

# Concentração do Mercado de Telecomunicações

RELATÓRIO DE ACOMPANHAMENTO ECONÔMICO 2012-2013

Superintendência de Competição  
CONSELHO NACIONAL DE ECONOMIA



# Agenda



# Concentração Importa?

Estrutura



Conduta



Desempenho

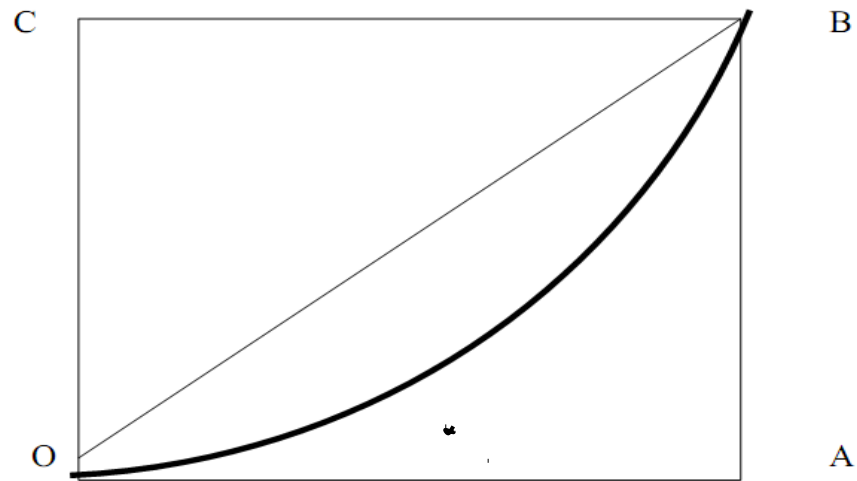
# Razão de Concentração

Índice Herfindahl-Hirschman (HHI)

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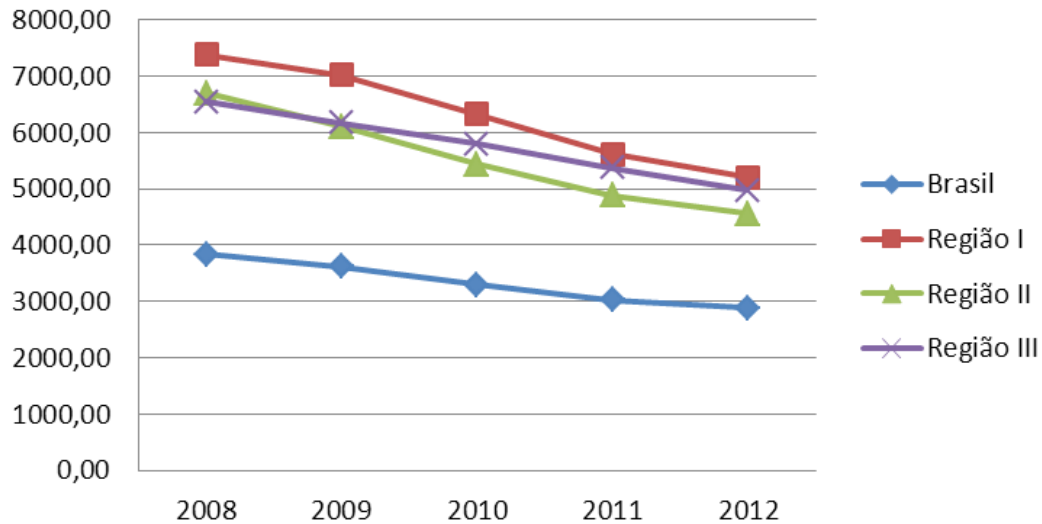
- Mercados pouco concentrados: HHI abaixo de 1500
- Mercados com concentração moderada: HHI entre 1500 e 2500
- Mercados altamente concentrados: HHI acima de 2500

