



CHAPTER

20 Media Ownership and Concentration in Brazil

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Abstract

This chapter considers media ownership and concentration in Brazil. After completing an overview of the Brazilian media landscape, the remainder of the chapter describes print media (newspapers, book publishing, magazine publishing), audiovisual media (radio, broadcast television, multichannel TV platforms, film), telecommunications media (wireline and wireless telecom), and Internet media (Internet Service Providers, search engines, online news market). Brazil has been experiencing major growth in media and telecom services. The main company is the Globo group, which dominates TV and newspapers, with strong positions in radio and magazines. In telecom, the major firms are Oi Telemar, Telefonica, Telmex, and Telecom Italia.

Keywords: Brazilian media market, media industry, media groups, print media, regulation, telecommunications, Internet, Globo, Telefonica, Globo, Oi Telemar, Telmex Brazilian media market, media industry, media groups, print media, regulation, telecommunications, Internet, Globo, Telefonica, Globo, Oi Telemar, Telmex

Subject: Economic Sociology, Social Research and Statistics

Introduction

For many years, the relationship in Brazil among media producers, consumers, and regulators has not been particularly close. But over the past decade, they have come together in deliberating media legislation regarding shareholding and concentration issues. The proliferation of Internet platforms for traditional media sources like radio, TV broadcasting, and print publications has altered circulation patterns and consumer demands. This is mainly due to the significant growth of a new stratum of consumers, the “C class,” Brazil’s newly emergent middle class that has grown substantially mainly from 2006 to 2012.¹

Public and corporate administrators have moved to demark a new legal environment for communications, which is inevitable for political reasons—the necessity of reorganizing the sector and instituting new concession rules—as well as for business reasons, in particular by bringing traditional media platforms into the national broadband system. A brief timeline of the government’s actions between January 2009 and January 2011 provides a few clues about the recent course of these issues:

- In 2010, the federal government renationalized Telebras to lead the implementation of the National Broadband Plan. First established in 1972, Telebras was the core of the national telecom market for over three decades. It was responsible for more than 95% of public telecom services in the country until it was privatized in July 1998. One month earlier, in June 1998, the Telebras system marked the installation of 18.2 million fixed terminals and 4.6 million phones distributed over 22.9 million localities.² In November 2010, six months after it was renationalized, the federal government announced that Telebras’s fiber optic network would be used to broadcast public digital terrestrial

television (DTT), which in the original plan was predicted to have required a net investment of US\$1.4 billion (R\$1.5 billion).³

- In November 2010, the President of the Senate reinstated the Social Communication Council, and requested that unions and media companies nominate representatives. As an auxiliary organ of Congress, anticipated in the 1988 Constitution and formally set up in 2002, the Council's role had been gradually reduced: in 2007 only one meeting was held, and after 2008 no new members joined the Council.⁴
- In December 2010, a draft version of the federal legislation for media was circulated unofficially as the "General Law for Social Communication," which among other issues anticipated the creation of a National Communications Agency (NCA) as a regulator.
- In June 2010, a bill on "audiovisual communication with conditional access" was submitted to a vote in the Senate. In September 2011, it was issued as Law No. 12.485.⁵

Expanded information collection of invoicing, composition, and mergers in Brazilian media markets demonstrates that the investigation and organization of the (not always) available information has been deemed necessary by regulators. The task still to be accomplished will provide legislators, governments, society, and fellow researchers with reliable data to evaluate these government interventions in the communications sphere of the economy.

The challenge for Brazilian research on ownership and concentration in the media and telecommunications industry is the lack of comprehension of strategic matters. Government policies and corporate agreements very often ground adopted decisions in restricted spheres. But because these decisions affect all consumers and producers indirectly, it is imperative to advance beyond circumstantial studies that do not map out continuities and trends. This means investing in academic studies that are impartial and independent.

When it comes to media concentration and regulation in Brazil, the literature on political economy of communications constitutes the most frequent theoretical reference. Lima (2001), Bolaño (2007), Jambeiro (1998), Brittos and Haussen (2009), Possebon (2007), Santos and Silveira (2007), and Dantas (2002) have authored work that deals with issues in monopoly, concentration, and national public policy within the broader perspective of the political economy of information access and Brazilian culture. There are practically no grounding studies focused on the economy of communications, the object of which would be to study in detail the forces and constraints that regulate media market structures internally and externally, and to examine consumer demand. Likewise, there are no analyses, as already identified by Noam and Wolfson (1997), that consider the assumption that "the telecommunications industry, long organized... along geographic and product lines that were both a shield and a weapon, is being transformed by contradictory forces: on the one hand, the trend toward global expansion by carriers, and on the other hand, fragmentation and entry in local communications," in a period of reduced competition and of greater enterprise integration, generating a complex market web.⁶ For example, media conglomerates have grown over the past decade in Brazil. Telecom service contractors, for example, reached a market value of US\$73 billion (R\$79.3 billion) in shares negotiated in the stock market at the end of September 2010, according to the Brazilian Stock Exchange.⁷

This large volume of investment is the result of growth in the market that began in 1999, following the 1998 privatization of regional wireline telecoms that had been part of Telebras. Brazil went from having 25 million wireline and 15 million mobile subscribers in 1999 to having 41.8 million and 191.5 million, respectively, by 2010.⁸ In this same decade, telephone operators contributed to the evolution of broadband services (which were practically nonexistent in 1998); as of 2010, there are 12.8 million broadband subscribers in Brazil. Cable TV companies have also benefitted from these circumstances: in 2010, they had 9.1 million subscribers, though the slower rhythm of expansion in this period was partly due to economic reasons (limited popularity of the paid service) and to infrastructure (lack of cables and retransmission towers for wireless cable systems).

Cable's slow growth was also due to flawed political decisions, such as the privatization of the Telebras system in 1998, which included the selling of Embratel, a state company that also operated the commercial BrasilSat satellites, to the US telecom major Verizon (America Movil, owned by the Mexican telecom tycoon Carlos Slim, subsequently acquired Embratel). This decision delayed the dissemination of the direct-to-home (DTH) and satellite cable TV systems.⁹

Almost simultaneously to the privatization of telephony, the Law of Community Broadcasting—Law 9.612 of 19 February 1998—was instituted in Brazil.¹⁰ As the first specific legislation for radio and TV broadcasting to be enacted in around 30 years, the law allowed hundreds of local clandestine broadcasting stations, popularly known as *rádios piratas* (pirate radio), to transmit from 2001 on with the consent of the Ministry of Communications, after they had been operating without licenses for almost 20 years in nearly all Brazilian states.

Despite criticism regarding the kinds of financing permitted and limited antenna range, communitarian low-frequency radios registered their largest increase ever in the first decade of the 21st century, growing from 980 channels in 2001 to 3,897 by 2009.¹¹ This shows the interest of Brazilians, independent of social background, in alternative media forms, and it is one of the elements that must be considered in order to understand the dynamics of online social networking in Brazil.

Another issue is the revenue generated by federal taxes on commercial telecoms. According to the National Agency of Telecommunications (ANATEL) and the National Treasury, between 2001 and the first trimester of 2010, US\$20.3 billion (R\$22.1 billion) was collected—of which US\$14.6 billion (R\$15.9 billion) went to supply the Fiscal Telecommunications Fund (FISTEL), US\$4.3 billion (R\$4.7 billion) went to for the Universalization of Funds of the Telecommunications Services (FUST), and US\$1.4 billion (R\$1.5 billion) went to the Fund for the Technological Development of Telecommunications (FUNTELE).¹² However, FUST, created to universalize telecom services and facilitate access for low-income and rural consumers, has not seen any of these programs yet implemented.

Some contextual data may contribute to a better understanding of the economic and cultural context for Brazilian media over the last 50 years, starting with the demographic numbers. From a predominantly rural country in 1960, Brazil has evolved into a markedly urban nation—with 84% of the population of 191 million inhabitants living in cities by 2010.¹³ Internal migratory processes motivated urban expansion, especially by the movement of the inhabitants of the Northeast region, toward the metropolitan areas of São Paulo and Rio de Janeiro.

Families who dominated the production of print newspapers and magazines for decades gradually added to their publishing business radio and television broadcasting, news agencies, and book publishing companies. Until the late 1990s, 10 families controlled most of the media industry in Brazil: the Marinho (news, print publishing, broadcasting) and Brito (news and radio broadcasting) families in Rio de Janeiro; the Frias (newspapers), Mesquita (newspapers and radio broadcasting), Civita (print publishing), and Saad (broadcasting) families in São Paulo; the Sirotsky family (newspapers and broadcasting) in the southern states of Rio Grande do Sul and Santa Catarina; the Câmara family (newspapers and broadcasting) in the midwestern states of Goiás and Tapajós; the Maiorana family (newspapers and radio broadcasting) in the northern state of Pará; and the Abravanel family (TV broadcasting) in São Paulo.¹⁴ A commonality among these families is their interest in the mass media industry; just a few families ventured into other businesses, such as finance.¹⁵

Since the first half of the 1990s, these families expanded their actions to add content distribution structures, online news portals, and Internet service providers (ISPs). Brazilian media conglomerates such as Folhapar (originated in the Frias family), Globopar (originated in the Marinho family), the Abril Group (originated in the Civita family), and the Estado Group (originated in the Mesquita family) are examples of the changes that took place in media production and ownership.

In the case of telecommunications, the main market and legal changes occurred after 1998, with the approval of the new General Telecommunications Law. It broke up the state monopoly of the sector, dividing Telebras into 12 holdings of wireline and mobile telephone services, privatizing Embratel (up until then a state company that managed satellite broadcasting service) and creating the National Agency of Telecommunications (ANATEL). The largest telecom company that emerged was Tele Norte Leste Participações S.A., which administered 16 state wireline operators that covered 64% of the country.

Telemar (created as Consórcio Telemar, later renamed Telemar Participações) has its origin in national groups that reorganized and diversified their investments to dedicate themselves to the exploration of this sector. They included the Andrade Gutierrez Group (which created AG Telecom Participações S.A.); the electronics manufacturer Inepar S.A. (which in 1999 created the business division Inepar S.A. Indústria e Construções and started a joint venture with Lucent Technologies); and La Fonte, a textile and metallurgy manufacturer (created La Fonte Telecom S.A.). The federal government would also maintain a stake in

Telemar Participações by means of the Companhia de Seguros Aliança do Brasil, created in 1997 as a participant of the state conglomerate Banco do Brasil; and of the BNDESPAR, an investment branch of the Banco Nacional de Desenvolvimento Econômico e Social (BNDES). Control of most of the wireless telecom firms, and of the wireline sector, changed into the hands of foreign groups, mainly European and North American. These include the companies Telecom Italia/TIM (Italy); Telefónica (Spain); Telmex/America Móvil (Mexico); Bell South, Sprint, and NII Holdings, Inc. (United States); Portugal Telecom (Portugal); France Telecom and Vivendi (France).

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p. 607

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Print Media

Newspapers

Four groups dominate the daily newspapers market, with a combined 89% market share: Folhapar, Infoglobo, S.A. O Estado de S. Paulo, and the RBS Group, the latter of which operates in the southern states of Santa Catarina and Rio Grande do Sul. All of these dailies were the starting point for what later became Brazil's first family-owned broadcasting and telecom conglomerates. There was no foreign participation in this industry until April 2010, when the Ongoing Group of Portugal acquired the Arca Group, owner of the *O Dia* daily (Table 20.1).

Table 20.1. Daily Newspapers (Market Shares by Circulation), 2000–2010

	2000	2004	2008	2009	2010
Folhapar S.A. ¹ (Frias Family) (<i>Folha de S. Paulo, Agora SP, Expresso, Valor - Econômico</i>)	30.7	34.5		27.3	27.9
Infopar (Marinho Family) Infoglobo Comunicação e Participações S.A.	20.8		30.1	27.2	28.4
Estado Group (<i>O Estado de S. Paulo, Jornal da Tarde</i>)	27.7	25.3	21.7	21.1	25.2
RBS Group (Sirotsky Family) (<i>Diário Gaúcho, Zero Hora</i>)	6.4	10.3	9.7	6.9	6.7
Diários Associados Group		7.0	8.4		
Arca Group (Ongoing, Portugal) (<i>Meia Hora</i>) ²	10.0	8.6	6.2		7.5
Jornal do Brasil		6.9	7.6		
Sada Group (Vittorio Mediolli) (<i>O Tempo, Super Notícia</i>)		2.1 ³	3.5		
Caldas Junior Group (Record Group) (<i>Correio do Povo</i>)			2.9		
Areté Editorial (<i>Lance!</i>)	1.0				
Others	3.4	5.3	9.9	17.5	4.3
Total Revenue (bil R\$) ⁴	2.0	2.4	3.4	3.1	3.0
Total Revenue (bil US\$)	1.1	1.2	1.9	1.6	1.7
Average Daily Circulation ANJ (mil)	7.8	6.5	8.4	8.1	8.1
Average Daily Circulation IVC (mil) ⁵	3.9	3.3	4.3	4.1	4.3
C4	89.2	78.7	69.9	82.5	89
HHI	2,419	2,111	1,658	1,978	2,321
<i>N</i> (>1%)	7	7	8	4	5
Noam Index	855	798	586	989	1,038

Source: National Association of Newspapers (ANJ), 2006–2011; Circulation Audit Institute (IVC), 2011; *InterMeios* Project, 2001–2011.

- 1 *Valor Econômico* was launched in May 2000 as a joint venture of Infoglobo and Folhapar, each with 50% of the shares.
- 2 The Carvalho family controlled the Arca Group until April 2010, when the Ongoing Group, based in Portugal, bought it.
- 3 In 2006.
- 4 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.
- 5 IVC has the most reliable (certified) data on circulation, but not all newspapers are affiliated with IVC, so ANJ's daily circulation estimates are included here as well.

