



Project Title: Policy Frameworks for Digital Platforms - Moving from Openness to Inclusion. Case Study. Mapping Rioplatense Platform Economy. The case of MercadoLibre in Uruguay and Argentina

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## I. Executive Summary

The growth in e-commerce has been fuelled by powerful platform intermediaries. The profits for online retail sales in Latin America rose from 18 in 2011 to 54 billion dollars in 2018, and 147,2 millions online shoppers (Statista 2018).

In the Global South, a number of regional unicorns have emerged adapted to local needs and peripheral markets. MercadoLibre has gained a dominant position in Latin American markets as it started operations when e-commerce giants were still hesitant to invest in the region. It is at the top of retailers web visits with 56.3 visitors followed by Amazon sites (22.4).

Our study aims to assess how online commerce platform economy in Argentina and Uruguay are really open new opportunities for producers and customers. We want to know how inclusive ecommerce platform services are for small and medium enterprises (SMEs). We want to know whether the SMEs take advantage of the benefits that MercadoLibre narrative promise?

What are the barriers that SMEs face when they try online commerce? What kind of problems are common around SMEs? Are they financial, commercial, logistical, or human capacities? What are the new skills and capabilities that need in order to take advantage of the online commerce? How does the second digital divide affect producers, both SMEs owners and their employees?

We interviewed both key informants from the industry and members of SMEs, including those that masters online commerce and those that not. We find that MercadoLibre addressed the financial and logistic problems but does not deal, or cannot deal, with skills, capabilities and country connectivity improvements.

We found that MercadoLibre's promise: "to democratize commerce..." are not obvious for SMEs to identify. To do so, users must have informational skills, the ability to search, evaluate, use and create information in order to accomplish their biz goals. In order be able to wield this abilities, previous basic digital skills, information and communication techniques and media literacy are needed.

So we concluded that is critical to promote commercial informational skills since secondary education (middle school), vocational training for small manufacturers and merchants on growing product categories and diffusion of high speed connectivity on small and mid cities. The research project collected data through the interview method and worked with news and media secondary information as well.

Our research team was able to advance with the work agenda in the fieldwork stage. But when working on the deliverables, the principal investigator had serious personal and family problems that delayed the work agenda. Despite these problems we were able to finish our project with important results. We found relevant project achievements in terms of outputs and outcomes.

## II. The research problem

In a mere span of two decades, e-commerce has become an important engine of the global economy, including the developing world. In the last 5 years, Profits for online retail sales in Latin America rose from 18 in 2011 to 54 billion dollars in 2018, and 147,2 millions online shoppers. The exponential growth in e-commerce has been fuelled by powerful platform intermediaries who took advantage of the new forms of economic exchange and information flows that digital disruption makes possible. (Statista 2018).

Relying on networked scale economies and real time algorithm-based recommendations, powerful e-commerce platforms, such as Amazon and Alibaba, re-orchestrate the relationship architecture between producers, suppliers and consumers in ways that ensure their end to end control in OECD and BRIC countries.

However, in the Global South, a number of regional unicorns have emerged, competing with well-entrenched platform companies from the US and China with strategies adapted to local needs and peripheral markets. MercadoLibre, born in 1999 and with HQ in Buenos Aires, has gained a dominant position in Latin American markets as it started operations when e-commerce giants were still hesitant to invest in the region. It is at the top of retailers web visits with 56.3 visitors followed by Amazon sites (22.4).

Regional platform companies such as MercadoLibre are native companies that deployed their services in Latin American markets overcoming logistic nightmares and providing their customers financial services that banks refused to offer, following frugal innovation strategies that telecom companies such as Telefónica and Claro were pioneers at. (Pralhad 2014).

They share a common interest in promoting changes in the laws and policies through their connections with domestic actors who can help them push their market growth. They have a different agenda to Multinational Corporation's as to how to build the economy of the platforms in the region.

Our study aims to assess how online commerce platform economy in Argentina and Uruguay open for producers and customers. We want to know how inclusive ecommerce platform services are for small and medium enterprises (SMEs).

To do so, our questions regarding SMEs inclusiveness in online commerce are:

- What opportunities did e-commerce open for producers and customers in Latin America?
- What are the advanced practices of SMEs that sells their products in MercadoLibre? Are they well diffused? Do all SMEs take advantage of the benefits that MercadoLibre narrative promise?
- What are the barriers that SMEs face when they try online commerce? What kind of problems are common around SMEs? Are they financial, commercial, logistical, or human capacities?
- What are the new skills and capabilities that need in order to take advantage of the online commerce? How does the second digital divide affect producers, both SMEs owners and their employees?

