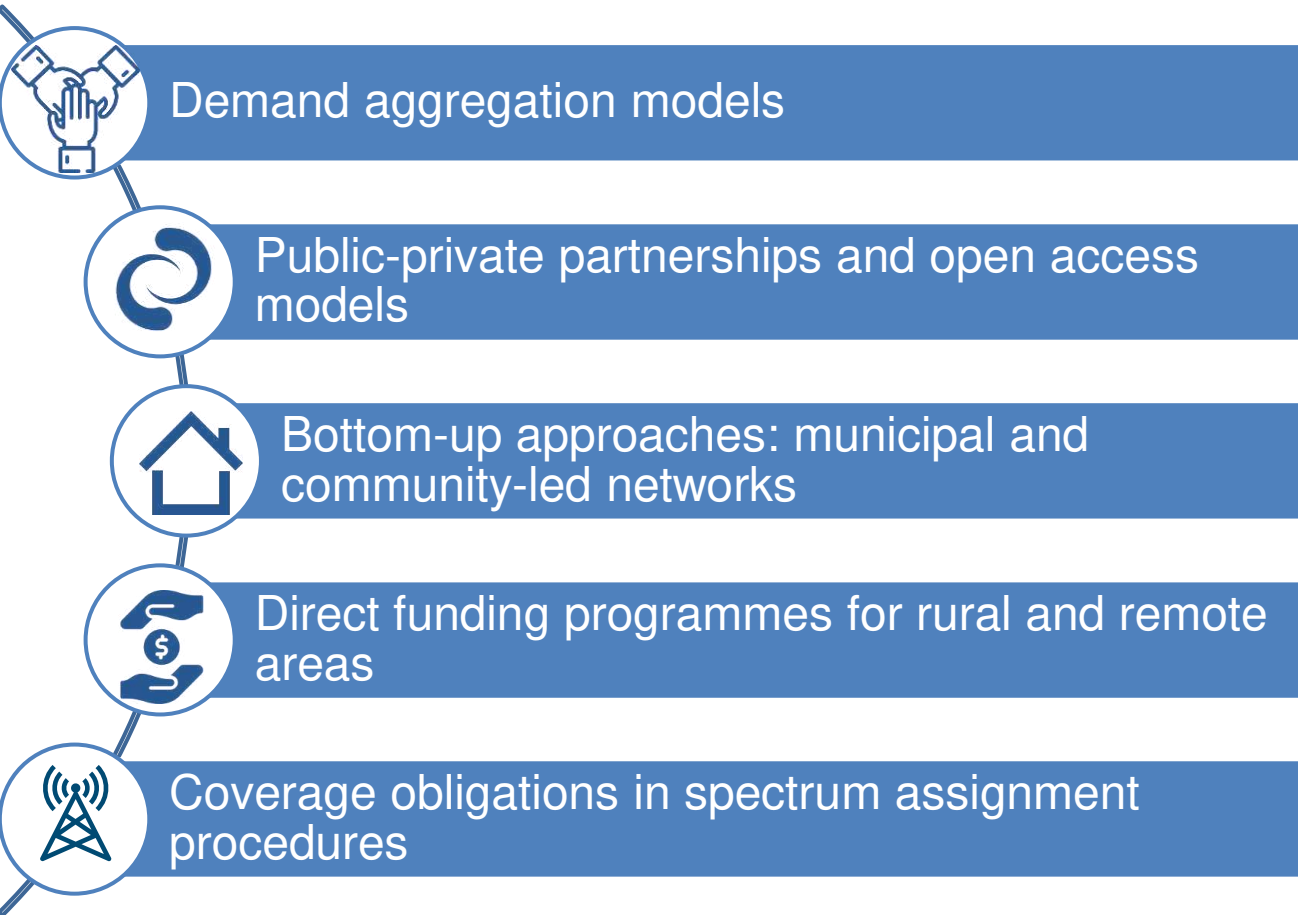
Four key areas of action to increase access to connectivity services and infrastructures in LAC



