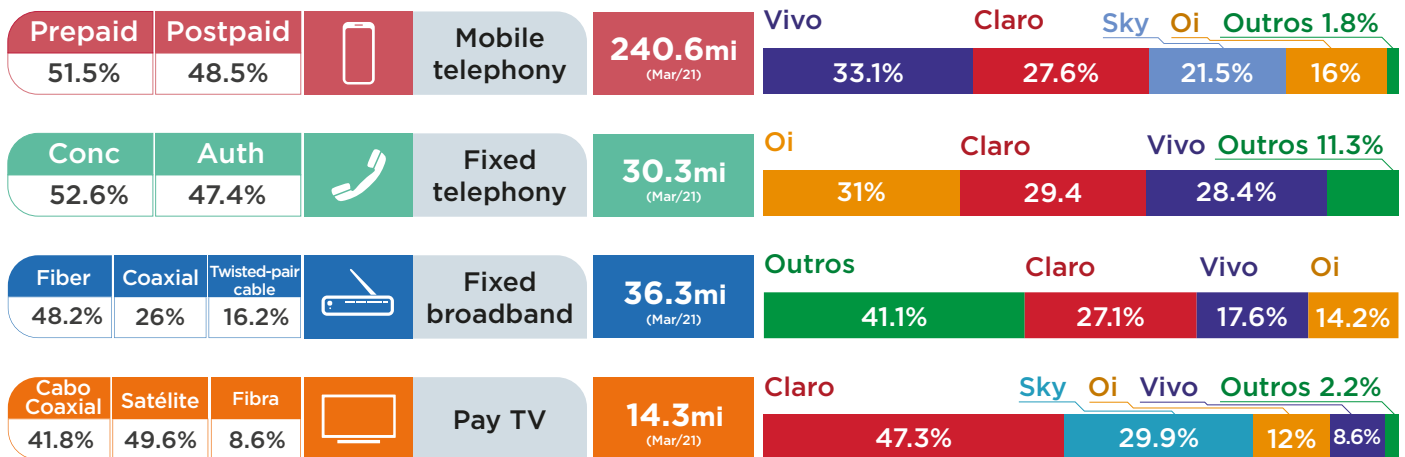


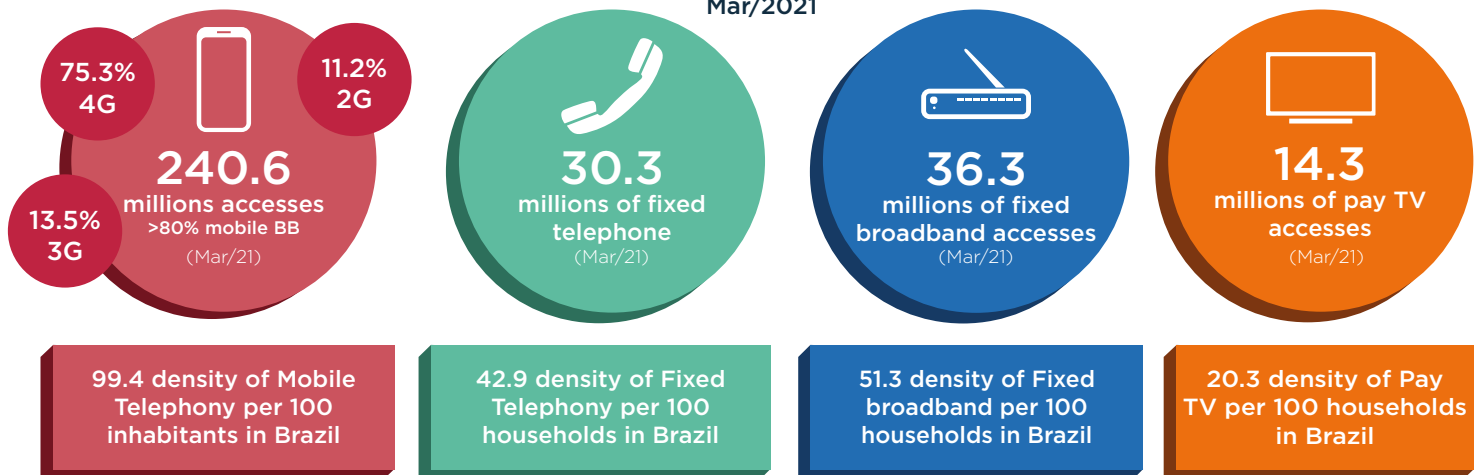


# OVERVIEW OF TELECOMMUNICATIONS IN BRAZIL MAR/2021



**321,4 Millions**

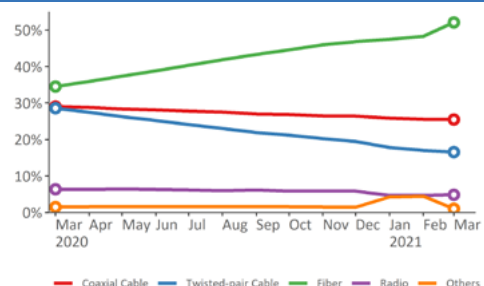
contract of telecom services in  
Mar/2021