# Curva de Lorenz

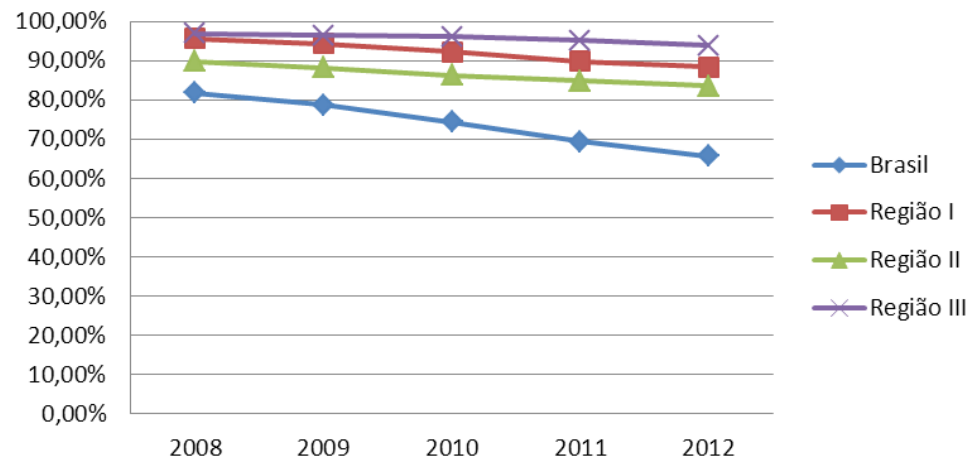


# STFC

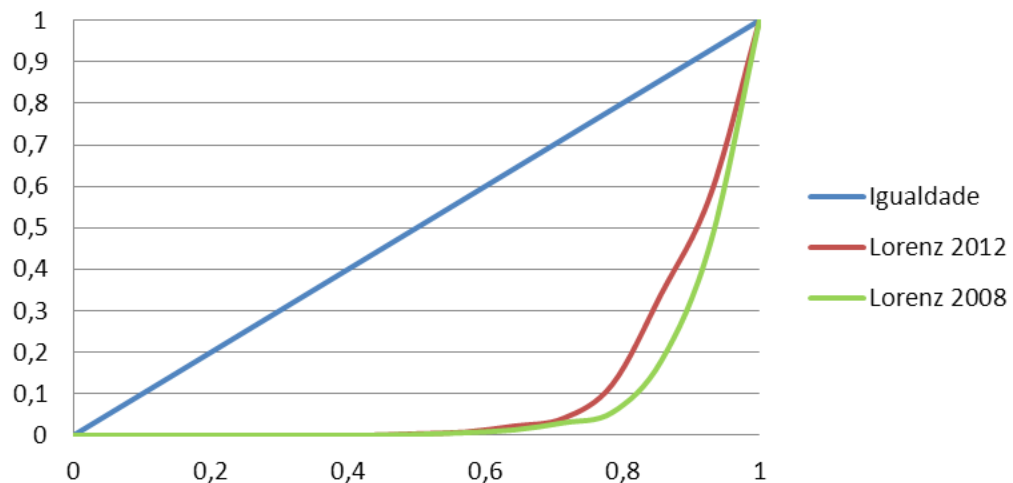
## HHI - Brasil e Regiões



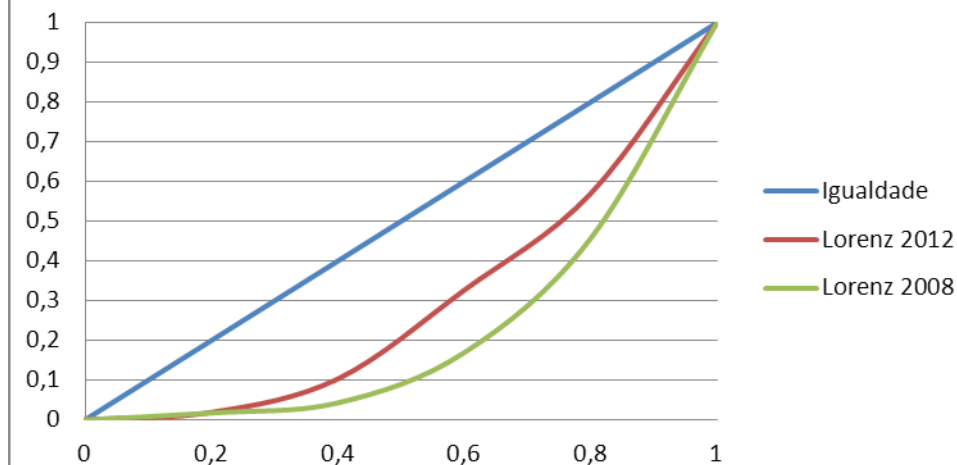
## C2 - Brasil e Regiões



## Curva de