- What are the platform solutions providers such as cloud based ERPs and CRMS?  
How data regimes are organized by MercadoLibre and other actors?

We also need to know how SMEs are impacted by the context created by MercadoLibre. We mapped the relationships between government, regulatory agencies, chambers, multinational extra-regional e-commerce competitors, and brick-and-mortar competitors. These relationships help frame the policies and regulations that affect both opportunities within and barriers to participation in the overall economy.

The distinctive characteristic of Mercado Libre (MeLi) is its ability to conquer, not only new countries, but new activity sectors. Having started operations as an auction platform for sellers to publish used products, soon its main publications became of new products sold on fixed prices. In this way, its sellers turned to be from hobby sellers to semi-professional sellers who sold new products as a way of living.

This fundamental change led the company to actively seek and convince shop sellers to start publishing in MeLi and to dabble on new activities in order to professionalize these sellers and offer them adding-value services: training, financing, logistics, advertising and more.

Gradually, the development of MeLi and its diversification of activities started drawing new and old companies to its radar, or to the platform ecosystem radar. It became clear to a lot of them that, in order to survive, they had no choice but to get on board.

### **III. Progress towards milestones**

Briefly describe achievement of project milestones for the entire reporting period.

Milestone 1. Presentation at Mumbai Meeting (Annex 1)

Milestone 2. Revised policy overview (Annex 2)

Milestone 3. Research Report (Annex 3)

When working on Research Report, the principal investigator had serious personal and family problems that delayed the work agenda.

Milestone 4. Policy Note (Annex 4 and 5)

#### **IV. Synthesis of research results and development outcomes**

MercadoLibre allows SMEs to get to buyers in other regions of the country, and, in this way, extend their sales to a wider area. It is recurrent for SMEs from Buenos Aires and Montevideo to sell their products to buyers located inland through MercadoLibre; charge using MercadoPago and send the products by postmail or MercadoEnvíos.

Argentina and Uruguay, like any other Latin American country with the exception of Mexico have logistic problems. In 2017, after several inconveniencias with the national postal systems of Argentina and Brazil, MercadoLibre finally decided to build its own logistic network with its very own massive storehouses.

MercadoPago, the digital payment service of MercadoLibre, overcomes the payment barriers of e-commerce. It started accepting credit cards in the online world, but in Argentina Visa was monopolistic. In 2016 CNDC (National Commission of Consumer Defense) held a research on VISA Argentina, and a year after signed a commitment allowing payment facilitators (Mercado Pago, PayU) to enter the market with both online and mobile devices. MercadoLibre continues doing lobbying thanks to a FinTech commission in the Central Bank.

#### **Informational Skills and connectivity**

On MercadoLibre's website section "Stories which inspire", testimonies from the same named contest organized by the company and NGO Endeavor Argentina can be found. "Stories which inspire" gives a prize to users of the platform in Argentina, Brasil, Uruguay, México, Venezuela, Colombia and Chile who can tell their story to "inspire others to start their own businesses.

The stories which can be found there are generally of young under-forty people, with a professional career or with basic education but with an intellectual capital which includes informational skills. All of them are live examples of MercadoLibre's promise: "to democratize commerce and money to have an impact on the development of the (latin american) region".

The opportunities MercadoLibre offers to small producers are not obvious for them to identify. To do so, users must have informational skills, the ability to search, evaluate, use and create information in order to accomplish their goals. If not, the platform will only be user as a new channel, adjusting the digital resource to the old traditional business model (UNESCO, 2005).

In order to be able to wield these abilities, previous basic digital skills, information and communication techniques and media literacy are needed. In other words, the knowledge of the different sorts of media and formats through which information is transmitted.

Several and diverse cases have been found on our research of users who can not move forward in the adoption of advanced practices. On one hand, there are skilled users with no ideas on how to get use of the information in order to seize ecommerce as a valuable

resource. For example the case of Claudio, who owns a Couch Workshop called CMV DECO in Villa Adelina, Buenos Aires Province in Argentina. It provides brick-and-mortar shops of accomodated neighbourhoods with low working capital. To him, the platform is a shop window, just another way of displaying its products, as could be Facebook or Instagram. He doesn't consider its financial or logistic services.

On the other hand, Héctor Martínez, from Su-llant (Lomas de Zamora, Buenos Aires province, Argentina) shows the opposite case. He is an experiences small metal-mechanic industrial manufacturer who acknowledges the commercial potential of online media but who lacks the digital abilities to start using them. His brother in law, who manages the commercial area, never accompanied him on the experimentation with MercadoLibre. In this way, the possibilities for a small or medium businessmen to make a profitable use of e-commerce depends on a delicate balance of complementary capacities. The informational or digital (more rare) gap, or the sum of both of them, the second digital gap, act as a barrier to adoption.