Connectivity is the pillar for digital transformation in LAC



Key tailored approaches to bridge connectivity divides in rural and remote areas



➤ Countries adopt different methods, but focus should be to prioritise policies to maximise private sector investment to ensure efficient use of public funds



Canada, Colombia, Mexico, Brazil



Nearly all OECD countries
Mapping initiatives a common prerequisite



Effective tool used in OECD countries to extend mobile broadband coverage



Bottom-up approaches: municipal and community-led networks

Municipal and community-led broadband networks add to the gamut of solutions to bridge rural connectivity divides

- Municipal and community networks are used in several OECD countries to promote fibre deployment in cities, smaller towns, and surrounding regions
- Examples across the OECD:
 - **Sweden**, Finland, Canada, United Kingdom, United States (e.g. Tennessee, Louisiana, North Dakota, California)
- Importance of spectrum licensing for local community broadband networks
 - Mexico, Australia, Finland, New Zealand, United States
- Important for rural areas and for indigenous population (14 OECD countries have indigenous populations)
- Open access fibre networks



Efforts to promote an **enabling environment for local broadband networks to flourish** could help bridge divides in rural and remote areas



Innovative models to boost future proof broadband networks in Latin America

Colombia: wholesale fibre networks (e.g. On Net Fibra)



Peru: Internet para Todos (IPT): Partnership Telefónica, Meta, BID Invest & CAF



Examples of innovative sharing and wholesale models in LAC to boost future proof networks



Brazil: Local fibre networks, small ISPs (e.g. Brisanet) & wholesale access fibre networks (e.g. V.tal, FiBrasil, Ufinet)

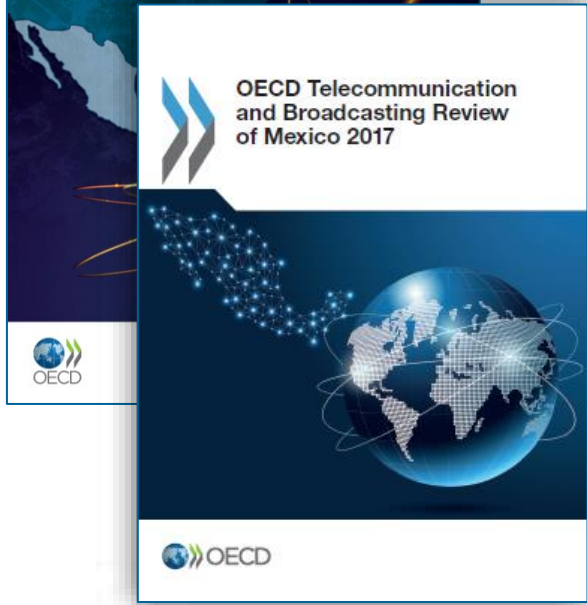
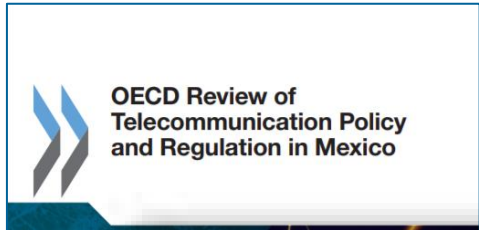


Chile: InfraCo (KKR-Telefónica)



Thank you!

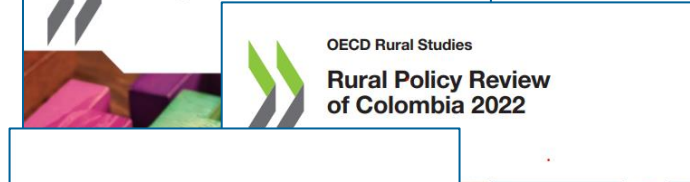
Working for the digital transformation of LAC



Mexico Telecom review **2012** & Implementation review **2017**



Regional Review 2016: Broadband Policies for LAC ([Digital Economy Toolkit](#))



Colombia Telecom review 2014, Going Digital review **2019** & Chapter in Rural Review (**2022**)



Brazil Telecom review 2020 & Going Digital review **2020**