Lorenz - Mercado

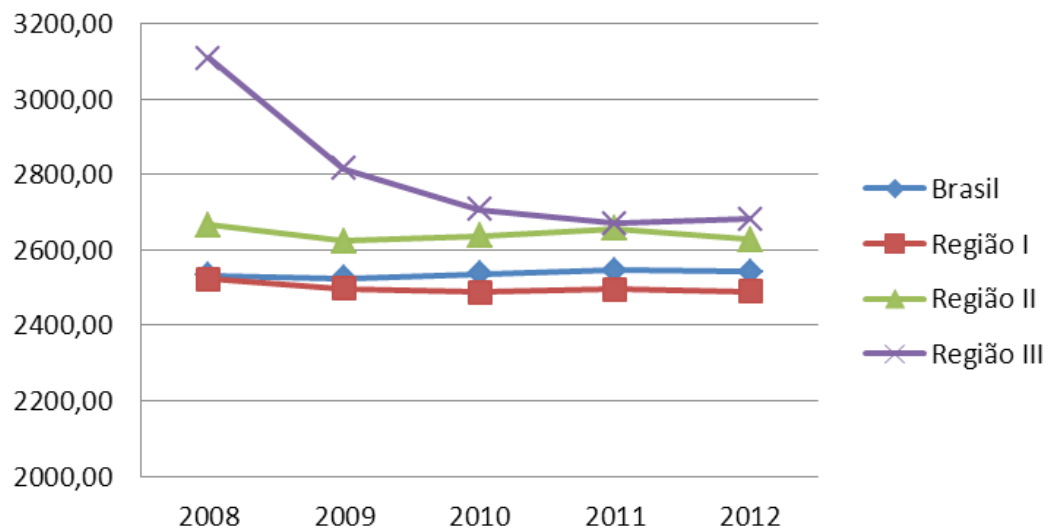


## Curva de Lorenz - L5

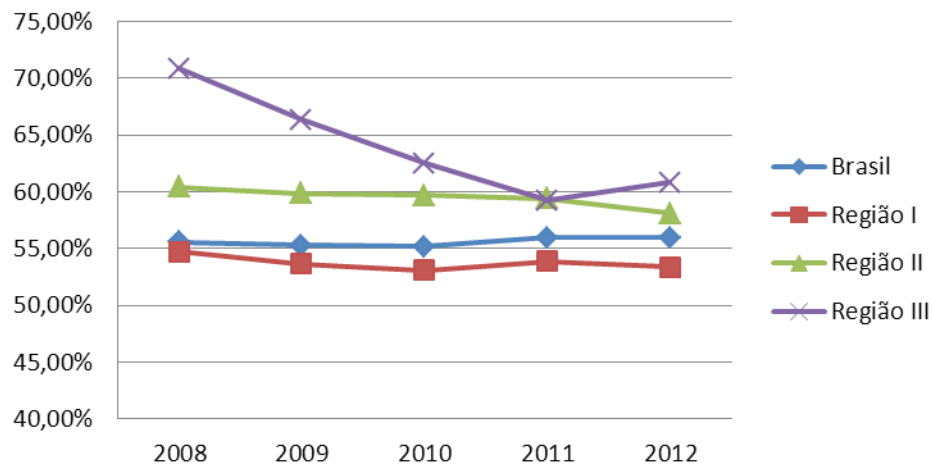




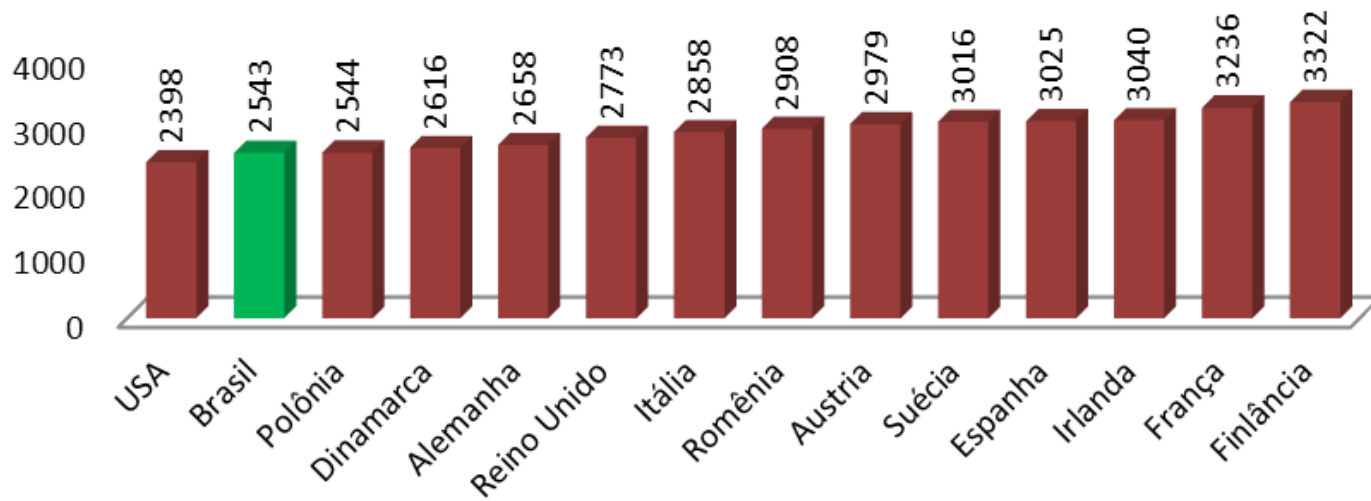
## HHI



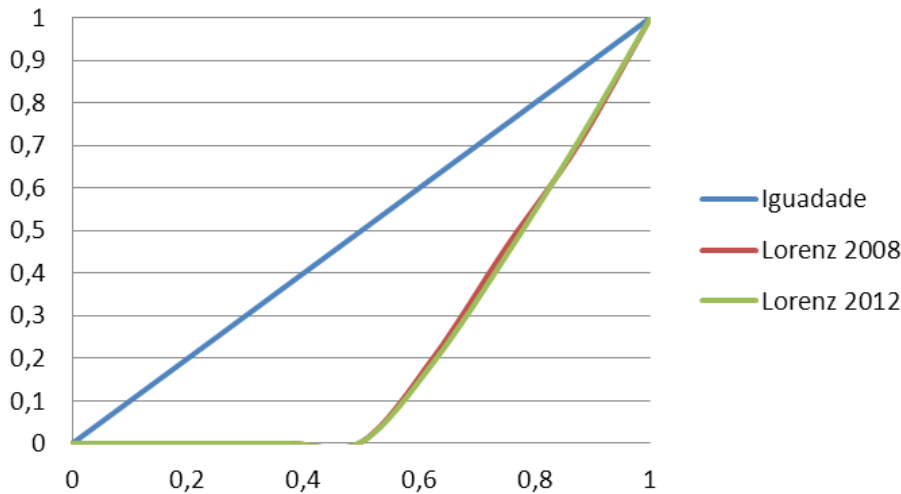