### **Logistics**

The logistic distribution networks of ecommerce platforms depend on the existence of public or private distribution or post companies. Also, these calculate their costs given the existing infrastructure, which in Latin America generally suffers of constant investment cuts.

Private companies only cover profitable distribution trails. And public post companies find themselves cyclically subjected to financial stress due to lousy state finances, or because of arbitrary decisions form political authorities. This constitutes a real nightmare for every ecommerce platform which is expanding and a good deterrent for super platforms such as Amazon.

These distribution lines follow a centralized diagram based on the connections with their metropolitan port: Buenos Aires in the case of Argentina, Montevideo in the case of Uruguay. They are the result of two development logics which, although they had their nuances, did not change the wheel-shaped, port-centered design whose rays go straight to the producing centers but without connecting inland locations with each other. They were created along with the railway lines at the beginning of the 20th century in accordance with the prevailing Agro-export Model, to export grains and meat to Europe, mainly to Great Britain. The period after 1945 failed to break this logic, since industrialization promoted rural-urban migration, expanding large cities to the detriment of medium-sized cities.

Therefore, the routes between the medium and small localities inland, in particular those which are outside from the oilseeds and cereals producing central region (the humid Pampa), are deficient. We have verified that if a producer from Salta in Argentina or from Salto in Uruguay is presented with the opportunity to sell their products to buyers in Chaco or Tacuarembó respectively, they are obliged to send their merchandise to their capital cities. Since, either there are no logistic services between the ends of the mentioned rays, or they are very onerous, or they do not have the necessary frequency.

Another problem speaking of the logistic networks, is the feeble capillarity of the distribution lines to the places where the producers are. For example, we have found that a producer of

fine fruit jam from the town of Los Antiguos in the extreme west of the Santa Cruz Province, located over the Andes mountain, finds it impossible to use MercadoLibre since the nearest receiving office is located in Comodoro Rivadavia 457 km on the Atlantic coast.

The role of the State is, in these cases, very important in order to balance the possibilities of participation in the new platform economy and seize its opportunities to promote local development, regardless of the profitability of these distribution circuits.

The policies we propose on logistics, can be carried out directly from the State or also with incentives to logistic companies so that they connect destinations which are not the most profitable ones on market terms. Only then, the platform's democratizing promises will get closer to reality.

#### Recommendations:

- To promote a logistics network of e-commerce platforms with greater connections between provinces, improving connectivity and fluidity.
- To improve the capillarity of logistics towards peripheral local production centers.
- Invest in infrastructure, as for the routes which connect different locations of the provinces with their neighbors.
- To develop logistic services, private or from national mail, to complete trips between provinces, connecting provinces with each other.

## V. Methodology

### Theoretical framework

Our study about how MercadoLibre allow SMEs take advantage of the online commerce implements the research framework of the project (Gurumurthy & Bharthur 2018). In order to grasp how the phenomenon of ‘platformization’ of the economy – in this case commerce and trade, financial services and credit – really work in the global south we need to adapt the framework thought for “the biggest platforms” to an scenario where king platforms, such as Amazon, are followers (Gonzalo, Federico, Drucaroff, & Kantis, 2013).

Srnicek describe platforms as “digital infrastructures” that present themselves as intermediaries that bring together different users: customers, advertisers, service providers, producers, suppliers, and even physical objects, that can also come with a series of tools that enable their users to build their own products, services, and marketplaces (Srnicek 2016).

But in developed markets this infrastructures can be used by all the economic actors since the digital divide, even if exist, can be easelly reduce. In the context of developing countries not all the actors are equally capable of take advantage of such services because digital divide is structural and chronic (Guillén & Suárez, 2001).

Our study intends to draw up a relational big picture of the platform ecosystem – its norms, rules, relationships and practices - around an actor that is particularly important, the small and medium business. It is the “Ham in the Sandwich”. It is not the big corporations nor individuals that can participate and flourish in the gig economy. In the developing world SMEs are the field where economic digital inclusion is taking place or not (D’Andrea, 2010; Hortaçsu, Asís Martínez-Jerez, & Douglas, 2009).