The federal government is the largest consumer of books in Brazil: it accounted for 40% of all book sales in the past decade, primarily textbooks. Mainly national companies controlled the industry until 1999, when France's Vivendi became the first foreign investor through the acquisition of a percentage of Editora Abril's book publishing branch. The book publishing sector has begun to register ample movement in terms of mergers and acquisitions in the last decade, beginning in 1999 with Vivendi's investment in the Abril Group's Editora Abril. The most significant shift in this segment occurred with the heavy investment of Spanish firms, especially the PRISA Group, which between 2001 and 2005 acquired Editora Moderna, the third largest educational book publisher and, in 2008, had taken over the leadership of the book publishing market. PRISA controls 13.9% of the market share, with the Abril Group's imprints holding 11.5% and the Saraiva and Ediouro Publicações groups with 9.3% and 5.1%, respectively. In 2003, Planeta Editora of Spain started a local venture and succeeded in acquiring the rights to bestselling Brazilian authors like Paulo Coelho. And in 2004, the Spanish firm Edições SM entered the Brazilian market as Edições SM Brasil with a US\$14.8 million (R\$20 million) investment. Other important international book publishers with a presence in Brazil include the Darby Overseas Investment Fund, which held a 35% stake in the Siciliano Group from 1998 to 2008. Almost 15% of the Saraiva Group belongs to foreign investors, including the International Financial Corporation, a World Bank division, that in 1999 acquired 2.6% of the book publisher. In 2008, the German publishing company Bertelsmann AG was interested in the Rio de Janeiro-based Record Editorial Group, but there was no acquisition. (Table 20.2).

Table 20.2. Book Publishing (Market Shares by Revenue), 1996–2010¹

	1996	2000	2004	2006	2008	2009	2010
PRISA (Polanco Family, Spain)					15.2	15.9	13.9
Moderna		4.4	6.6	6.8	9.5		
Objetiva							
Abril Group ² (Civita Family; Naspers, South Africa)	13.7	12.7	16.1	11.9	11.6	15.1	11.5
Saraiva Group (Saraiva Family)	4.6	8.6	9.5	8.5	10.8	10.1	9.3
Siciliano	0.7	0.7	0.5	0.3			
Ediouro Publicações ³	0.5	2.8	5.4	6.3	7.9	7.6	5.1
Editora FTD ⁴	7.4	8.3	9.3	10.2	9.9	9.9	3.6
Sextante ⁵		1.5	1.0	1.1	2.7	3.6	3.6
Record Editorial Group ⁶	2.7	2.4	5.4	4.2	4.5	3.0	2.1
Others	65.5	54.6	42.1	45.5	34.2	34.8	53.0
Total Revenue (mil R\$) ⁷			1,847		2,521		
Total Revenue (mil US\$)			942		1,412		
C4	30.1	36.2	41.7	40.1	47.5	51.0	39.8
HHI	292	364	542	466	670	761	467
<i>N</i> (>1%)	5	7	7	7	7	7	7
Noam Index	103	121	181	165	253	287	176

Source: National Association of Magazine Editors (ANER), 2007–2010; Circulation Audit Institute (IVC), 2010–2011; InterMeios Project, 2001–2010.

- 1 There are two other important book publishing houses operating in this sector, but their market shares are not tracked. They are São Paulo's Schwarcz Editors Ltd. (which has seven imprints, including Penguin Book's Brazilian arm); and Rocco Editors of Rio de Janeiro.
- 2 Ática/Scipione. Naspers, the South African media group, has a 30% stake in Abril.
- 3 Agir, Nova Fronteira/Nova Aguilar, Thomas Nelson Brazil (joint). The US publishing house Thomas Nelson launched the venture in 2007 and has a 50% stake in the joint venture, which primarily publishes religious (Christian) literature.
- 4 Quinteto.
- 5 Intrínseca.
- 6 Editora Record, BCD União de Editoras, Harlequin Enterprises (joint). The Canada-based publisher Harlequin inaugurated a Brazilian arm in 2005 with the Record Editorial Group, specializing in romantic fiction.
- 7 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

The first major sign of an emerging e-book market in the country was the acquisition by Penguin, a division of the Pearson Group, of a 45% share of Companhia das Letras, part of Schwarcz Editors Ltd. Another sign in this area was the arrival of Amazon.com from the United States, which will almost certainly affect the market for electronic books and the business model of the major national bookstore chains after starting its e-book operations in Brazil in December 2012.¹⁶ According to the first “book census” of Brazil using data collected between November 2010 and April 2011, there are 750 active publishers in the country, one-third of which do not match the criteria of UNESCO for firms to publish at least five titles and 5,000 copies per year. Of the 498 publishers that met this specification, only 16 demonstrated incomes of more than

US\$16.4 million (R\$28 million) annually. Almost half of them earn less than US\$0.4 million (R\$0.6 million) annually.¹⁷

Magazines

Two families dominate the magazine industry: the Marinhos, of Globopar, and the Civitas, of the Abril Group. Globopar and Abril control the magazine sector with approximately 51% combined of the national market in 2009. The Abril Group, though, is the dominant player, with its publishing strategy focused on both weekly and monthly editions. The Abril Group is the most traditional magazine printing company in the country, founded in the 1950s by Victor Civita, an American publisher of Italian origin, to print Portuguese editions of Walt Disney comic books.

p. 613 In 2004, the Abril Group became the first Brazilian media conglomerate to attract foreign direct investment (permitted on the constitutional amendment approved two years previously by Congress). The Capital Group, one of the largest US hedge fund managers, acquired a 13.8% stake in Abril. By that time, Editora Abril was the magazine industry's market leader, with over 200 publications and 26 million readers nationwide. In addition, it held TVA, the first pay TV service launched in Brazil, and owned 70% of Viacom's local MTV Channel, MTV Brasil. The uncertainty regarding the successors of its CEO Roberto Civita, though, led the editorial group to invest in education, which was viewed as more promising than the magazine industry, by creating the Abril Educação Company in 2009, which would have no relation to the rest of Abril Media. However, with changes in the publishing industry, together with a fragmentation of audiences interests, Abril Media has either closed down companies (such as the record company Abril Music, the music website *Usina do Som*, and the pay TV channels Fiz TV and Idea TV) or sold its shareholdings, as was the case with the BOL Internet service provider; its licenses for HBO Brazil, DirecTV Latin America, ESPN Brazil, and Eurochannel; and the direct-to-home (DTH) satellite service TVA. Presently, the Abril Group is focused on its print publishing ventures, as well as on its print distribution and logistics arm DBG (which is a monopolist in print distribution and logistics), the digital-out-of-home (DOOH) advertiser Elemidia, and MTV Brasil (Table 20.3).¹⁸

Table 20.3. Magazine Publishing (Market Shares by Circulation), 2000–2010

	2000	2004	2006	2008	2009	2010
Abril Group (Civita Family; Naspers, South Africa) Editora Abril	55.3	52.5	51.2	34.6	35.9	37.3
Editora Globo (Globopar S.A., Marinho Family)	19.6	15.3	18.4	13.7	15.1	
Editora Escala		7.1			2.9	5.7
Ediouro Group				0.5	1.2	
Others	25.1	25.1	30.4	51.2	46.2	42.0
Total Revenue (bil R\$) ¹	2.0	2.7	3.7	5.5	5.6	6.0
Total Revenue (bil US\$)	1.1	1.4	1.7	3.1	2.9	3.4
C4	74.9	74.9	69.6	48.8	55.1	58.0
HHI	3,442	3,041	2,960	1,385	1,526	1,652
<i>N</i> (>1%)	2	3	2	2	4	2
Noam Index	2,434	1,756	2,093	800	763	954

Source: National Association of Magazine Editors (ANER), 2007–2010; Circulation Audit Institute (IVC), 2010–2011; InterMeios Project, 2001–2010.

1 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

Newspapers

Four groups dominate the daily newspapers market, with a combined 89% market share: Folhapar, Infoglobo, S.A. O Estado de S. Paulo, and the RBS Group, the latter of which operates in the southern states of Santa Catarina and Rio Grande do Sul. All of these dailies were the starting point for what later became Brazil's first family-owned broadcasting and telecom conglomerates. There was no foreign participation in this industry until April 2010, when the Ongoing Group of Portugal acquired the Arca Group, owner of the *O Dia* daily (Table 20.1).

Table 20.1. Daily Newspapers (Market Shares by Circulation), 2000–2010

	2000	2004	2008	2009	2010
Folhapar S.A. ¹ (Frias Family) (<i>Folha de S. Paulo, Agora SP, Expresso, Valor - Econômico</i>)	30.7	34.5		27.3	27.9
Infopar (Marinho Family) Infoglobo Comunicação e Participações S.A.	20.8		30.1	27.2	28.4
Estado Group (<i>O Estado de S. Paulo, Jornal da Tarde</i>)	27.7	25.3	21.7	21.1	25.2
RBS Group (Sirotsky Family) (<i>Diário Gaúcho, Zero Hora</i>)	6.4	10.3	9.7	6.9	6.7
Diários Associados Group		7.0	8.4		
Arca Group (Ongoing, Portugal) (<i>Meia Hora</i>) ²	10.0	8.6	6.2		7.5
Jornal do Brasil		6.9	7.6		
Sada Group (Vittorio Medioli) (<i>O Tempo, Super Notícia</i>)		2.1 ³	3.5		
Caldas Junior Group (Record Group) (<i>Correio do Povo</i>)			2.9		
Areté Editorial (<i>Lance!</i>)	1.0				
Others	3.4	5.3	9.9	17.5	4.3
Total Revenue (bil R\$) ⁴	2.0	2.4	3.4	3.1	3.0
Total Revenue (bil US\$)	1.1	1.2	1.9	1.6	1.7
Average Daily Circulation ANJ (mil)	7.8	6.5	8.4	8.1	8.1
Average Daily Circulation IVC (mil) ⁵	3.9	3.3	4.3	4.1	4.3
C4	89.2	78.7	69.9	82.5	89
HHI	2,419	2,111	1,658	1,978	2,321
<i>N</i> (>1%)	7	7	8	4	5
Noam Index	855	798	586	989	1,038

Source: National Association of Newspapers (ANJ), 2006–2011; Circulation Audit Institute (IVC), 2011; *InterMeios* Project, 2001–2011.

- 1 *Valor Econômico* was launched in May 2000 as a joint venture of Infoglobo and Folhapar, each with 50% of the shares.
- 2 The Carvalho family controlled the Arca Group until April 2010, when the Ongoing Group, based in Portugal, bought it.
- 3 In 2006.
- 4 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.
- 5 IVC has the most reliable (certified) data on circulation, but not all newspapers are affiliated with IVC, so ANJ's daily circulation estimates are included here as well.

The federal government is the largest consumer of books in Brazil: it accounted for 40% of all book sales in the past decade, primarily textbooks. Mainly national companies controlled the industry until 1999, when France's Vivendi became the first foreign investor through the acquisition of a percentage of Editora Abril's book publishing branch. The book publishing sector has begun to register ample movement in terms of mergers and acquisitions in the last decade, beginning in 1999 with Vivendi's investment in the Abril Group's Editora Abril. The most significant shift in this segment occurred with the heavy investment of Spanish firms, especially the PRISA Group, which between 2001 and 2005 acquired Editora Moderna, the third largest educational book publisher and, in 2008, had taken over the leadership of the book publishing market. PRISA controls 13.9% of the market share, with the Abril Group's imprints holding 11.5% and the Saraiva and Ediouro Publicações groups with 9.3% and 5.1%, respectively. In 2003, Planeta Editora of Spain started a local venture and succeeded in acquiring the rights to bestselling Brazilian authors like Paulo Coelho. And in 2004, the Spanish firm Edições SM entered the Brazilian market as Edições SM Brasil with a US\$14.8 million (R\$20 million) investment. Other important international book publishers with a presence in Brazil include the Darby Overseas Investment Fund, which held a 35% stake in the Siciliano Group from 1998 to 2008. Almost 15% of the Saraiva Group belongs to foreign investors, including the International Financial Corporation, a World Bank division, that in 1999 acquired 2.6% of the book publisher. In 2008, the German publishing company Bertelsmann AG was interested in the Rio de Janeiro-based Record Editorial Group, but there was no acquisition. (Table 20.2).

Table 20.2. Book Publishing (Market Shares by Revenue), 1996–2010¹

	1996	2000	2004	2006	2008	2009	2010
PRISA (Polanco Family, Spain)					15.2	15.9	13.9
Moderna		4.4	6.6	6.8	9.5		
Objetiva							
Abril Group ² (Civita Family; Naspers, South Africa)	13.7	12.7	16.1	11.9	11.6	15.1	11.5
Saraiva Group (Saraiva Family)	4.6	8.6	9.5	8.5	10.8	10.1	9.3
Siciliano	0.7	0.7	0.5	0.3			
Ediouro Publicações ³	0.5	2.8	5.4	6.3	7.9	7.6	5.1
Editora FTD ⁴	7.4	8.3	9.3	10.2	9.9	9.9	3.6
Sextante ⁵		1.5	1.0	1.1	2.7	3.6	3.6
Record Editorial Group ⁶	2.7	2.4	5.4	4.2	4.5	3.0	2.1
Others	65.5	54.6	42.1	45.5	34.2	34.8	53.0
Total Revenue (mil R\$) ⁷			1,847		2,521		
Total Revenue (mil US\$)			942		1,412		
C4	30.1	36.2	41.7	40.1	47.5	51.0	39.8
HHI	292	364	542	466	670	761	467
<i>N</i> (>1%)	5	7	7	7	7	7	7
Noam Index	103	121	181	165	253	287	176

Source: National Association of Magazine Editors (ANER), 2007–2010; Circulation Audit Institute (IVC), 2010–2011; InterMeios Project, 2001–2010.