Density of Fixed Broadband



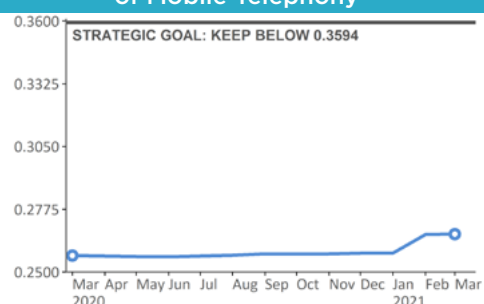
Technological Evolution of  
Fixed Broadband



Market Concentration\*  
of Fixed Broadband



Market Concentration\*  
of Mobile Telephony



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

MOBILE TELEPHONY, PER GROUP AND TECHNOLOGY					
Group	Accesses	4G	3G	2G	Market Share
VIVO	79,681,986	57,674,595	9,026,889	12,980,502	33.1%
CLARO	66,338,464	48,202,994	15,731,934	2,403,536	27.6%
TIM	51,728,062	43,970,990	4,250,398	3,506,674	21.5%
OI	38,563,865	28,263,442	3,191,244	7,109,179	16.0%
Other	4,245,869	3,142,630	267,964	835,275	1.8%
TOTAL	240,558,246	181,254,651	32,468,429	26,835,166	100%
PERCENTAGE	100%	75.3%	13.5%	11.2%	

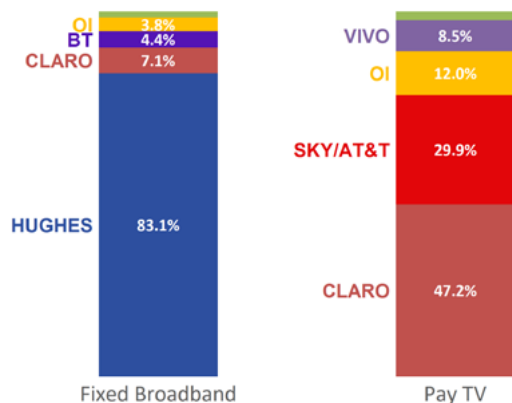
Fixed telephony	ON SERVICE ACCESSES, FIXED TELEPHONY		
	Group	Accesses	Market Share
	OI	9,392,835	31.0%
	CLARO	8,904,240	29.4%
	VIVO	8,597,282	28.4%
	Other	3,417,733	11.3%
	<b>TOTAL</b>	<b>30,312,090</b>	<b>100%</b>

ACCESSES PER TYPE OF GRANTS, FIXED TELEPHONY		
Type	Accesses	Percentual
As a public service concession	15,911,038	52.5%
As a private service	14,401,052	47.5%
<b>TOTAL</b>	<b>30,312,090</b>	<b>100%</b>

Fixed broadband	FIXED BROADBAND, PER GROUP AND TECHNOLOGY							
	Group	Accesses	Optic Fiber	Coaxial Cable	Twisted-pair cable	Radio	Indefinite	Market Share
	CLARO	9,825,150	511,984	9,250,773	32,920	6,008	0	27.1%
	VIVO	6,380,655	3,746,382	59	2,634,214	0	0	17.6%
	OI	5,134,644	2,777,182	123	2,332,073	12,629	0	14.2%
	Other	14,912,778	11,627,608	205,725	1,098,915	1,623,681	62,287	41.1%
	<b>TOTAL</b>	<b>36,253,227</b>	<b>18,663,156</b>	<b>9,456,680</b>	<b>6,098,122</b>	<b>1,642,318</b>	<b>62,287</b>	<b>100%</b>
	<b>PERCENTAGE</b>	<b>100%</b>	<b>51.1%</b>	<b>26.1%</b>	<b>16.8%</b>	<b>4.5%</b>	<b>0.2%</b>	<b>9%</b>

Pay TV	PAY TV, PER GROUP AND TECHNOLOGY					
	Group	Accesses	Coaxial Cable	Satellite	Indefinite	Market Share
	CLARO	6,764,597	5,886,863	800,753	0	47.3%
	SKY/AT&T	4,284,348	0	4,284,348	0	29.9%
	OI	1,723,795	0	1,627,588	0	12.0%
	VIVO	1,223,505	0	309,623	0	8.6%
	Other	311,414	115,156	41,192	0	2.2%
	<b>TOTAL</b>	<b>14,307,659</b>	<b>6,002,019</b>	<b>7,063,504</b>	<b>0</b>	<b>100%</b>
	<b>PERCENTAGE</b>	<b>100%</b>	<b>49.4%</b>	<b>41.9%</b>		<b>8.7%</b>

Market Share - Satellite

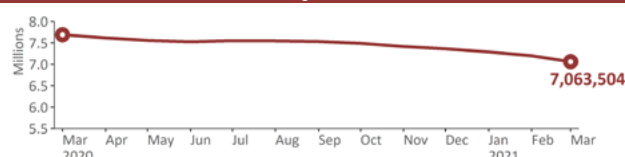


Number of satellite service accesses

Broadband Internet



Pay TV



In January 2021, there was a change in access data collection, according to [Resolution No. 712/2019](#), and some databases are still undergoing adjustments.