Mapping both the relationships with the downstream of the data value chain, the information infrastructure that it is accessible for SMEs, and the relationships upstream, with governments, and their key organizations like the mail, and IT and Financials Services Corporations. In order to do that we propose explore two dimensions:

1. The history of the relationships. First we will reconstruct the milestones that restructured the map of relationships. It will be use data from media and publications complemented with interviews to key informants such as researchers, entrepreneurs, specialized journalists, regulators and chamber members.
2. The voices of data ensembles. Second we will work with storytelling, trying to assert the sense-making role of stories in working knowledge in narratives from producers, politicians, entrepreneurs and their network partners. We want to distinguish universal categories, neutral standards, and scientific facts from stories of political accounts whose claim objective progress.
3. By analyzing using narratives with context-appropriate theoretical rubrics we will follow the theoretical blend proposed by Jose Van Dijck that combine actor-network theory (ANT) with Castell’s political economy. (Van Dijck 2013, 27).

We think that the question of agency should be central to SMEs engagement with data . We agree with her when she asserts “It is important that debates about data power recognizes that data is also generated, collected and analyzed by alternative actors, enhancing rather than undermining the agency of the public.” (Van Dijck 2017).

The way SMEs, officials and politicians talk about their experience of inclusion/exclusion in platform economy at the same time they are organizing their activities, building up technologies and standards and enacting new policies and regulations could give us data about the comprehension or ignorance of their commitment in the construction of the platform economy .

Working with storytelling through with actor-network theory (ANT) we want to understand simultaneous enacting of narratives, “translations”, and practices in action of “blackboxing”. And also it is very important to follow the transformation of technologies and regulations along the way and their relationship with actors narratives (Callon, 1986; Latour, 1996).

Also, we expect that our inquiry on actors narratives and the history of Rioplatense e-commerce could shed light in the development of new indicators of the platform society in the world periphery from the Latin America experience.

### **III.2. Research questions**

Our main research question is:

- How do relationships between MercadoLibre and others actors of the “horizontal integration” of the platform economy both downstream (SMEs and customers) and upstream (such as government, regulatory agencies, chambers, multinational extra-regional e-commerce competitors and brick-and-mortar competitors) affect economic opportunities and barriers to participation in the economy?

And the auxiliary questions are:

- How did MercadoLibre change the Rioplatense Platform Economy? What opportunities did it open for producers and customers?
  - How did financial instabilities and changes affect relationships between MercadoLibre, government, and banks in unstable economies? How is power structured among actors? How did regulatory mechanisms change between government administrations?

- How did these relationships evolve along MercadoLibre history since its foundation in 1999? How did platform governance (Industry standards for platform openness) change since?
  - What structures did/should the country build to prepare itself for the platform economy (material, technical: bandwidth, discursive, policy)? How do holes in this structure affect the development of platforms? What do they do to counteract this difficulties?
  - What is the discursive construction platforms generate to strengthen their position in front of government and other actors?
  - How did mobile devices change platforms activity? How did this change affect the Rioplatense Platform Economy?
  - Are there new producers (new sector or activity within a sector) and new consumers due to the development of the platform economy?
  - What are the economic, social, public and private values of platforms like Mercado Libre for the country? Are these values equally perceived?
- What are the advanced practices of SMEs that sell their products in MercadoLibre? Are they well diffused? What are the barriers for SMEs capabilities and performance?
    - What are the start-up entrepreneurs that develop platform integrations with MercadoLibre platform, including cloud based ERPs and CRMS? How data regimes are organized by MercadoLibre (data management, data ownership, Identity authentication systems, material infrastructure)?
    - How can policies and laws maximize platform opportunity for local economic autonomy?
    - Which are the barriers for SME's to maximize their activity in the platform (technical, financial, logistic and knowledge barriers)?
    - Does Mercado Libre attempt to reduce this barriers? How?
    - Does it aim to strengthen SME's in any way in order for them to be able to cope with barriers in a better way?
    - How has work changed in SME's since the development of platforms as Mercado Libre? (outsourcing, informal work, skills)
  - What is happening to work in MercadoLibre (formalization/informalization, skills and capabilities, human labor versus algorithms, alienation of labor, collective organizing of individuals)?
    - How does the second digital divide affect the e-commerce industry? What are the new skills and capabilities that need to be built?

- How can educational policies for the platform opportunity create new curriculum and public goods (ex. MOOC or conventional courses, books, etc)?

### Data collection

In order to understand the way policies and laws for the platform economy developed and the role that different actors played, it was critical to map the relationships between MercadoLibre and other actors involved in the “horizontal integration” of the platform economy both:

- downstream (SMEs and customers) and
- upstream (such as government, regulatory agencies, chambers, multinational extra-regional e-commerce competitors and brick-and-mortar competitors)

Internal information of the main actors of the platform ecosystem and regulatory, discursive and policy information were also required. In this way, a matrix of cases was constructed in order to recover actors narratives using the interview collection method. Cases were selected with the “snowball” technique, where each case leads the researchers to new cases.

