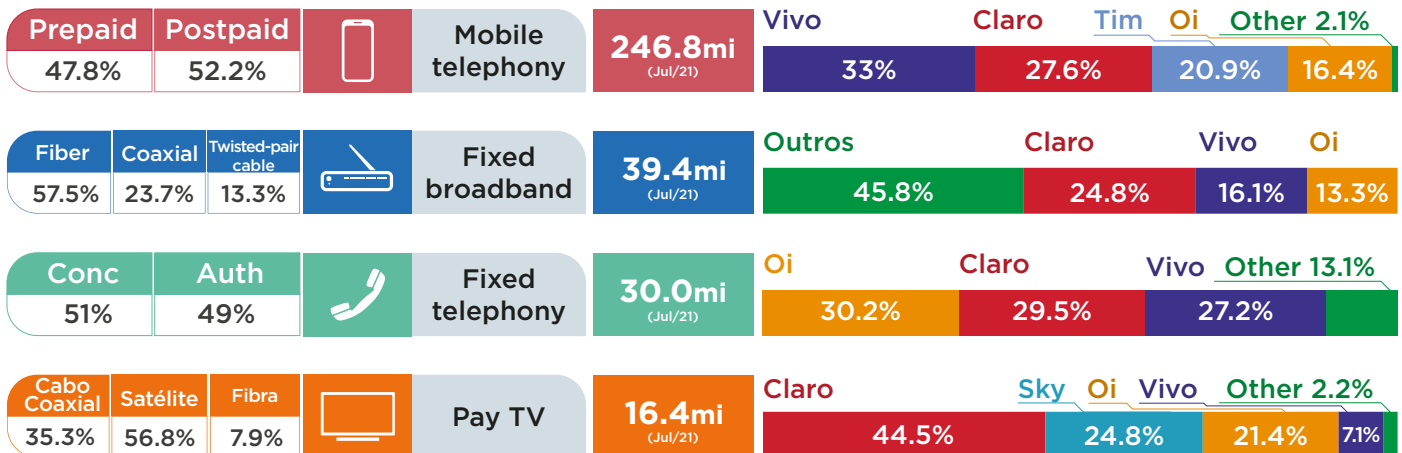


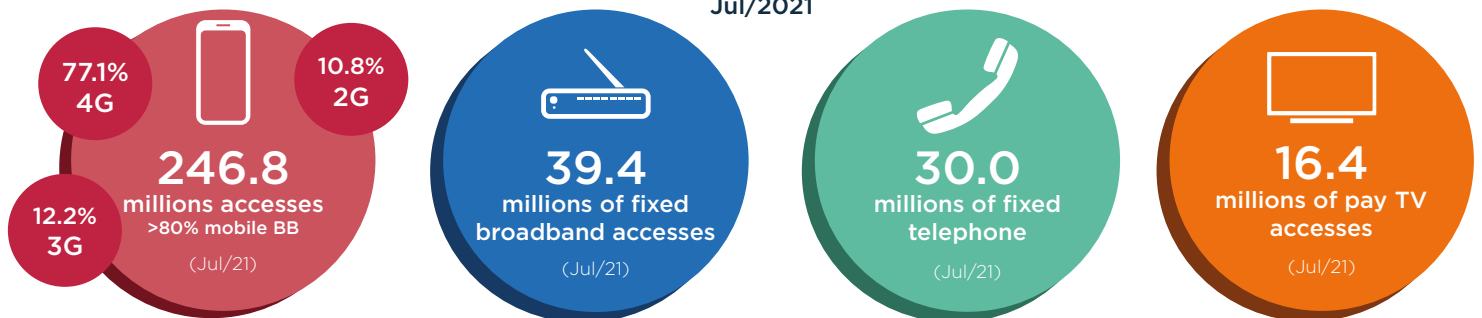


OVERVIEW OF TELECOMMUNICATIONS IN BRAZIL JUL/2021



332.5 Millions

contracts of telecom services in
Jul/2021



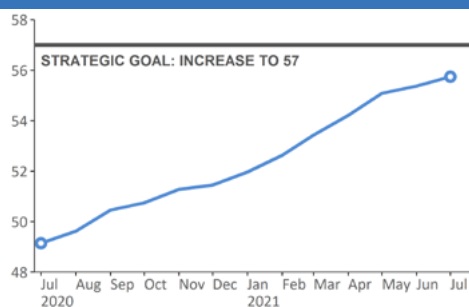
101.4 density of Mobile
Telephony per 100
inhabitants in Brazil

55.7 density of Fixed
broadband per 100
households in Brazil

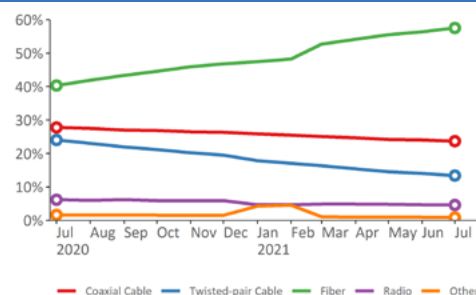
42.5 density of Fixed
Telephony per 100
households in Brazil

23.2 density of
Pay TV per 100
households in Brazil

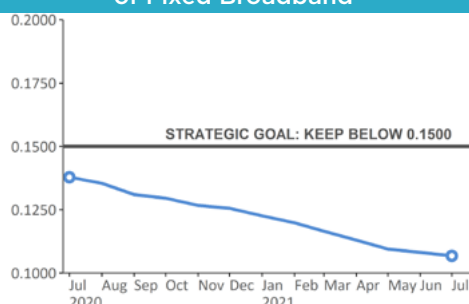
Density of Fixed Broadband



Technological Evolution of
Fixed Broadband



Market Concentration*
of Fixed Broadband



Market Concentration*
of Mobile Telephony



* Market Concentration is calculated using *Herfindahl-Hirschman Index (HHI)*.