- 1 There are two other important book publishing houses operating in this sector, but their market shares are not tracked. They are São Paulo's Schwarcz Editors Ltd. (which has seven imprints, including Penguin Book's Brazilian arm); and Rocco Editors of Rio de Janeiro.
- 2 Ática/Scipione. Naspers, the South African media group, has a 30% stake in Abril.
- 3 Agir, Nova Fronteira/Nova Aguilar, Thomas Nelson Brazil (joint). The US publishing house Thomas Nelson launched the venture in 2007 and has a 50% stake in the joint venture, which primarily publishes religious (Christian) literature.
- 4 Quinteto.
- 5 Intrínseca.
- 6 Editora Record, BCD União de Editoras, Harlequin Enterprises (joint). The Canada-based publisher Harlequin inaugurated a Brazilian arm in 2005 with the Record Editorial Group, specializing in romantic fiction.
- 7 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

The first major sign of an emerging e-book market in the country was the acquisition by Penguin, a division of the Pearson Group, of a 45% share of Companhia das Letras, part of Schwarcz Editors Ltd. Another sign in this area was the arrival of Amazon.com from the United States, which will almost certainly affect the market for electronic books and the business model of the major national bookstore chains after starting its e-book operations in Brazil in December 2012.¹⁶ According to the first “book census” of Brazil using data collected between November 2010 and April 2011, there are 750 active publishers in the country, one-third of which do not match the criteria of UNESCO for firms to publish at least five titles and 5,000 copies per year. Of the 498 publishers that met this specification, only 16 demonstrated incomes of more than

US\$16.4 million (R\$28 million) annually. Almost half of them earn less than US\$0.4 million (R\$0.6 million) annually.¹⁷

Magazines

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Ediouro Group				0.5	1.2	
Others	25.1	25.1	30.4	51.2	46.2	42.0
Total Revenue (bil R\$) ¹	2.0	2.7	3.7	5.5	5.6	6.0
Total Revenue (bil US\$)	1.1	1.4	1.7	3.1	2.9	3.4
C4	74.9	74.9	69.6	48.8	55.1	58.0
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<i>N</i> (>1%)	2	3	2	2	4	2
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Source: National Association of Magazine Editors (ANER), 2007–2010; Circulation Audit Institute (IVC), 2010–2011; InterMeios Project, 2001–2010.

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Radio

In Brazil, domestic producers dominate the radio market, with no foreign participation, though foreign players did help shape the sector when it was first emerging. During the 1940s, the presence in the country of the Office of the Coordinator of Inter-American Affairs led by Nelson Rockefeller shaped the local radio business to the American model.¹⁹ The concentration of the Brazilian radio industry in urban centers is clear, but it is also evident that current regional networks are sources of economic and political power, mostly owned by local family groups with economic power in these places. One example is the Edson Queiroz Group, based in Fortaleza (the capital of the northeastern state of Ceará), which started out in the gas distribution business in 1951. Less than a decade later, it had acquired a radio broadcasting station, then received a TV broadcasting license, and in the 1980s entered newspaper publishing.

At present, the radio industry is a fragmented sector with more than 9,000 stations—4,988 AM, FM, short wave (SW), and tropical wave (TW) stations plus 4,150 community radios—according to ANATEL. Politics is a key issue to consider when analyzing the radio business: besides the substantial participation of politicians, or rather, *because* of it, the government has struggled since 2008 to introduce a public broadcasting model.

For a commercial media industry, it is characterized by a considerable imbalance in terms of ownership: it is estimated that politicians (deputies, senators, governors, and a few mayors) own around 30% of these concessions, even though the Constitution prohibits this practice. In other words, a public broadcasting system at the national-federal level would lessen the politicians' control and they have little reason to support it. Data compiled in 2008 by the Institute for Studies and Research in Communication (Epcom) revealed that 271 Brazilian politicians, in contravention to the Constitution's Article No. 54, were partners or directors in 348 private radio and TV broadcasting stations. Of these, 54% were mayors, 21% were state representatives, 18% were deputies, 7% were senators, and one of them was a governor.²⁰

Religious groups also control radio concessions, in particular those linked to Neo-Pentecostal churches.²¹ More recently, this imbalance spread to community broadcasting stations, which have grown the most since their regulation by the government with the 1998 Law of Community Broadcasting. In addition, a new expedient was discovered by political groups to cover up their participation in the radio broadcasting sector: the purchase of licenses to operate educational radio channels. A similar phenomenon occurs in television broadcasting, but it is less prevalent because the licensing fees in TV cost more than radio (Table 20.4).

Table 20.4. Radio Group (Market Shares by Revenue), 2000–2010

	2000	2004	2008	2009	2010
Globopar S.A. (Globo Radio System, Marinho Family) ¹	12.4	11.2	8.8	9.1	9.8
Bandeirantes Communication Group (Bandeirantes Radio System, Saad Family)	4.0	3.2		3.7	4.7
RBS Group (Sirotsky Family) (<i>Rede Gaúcha de Rádio</i>)	5.9	5.4	4.1	4.0	4.2
EBC (public) MEC AM and FM, Radiobras Radio Network			2.7	2.8	4.2
Estado Group (Mesquita Family and The Walt Disney Company—2007 <i>Estadão ESPN (AM & FM Radio)</i>)		1.5	2.6	3.8	4.0
Radio Panamericana (<i>Jovem Pan Sat</i>)			2.7	2.5	1.8
Alfa Group <i>Rede Transamerica de Rádio</i> ¹		1.9	2.1	2.5	
Diários Associados Group		1.8	1.6		
GRPCOM—Grupo Paranaense de Comunicação (Pereira and Lemansky families)		1.2	0.9	1.0	1.5
Jaime Câmara Organization (Câmara Family) (Câmara Family) ³	0.9	0.9	0.7	0.7	
Others	76.8	72.9	72.6	69.9	69.8
Total Revenue (mil R\$) ⁴	643	1,000	1,700	2,000	2,200
Total Revenue (mil US\$)	351	505	946	1,031	1,251
C4	23.3	21.3	18.8	19.7	22.9
HHI	207	172	119	121	136
<i>N</i> (>1%)	3	6	7	4	5
Noam Index	103	65	40	61	61

Source: National Agency of Telecommunications (ANATEL), 2007–2010; Tudo Radio 2010 <<http://tudoradio.com/noticias>>, InterMeios Project, 2001–2010.⁵

1 Includes *Rádios Globo* and *CBN*.

2 Includes *Transamerica Pop*, *Transamerica Light*, and *Rede Transamerica Hits*.

3 Includes *Anhanguera* and *Araguaia Radio*.

4 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

5 Figures regarding radio revenues are not kept by ANATEL. The InterMeios Project, a private organization that collects the annual reports provided by media companies under a non-identification agreement, has published the ones cited here. The “Total Revenue” given in Table 20.4 represents just a small portion of the real advertising income for radio.

The high share for “Others” is another consequence of the participation of politicians in the radio broadcasting industry. Besides ownership, it is difficult to obtain data on financial reports or advertising shares of radio stations and/or networks belonging to politicians.

Broadcast Television

Globopar, with 52.4% of the market share, is by far the predominant group in terrestrial broadcasting. Regional groups hold a significant stake of 24%, and the Universal Church Group holds 14.7% of the market. Three commercial groups (Bandeirantes, Silvio Santos, and Rede TV!) and the state-owned Empresa Brasil de Comunicação (EBC) control most of the rest of industry.²² Globopar is the only company, among private groups, that releases public information about its ownership structure. The group operates in the communications and entertainment sectors and in online infrastructure.

- p. 615 Globopar's dominance dates from the period of military dictatorship (1964–1985). TV Globo was founded in 1965 under that regime, which assisted Globopar's rapid growth as the main TV network in the country by allowing the US firm Time-Life Inc. to participate in the broadcasting company. In the early 1960s, as Time-Life searched a way to enter the Brazilian market, Roberto Marinho's TV broadcasting project needed investments and knowledge. In 1962, three years before the launching of TV Globo's programming, two contracts with Time-Life were signed in New York: the generic aspects of the agreement were defined in the
- p. 616 main contract, and the technical aspects were presented in the technical assistance agreement. ↪ Time-Life was responsible for providing technical information; training the TV Globo's professionals; assisting in planning, construction, and operation of the studios and equipment; and guiding the acquisition of films and programs produced abroad. So, "[t]hese were the ingredients for a perfect plot, written by a local baron and funded by a multinational, under the gaze of a government which conveniently ignored the unconstitutional nature of the agreement."²³

In relation to TV broadcasting, the most significant movement happened within the public sector, with the launch in 2007 of EBC, officially created to "fill in a gap in the radio broadcasting system and with the objective of implanting and administrating the public channels, those that, for their independent publishing distinguish themselves from the state or government channels."²⁴ The company was formed from the incorporation of two state television channels: of the TVE Brasil (Brazil Educational TV), then under the administration of the Roquette Pinto Association of Educational Communication (ACERP), and RADIOBRAS, a company that from its creation in 1975 was linked to three state organs: the Ministry of Communications, the Ministry of Justice, and the Office of the President (Table 20.5).

Table 20.5. TV Broadcasting (Market Shares by Revenue), 1996–2010

	1996	2000	2004	2006	2008	2009	2010
Globo TV Network (Globopar S.A., Marinho Family)	31.0	42.7	43.7	45.4	53.9	61.8	52.4
Record TV Network (Universal Church Group)	1.0	4.8	6.0	9.1	9.5	16.5	14.7
Bandeirantes Group		4.6	3.0 ¹	5.7	6.1 ²	7.3	
SBT TV Network (Silvio Santos Group)	11.7	8.6 ³	7.0	6.3	5.0	5.1	4.2
Manchete TV Network (Bloch Group)	2.4	1.0	2.3	2.4	2.2	2.2	
EBC Brasil (public)					2.8	2.7	2.3
ACERP/TVE Brasil		0.7	1.7	1.7	EBC Brasil		
Radiobras		1.9	1.3	1.4	EBC Brasil		
Fundação Padre Anchieta (State of São Paulo) (public)							
Cultura TV Network		0.5	1.2	1.4	1.6		1.3
Others	34.7	34.6	26.8	17.5	19.0	4.5	25.2
Total Revenues (mil R\$) ⁴	5,542	8,223	10,354	12,605	13,600	14,400	18,332
Total Revenues (mil US\$)	5,535	4,494	5,233	5,800	7,568	7,422	10,425
C4	46.1	60.7	59.7	66.5	74.5	90.7	73.6
HHI	1,105	1,947	2,015	2,228	3,073	4,183	2,983
<i>N</i> (>1%)	4	6	8	8	7	6	5
Noam Index	552	688	712	788	1,161	1,708	1,334

Source: National Agency of Telecommunications (ANATEL), 2011; InterMeios Project, 2001–2010; CADE, 2004.

1 In 2003.

2 In 2007.

3 In 1999.

4 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

Multichannel TV Platforms

Until February 2012, Globopar and America Móvil (Mexico) shared control of the cable TV industry as partners of the cable TV provider *NET* Cable. Today this is the largest multiservice cable provider in Latin America and is present in over 100 Brazilian cities, offering cable TV, ISP, and wireline telecom services. In March 2012, the *Comissão de Valores Imobiliários—CVM*—the Brazilian equivalent of the US Securities and Exchange Commission—announced that America Móvil had assumed control as the major stockholder of the cable provider, with 92.2% of stocks acquired by its subsidiaries Embratel and Embrapar. The participation of the Marinho family was reduced to 6% of the assets.²⁵ Besides being one of the major moves in the cable and satellite providers' sector, it also strengthened the ever-growing presence of Carlos Slim, the Mexican media tycoon, in Brazilian telecoms. It also confirmed the goal set by Slim's America Móvil²⁶ in 2010, aimed at the acquisition of 100% of the preferred shares of the cable TV operator as a strategy to maintain control over his companies in Brazil, thus creating better conditions to integrate these operations.²⁷

In addition to cable TV, television providers also transmit channels via DTH and multichannel multipoint distribution service (MMDS). As of September 2011, the pay-TV market has been regulated by Act 12.485/11, which opened the market to national and foreign telecommunications companies.²⁸ The new law unified the regulation on transmission via satellite (DTH), cable, or microwave (MMDS). Even though foreign companies are now permitted to enter the cable TV distribution market (in the previous rule, their participation was limited to no more than a 49% stake in any one provider), they have stayed out of content production but are able to offer combined services of pay-TV, telephone, and broadband services. The law remained in limbo for five years before its approval in the Senate. The delay was due, to some extent, to the inclusion of national quotas as compulsory in the programming. The law establishes a quota of three hours a week of content produced in Brazil—half of it created by companies with no links to traditional broadcasting groups. Also, 30% of the resources of the Audiovisual Sector Fund (FSA), introduced by Act 12.2485/11, will be allocated to productions originating in the north, northeast, and midwest regions. Managed by the National Agency of Cinema (ANCINE), the Fund supervises the interdependent development of the entire audiovisual production chain in Brazil (Table 20.6).

Table 20.6. Multichannel Video Platforms: Cable MSOs, DBS, IPTV (Market Shares by Revenue), 2000–2010

	2000	2004	2006	2008	2009	2010
Globopar/America Móvil (NET Cable) (Mexico)	52.3	37.5	34.5	40.6	43.0	52.3
Globopar (Liberty Media, US; News Corp., Murdoch Family, US/UK/AUS) (SKY TV)	19.0	12.1	12.7	15.3	14.0	19.0
Telefónica (Spain) ¹		7.5		4.7	4.0	3.8
America Móvil (<i>Claro TV</i>) (Mexico)				7.2 ²	3.0	6.4
Embratel TV			6.6 ³			
Vivax		5.2	Globopar/America Móvil			
Telemar Participações S.A. (Oi TV) (Portugal Telecom, Portugal) ⁴					0.1	0.3
Infovias/Cemig WayBrasil	12.8	1.0	1.0	Telemar (Oi TV)		
Others	9.3	23.7	30.9	32.2	34.6	32.4
Total Revenue (mil R\$) ⁵	1,070	4,000	5,500	9,300	10,700	12,220
Total Revenues (mil US\$)	584	2,020	2,530	5,170	5,510	6,950
C4	84.1	62.3	54.8	67.8	64.0	67.5
HHI	3,260	1,637	1,396	1,954	2,070	2,179
<i>N</i> (>1%)	3	5	4	4	4	4
Noam Index	1,882	732	698	977	1,035	1,090

Source: National Agency of Telecommunications (ANATEL), 2008; InterMeios Project, 2001–2010.

