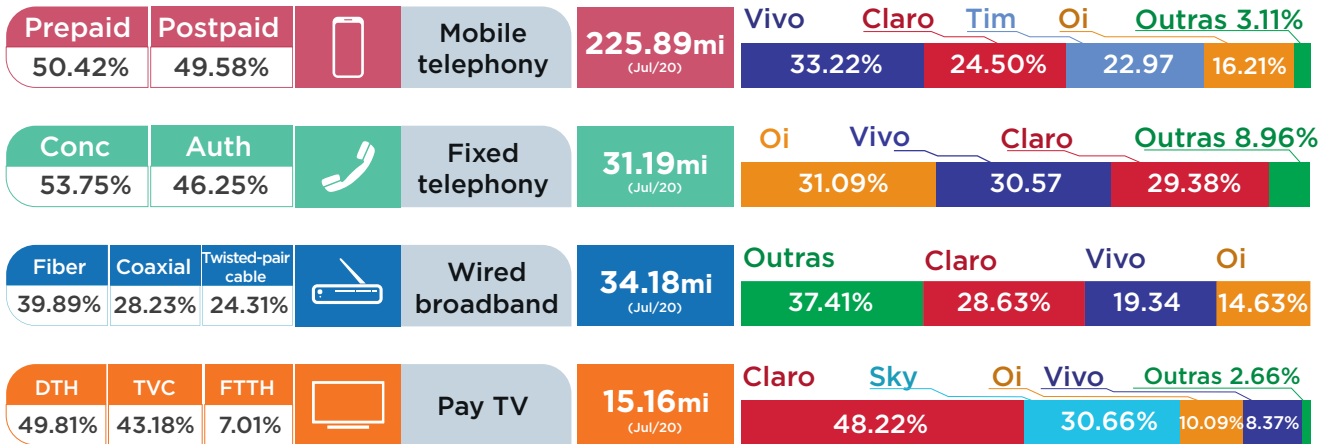


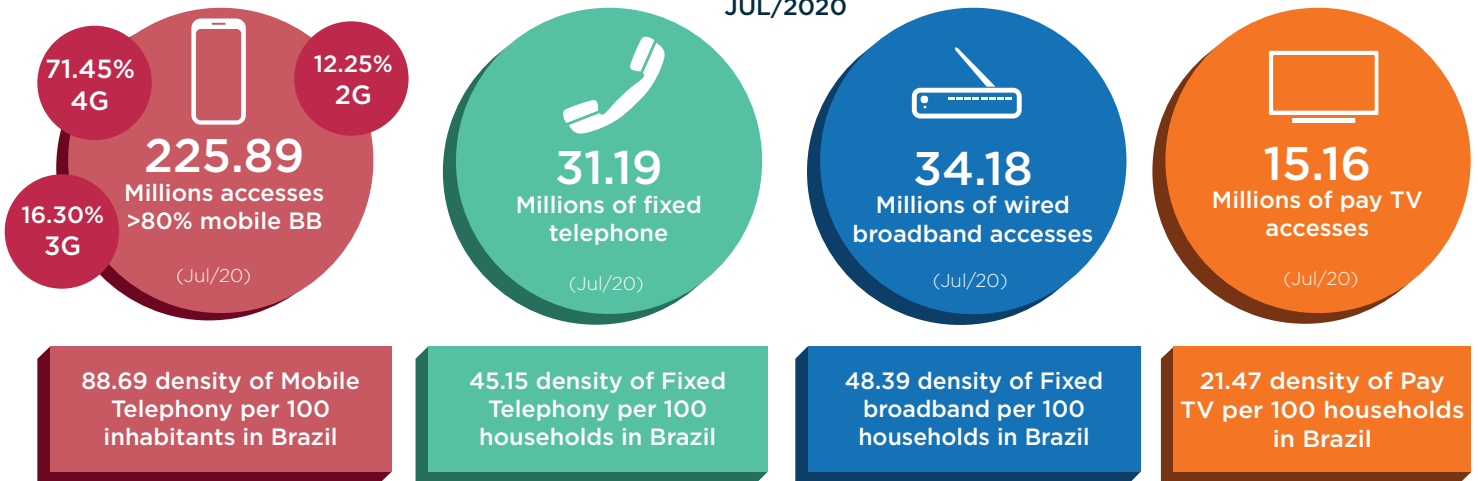


OVERVIEW OF TELECOMMUNICATION IN BRAZIL JUL/2020

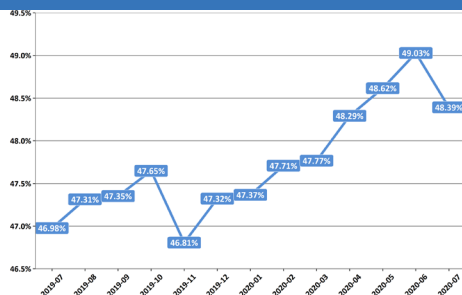


306.42 Millions

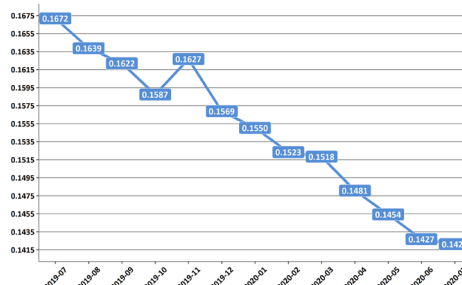
contract of telecom services in
JUL/2020