## C2



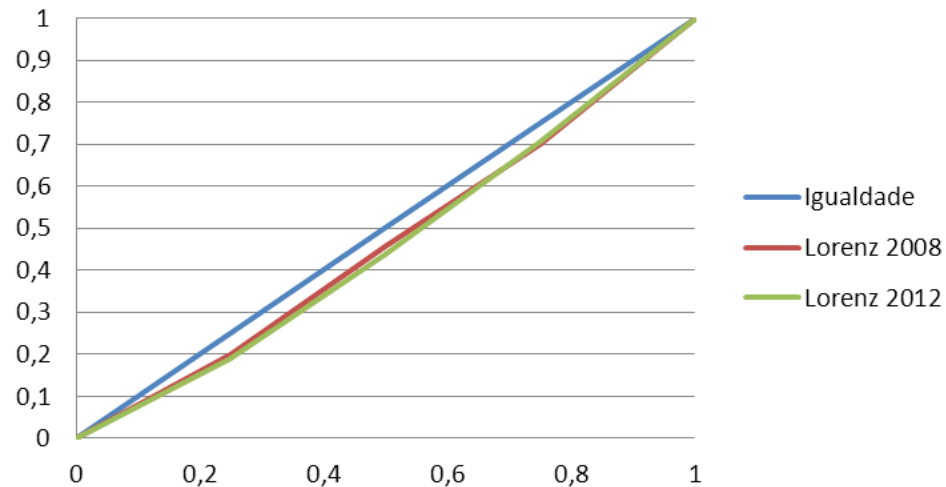
## HHI - Comparação Internacional



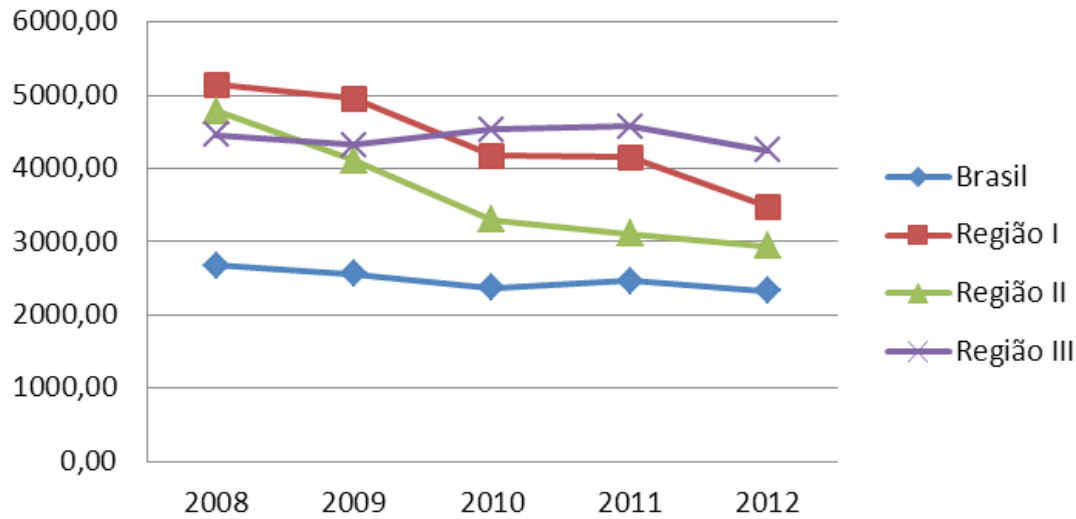
### Lorenz - Mercado



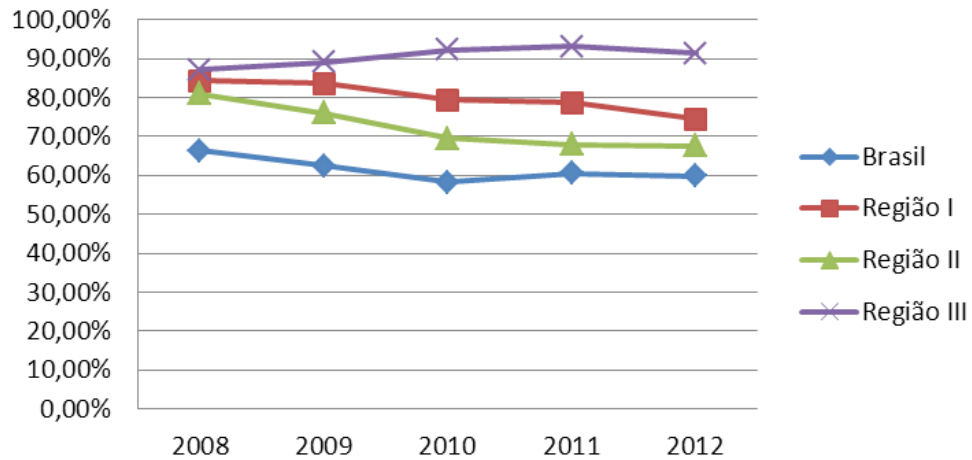