- 1 Ownership of Brazil's TVA network transferred from the Abril Group to Telefónica in 2007.
- 2 In 2007.
- 3 In 2005.
- 4 Portugal Telecom holds a 22.4% stake in Telemar Participações S.A.
- 5 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

In August 2006, Globopar and DirecTV (US) announced their association in the business of satellite communications operated by SKY Brasil, a property of Rupert Murdoch's News Corp., and DirecTV Brazil. DirecTV acquired the shares of News Corp. and Liberty Media in SKY Brasil. The groups did not report the

p. 618 value of the transaction, but according to the announcement, the DirecTV Group owned approximately 74% of SKY Brasil and Globo owned approximately 26%. This operation completed a move initiated in October 2004 involving News Corp. (US/UK/AUS), ↳ Globopar (Brazil), Grupo Televisa S.A. (Mexico), and Liberty Media International (US) to join two DTH platforms—DirecTV Latin America and SKY Latin America—into a single platform operating in the main areas of the region. As a result, the DirecTV Group and its affiliate, SKY Mexico (in which the DirecTV Group had a 41% share) started broadcasting to approximately 4 million subscribers in Latin America by that time.

p. 619 In the last quarter of 2011, the cable provider NET, wireless provider Claro, and the long-distance services provider Embratel (all now controlled by America Móvil²⁹) announced a ↳ commercial venture that enabled the three companies to create packages of products and services. The companies started integrating their networks and prepared the 2012 launch of cable, fixed, and mobile services. The Law of Conditional Access Services (2011) for the pay TV sector also benefited the four dominant groups operating in Brazil: Spain's Telefónica, Mexico's America Móvil, Telecom Italia (Italy), and Brazil's Telemar with Portugal Telecom.

Film

International conglomerates dominate the Brazilian film sector, especially the US majors in Hollywood. Today, the market includes Sony, the Walt Disney Company, Viacom, Time Warner, News Corporation, and Comcast/GE's Universal. In 2010, Sony and Disney held 10.7% of the market share each; Viacom (through its subsidiary Paramount), 19.2%; 20th Century Fox (News Corp.), 11.1%; and Time Warner (Warner Bros.), 12.6% of the film distribution market. The four largest distributors control 53.6% of the very lucrative Brazilian market: among Latin American countries, Brazil stands as the second largest market in revenues, following Mexico's, and it was also the second largest producer of feature films in the region in 2008, with 82 local films released, behind Argentina (85) and ahead of Mexico (70) (Table 20.7).³⁰

Table 20.7. Film Production/Distribution (Market Shares by Box Office%), 1996–2010

	1996	2000	2002	2005	2007	2008	2009	2010 ¹
Sony (US)				16.2				10.7
Columbia	19.4	21.2	23.6					
Walt Disney Studios (US)	19.2	10.8	11.1	14.0	9.9	9.3	9.2	10.7
Viacom (Paramount)	9.6	2.3	9.8	13.3	18.5	7.1	19.6	19.2
Comcast/GE (Universal/ UIP) (US)	9.6	7.6	9.8	6.8	9.1	5.8		
Twentieth Century Fox (News Corp., Murdoch Family, US/UK/AUS)	11.1	13.2	18.4	14.8	13.5	26.6	18.7	11.1
Warner Brothers (Time Warner) (US)	12.6	25.1	20.6	14.6	13.4	11.7	12.9	12.6
Paris Films	2.5			1.5	4.5	7.3	6.7	2.5
PlayArte	3.0	3.9	5.7	2.1	5.6	4.8	3.3	3.0
Imagem Filmes			0.1	0.1	7.2	6.3	3.2	
Rio Filmes S.A.	0.5	0.2	0.1	1.3	1.4	1.7	1.9	0.5
Others	10.7	13.3	8.2	15.7	6.5	3.6	12.3	10.7
Total Revenue (mil R\$) ²	183.0	150.4	282.5	401.0	423.4	557.7	756.9	183.0
Total Revenue (mil US\$)	72.0	82.1	101.0	264.1	217.5	310.3	390.1	104.1
C4	62.3	70.3	73.7	59.2	55.8	54.9	60.4	53.6
HHI	1,227	1,449	1,668	1,109	1,098	1,134	1,055	895
N (>1%)	8	7	7	9	9	9	8	7
Noam Index	434	548	590	553	351	378	373	338

Source: National Agency of Cinema (ANCINE); InterMeios Project, 2001–2010; Focus, 2009, 2011; Filme B.

- 1 For 2010, it was only possible to find the aggregated totals for Sony-Columbia/Disney and Paramount/Universal-UIP. We estimate that an equal share is held between Sony-Colombia and Disney, and also for Paramount and Universal-UIP.
- 2 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

Audiovisual Media

Radio

In Brazil, domestic producers dominate the radio market, with no foreign participation, though foreign players did help shape the sector when it was first emerging. During the 1940s, the presence in the country of the Office of the Coordinator of Inter-American Affairs led by Nelson Rockefeller shaped the local radio business to the American model.¹⁹ The concentration of the Brazilian radio industry in urban centers is clear, but it is also evident that current regional networks are sources of economic and political power, mostly owned by local family groups with economic power in these places. One example is the Edson Queiroz Group, based in Fortaleza (the capital of the northeastern state of Ceará), which started out in the gas distribution business in 1951. Less than a decade later, it had acquired a radio broadcasting station, then received a TV broadcasting license, and in the 1980s entered newspaper publishing.

At present, the radio industry is a fragmented sector with more than 9,000 stations—4,988 AM, FM, short wave (SW), and tropical wave (TW) stations plus 4,150 community radios—according to ANATEL. Politics is a key issue to consider when analyzing the radio business: besides the substantial participation of politicians, or rather, *because* of it, the government has struggled since 2008 to introduce a public broadcasting model.

p. 614 For a commercial media industry, it is characterized by a considerable imbalance in terms of ownership: it is estimated that politicians (deputies, senators, governors, and a few mayors) own around 30% of these concessions, even though the Constitution prohibits this practice. In other words, a public broadcasting system at the national-federal level would lessen the politicians' control and they have little reason to support it. Data compiled in 2008 by the Institute for Studies and Research in Communication (Epcom) revealed that 271 Brazilian politicians, in contravention to the Constitution's Article No. 54, were partners or directors in 348 private radio and TV broadcasting stations. Of these, 54% were mayors, 21% were state representatives, 18% were deputies, 7% were senators, and one of them was a governor.²⁰

Religious groups also control radio concessions, in particular those linked to Neo-Pentecostal churches.²¹ More recently, this imbalance spread to community broadcasting stations, which have grown the most since their regulation by the government with the 1998 Law of Community Broadcasting. In addition, a new expedient was discovered by political groups to cover up their participation in the radio broadcasting sector: the purchase of licenses to operate educational radio channels. A similar phenomenon occurs in television broadcasting, but it is less prevalent because the licensing fees in TV cost more than radio (Table 20.4).

Table 20.4. Radio Group (Market Shares by Revenue), 2000–2010

	2000	2004	2008	2009	2010
Globopar S.A. (Globo Radio System, Marinho Family) ¹	12.4	11.2	8.8	9.1	9.8
Bandeirantes Communication Group (Bandeirantes Radio System, Saad Family)	4.0	3.2		3.7	4.7
RBS Group (Sirotsky Family) (<i>Rede Gaúcha de Rádio</i>)	5.9	5.4	4.1	4.0	4.2
EBC (public) MEC AM and FM, Radiobras Radio Network			2.7	2.8	4.2
Estado Group (Mesquita Family and The Walt Disney Company—2007 <i>Estadão ESPN (AM & FM Radio)</i>)		1.5	2.6	3.8	4.0
Radio Panamericana (<i>Jovem Pan Sat</i>)			2.7	2.5	1.8
Alfa Group <i>Rede Transamerica de Rádio</i> ¹		1.9	2.1	2.5	
Diários Associados Group		1.8	1.6		
GRPCOM—Grupo Paranaense de Comunicação (Pereira and Lemansky families)		1.2	0.9	1.0	1.5
Jaime Câmara Organization (Câmara Family) (Câmara Family) ³	0.9	0.9	0.7	0.7	
Others	76.8	72.9	72.6	69.9	69.8
Total Revenue (mil R\$) ⁴	643	1,000	1,700	2,000	2,200
Total Revenue (mil US\$)	351	505	946	1,031	1,251
C4	23.3	21.3	18.8	19.7	22.9
HHI	207	172	119	121	136
<i>N</i> (>1%)	3	6	7	4	5
Noam Index	103	65	40	61	61

Source: National Agency of Telecommunications (ANATEL), 2007–2010; Tudo Radio 2010 <<http://tudoradio.com/noticias>>, InterMeios Project, 2001–2010.⁵

1 Includes *Rádios Globo* and *CBN*.

2 Includes *Transamerica Pop*, *Transamerica Light*, and *Rede Transamerica Hits*.

3 Includes *Anhanguera* and *Araguaia Radio*.

4 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

5 Figures regarding radio revenues are not kept by ANATEL. The InterMeios Project, a private organization that collects the annual reports provided by media companies under a non-identification agreement, has published the ones cited here. The “Total Revenue” given in Table 20.4 represents just a small portion of the real advertising income for radio.

The high share for “Others” is another consequence of the participation of politicians in the radio broadcasting industry. Besides ownership, it is difficult to obtain data on financial reports or advertising shares of radio stations and/or networks belonging to politicians.

Broadcast Television

Globopar, with 52.4% of the market share, is by far the predominant group in terrestrial broadcasting. Regional groups hold a significant stake of 24%, and the Universal Church Group holds 14.7% of the market. Three commercial groups (Bandeirantes, Silvio Santos, and Rede TV!) and the state-owned Empresa Brasil de Comunicação (EBC) control most of the rest of industry.²² Globopar is the only company, among private groups, that releases public information about its ownership structure. The group operates in the communications and entertainment sectors and in online infrastructure.

- p. 615 Globopar's dominance dates from the period of military dictatorship (1964–1985). TV Globo was founded in 1965 under that regime, which assisted Globopar's rapid growth as the main TV network in the country by allowing the US firm Time-Life Inc. to participate in the broadcasting company. In the early 1960s, as Time-Life searched a way to enter the Brazilian market, Roberto Marinho's TV broadcasting project needed investments and knowledge. In 1962, three years before the launching of TV Globo's programming, two contracts with Time-Life were signed in New York: the generic aspects of the agreement were defined in the
- p. 616 main contract, and the technical aspects were presented in the technical assistance agreement. ↪ Time-Life was responsible for providing technical information; training the TV Globo's professionals; assisting in planning, construction, and operation of the studios and equipment; and guiding the acquisition of films and programs produced abroad. So, "[t]hese were the ingredients for a perfect plot, written by a local baron and funded by a multinational, under the gaze of a government which conveniently ignored the unconstitutional nature of the agreement."²³

In relation to TV broadcasting, the most significant movement happened within the public sector, with the launch in 2007 of EBC, officially created to "fill in a gap in the radio broadcasting system and with the objective of implanting and administrating the public channels, those that, for their independent publishing distinguish themselves from the state or government channels."²⁴ The company was formed from the incorporation of two state television channels: of the TVE Brasil (Brazil Educational TV), then under the administration of the Roquette Pinto Association of Educational Communication (ACERP), and RADIOBRAS, a company that from its creation in 1975 was linked to three state organs: the Ministry of Communications, the Ministry of Justice, and the Office of the President (Table 20.5).

Table 20.5. TV Broadcasting (Market Shares by Revenue), 1996–2010

	1996	2000	2004	2006	2008	2009	2010
Globo TV Network (Globopar S.A., Marinho Family)	31.0	42.7	43.7	45.4	53.9	61.8	52.4
Record TV Network (Universal Church Group)	1.0	4.8	6.0	9.1	9.5	16.5	14.7
Bandeirantes Group		4.6	3.0 ¹	5.7	6.1 ²	7.3	
SBT TV Network (Silvio Santos Group)	11.7	8.6 ³	7.0	6.3	5.0	5.1	4.2
Manchete TV Network (Bloch Group)	2.4	1.0	2.3	2.4	2.2	2.2	
EBC Brasil (public)					2.8	2.7	2.3
ACERP/TVE Brasil		0.7	1.7	1.7	EBC Brasil		
Radiobras		1.9	1.3	1.4	EBC Brasil		
Fundação Padre Anchieta (State of São Paulo) (public)							
Cultura TV Network		0.5	1.2	1.4	1.6		1.3
Others	34.7	34.6	26.8	17.5	19.0	4.5	25.2
Total Revenues (mil R\$) ⁴	5,542	8,223	10,354	12,605	13,600	14,400	18,332
Total Revenues (mil US\$)	5,535	4,494	5,233	5,800	7,568	7,422	10,425
C4	46.1	60.7	59.7	66.5	74.5	90.7	73.6
HHI	1,105	1,947	2,015	2,228	3,073	4,183	2,983
<i>N</i> (>1%)	4	6	8	8	7	6	5
Noam Index	552	688	712	788	1,161	1,708	1,334

Source: National Agency of Telecommunications (ANATEL), 2011; InterMeios Project, 2001–2010; CADE, 2004.