Mobile telephony	MOBILE TELEPHONY, PER GROUP AND TECHNOLOGY					
	Group	Accesses	4G	3G	2G	Market Share
	VIVO	81,434,363	59,921,450	8,652,510	12,860,403	33.0%
	CLARO	68,222,458	51,070,612	14,357,073	2,794,773	27.6%
	TIM	51,577,033	44,742,334	3,667,861	3,166,838	20.9%
	OI	40,375,013	30,592,059	3,129,839	6,653,115	16.4%
	Other	5,183,397	3,862,758	250,715	1,069,924	2.1%
	TOTAL	246,792,264	190,189,213	30,057,998	26,545,053	100%
	PERCENTAGE	100%	77.1%	12.2%	10.8%	

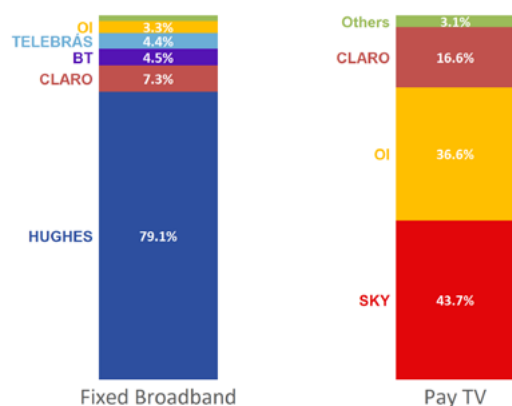
Fixed broadband	FIXED BROADBAND, PER GROUP AND TECHNOLOGY								
	Group	Accesses	Optic Fiber	Coaxial Cable	Twisted-pair cable	Radio	Indefinite	Satellite	Market Share
	CLARO	9,768,259	545,728	9,119,517	72,710	5,704	0	24,600	24.8%
	VIVO	6,331,075	4,149,304	59	2,181,712	0	0	0	16.1%
	OI	5,238,178	3,273,600	123	1,940,656	12,596	0	11,203	13.3%
	Other	18,038,187	14,679,227	198,366	1,061,261	1,796,727	0	302,606	45.8%
	TOTAL	39,375,699	22,647,859	9,318,065	5,256,339	1,815,027	0	338,409	100%
	PERCENTAGE	100%	57.5%	23.7%	13.3%	4.6%		0.9%	

Fixed telephony	ON SERVICE ACCESSES, FIXED TELEPHONY		
	Group	Accesses	Market Share
	OI	9,067,401	30.2%
	CLARO	8,844,287	29.5%
	VIVO	8,174,297	27.2%
	Other	3,918,683	13.1%
	TOTAL	30,004,668	100%

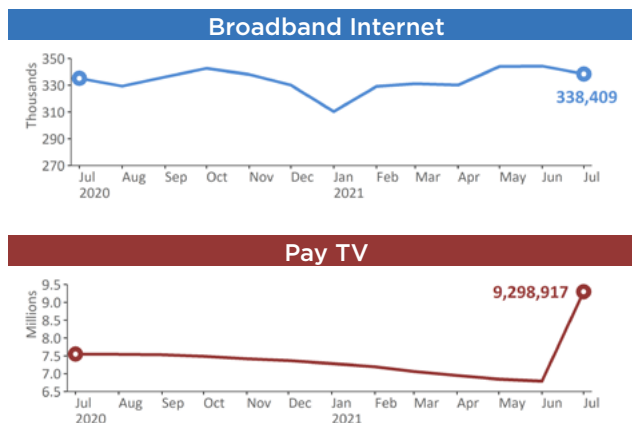
ACCESSES PER TYPE OF GRANTS, FIXED TELEPHONY		
Type	Accesses	Percentual
As a public service concession	15,299,142	51.0%
As a private service	14,705,526	49.0%
TOTAL	30,004,668	100%

Pay TV	PAY TV, PER GROUP AND TECHNOLOGY						
	Group	Accesses	Coaxial Cable	Satellite	Indefinite	Optic Fiber	Market Share
	CLARO	7,280,418	5,652,802	1,539,524	0	88,092	44.5%
	SKY	4,064,788	0	4,064,788	0	0	24.8%
	OI	3,499,202	0	3,402,048	0	97,154	21.4%
	VIVO	1,168,474	0	249,712	0	918,762	7.1%
	Other	359,864	122,255	42,845	0	188,909	2.2%
	TOTAL	16,372,746	5,775,057	9,298,917	0	1,292,917	100%
	PERCENTAGE	100%	35.3%	56.8%		7.9%	

Market Share - Satellite



Number of satellite service accesses



Prepaid TV offers known as Sky Livre or similar were considered as Pay TV and, as of July 2021, became part of the subscriber data base made available by Anatel in its publications.