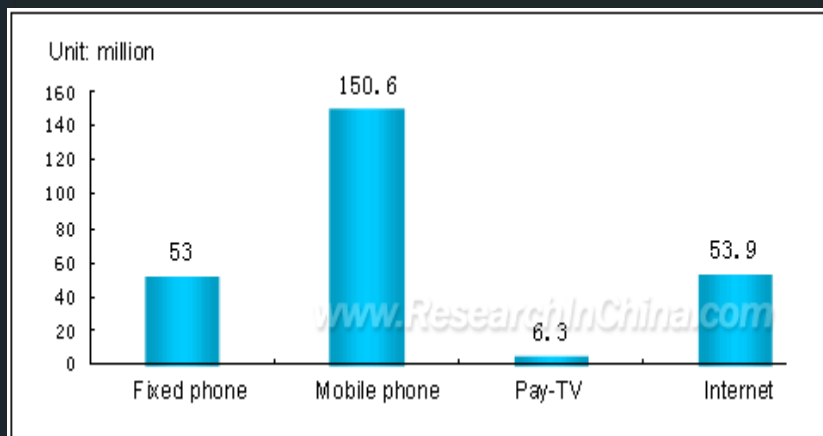


# Brazil Telecom Industry Report, 2008



Brazil is the largest country in Latin America in terms of area and population, and it is also the largest telecom market in Latin America. The telecom management and operation is at a relative high level in Brazil, and its telecom supervisory also sets an example for the developing countries. Brazil has a great potential telecom market. In the year of 2008, the subscriber quantity of fixed phone, mobile phone and internet was 53 million, 150 million and 53.9 million respectively, and the coverage rate was 28%, 79% and 28% respectively; and the telecom operating revenue was totaled at US \$55.8 billion, up US\$7.4 billion than 2007.

## Telecom Subscriber Quantity in Brazil, 2008



Source: ResearchInChina

The three telecom giants, Vivo, Oi and Claro together shared 80.7% of Brazil telecom market in 2008. Vivo, Oi and Claro are advantaged at mobile communication, fixed line and Pay-TV respectively.

## Market Share Distribution of Telecom Operators in Brazil, 2008

2008	Operating revenue	Market share			
		Fixed phone	Mobile Phone	Broadband	Pay-TV
Telefonica/Vivo	29.5%	28.2%	29.8%	25.5%	7.5%
Oi/Brt	28.7%	53.4%	19.9%	38.2%	1.0%
Claro/Embratel/Net	22.6%	13.0%	25.7%	22.1%	48.6%
Tim	11.9%	0.0%	24.2%	0.0%	0.0%
Outros	7.4%	5.4%	0.4%	14.2%	43.0%
Total Brasil	100.0%	100.0%	100.0%	100.0%	100.0%

Source: ResearchInChina

This report comprehensively studies Brazil telecom market on the aspects of supervisory polices, operations and key operators, involves the businesses of fixed phone, mobile communication, internet and 3G.

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