1 In 2003.

2 In 2007.

3 In 1999.

4 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

Multichannel TV Platforms

Until February 2012, Globopar and America Móvil (Mexico) shared control of the cable TV industry as partners of the cable TV provider *NET* Cable. Today this is the largest multiservice cable provider in Latin America and is present in over 100 Brazilian cities, offering cable TV, ISP, and wireline telecom services. In March 2012, the *Comissão de Valores Imobiliários—CVM*—the Brazilian equivalent of the US Securities and Exchange Commission—announced that America Móvil had assumed control as the major stockholder of the cable provider, with 92.2% of stocks acquired by its subsidiaries Embratel and Embrapar. The participation of the Marinho family was reduced to 6% of the assets.²⁵ Besides being one of the major moves in the cable and satellite providers' sector, it also strengthened the ever-growing presence of Carlos Slim, the Mexican media tycoon, in Brazilian telecoms. It also confirmed the goal set by Slim's America Móvil²⁶ in 2010, aimed at the acquisition of 100% of the preferred shares of the cable TV operator as a strategy to maintain control over his companies in Brazil, thus creating better conditions to integrate these operations.²⁷

In addition to cable TV, television providers also transmit channels via DTH and multichannel multipoint distribution service (MMDS). As of September 2011, the pay-TV market has been regulated by Act 12.485/11, which opened the market to national and foreign telecommunications companies.²⁸ The new law unified the regulation on transmission via satellite (DTH), cable, or microwave (MMDS). Even though foreign companies are now permitted to enter the cable TV distribution market (in the previous rule, their participation was limited to no more than a 49% stake in any one provider), they have stayed out of content production but are able to offer combined services of pay-TV, telephone, and broadband services. The law remained in limbo for five years before its approval in the Senate. The delay was due, to some extent, to the inclusion of national quotas as compulsory in the programming. The law establishes a quota of three hours a week of content produced in Brazil—half of it created by companies with no links to traditional broadcasting groups. Also, 30% of the resources of the Audiovisual Sector Fund (FSA), introduced by Act 12.2485/11, will be allocated to productions originating in the north, northeast, and midwest regions. Managed by the National Agency of Cinema (ANCINE), the Fund supervises the interdependent development of the entire audiovisual production chain in Brazil (Table 20.6).

Table 20.6. Multichannel Video Platforms: Cable MSOs, DBS, IPTV (Market Shares by Revenue), 2000–2010

	2000	2004	2006	2008	2009	2010
Globopar/America Móvil (NET Cable) (Mexico)	52.3	37.5	34.5	40.6	43.0	52.3
Globopar (Liberty Media, US; News Corp., Murdoch Family, US/UK/AUS) (SKY TV)	19.0	12.1	12.7	15.3	14.0	19.0
Telefónica (Spain) ¹		7.5		4.7	4.0	3.8
America Móvil (<i>Claro TV</i>) (Mexico)				7.2 ²	3.0	6.4
Embratel TV			6.6 ³			
Vivax		5.2	Globopar/America Móvil			
Telemar Participações S.A. (Oi TV) (Portugal Telecom, Portugal) ⁴					0.1	0.3
Infovias/Cemig <i>WayBrasil</i>	12.8	1.0	1.0	Telemar (Oi TV)		
Others	9.3	23.7	30.9	32.2	34.6	32.4
Total Revenue (mil R\$) ⁵	1,070	4,000	5,500	9,300	10,700	12,220
Total Revenues (mil US\$)	584	2,020	2,530	5,170	5,510	6,950
C4	84.1	62.3	54.8	67.8	64.0	67.5
HHI	3,260	1,637	1,396	1,954	2,070	2,179
<i>N</i> (>1%)	3	5	4	4	4	4
Noam Index	1,882	732	698	977	1,035	1,090

Source: National Agency of Telecommunications (ANATEL), 2008; InterMeios Project, 2001–2010.

- 1 Ownership of Brazil's TVA network transferred from the Abril Group to Telefónica in 2007.
- 2 In 2007.
- 3 In 2005.
- 4 Portugal Telecom holds a 22.4% stake in Telemar Participações S.A.
- 5 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

In August 2006, Globopar and DirecTV (US) announced their association in the business of satellite communications operated by SKY Brasil, a property of Rupert Murdoch's News Corp., and DirecTV Brazil. DirecTV acquired the shares of News Corp. and Liberty Media in SKY Brasil. The groups did not report the value of the transaction, but according to the announcement, the DirecTV Group owned approximately 74% of SKY Brasil and Globo owned approximately 26%. This operation completed a move initiated in October 2004 involving News Corp. (US/UK/AUS), ↳ Globopar (Brazil), Grupo Televisa S.A. (Mexico), and Liberty Media International (US) to join two DTH platforms—DirecTV Latin America and SKY Latin America—into a single platform operating in the main areas of the region. As a result, the DirecTV Group and its affiliate, SKY Mexico (in which the DirecTV Group had a 41% share) started broadcasting to approximately 4 million subscribers in Latin America by that time.

In the last quarter of 2011, the cable provider NET, wireless provider Claro, and the long-distance services provider Embratel (all now controlled by America Móvil²⁹) announced a ↳ commercial venture that enabled the three companies to create packages of products and services. The companies started integrating their networks and prepared the 2012 launch of cable, fixed, and mobile services. The Law of Conditional Access Services (2011) for the pay TV sector also benefited the four dominant groups operating in Brazil: Spain's Telefónica, Mexico's America Móvil, Telecom Italia (Italy), and Brazil's Telemar with Portugal Telecom.

Film

International conglomerates dominate the Brazilian film sector, especially the US majors in Hollywood. Today, the market includes Sony, the Walt Disney Company, Viacom, Time Warner, News Corporation, and Comcast/GE's Universal. In 2010, Sony and Disney held 10.7% of the market share each; Viacom (through its subsidiary Paramount), 19.2%; 20th Century Fox (News Corp.), 11.1%; and Time Warner (Warner Bros.), 12.6% of the film distribution market. The four largest distributors control 53.6% of the very lucrative Brazilian market: among Latin American countries, Brazil stands as the second largest market in revenues, following Mexico's, and it was also the second largest producer of feature films in the region in 2008, with 82 local films released, behind Argentina (85) and ahead of Mexico (70) (Table 20.7).³⁰

Table 20.7. Film Production/Distribution (Market Shares by Box Office%), 1996–2010

	1996	2000	2002	2005	2007	2008	2009	2010 ¹
Sony (US)				16.2				10.7
Columbia	19.4	21.2	23.6					
Walt Disney Studios (US)	19.2	10.8	11.1	14.0	9.9	9.3	9.2	10.7
Viacom (Paramount)	9.6	2.3	9.8	13.3	18.5	7.1	19.6	19.2
Comcast/GE (Universal/ UIP) (US)	9.6	7.6	9.8	6.8	9.1	5.8		
Twentieth Century Fox (News Corp., Murdoch Family, US/UK/AUS)	11.1	13.2	18.4	14.8	13.5	26.6	18.7	11.1
Warner Brothers (Time Warner) (US)	12.6	25.1	20.6	14.6	13.4	11.7	12.9	12.6
Paris Films	2.5			1.5	4.5	7.3	6.7	2.5
PlayArte	3.0	3.9	5.7	2.1	5.6	4.8	3.3	3.0
Imagem Filmes			0.1	0.1	7.2	6.3	3.2	
Rio Filmes S.A.	0.5	0.2	0.1	1.3	1.4	1.7	1.9	0.5
Others	10.7	13.3	8.2	15.7	6.5	3.6	12.3	10.7
Total Revenue (mil R\$) ²	183.0	150.4	282.5	401.0	423.4	557.7	756.9	183.0
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<i>N</i> (>1%)	8	7	7	9	9	9	8	7
Noam Index	434	548	590	553	351	378	373	338

Source: National Agency of Cinema (ANCINE); InterMeios Project, 2001–2010; Focus, 2009, 2011; Filme B.

- 1 For 2010, it was only possible to find the aggregated totals for Sony-Columbia/Disney and Paramount/Universal-UIP. We estimate that an equal share is held between Sony-Colombia and Disney, and also for Paramount and Universal-UIP.
- 2 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

Telecommunications Media

Wireline Telecom

In 1998, the Brazilian government privatized the national telecom sector. State wireline and wireless companies were sold in a public auction by a sum of US\$15.3 billion (R\$18.3 billion). Today, the Telemar Group dominates the wireline market with 42.1% of the market share.³¹ The position of the Telemar group in 2010 was a result of previous mergers, especially the one managed by Brazil's Opportunity Group. Together with Telecom Italia, it acquired the Tele Centro Sul carrier for US\$1.5 billion in 1998 (R\$1.8 billion) during the privatization process of Telebras. Soon after that, the Tele Centro Sul was transformed into Brasil Telecom, which was acquired by Telemar in 2008. Now operating under the brand Oi, 26% of its shares were acquired in 2010 by Portugal Telecom.

Telefónica (Spain) ranks second in the sector, with 27% of the market share, and America Móvil ranks third, with a 17% share through Embratel's 17%. The United States' MCI (formerly WorldCom) was in control of the main Brazilian telecom company until July 2004, when Telmex International (now America Móvil) acquired it in a US\$204 million deal (R\$400 million). Vivendi entered the Brazilian wireline market in 2009 by acquiring the Brazilian provider GVT after a long dispute with Telefónica. Sercomtel, a joint venture of the Londrina City Hall (a medium size city in the southern state of Paraná) and the local electricity company Copel, is one of the very few regional groups to stand among the "giants" of media conglomerates. Intelig, a joint venture of Telecom Italia and Docas Investments of Brazil, and was fully acquired by Telecom Italia in 2010, completes the wireline telecommunication industries operating in the country (Table 20.8).

Table 20.8. Wireline Telecom (Market Shares by Revenue), 2006–2012

	2006	2007	2008	2009	2010	2012
Telemar Participações S.A. (Telemar/Oi) (Portugal Telecom, Portugal)	58.9	56.6	53.7	51.51	47.6	42.1
Brasil Telecom			Telemar - Participações S.A.			
Telecom Italia (Italy)/Opportunity Group ¹	0.1	0.1	0.2	0.1	0.1	0.1
Telefónica (Spain)	31.2	30.4	28.4	27.1	26.9	23.8
America Móvil (Mexico) ²	5.7	8.5	12.3	14.4	16.8	27.9
Embratel						
Bell South (US)						
Vivendi (France)				3.5	5.0	8.2
GVT (Global Village Telecom)	1.7	2.0	2.5	Vivendi		
Algar S.A.	1.7	2.0	2.5	3.5	5.0	2.0
CTBC						
Sprint/France Telecom	0.1	0.1	0.7			
Intelig Telecom (Docas Investments/Telecom Italia, Italy)				1.1	1.5	1.1
Sercomtel	0.2	0.2	0.2	0.2	0.4	0.4
Others	0.5	0.5	0.5	0.5	0.3	0.5
Total Revenue (bil R\$) ³	70.0	70.0	76.0	90.0	91.8	
Total Revenue (bil US\$)	32.2	36.0	42.3	46.4	52.2	
C4	97.5	97.5	96.9	96.5	96.2	102
HHI	4,481	4,208	3,855	3,620	3,321	3,190
N (>1%)	5	5	5	6	6	6
Noam Index	2,004	1,882	1,457	1,368	1,255	1,302

Source: ANATEL 2011 Annual Report—National Agency of Telecommunications; Prêmio Melhores do Brasil, *Brasil Econômico*, June 2012; Anuário Telecom 2010, Plano Editorial, August 2011; Atlas Brasileiro de Telecomunicações 2011, Converge Comunicações, May 2012.

- 1 Telefónica has a controlling 9.47% stake in Telecom Italia through the Telco consortium as of 2007. Telecom Italia data by communication from company and Mintel
- 2 In 2004, Mexico's Telmex acquired Embratel, formerly part of WorldCom.
- 3 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

Wireless Telecom

p. 620 Telefónica (Spain) ranks first in the Brazilian wireless market. After almost four years of combined business, Portugal Telecom sold its share of 30% in Vivo and simultaneously announced the acquisition of 25.6% of Oi, Telemar's telecom division, until then the only Brazilian telecommunications group in the sector. In three years, all movements within the sector had come to concentrate among the same established players: Telemar's acquisition of the wireless carrier Brasil Telecom in 2008, Vivendi's acquisition of GVT in 2009, and Portugal Telecom's 2010 entrance into the Telemar Group. Telecom Italia, second in the market, made just one move in the wireless market in the past decade: together with Opportunity Group and Citigroup (US), it held Brasil Telecom from 2004 to 2008.

p. 621 America Móvil, controller of Claro, on the contrary, entered the market in 2002 as Telmex, with the strategy of acquiring small regional companies—at first ATL, then Claro Digital, Americel, Tess, BSE, and BCP (in a dispute with Telefónica and Embratel). Those steps created the basis for its most valuable asset, the Latin American division of AT&T, which wanted to withdraw from the market. That acquisition, valued at US\$68.3 million (R\$207 million) in 2003, opened markets for America Móvil in Colombia, Chile, Peru, Brazil, and Argentina. In 2004, Telefónica launched a counterattack by purchasing 100% of Bell South's Latin American operations.³² With that move, Telefónica entered Venezuela, Colombia, Ecuador, and Uruguay, thus consolidating its position in South and Central America.³³ In 2007, Telefónica also paid \$3.12 billion for a 42.3% share of Telco, the company that was born after the sale of the Pirelli Group's Telco stake (Table 20.9).

Table 20.9. Wireless Telecom (Market Shares by Revenue), 1999–2013

	1999	2000	2002	2004	2005	2006	2007	2008	2009	2010	2013
Telefónica (Spain)	45.8	20.8	35.3	27.5	30.4	30.8	38.8	32.9	30.9	29.5	28.6
Vivo ¹											
Telemig Celular	9.9	5.8	6.4	4.3	5.0	5.0	²				
Telecom Italia (Italy) ³	23.2	16.2	12.3	9.6	9.2	28.5	31.3	27.0	24.7	25.8	27.2
TIM Participações (Italy)											
America Móvil (Mexico)				18.8	20.6	23.7	25.2	24.0	22.7	25.5	25.1
Claro											
Bell South (US)	23.9	10.2	15.3								
BCP ⁴											
Telemar Participações S.A. (Portugal Telecom, Portugal)			7.9	7.9	8.7	8.2	9.4	14.8	17.1	18.9	18.6
Oi Móvel											
Amazonia Celular		7.2	3.6	2.7	1.9	1.4	1.2	⁵	⁶		
Brasil Telecom Móvel								⁷			
Telecom Italia (Italy)/opportunity Group				0.3	2.2	3.4	4.3	4.2			
NII Holdings Inc. (US)		4.6	2.2	1.6	1.3	1.6	2	2.7	3.3	0.6	
Nextel Comunicações Ltda.											
Algar Telecom	1.9	1.0	1.1	0.5	0.7	0.6	0.7	0.6	0.4	0.3	0.4
CTBC Celular											
Sercomtel Celular	0.0	0.3	0.3	0.2	0.2	0.1	0.1	0.3	0.1	0.04	0.1
Total Revenue (bil R\$) ⁸	12.0	13.0	17.0	27.0	32.0	36.0	39.0	48.0	53.0	57.0	102
Total Revenue (bil US\$)	6.7	7.1	6.1	13.6	21.1	16.6	20.0	26.7	27.3	32.4	42.8
C4	102.8	53.0	70.8	63.8	68.9	91.1	104.8	98.7	95.4	99.7	99.5
HHI	3,365	866	1,748	1,288	1,542	2,427	3,233	2,632	2,384	2,543	2,534
N (>1%)	4	6	6	5	6	6	6	6	5	4	4
Noam Index	1,272	306	583	408	488	768	1,143	931	901	961	1,267

Source: Anatel 2011 Annual Report, National Agency of Telecommunications; Prêmio Melhores do Brasil, *Brasil Econômico*, June 2012; Anuário Telecom 2010, Plano Editorial, August 2011; Atlas Brasileiro de Telecomunicações 2011, Converge Comunicações, May 2012. 2013 updates provided by editors.