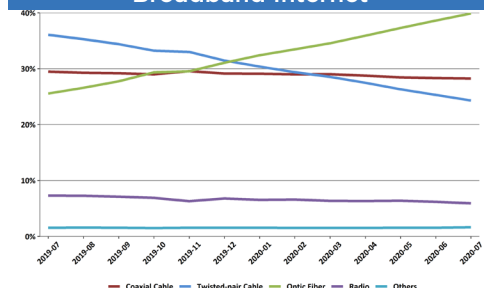
Density of Fixed Broadband



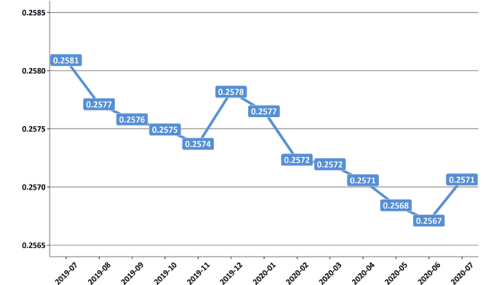
Market Concentration of Fixed Broadband



Technological Evolution of
Broadband Internet



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	75,031,255	51,867,957	10,149,571	13,013,727	33.22%
CLARO	55,346,308	38,269,133	15,648,122	1,429,053	24.50%
TIM	51,881,927	39,685,983	6,528,734	5,667,210	22.97%
OI	36,609,851	25,968,106	3,766,581	6,875,164	16.21%
OTHER	7,024,013	5,598,368	727,835	697,810	3.11%
TOTAL	225,893,354	161,389,547	36,820,843	27,682,964	100.00%
PERCENTAGE	100.00%	71.45%	16.30%	12.25%	

Fixed telephony

ON SERVICE ACCESSES, FIXED TELEPHONY

Group	Accesses	Market Share
VIVO	9,695,815	31.09%
OI	9,533,163	30.57%
CLARO	9,161,157	29.38%
OTHER	2,795,659	8.96%
TOTAL	31,185,794	100.00%

ACCESSES PER TYPE OF GRANTS, FIXED TELEPHONY

Type	Accesses	Percentage
As a public service concession	16,763,241	53.75%
As a private service	14,422,553	46.25%
TOTAL	31,464,707	100.00%

Wired broadband

WIRED BROADBAND, PER GROUP AND TECHNOLOGY

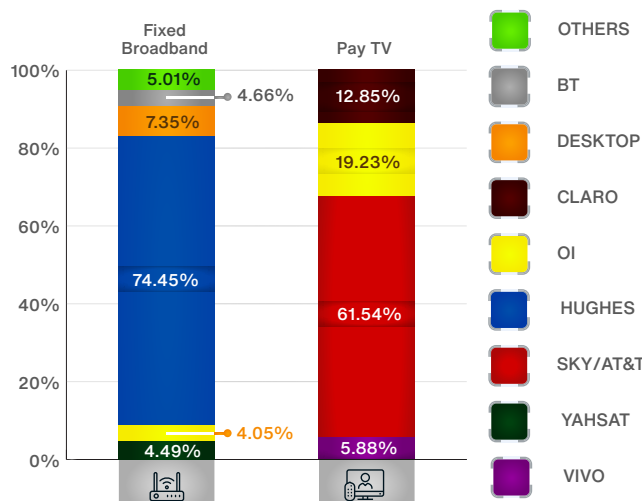
Group	Accesses	Twisted-pair cable	Coaxial cable	Optic Fiber	Radio	LTE	Satellite	Market Share
CLARO	9,784,829	77,109	9,288,817	394,269	14,602	0	10,032	28.63%
VIVO	6,610,527	3,538,087	0	3,072,440	0	0	0	19.34%
OI	4,999,718	3,192,806	0	1,777,374	15,968	0	13,570	14.63%
OTHER	12,786,250	1,502,627	360,826	8,389,973	1,993,696	227,601	311,527	37.41%
TOTAL	34,181,324	8,310,629	9,649,643	13,634,056	2,024,266	227,601	335,129	100.00%
PERCENTAGE	100.00%	24.31%	28.23%	39.89%	5.92%	0.67%	0.98%	

Pay TV

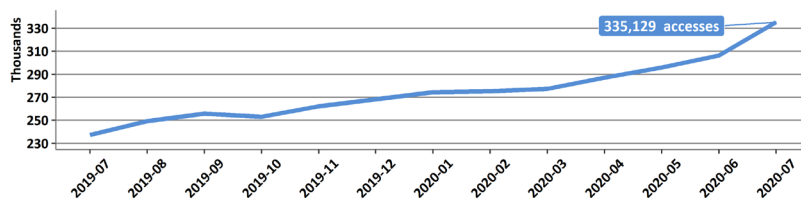
PAY TV, PER GROUP AND TECHNOLOGY

Group	Accesses	DTH	FTTH	MMDS	TVA	TVC	Market Share
CLARO	7,311,170	970,564	0	0	0	6,340,606	48.22%
SKY/AT&T	4,648,176	4,648,176	0	0	0	0	30.66%
OI	1,530,320	1,452,109	78,211	0	0	0	10.09%
VIVO	1,269,188	443,785	825,403	0	0	0	8.37%
OTHER	403,762	38,431	159,136	240	64	205,891	2.66%
TOTAL	15,162,616	7,553,065	1,062,750	240	64	6,546,497	100.00%
PERCENTAGE	100.00%	49.81%	7.01%	0.00%	0.00%	43.18%	

MARKET SHARE - SATELLITE



Number of satellite service accesses, Broadband Internet



Number of satellite service accesses, Pay TV

