



Panel 4: Digital Inclusion • DSA Global Summit 2026

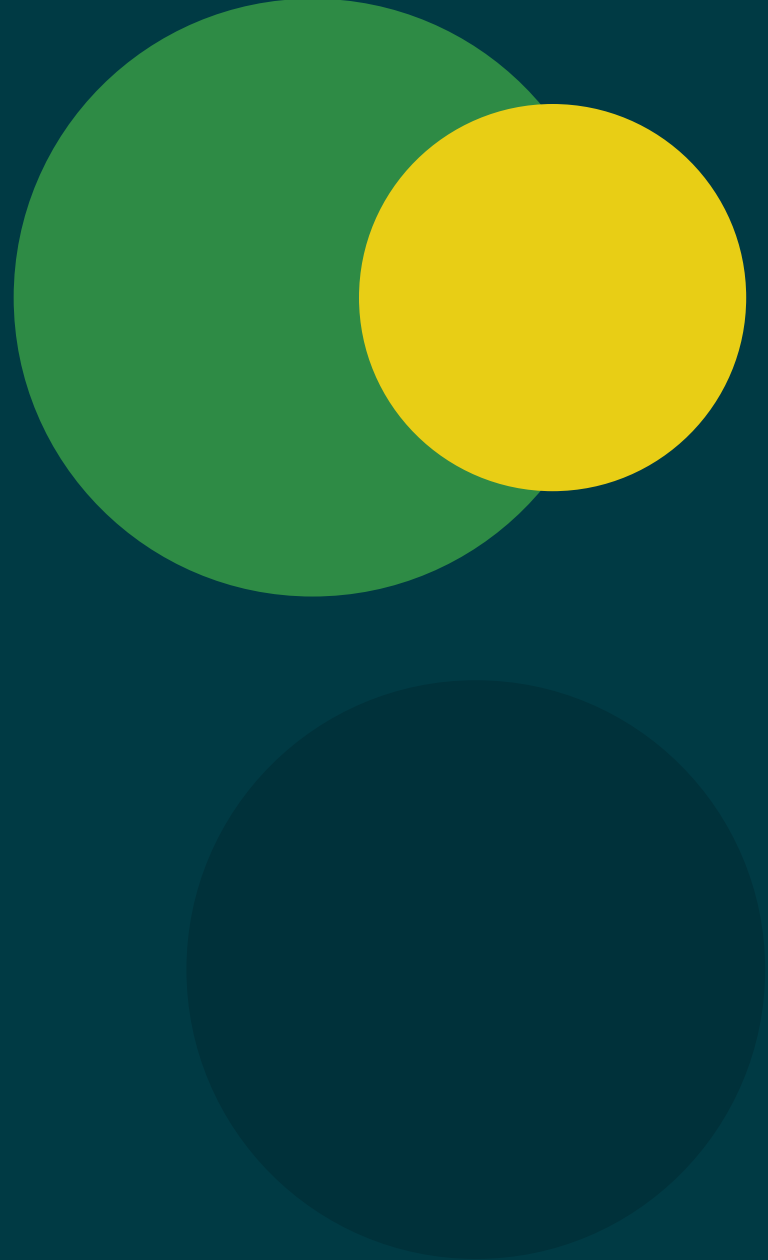
Brazil: A Different Path to Digital Inclusion

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

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ABRINT



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

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

Local businesses became infrastructure builders.



What made this ecosystem possible?

Competition converted local entrepreneurship into large-scale private investment

COMPETITION

More players and more
alternatives for consumers

ENTREPRENEURSHIP

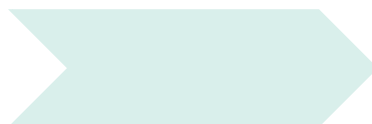
Thousands of local companies
willing to invest

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.



Brazil: scale, fiber and quality

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

56.8M

fixed broadband connections

Jul 2026

44.7M

fiber connections • 80%+

2Q 2026

309.8 Mbps

median fixed download speed

Sep 2026

~21k

service providers

Jul 2026

64%

of fixed-broadband CAPEX by
PPPs*

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.



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.



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.



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

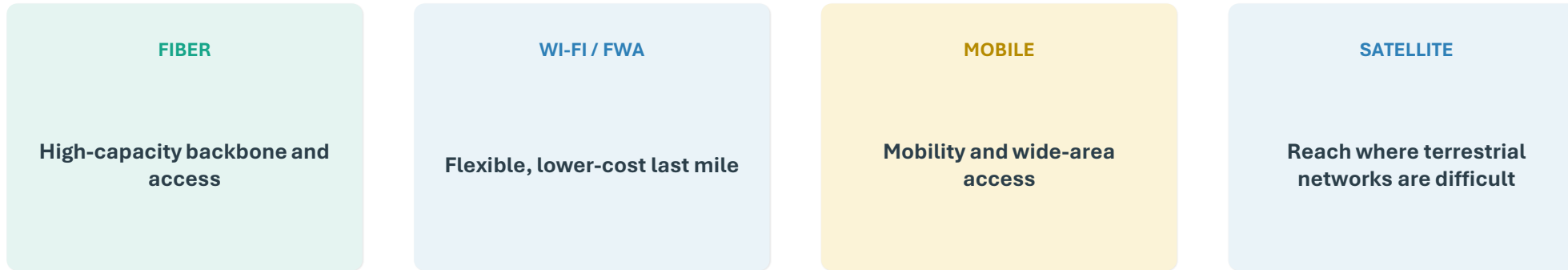
ABRINT SUPPORTS THIS DIRECTION

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



Different networks. One goal: meaningful connectivity

No single technology solves the whole connectivity challenge



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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