1 In 2010, Telefónica bought out Portugal Telecom's stake in Vivo's wireless services, becoming the sole controller.

2 Telefónica/Portugal Telecom (Portugal).

- 3 Telefonica controlled Telecom Italia from 2007–2014, when they separated again.
- 4 Purchased by America Móvil in 2003.
- 5 Telefónica/ Portugal Telecom (Portugal).
- 6 Telemar Participações S.A.
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- 8 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

p. 622 The wireless industry, one of the most profitable sectors of local telecommunications, comprised 242.2 million users at the end of 2011, representing a growth of 19.4% over the previous year. ↴

p. 623 ↴

Telecommunications Media

Wireline Telecom

In 1998, the Brazilian government privatized the national telecom sector. State wireline and wireless companies were sold in a public auction by a sum of US\$15.3 billion (R\$18.3 billion). Today, the Telemar Group dominates the wireline market with 42.1% of the market share.³¹ The position of the Telemar group in 2010 was a result of previous mergers, especially the one managed by Brazil's Opportunity Group. Together with Telecom Italia, it acquired the Tele Centro Sul carrier for US\$1.5 billion in 1998 (R\$1.8 billion) during the privatization process of Telebras. Soon after that, the Tele Centro Sul was transformed into Brasil Telecom, which was acquired by Telemar in 2008. Now operating under the brand Oi, 26% of its shares were acquired in 2010 by Portugal Telecom.

Telefónica (Spain) ranks second in the sector, with 27% of the market share, and America Móvil ranks third, with a 17% share through Embratel's 17%. The United States' MCI (formerly WorldCom) was in control of the main Brazilian telecom company until July 2004, when Telmex International (now America Móvil) acquired it in a US\$204 million deal (R\$400 million). Vivendi entered the Brazilian wireline market in 2009 by acquiring the Brazilian provider GVT after a long dispute with Telefónica. Sercomtel, a joint venture of the Londrina City Hall (a medium size city in the southern state of Paraná) and the local electricity company Copel, is one of the very few regional groups to stand among the "giants" of media conglomerates. Intelig, a joint venture of Telecom Italia and Docas Investments of Brazil, and was fully acquired by Telecom Italia in 2010, completes the wireline telecommunication industries operating in the country (Table 20.8).

Table 20.8. Wireline Telecom (Market Shares by Revenue), 2006–2012

	2006	2007	2008	2009	2010	2012
Telemar Participações S.A. (Telemar/Oi) (Portugal Telecom, Portugal)	58.9	56.6	53.7	51.51	47.6	42.1
Brasil Telecom			Telemar - Participações S.A.			
Telecom Italia (Italy)/Opportunity Group ¹	0.1	0.1	0.2	0.1	0.1	0.1
Telefónica (Spain)	31.2	30.4	28.4	27.1	26.9	23.8
America Móvil (Mexico) ²	5.7	8.5	12.3	14.4	16.8	27.9
Embratel						
Bell South (US)						
Vivendi (France)				3.5	5.0	8.2
GVT (Global Village Telecom)	1.7	2.0	2.5	Vivendi		
Algar S.A.	1.7	2.0	2.5	3.5	5.0	2.0
CTBC						
Sprint/France Telecom	0.1	0.1	0.7			
Intelig Telecom (Docas Investments/Telecom Italia, Italy)				1.1	1.5	1.1
Sercomtel	0.2	0.2	0.2	0.2	0.4	0.4
Others	0.5	0.5	0.5	0.5	0.3	0.5
Total Revenue (bil R\$) ³	70.0	70.0	76.0	90.0	91.8	
Total Revenue (bil US\$)	32.2	36.0	42.3	46.4	52.2	
C4	97.5	97.5	96.9	96.5	96.2	102
HHI	4,481	4,208	3,855	3,620	3,321	3,190
N (>1%)	5	5	5	6	6	6
Noam Index	2,004	1,882	1,457	1,368	1,255	1,302

Source: ANATEL 2011 Annual Report—National Agency of Telecommunications; Prêmio Melhores do Brasil, *Brasil Econômico*, June 2012; Anuário Telecom 2010, Plano Editorial, August 2011; Atlas Brasileiro de Telecomunicações 2011, Converge Comunicações, May 2012.

- 1 Telefónica has a controlling 9.47% stake in Telecom Italia through the Telco consortium as of 2007. Telecom Italia data by communication from company and Mintel
- 2 In 2004, Mexico's Telmex acquired Embratel, formerly part of WorldCom.
- 3 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

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p. 620

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p. 621

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Nextel Comunicações Ltda.											
Algar Telecom	1.9	1.0	1.1	0.5	0.7	0.6	0.7	0.6	0.4	0.3	0.4
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Sercomtel Celular	0.0	0.3	0.3	0.2	0.2	0.1	0.1	0.3	0.1	0.04	0.1
Total Revenue (bil R\$) ⁸	12.0	13.0	17.0	27.0	32.0	36.0	39.0	48.0	53.0	57.0	102
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C4	102.8	53.0	70.8	63.8	68.9	91.1	104.8	98.7	95.4	99.7	99.5
HHI	3,365	866	1,748	1,288	1,542	2,427	3,233	2,632	2,384	2,543	2,534
N (>1%)	4	6	6	5	6	6	6	6	5	4	4
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p. 623 ↴

p. 624 Internet Media

Internet Service Providers (ISP)

The early years of the commercial Internet in Brazil began with the launching of the BBS Mandic ISP in 1993 (Mandic Internet, by 1995), the first ISP to have an investment group—Garantia Partners Investimentos—as associate. In 1998, Mandic Internet’s revenue stood around US\$10.8 million (R\$13 million), and in 1999 the Argentinean group El Sitio acquired it. A few ISPs initiated their commercial activities in 1996, such as UOL (Folhapar) and BOL (Abril Group), both properties of print publishers. Both Folhapar and the Abril Group soon decided to form a joint venture, which lasted from 1996 to 2005, when Portugal Telecom became a partner in UOL. Aleksandar Mandic, the founder and first owner of Mandic, was also part of the founding team of iG, which became the largest Brazilian free Internet service provider in 2000. In those early years, foreign ISPs began entering the market in strength: the Canadian Primus Telecommunications Group acquired 51% of Matrix in 1998, and PSI Net (US) acquired Openlink in 1999.

The year 1999 witnessed many moves in the ISP sector with the arrival of bigger foreign companies in Brazil, who were attracted by the telecom privatization. Many regional small providers from the southern and southeastern regions also launched ISPs, such as Telefónica’s Terra Networks Brasil, which was based in the infrastructure of two small Internet providers, ZAZ and Nutecnet. American Online (AOL) also ventured into the sector with a joint venture business backed by AOL USA, the Cisneros Group from Venezuela, and Brazil’s Itaú Bank. Its poor performance in the market facilitated its acquisition by Telefónica in 2006.

In general terms, the most recent transactions were those of Brasil Telecom, acquired by Telemar in 2008, the acquisition of GVT by Vivendi in 2009, the acquisition of 22.4% of Oi Internet by Portugal Telecom; the entrance of the Hypermarchas (a Brazilian medicinal, cosmetics, food and cleaning service company) in UOL-Folhapar with a 29% stake and (in 2010) the Net Virtua transfer of 91.7% of its shares to Telmex. In 2010, there were two major moves in the sector: Portugal Telecom left the Folha/UOL Group and acquired 22.4% of Telemar Participações and Hypermarchas acquired 29% of the Folha/UOL Group (Table 20.10).

Table 20.10. Internet Service Providers (Market Shares by Revenue), 2000–2012

	2000	2004	2007	2008	2009	2010	2012
Globopar/Telmex (Mexico) ¹	1.6	7.8	22.9	20.5	21.2	22.4	25.9
NET Virtua	Globo/ Telecom Italia		Telmex		Telmex		
Folhapar S.A.	30.8	32.4	24.6	18.2	16.2		
Universo Online (UOL)	Folha de S. Paulo/Abril Group	Folha-UOL S.A./Portugal Telecom (Portugal)		Folha-UOL S.A./Hypermarcas			
Telefónica (Spain)	19.1	29.2	26.4	15.1	14.2	12.5	27.7
Terra Networks Brasil S.A.							
RBS Group							
ZAZ/Nutecnet	Telefónica						
AOL Latin America Inc.	2.0						
AOL Brasil Ltda.	Telefónica						
Telemar Participações S.A.			7.2	15.1	15.8	15.4	30.3
Oi Internet/Oi Velox						Portugal Telecom (Portugal)	
Brasil Telecom	6.75	4.8	4.4				
BRT Serviços de				Telemar Part. S.A.			
Internet Group Ltd.	8.2	16.4					
iG	Brasil Telecom						
Vivendi (France)					9.7	10.2	10.6
GVT S.A.	7.5		10.1	8.4	Vivendi		
Pop							
Others	31.6	1.9	4.4	22.7	22.9	23.8	7.0
Total Revenue (mil R\$) ²	1,400		2,900	4,400	6,000	7,100	
Total Revenue (mil US\$)	708		1,489	2,450	3,090	4,040	
C4	64.9	85.8	84.0	68.9	67.4	66.0	94.5

HHI	1,435	2,310	1,998	1,277	1,256	1,246	2.469
N (>1%)	6	6	5	5	5	4	4
Noam Index	586	943	816	571	562	557	1,235

Source: The Brazilian Association of Internet Providers (ABRANET), Ibope/NetRatings 2010, <<http://www.abranet.org.br/index.php/ibopenetratings/category/16-ibopenetratings-dados-de-2010>>; *ICT Households and Enterprises 2011*, CETIC.br <<http://op.ceptro.br/cgi-bin/cetic/tic-domicilios-e-empresas-2011.pdf>>; *Acesso à Internet e posse de telefone móvel celular para uso pessoal 2005*, The Brazilian Institute of Geography and Statistics (IBGE) 2006 <www.ibge.gov.br/home/estatistica/populacao/acesoainternet/comentarios.pdf>; *Anuário Telecom 2011*, Plano Editorial <www.anuariotelecom.com.br/anutel/2011/servicos.shtml>; *Atlas Brasileiro de Telecomunicações 2011*, Converge Comunicações, May 2012.

- 1 Telmex's stake stood at 34% in 2005, 49% in 2007, and 91.9% in 2010.
- 2 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

The last two years have demonstrated great growth of Internet users nationwide. Of the total accesses, about 50% were related to e-commerce, while entertainment (audiovisual and film) accounted for more than 60% of households requests.³⁴

Search Engines

As of 2012, Google is the leading search engine in Brazil, holding 90.2% of the market share,

followed distantly by Microsoft's Bing, with 1.3%, and the Yahoo/Cadê search system, which a market share less than 1%.³⁵ Google Brasil established its first regional office in 2005 in São Paulo. One year later, it inaugurated in Belo Horizonte, the state capital of Minas Gerais, the Center for Research and Development in Brazil to train personnel. The center was established after Google acquired Akwan, a company owned by local Internet R&D groups.

Two national search engines, both created in 1995, attempted to wrest dominance from Google. Inspired by Yahoo, Cadê—a Brazilian Portuguese colloquialism meaning “where is it?”—used similar interface and categorization hierarchies, but also invested in subsections for more specific searches. In 1999, starMedia (Mexico), which entered the national market in its expansion to Latin American countries, acquired Cadê, but the venture did not last long. When the “<http://dot.com> bubble” collapsed in 2000, Cadê's market share fell fast and Yahoo Brasil finally acquired it in 2002. AltaVista was

p. 625

p. 626 ↪

p. 627 ↪

p. 628 ↪

p. 629 ↪

the other national search engine, and it allowed advanced research in a multimedia search for photos, music, and videos, but it has also only held a very small market share, less than 1% (Table 20.11).

Table 20.11. Internet Search Engines (Market Shares by Monthly Search Volume), 2008–2012

	2008	2009	2010	2012
Google (US)	97.8	97.4	97.5	96.2
Microsoft Bing (US)	0.0	0.8	1.8	1.3
Yahoo/ Cadê (US)	1.0	1.5	0.7	0.5
Altavista	0.9	0.2	0.1	
Others	0.3	0.1	0.0	1.6
Monthly Search Volume (mil)	31.5	34.0	39.0	
C4	99.7	99.9	100.0	98
HHI	9,560	9,480	9,506	9,256
<i>N</i> (>1%)	2	2	2	2
Noam Index	5,520	5,473	5,488	6,545

Source: Stat Counter, Global Stats, “Top 5 Search Engine in Brazil, Dec 2008 to Dec 2010”

<http://gs.statcounter.com/#search_engine-br-monthly-200812-201012>; *Anuário Telecom 2011*, Plano Editorial <www.anuariotelecom.com.br/anutel/2011/servicos.shtml>; “Market share de buscadores, sistemas operacionais e navegadores,” Webartz, December 2010 <<http://www.webartz.com.br/tecnologia-da-informacao/market-share-de-buscadores-sistemas-operacionais-e-navegadores/>>

Online News

Four large groups currently operating in the telecommunications and media sectors in Brazil concentrate the delivery of online news services. Altogether, they control 70% of the market: Folhapar, through its news portal UOL, accounts for 31.9% of the market; *Terra Notícias* (Telefónica) accounts for 21.2%; <http://Globo.com> (Globopar), for 13.3%; and iG (Telemar), for 12% of the market share.