### Curva de Lorenz - L4



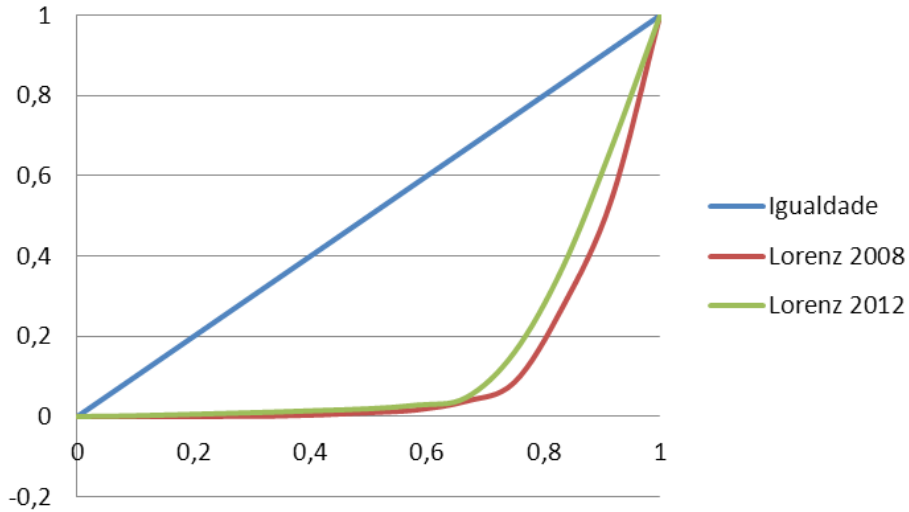
## HHI



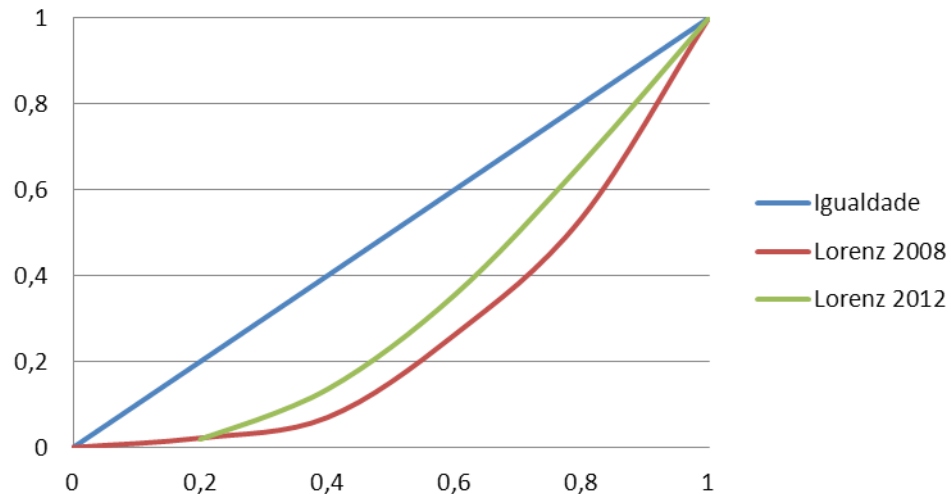
## C2



### Curva de Lorenz - L12

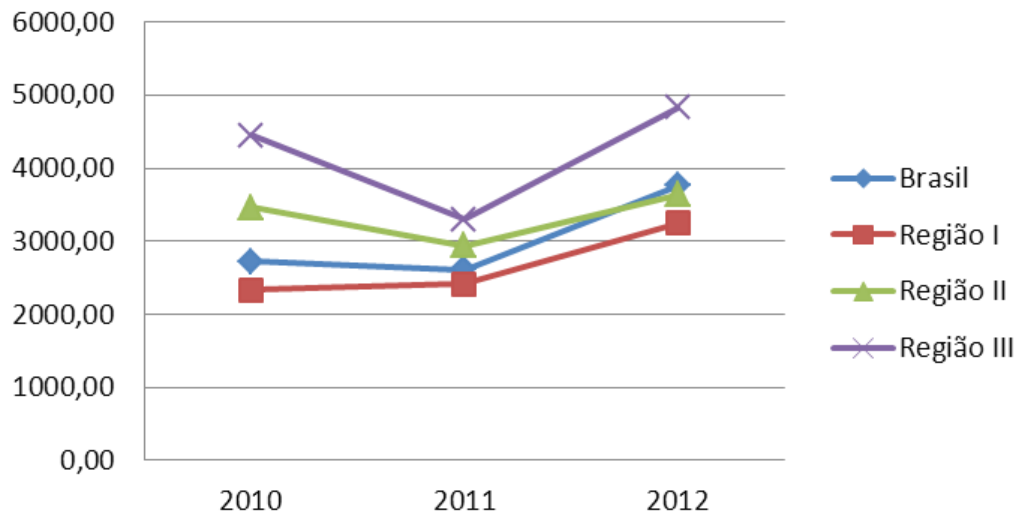


### Curva de Lorenz - L5

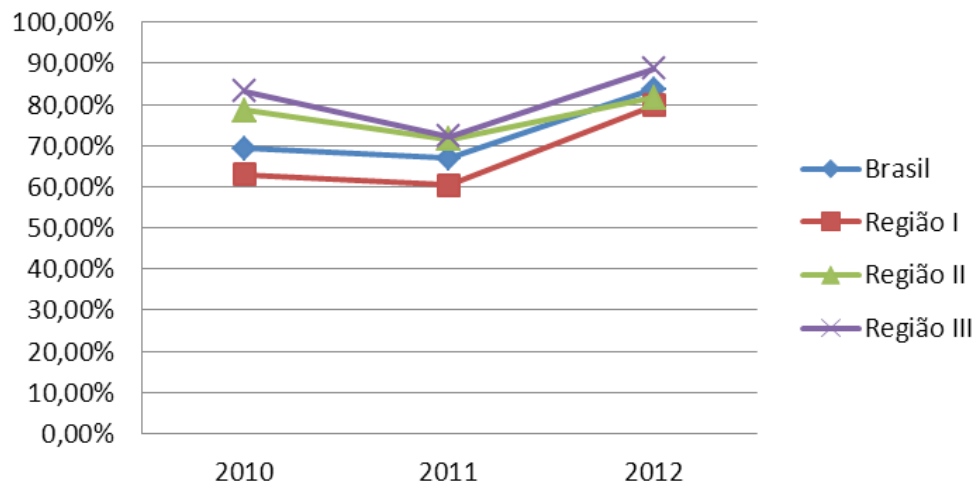