		SMEs in e-comm	SMEs not in e-comm	Regulators	MeLi
Argentina	Buenos Aires	6	5	3	3
	Salta	2	3		
Uruguay	Montevideo	6	6	3	3
	Inland	3	6		
<b>Total</b>	<b>50</b>	17	21	6	6

Every location of the research needed to be addressed. Mercado Libre users and non users SME’s were interviewed in order to identify the perceived impact, benefits and disadvantages users could recognize, but also the barriers and motifs non-users had, for not selling through the platform. Actors linked to regulation aspects of the platform ecosystem, such as public servants and chamber members were also interviewed. And finally, people related to platforms such as MercadoLibre employees and ex employees, people with work experience on several platforms and other key informants of the platform economy.

In order to reconstruct MercadoLibre's history, controversies with different actors and discursive structures, media and publications data was also collected.

### **Procedure of analysis**

Data collected from interviews and observations was analyzed with atlas.ti. This tool allowed to codify verbatims and analyze the information in an easier and more clear way.

The news articles and media were classified on a spreadsheet. Each one of them was codified depending on the topics addressed.

We are interested in conducting a comparative study about the evolution of MercadoLibre as an e-commerce service provider for SMEs in theseis two countries, Argentina and Uruguay. Mapping both the relationships with the downstream of the data value chain, the information infrastructure that it is accessible for SMEs, and the relationships upstream, with governments, and their key organizations like the mail, and IT and Financials Services Corporations. Our study intends to draw up a relational big picture of the platform ecosystem – its norms, rules, relationships and practices.

## **VI. Project outputs**

We plan to disseminate our outputs by seminars with journalists and academics.

In the next 6 months we plan to prepare a paper and three blogs entries about different aspects of our research.

## **VII) Problems and Challenges**

We faced problems communicating main aspects of the study. It took time to develop a consistent explanation of the specific problem we were trying to investigate about online commerce in Latin America. Both because it was difficult to translate into English and because it was difficult to find the right concepts to characterize the phenomenon.

When working on Research Report, the principal investigator had serious personal and family problems that delayed the work agenda:

- On November 7 PI broke her leg in a street accident.
- On December 6 his wife suddenly got sick and then passed away on 11.

But finally the principal investigator can recover and finish the project.

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## **Videos**

<http://www.mercadolibrepublicidad.com.ar/ar/>

## Annexes

### Glossary of Terms

**AFIP** (Administración Federal de Ingresos Públicos): Federal Administration of Public Revenues. It is the agency responsible for the execution of the tax, customs and collection policy of the Nation's social security resources.

**AMBA** (Área Metropolitana de Buenos Aires): Buenos Aires Metropolitan Area. It is the common urban area that includes the capital city of Argentina (Buenos Aires) and 40 cities that surround it.

**ATACC**: Contact Centers Union

**CACE** (Cámara Argentina de Comercio Electrónico): Argentinian Ecommerce Chamber. It is a non-profit Civil Association constituted in 1999 with the purpose of disclosing and promoting the use and development of new technologies applied to work, communications, commerce and electronic business.

**CEDU** (Cámara de la Economía digital de Uruguay): It is the association that brings together the main actors of the national Digital Economy, both public and private. It represents, groups, coordinates, organizes and disseminates the activities of associated companies, representing them before the public authorities, official and private agencies in the national and international scope.

**CESSI** (Cámara de Empresas de Software y Servicios Informáticos). The Chamber of Software and Computer Services Companies (CESSI) is a non-profit organization that brings together regional companies and entities dedicated to the development, production, marketing and implementation of software and all the service variants in the entire field of the Argentinian republic.

**CICOMRA** (Cámara de Informática y Comunicaciones de la República Argentina). Informatics and Communications Chamber. It brings together industrial, commercial and service companies from the IT and Communications sector in the country.

**CNDC** (Comisión Nacional de Defensa de la Competencia): National Competition Defense Chamber. Its goals are to increase consumer welfare, strengthen the competitiveness of the industry and promote innovation and economic development

**Camara Argentina de Comercio**: Argentine Chamber of Commerce. CACE brings together merchants, industrialists, importers, agriculturists and industrialists to join an institution that represents their interests vis-à-vis the public authorities, the business community of the country and also the world

**Correo Argentino:** It is the state-owned company that covers the postal service in Argentina.

**Ebay:** International Ecommerce platform.

**Rioplatense:** Which relates itself to the Río de la Plata, cultural region that unites the central and southern zone of Uruguay, Buenos Aires, and the Argentine coast in the same historical and cultural characteristics.