Foreign participation in the sector is limited mainly to Telefónica’s *Terra Notícias*; Portugal’s Ongoing Group, which maintains online sites of the daily newspapers *O Dia* and *Brasil Econômico*; and the South African Naspers’ stake in <http://Abril.com>. A former president of the portal recalls that iG had a controversial start offering free access to the Internet, “but it created the largest portfolio of electronic addresses of Brazil and then turned itself into a major portal for information and entertainment” (Table 20.12).³⁶

Table 20.12. Online News Media (Market Shares by Revenue), 2005–2010

	2005	2006	2007	2008	2009	2010
Folhapar S.A. ¹	29.5	25.7	43.0	44.4	44.8	31.9
<i>Folha Online</i>						5.0
<i>UOL</i>						26.9
Telefónica (Spain)	25.3	35.1	37.0	30.8	35.6	21.2
<i>Terra Notícias</i>						
Globopar S.A.						13.3
http://Globo.com						
Infoglobo S.A.						
<i>O Globo Online</i>						
Telemar Participações S.A./Portugal Telecom (Portugal)					11.3	12.1
<i>iG</i>						
O Estado Group					8.56	4.9
http://Estadao.com.br						
<i>AE, Agência Estado</i>						
Abril Group (Civita Family/Naspers, South Africa)						6.4
http://Abril.com						
Universal Church Group						4.9
http://R7.com						
Thomson Reuters (UK)						
<i>Reuters Brasil</i>						
Arca Group						Ongoing Group (Portugal)
<i>O Dia Online</i>						
Ongoing Group (Portugal)						
<i>O Dia Online</i>						
<i>Brasil Econômico Online</i>						
<i>Jornal do Brasil Online</i>						
Others	45.2	39.2	20.0	24.8	0	25.4
Total Revenues (mil R\$) ²	531.2	722.0	1,207	1,300	1,600	3,040
Total Revenues (mil US\$)	349.9	332.2	620.0	723.4	824.7	1,729

C4	89.3	58.8	80.0	75.1	100.0	70.0
HHI	2,699	1,791	3,215	2,916	3,472	1,875
N (>1%)	2	2	2	2	4	7
Noam Index	1,558	1,266	2,273	2,062	1,736	625

Source: InterMeios Project, 2010, www.projetointermeios.com.br/relatoriosInvestimento.aspx; “Most-visited News Websites in Brazil,” *ComScore Data Mine*, Nov. 2010 <<http://www.comscoredatamine.com/2010/11/most-visited-news-websites-in-brazil>>; Top Sites in Brazil, Alexa <<http://www.alexa.com/topsites/countries/br>>; “Pesquisa Anuário Meio&Mensagem 2010,” IVC Brasil, Auditoria Web, Feb., 2011 <http://www.ivcbrasil.org.br/conteudos/pesquisas_estudos/pesquisa%20anu%c3%a1rio%20mm.pdf>.

- 1 Data regarding the Folhapar Group are included here in the totals concerning *Folha Online* (the online edition of the *Folha de S. Paulo* daily).
- 2 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

Internet Media

Internet Service Providers (ISP)

The early years of the commercial Internet in Brazil began with the launching of the BBS Mandic ISP in 1993 (Mandic Internet, by 1995), the first ISP to have an investment group—Garantia Partners Investimentos—as associate. In 1998, Mandic Internet’s revenue stood around US\$10.8 million (R\$13 million), and in 1999 the Argentinean group El Sitio acquired it. A few ISPs initiated their commercial activities in 1996, such as UOL (Folhapar) and BOL (Abril Group), both properties of print publishers. Both Folhapar and the Abril Group soon decided to form a joint venture, which lasted from 1996 to 2005, when Portugal Telecom became a partner in UOL. Aleksandar Mandic, the founder and first owner of Mandic, was also part of the founding team of iG, which became the largest Brazilian free Internet service provider in 2000. In those early years, foreign ISPs began entering the market in strength: the Canadian Primus Telecommunications Group acquired 51% of Matrix in 1998, and PSI Net (US) acquired Openlink in 1999.

The year 1999 witnessed many moves in the ISP sector with the arrival of bigger foreign companies in Brazil, who were attracted by the telecom privatization. Many regional small providers from the southern and southeastern regions also launched ISPs, such as Telefónica’s Terra Networks Brasil, which was based in the infrastructure of two small Internet providers, ZAZ and Nutecnet. American Online (AOL) also ventured into the sector with a joint venture business backed by AOL USA, the Cisneros Group from Venezuela, and Brazil’s Itaú Bank. Its poor performance in the market facilitated its acquisition by Telefónica in 2006.

In general terms, the most recent transactions were those of Brasil Telecom, acquired by Telemar in 2008, the acquisition of GVT by Vivendi in 2009, the acquisition of 22.4% of Oi Internet by Portugal Telecom; the entrance of the Hypermarchas (a Brazilian medicinal, cosmetics, food and cleaning service company) in UOL-Folhapar with a 29% stake and (in 2010) the Net Virtua transfer of 91.7% of its shares to Telmex. In 2010, there were two major moves in the sector: Portugal Telecom left the Folha/UOL Group and acquired 22.4% of Telemar Participações and Hypermarchas acquired 29% of the Folha/UOL Group (Table 20.10).

Table 20.10. Internet Service Providers (Market Shares by Revenue), 2000–2012

	2000	2004	2007	2008	2009	2010	2012
Globopar/Telmex (Mexico) ¹	1.6	7.8	22.9	20.5	21.2	22.4	25.9
NET Virtua	Globo/ Telecom Italia		Telmex		Telmex		
Folhapar S.A.	30.8	32.4	24.6	18.2	16.2		
Universo Online (UOL)	Folha de S. Paulo/Abril Group	Folha-UOL S.A./Portugal Telecom (Portugal)				Folha-UOL S.A./Hypermarcas	
Telefónica (Spain)	19.1	29.2	26.4	15.1	14.2	12.5	27.7
Terra Networks Brasil S.A.							
RBS Group							
ZAZ/Nutecnet	Telefónica						
AOL Latin America Inc.	2.0						
AOL Brasil Ltda.	Telefónica						
Telemar Participações S.A.			7.2	15.1	15.8	15.4	30.3
Oi Internet/Oi Velox						Portugal Telecom (Portugal)	
Brasil Telecom	6.75	4.8	4.4				
BRT Serviços de				Telemar Part. S.A.			
Internet Group Ltd.	8.2	16.4					
iG		Brasil Telecom					
Vivendi (France)					9.7	10.2	10.6
GVT S.A.		7.5	10.1	8.4	Vivendi		
Pop							
Others	31.6	1.9	4.4	22.7	22.9	23.8	7.0
Total Revenue (mil R\$) ²		1,400	2,900	4,400	6,000	7,100	
Total Revenue (mil US\$)		708	1,489	2,450	3,090	4,040	
C4	64.9	85.8	84.0	68.9	67.4	66.0	94.5

HHI	1,435	2,310	1,998	1,277	1,256	1,246	2.469
N (>1%)	6	6	5	5	5	4	4
Noam Index	586	943	816	571	562	557	1,235

Source: The Brazilian Association of Internet Providers (ABRANET), Ibope/NetRatings 2010, <<http://www.abranet.org.br/index.php/ibopenetratings/category/16-ibopenetratings-dados-de-2010>>; *ICT Households and Enterprises 2011*, CETIC.br<<http://op.ceptro.br/cgi-bin/cetic/tic-domicilios-e-empresas-2011.pdf>>; *Acesso à Internet e posse de telefone móvel celular para uso pessoal 2005*, The Brazilian Institute of Geography and Statistics (IBGE) 2006<www.ibge.gov.br/home/estatistica/populacao/acesoainternet/comentarios.pdf>; *Anuário Telecom 2011*, Plano Editorial<www.anuariotelecom.com.br/anutel/2011/servicos.shtml>; *Atlas Brasileiro de Telecomunicações 2011*, Converge Comunicações, May 2012.

- 1 Telmex's stake stood at 34% in 2005, 49% in 2007, and 91.9% in 2010.
- 2 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

The last two years have demonstrated great growth of Internet users nationwide. Of the total accesses, about 50% were related to e-commerce, while entertainment (audiovisual and film) accounted for more than 60% of households requests.³⁴

Search Engines

As of 2012, Google is the leading search engine in Brazil, holding 90.2% of the market share,

followed distantly by Microsoft's Bing, with 1.3%, and the Yahoo/Cadê search system, which a market share less than 1%.³⁵ Google Brasil established its first regional office in 2005 in São Paulo. One year later, it inaugurated in Belo Horizonte, the state capital of Minas Gerais, the Center for Research and Development in Brazil to train personnel. The center was established after Google acquired Akwan, a company owned by local Internet R&D groups.

Two national search engines, both created in 1995, attempted to wrest dominance from Google. Inspired by Yahoo, Cadê—a Brazilian Portuguese colloquialism meaning “where is it?”—used similar interface and categorization hierarchies, but also invested in subsections for more specific searches. In 1999, starMedia (Mexico), which entered the national market in its expansion to Latin American countries, acquired Cadê, but the venture did not last long. When the “<http://dot.com> bubble” collapsed in 2000, Cadê's market share fell fast and Yahoo Brasil finally acquired it in 2002. AltaVista was

p. 625

p. 626 ↪

p. 627 ↪

p. 628 ↪

p. 629 ↪

the other national search engine, and it allowed advanced research in a multimedia search for photos, music, and videos, but it has also only held a very small market share, less than 1% (Table 20.11).

Table 20.11. Internet Search Engines (Market Shares by Monthly Search Volume), 2008–2012

	2008	2009	2010	2012
Google (US)	97.8	97.4	97.5	96.2
Microsoft Bing (US)	0.0	0.8	1.8	1.3
Yahoo/ Cadê (US)	1.0	1.5	0.7	0.5
Altavista	0.9	0.2	0.1	
Others	0.3	0.1	0.0	1.6
Monthly Search Volume (mil)	31.5	34.0	39.0	
C4	99.7	99.9	100.0	98
HHI	9,560	9,480	9,506	9,256
<i>N</i> (>1%)	2	2	2	2
Noam Index	5,520	5,473	5,488	6,545

Source: Stat Counter, Global Stats, “Top 5 Search Engine in Brazil, Dec 2008 to Dec 2010”

<http://gs.statcounter.com/#search_engine-br-monthly-200812-201012>; *Anuário Telecom 2011*, Plano Editorial <www.anuariotelecom.com.br/anutel/2011/servicos.shtml>; “Market share de buscadores, sistemas operacionais e navegadores,” Webartz, December 2010<<http://www.webartz.com.br/tecnologia-da-informacao/market-share-de-buscadores-sistemas-operacionais-e-navegadores/>>

Online News

Four large groups currently operating in the telecommunications and media sectors in Brazil concentrate the delivery of online news services. Altogether, they control 70% of the market: Folhapar, through its news portal UOL, accounts for 31.9% of the market; *Terra Notícias* (Telefónica) accounts for 21.2%; <http://Globo.com> (Globopar), for 13.3%; and iG (Telemar), for 12% of the market share.

Foreign participation in the sector is limited mainly to Telefónica’s *Terra Notícias*; Portugal’s Ongoing Group, which maintains online sites of the daily newspapers *O Dia* and *Brasil Econômico*; and the South African Naspers’ stake in <http://Abril.com>. A former president of the portal recalls that iG had a controversial start offering free access to the Internet, “but it created the largest portfolio of electronic addresses of Brazil and then turned itself into a major portal for information and entertainment” (Table 20.12).³⁶

Table 20.12. Online News Media (Market Shares by Revenue), 2005–2010

	2005	2006	2007	2008	2009	2010
Folhapar S.A. ¹	29.5	25.7	43.0	44.4	44.8	31.9
<i>Folha Online</i>						5.0
<i>UOL</i>						26.9
Telefónica (Spain)	25.3	35.1	37.0	30.8	35.6	21.2
<i>Terra Notícias</i>						
Globopar S.A.						13.3
http://Globo.com						
Infoglobo S.A.						
<i>O Globo Online</i>						
Telemar Participações S.A./Portugal Telecom (Portugal)					11.3	12.1
<i>iG</i>						
O Estado Group					8.56	4.9
http://Estadao.com.br						
<i>AE, Agência Estado</i>						
Abril Group (Civita Family/Naspers, South Africa)						6.4
http://Abril.com						
Universal Church Group						4.9
http://R7.com						
Thomson Reuters (UK)						
<i>Reuters Brasil</i>						
Arca Group						Ongoing Group (Portugal)
<i>O Dia Online</i>						
Ongoing Group (Portugal)						
<i>O Dia Online</i>						
<i>Brasil Econômico Online</i>						
<i>Jornal do Brasil Online</i>						
Others	45.2	39.2	20.0	24.8	0	25.4
Total Revenues (mil R\$) ²	531.2	722.0	1,207	1,300	1,600	3,040
Total Revenues (mil US\$)	349.9	332.2	620.0	723.4	824.7	1,729

C4	89.3	58.8	80.0	75.1	100.0	70.0
HHI	2,699	1,791	3,215	2,916	3,472	1,875
<i>N</i> (>1%)	2	2	2	2	4	7
Noam Index	1,558	1,266	2,273	2,062	1,736	625

Source: InterMeios Project, 2010, www.projetointermeios.com.br/relatoriosInvestimento.aspx; “Most-visited News Websites in Brazil,” *ComScore Data Mine*, Nov. 2010 <<http://www.comscoredata.com/2010/11/most-visited-news-websites-in-brazil>>; Top Sites in Brazil, Alexa <<http://www.alexa.com/topsites/countries/br>>; “Pesquisa Anuário Meio&Mensagem 2010,” IVC Brasil, Auditoria Web, Feb.,

