Panel 4: Digital Inclusion • DSA Global Summit 2026

# Brazil: A Different Path to Digital Inclusion

What Brazil’s regional ISP experience can teach us about local entrepreneurship, competition and spectrum management

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ABRINT

THE BRAZILIAN PATH

# Why regional ISPs succeeded

Business models adapted to the economics of the last mile

**LOCAL KNOWLEDGE**

Closer to demand and customer needs

**LEAN OPERATIONS**

Lower overhead and faster decisions

**FLEXIBLE INVESTMENT**

Networks expanded step by step as demand grew

**ADAPTED OFFERS**

Prices and service models matched local reality

**LAST-MILE FOCUS**

Strong presence in small and underserved markets

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**They invested where traditional large-scale models were often less attractive.**

**Local businesses became infrastructure builders.**

A PRO-COMPETITION ENVIRONMENT

# What made this ecosystem possible?

Competition converted local entrepreneurship into large-scale private investment

**COMPETITION**

More players and more alternatives for consumers

**ENTREPRENEURSHIP**

Thousands of local companies willing to invest

**LOWER BARRIERS**

Asymmetric regulation reduced entry barriers

**PRIVATE INVESTMENT**

Market demand mobilized capital

## DIGITAL INCLUSION

Expansion beyond universal-service obligations

**Competition became a tool for digital inclusion.**

*Source: Anatel — fixed broadband is privately provided; regulatory measures reduced barriers for smaller providers.*

LATEST DATA

# Brazil: scale, fiber and quality

A large fixed-broadband ecosystem, increasingly built by regional providers

| 56.8M | 44.7M | 309.8 Mbps | ~21k | 64% |
|---|---|---|---|---|
| fixed broadband connections | fiber connections • 80%+ | median fixed download speed | service providers | of fixed-broadband CAPEX by PPPs* |
| Jul 2026 | 2Q 2026 | Sep 2026 | Jul 2026 | Anatel sector study |

QUALITY MATTERS FOR INCLUSION

**Brazilian fixed broadband now delivers median download speeds above 300 Mbps.**

INTERIORIZATION

**Small providers account for 91% of fiber connections in municipalities up to 30,000 inhabitants.**

**Competition delivered not only coverage — but also high-capacity networks.**

*Sources: Anatel 2Q/Jul 2026; TCU Sep 2026; Speedtest Global Index Sep 2026. *PPPs = small providers.*

THE RESULT

# Regional ISPs moved from challengers to the majority

A structural transformation in Brazil's fixed-broadband market

**35.8%**

**market share**
**2Q 2020**

**56.4%**

**market share**
**2Q 2025**

**91%**

**of fiber connections in towns**
**≤ 30,000 inhabitants**

WHAT THIS MEANS

- Thousands of locally owned networks
- Strong fiber deployment
- Presence beyond major urban centers
- Significant private infrastructure investment

**Regional providers are no longer a niche segment — they are a structural part of Brazil's broadband ecosystem.**

*Sources: Anatel market data (Abrint base deck); TCU, Sep 2026.*

THE POLICY LESSON

# Spectrum policy is also competition policy

Spectrum rules influence who can enter, invest and serve underserved communities

## SPECTRUM RULES

- ASSIGNED
- LICENSED
- PRICED
- SHARED

## MARKET OUTCOMES

- Who can enter the market
- Who can invest
- Which business models are viable
- Who can reach underserved communities

**Flexible tools already in use or under discussion:**

**Local licensing • Shared access • Unlicensed spectrum • AFC**

**Spectrum rules can enable competition — or reinforce concentration.**

A CURRENT BRAZILIAN CASE

# 6 GHz: from in-home Wi-Fi to last-mile connectivity

Standard Power + AFC can extend unlicensed spectrum into the access network

## BRAZIL TODAY

| | |
|---|---|
| 500 MHz | lower 6 GHz remains available for unlicensed / Wi-Fi |
| CP 41/2026 | Standard Power Wi-Fi certification requirements |
| CP 42/2026 | Automated Frequency Coordination (AFC) rules |
| 700 MHz | upper 6 GHz proposed for IMT / mobile |

## DIGITAL-INCLUSION OPPORTUNITY

- Outdoor Wi-Fi
- Unlicensed FWA
- Higher-capacity last mile
- Rural and underserved areas
- AFC protection for incumbents

**ABRINT SUPPORTS THIS DIRECTION**

**Wi-Fi can be part of the access network — not only the in-home network.**

*Sources: Anatel CP 41/2026 and CP 42/2026; DSA submissions on 6 GHz; ABRINT perspective.*

THE CONCLUSION

# Different networks. One goal: meaningful connectivity

No single technology solves the whole connectivity challenge

**FIBER**

High-capacity backbone and access

**WI-FI / FWA**

Flexible, lower-cost last mile

**MOBILE**

Mobility and wide-area access

**SATELLITE**

Reach where terrestrial networks are difficult

## MEANINGFUL CONNECTIVITY

**Affordable • Reliable • High-capacity • Available where people need it**

**Regulation should create the conditions for technologies and business models to compete and complement each other.**

**The goal is more flexible access to spectrum — so that more people can be connected.**

# Thank you

Erich Rodrigues • Member of the Board of Directors

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