# TV por Assinatura

## HHI

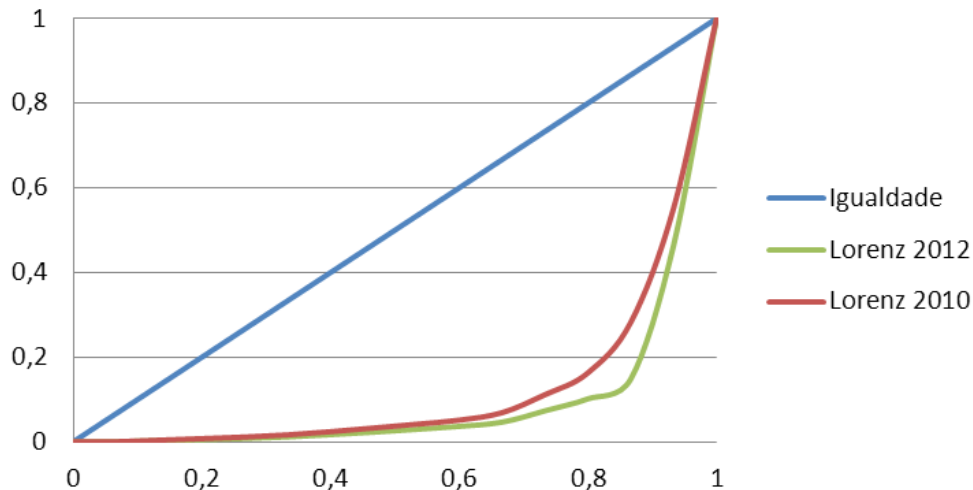


## C2

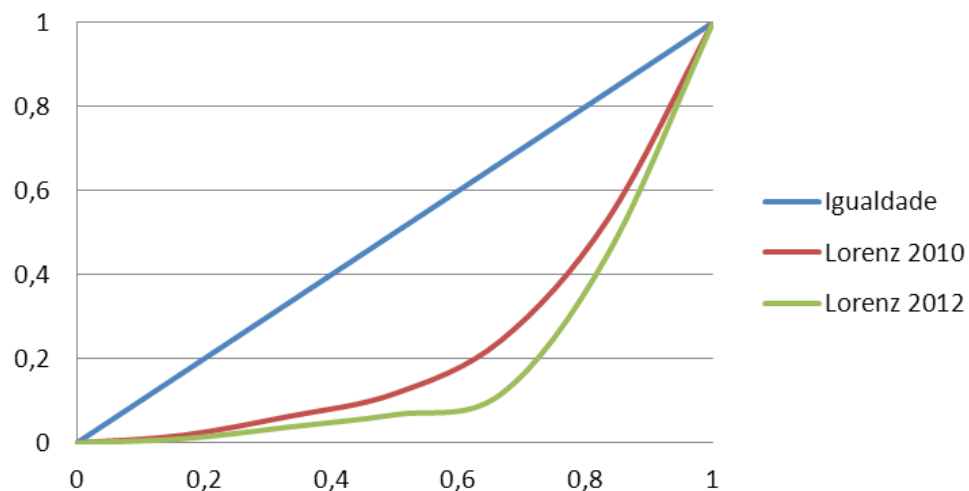


# TV por Assinatura

## Lorenz - L15



## Lorenz - L6



- STFC, SCM e SMP apresentam tendência de desconcentração ao longo do tempo.
- SMP é o serviços menos concentrados no país, e pouco concentrado considerando-se as comparações internacionais.
- SCM e SeAC são mais concentrados em algumas regiões (principalmente Região III).
- Para reduzir a concentração e ampliar a competição, a Anatel deve reduzir barreiras à entrada:
  - Simplificação da burocracia;
  - Assimetrias regulatórias;
  - Redução dos custos de observância.