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- 1 Data regarding the Folhapar Group are included here in the totals concerning *Folha Online* (the online edition of the *Folha de S. Paulo* daily).
- 2 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

Conclusion

The demand for broadband represents a significant challenge to Brazilian providers. Broadband integration implicates the complex online web of networking, products, and markets. Today, Brazil’s access to sites in Colombia, Ecuador, and Peru, for instance, is done via the United States, through a submarine cable, and returns through another cable via the Pacific. The countries of UNASUR (Union of South American Nations) ratified a plan in 2012 to integrate the broadband networks of neighboring countries. The optical ring at the center of the plan will allow online traffic to stay in South America, with the added economy of time and cost. In the case of Brazil, the optical ring will also reduce the percentage of the Internet data routed to the United States (35% of Brazilian internal traffic).³⁷

p. 630 Internally, the Brazilian government created the National Broadband Program (PNBL) in 2010 to “promote digital inclusion, expanding of e-gov services, and also to increase the country’s competitiveness and technological autonomy.”³⁸ The program was officially inaugurated by decree No. 7175 on May 12, 2010, and aims to greatly expand broadband access. 85% of Brazilian wireline connections are in cities that meet 53% of the population, and account for 71% of GDP. The cities of lower income represent only 2% of broadband connections.³⁹

The new regulations for audiovisual and telecom services boost the expansion of the paid TV market, since the rules facilitate the licensing and authorize the services’ expansion into areas not currently served. Analysts believe that, in this circumstance, Telefónica should see a rapid expansion of its service because it is the largest mobile operator in the country. America Móvil—a major player in the wireline and wireless industry as the controller of the country’s main cable TV operator (and satellite transmitters)—also benefited from the process of reinforcing connections within the group companies. Data released by the International Telecommunication Union (ITU) in 2011 pointed out that among the five largest mobile phone markets in the world, four were BRICS (Brazil–Russia–India–China–South Africa) countries: China (900 million), India (812 million), Russia (220 million), and (in fifth place) Brazil (211 million).⁴⁰

In the context of the multichannel industry, the most significant growth is expected in the satellite and cable services. Data released in 2012 by the National Telecommunications Agency (ANATEL) indicated that the pay TV market grew 2.4% in 2011—with services available in about 13.3 million households. Also according to ANATEL, pay TV services reached 43 million views nationwide, and in January 2012 alone, the sector added 309,800 new subscribers.⁴¹

The share of satellite services (DTH) reached 55.5% of the subscriber base, while the services provided via cable accounted for 42.7%. Adding up to the new regulation for the cable TV industry, ANATEL also reopened the issuing of licenses for new cable TV services, which had been closed since 2003.⁴²

Overall, at the beginning of the second decade of the 21st century, Brazil was experiencing a special moment of growth in media and telecom services. The difficulties in growth are mainly attributable to outdated technology (when compared to infrastructure in other highly industrialized nations) and the slow process of

improving regulation, a battle that has been ongoing for 50 years now, which has kept Brazil tethered to an archaic legislation that does not correspond to the nation's actual stage of media development.

Evaluating these shortcomings precisely is difficult because although most companies are responsible for publishing their balance sheets each year, these publications are not always easy to find. These publications include detailed reports and quantitative/qualitative documents with added numbers per sector produced by consultancy firms that charge companies for the material if it becomes public. Primary sources—official documents, legal texts, technical reports, annual balance sheets, and internal documents—constitute rare official references. Market projections and audience records published by independent institutions, like the Grupo de Mídia São Paulo and Projeto InterMeios, are more readily available. In Brazil, there is still a lack of systematic organization of information that could provide media producers, consumers, and regulators with accurate figures concerning corporations' assessments of their business interests. This would improve the quality and relevance of wide-ranging public policies. The collection of information followed by a comparative reading of the industries could assist in such an important task.

Conclusion

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p. 634

Brazil—Data Summaries

Brazil is ranked 13th-highest in levels of Pooled HHI concentration, meaning that the top firms are big overall, not just in their core industries (Table 20.13).

Table 20.13. National Media Industries Concentration in Brazil

	2004/5		2011 or Most Recent		% Change Annual Average	
	Company Power Index in Country	Company Share of the Overall National Media Market (%)	Company Power Index in Country	Company Share of the Overall National Media Market (%)	Company Power Index in Country	Company Share of the Overall National Media Market (%)
Oi/Telemar Participações	1,627	32.4	876	24.7	-7.7%	-1.3
Telefónica (Spain)	716	24.8	542	20.8	-4.1	-0.7
Globo Group	199	5.1	407	8.5	17.5	0.6
Telmex (Grupo Carso, Mexico)	550	12.6	552	21.0	0.06	1.4
Telecom Italia (Italy)	313	15.2	149	9.2	-3.4	-1.0
Google (US)	10	0.1	55	0.6	73.8	0.08
Abril Group	90	1.5	65	1.5	-4.7	0.01
Folhaper	33	1.0	33	1.3	0.04	0.06
DirectTV (US)	0	0	17	1.0	N/A	0.2
Liberty Global (US)	0.76	0.14	0	0	-16.7	0.02
Vivendi (France)	0	0	27	3.4	N/A	0.56
Estado de São Paulo	10	0.42	9	0.44	-1.9	0.004
Universal Church Group	3	0.4	18	1.3	104.8	0.14
PRISA Group (Spain)	0.5	0.08	2	0.15	49.7	0.01
Bandeirantes Group	0.69	0.2	5	0.6	94.6	0.07
Murdoch Interests (US)	1	0.1	0.4	0.03	-10.7	-0.02
Silvio Santos Group	5	0.7	2	0.4	-14.2	-0.1
Saravia	3	0.5	1	0.3	-9.5	-0.02
Sony/Disney (Japan & US)	3	0.1	1	0.07	-9.3	-0.01
Editora FTD	1	0.12	0.14	0.04	-0.14	-0.01
Diarios Associados Group	0.8	0.1	1	0.1	3.7	0.001
Jornal do Brasil	0.75	0.1	0.77	0.1	0.5	-0.001
RBS Group	2	0.2	0.8	0.1	-9.8	-0.01

EBC (public)	0.67	0.2	0.61	0.2	-1.5	0.001
Ongoing	1	0.13	0.75	0.10	-5.9	-0.01
Bloch Group	0.36	0.16	0.4	0.18	1.5	0.004
Sada Group	0.1	0.03	0.2	0.05	22.6	0.002

Media Concentration Index	2004/5	2011 or Most Recent	% Change Annual Average
Total Revenue: Nat'l Media Industry (mil US\$)	76,023	127,050	11.2
Total Voices (<i>n</i>)	50	44	-2.0
Net Voices (<i>n</i>)	36	26	-4.6
Public Ownership (%)	0.2	0.2	0.0
Foreign Ownership (%)	60.7	65.8	0.8
C4 Average—Weighted	83.7	91.7	1.3
HHI Average—Weighted	2,903	2,773	-0.7
C1 Average—Weighted	45.0	38	-1
Noam Index Average—Weighted	856	1,235	7.4
Pooled Overall Sector C4	85.0	75.7	-1.6
Pooled Overall Sector HHI	2,084	1,660	-3.4
Pooled Overall Sector Noam Index	182	273	8.3
Market Share of Top 10 Companies: Nat'l Media Industry (%) (Pooled C10)	93.8	92.6	-0.2
National Media Power Index	3,570	2,868	-3.3

The national power index declined from 3,570 in 2004–2005 to 2,868 in 2009 or most recent. Foreign ownership of Brazil's platform media is very high: the three top platform companies out of four listed in Table 20.3 are all foreign-owned (Telefónica, Telmex, Telecom Italia). In addition, the company with the largest market share, Telemar, with its Oi operator, was 22.4% owned by the Portuguese company, Telecom Portugal, until they merged. Telemar holds the largest share of the overall national market, at 24.7%, and about one-third of platform media market share. Partly in response to concerns about foreign ownership in relation to the implementation of national digitization, Brazil renationalized the former public telecom monopolist Telebras in 2010 from Carlos Slim's America Móvil (Mexico).

Beyond telecom, Globo Group is the dominant player in Brazil's content media industries, controlling an extraordinary 35.1% of the content market (Table 20.14). Globo Group controls 52.4% of the Brazilian TV broadcasting market, 53.6% of the multichannel platforms market, 28.4% of the daily newspapers market, and 1.7% of the ISP market. It also has significant holdings in magazines (19.6%) and radio (9.8%).

Table 20.14. Top Content Media Companies in Brazil

	2004/5		2011 or Most Recent		% Change Annual Average	
	Company Power Index in Country	Company Share of the National Content Media Market (%)	Company Power Index in Country	Company Share of the National Content Media Market (%)	Company Power Index in Country	Company Share of the National Content Media Market (%)
Globo Group	1,203	30.6	1,641	35.1	6.1	0.8
Google (US)	72	0.7	298	3.1	52.3	0.4
Abril Group	643	10.5	353	8.2	-7.5	-0.4
Folhapar	163	4.9	132	4.4	-3.1	-0.08
Universal Church Group	18	3.0	98	6.9	76	0.7
Bandeiranted Group	5	1.62	25	3.5	68.2	0.3
Murdoch Interests (US)	6	0.6	2	0.2	-11.1	-0.1
Silvio Santos Group	24	3.4	8	1.9	-11.2	-0.3
Jornal do Brasil	5	0.8	4	0.6	-3.6	-0.04
EBC (Public)	5	1.6	3	1.3	-5.1	-0.06
Ongoing (Arca Group) (Portugal)	8	1.0	4	0.5	-8.5	-0.07
Bloch Group	3	1.1	2	1.0	-2.8	-0.02
Sada Group	0.5	0.2	0.9	0.3	13.3	0.003
Media Concentration Index						
	2004/5	2011 or Most Recent	% Change Annual Average			
Public Ownership (%)	1.6	1.3	-0.1%			
Foreign Ownership (%)	6.2	10.4	0.7%			
C4 Average—Weighted	62	68	0.9%			
HHI Average—Weighted	1,987	2,453	4.0%			
C1 Average—Weighted	41	45	1%			
National Power Index	2,326	2,746	3%			

Along with Globo Grupo, Folhapar and Estado de São Paulo also hold significant shares of daily newspapers, at 27.9% and 25.2% respectively. Folhapar also owns 31.9% of online news media. Another important content company is Abril Group, which owns 48.5% of magazines and 11.5% of book publishing.

Radio has been an important political and economic entity at the sub-national level, due to Brazil's geography and underdeveloped ICT infrastructure. Liberal ownership controls meant that politicians are able to own radio licenses, and they often use them for electoral purposes (Table 20.15). ↴

p. 635

p. 636 ↴

p. 637 ↴

**Table 20.15.** Top Content Media Companies in Brazil

	2004/5		2011 or Most Recent		% Change Annual Average	
	Company Power Index in Country	Company Share of the National Platform Media Market (%)	Company Power Index in Country	Company Share of the National Platform Media Market (%)	Company Power Index in Country	Company Share of the National Platform Media Market (%)
Oi/Telemar Participações	1,892	37.7	1,071	30.0	-7.2	-1.3
Telefonica (Spain)	829	28.6	657	25.0	-3.5	-0.6
Telmex (Mexico)	640	14.6	676	25.6	0.9	1.8
Telecom Italia (Italy)	364	17.7	305	11.2	-2.7	-1.1
Globo Group	35	0.9	129	2.5	45.1	0.3

Media Concentration Index	2004/5	2011 or Most Recent	% Change Annual Average
Public Ownership (%)	0	0	0%
Foreign Ownership (%)	69.6	78.2	1.4%
C4 Average—Weighted	87.2	97.1	1.7%
HHI Average—Weighted	3,052	2,846	-1.13%
C1 Average—Weighted	46	37	-2%
National Power Index	3,772	2,896	-3.9%

Brazil—Data Summaries

Brazil is ranked 13th-highest in levels of Pooled HHI concentration, meaning that the top firms are big overall, not just in their core industries (Table 20.13).

Table 20.13. National Media Industries Concentration in Brazil

	2004/5		2011 or Most Recent		% Change Annual Average	
	Company Power Index in Country	Company Share of the Overall National Media Market (%)	Company Power Index in Country	Company Share of the Overall National Media Market (%)	Company Power Index in Country	Company Share of the Overall National Media Market (%)
Oi/Telemar Participações	1,627	32.4	876	24.7	-7.7%	-1.3
Telefónica (Spain)	716	24.8	542	20.8	-4.1	-0.7
Globo Group	199	5.1	407	8.5	17.5	0.6
Telmex (Grupo Carso, Mexico)	550	12.6	552	21.0	0.06	1.4
Telecom Italia (Italy)	313	15.2	149	9.2	-3.4	-1.0
Google (US)	10	0.1	55	0.6	73.8	0.08
Abril Group	90	1.5	65	1.5	-4.7	0.01
Folhaper	33	1.0	33	1.3	0.04	0.06
DirectTV (US)	0	0	17	1.0	N/A	0.2
Liberty Global (US)	0.76	0.14	0	0	-16.7	0.02
Vivendi (France)	0	0	27	3.4	N/A	0.56
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Silvio Santos Group	5	0.7	2	0.4	-14.2	-0.1
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p. 635

p. 636 ↴

p. 637 ↴

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Notes

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9. “[A]ll the Brazilian information that passes through space—be it military, governmental, or from national private companies—[passes] through private satellites controlled by only one company, Star One, owned by the Mexican billionaire Carlos Slim. Actually, Brazil is a simple lessor of a spatial retransmitter that has as its main purpose the generation of profit for its owner.” Sequeira, C. D. “Brasil devassado.” *IstoÉ* 2166, May 13, 2011. July 16, 2012 at <http://www.istoe.com.br/reportagens/137133_brasil+devassado?pathimagens=&path=&actualarea=internalpage>.
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