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The following figures are based on AGCOM’s elaborations on firms’ data and other sources (updated to June 2019). Due to changes in firms’ accounting methods, some figures cannot be compared directly with those reported in previous issues.
A decrease in the total number of lines is recorded in the last quarter.

On a YoY basis, while TIM’s access lines have decreased by 1,100 thousand units, other operators’ access lines have increased by about 450 thousand units.

TIM’s market share dropped to 48.1% at the end of June 2019 (-3.9 pp)

Vodafone’s market share has reached 14.8% with a growth of 1.5 pp, Wind Tre’s market share has reached 13.6%, with a growth of 0.5 pp, and Fastweb’s market share amounts to 13.6% with a growth of 1.1 pp.

Other operators have, as a whole, increased their market share by 0.6 pp (YoY); the increase has been more evident for Fixed Wireless Access (FWA) operators.
1.2 Access lines by infrastructure

- Access lines through TIM's copper network have decreased by **23%** (YoY), and by **45.1%** as compared to June 2015
- The services offered using FTTC access technologies (fiber on a mixed copper network) grew by **36.8%** YoY, thanks in particular to the growth of the wholesale services offered by TIM, and FTTH access services by **49.4%**, driven by the growth of services offered by Open Fiber
- Over the entire period observed, the weight of FTTC + FTTH accesses has increased from **5%** to around **42%** of total access lines
- FWA lines have increased by **11%** (YoY), reaching an amount of **1.3** million units
### 1.3 Broadband and ultrabroadband fixed lines

- Broadband lines have increased by about **290** thousand units YoY.
- DSL lines (7.60 million lines) have decreased by about **2.13** million units (YoY), now accounting for the **44%** of broadband and ultrabroadband lines.
- Other technologies, in particular NGA lines, grew from **7.15** to **9.56** million units (YoY), now accounting for the **56%** of broadband and ultrabroadband lines.
- TIM’s market share has reduced by **1.5** pp (YoY).
- Vodafone’s and Fastweb’s market shares have increased by **1.2** and **0.6** pp (YoY), respectively, while Wind Tre’s market share has decreased by **0.4** p.p.
- The cumulative growth of Linkem and other operators’ (+0.4 pp) market share is essentially due to the increase in the number of FWA lines.
In June 2019, lines faster than (or equal) 30 Mbps have increased by 2.25 million units (YoY) and now account for 50% of total broadband lines.

This trend is attributable to the growth of lines faster than (or equal) 30 Mbps but below 100 Mbps (+870 thousand of lines) and of lines with speeds faster than (or equal) 100 Mbps (+1.4 million of lines), now accounting for 28.2% and 22.1% of total broadband lines, respectively.

Broadband lines faster than (or equal) 10 Mbps but below 30 Mbps have decreased by 1 million units YoY and now account for approximately 27.5% of total broadband lines.
1.5 Broadband fixed lines by type of customer

- Broadband fixed lines may be broken down as follows: **82.2%** are residential subscribers and **17.8%** are business subscribers.

- In the **residential segment**, TIM’s market share has reached **43.6%**, followed by Vodafone (16.8%) and Wind Tre (14.8%).

- Almost **47%** of accesses has a speed equal to or less than 30Mbps.

- The **business segment** is characterized by a greater concentration in the market shares of the first three operators as compared to the residential segment (75.2% in the business segment compared to 78.5% in the residential segment) while in terms of speed, it is higher the weight of lines up to 30 Mbps (63.6% vs. 46.7%).
For lines up to 10 Mbps, TIM’s market share has reached 68.6%.

For lines faster than (or equal) 10 Mbps but below 30 Mbps, it is possible to observe a higher level of competition, with the three main operators that are TIM (27.6%), Fastweb (24.9%) and Wind Tre (22.9%).

For lines faster than (or equal) 30 Mbps but below 1000 Mbps, thanks to the migration towards FTTC solutions, TIM’s market share has reached 70.1%.

For lines faster than (or equal) 100 Mbps, despite a YoY reduction, Fastweb preserve the leading position with a market share of 37.7%; to note that this reduction is partly due to the increase in the number of lines in the speed segment as a consequences of the migration of the lines of other operators coming from the segments at lower speeds.
1.7 Mobile subscribers

- Mobile lines have increased by about 3 million units YoY
- Over the last five years, «M2M» SIM cards have increased by 14.4 million units, now accounting for 22.8 million lines

- Overall, the three main operators show a reduction in market shares, while the new entrant Iliad gain 3.7 pp YoY
- A similar pattern is observed with regard to the “human” SIM cards; at the end of June 2019, Iliad reaches a market share of 4.7%

(*) - The data collected on TIM and Vodafone include the lines of the 100% subsidiaries, respectively Kena mobile and VEI (which offers mobile telephony services called .ho)
- Non residential SIM cards (9.5 million units at the end of June 2018) have decreased on a yearly basis by 0.1 million units
- Residential SIM cards (72 million units at the end of June 2019) have decreased by 1.2 million units (YoY)

- In the residential segment, as a consequence of the entry of a new brand (Iliad), the main operators suffer a market share reduction
- In the business segment TIM has become leader of the market with a share of 37.6% (+0.4 pp)
In the **prepaid** segment, Wind Tre, despite a reduction (-3.6 pp), retained the leadership position with a market share of 31.2%.

In the **postpaid** segment, with a share of 33.4%, Wind Tre become market leader, followed by TIM with a share of 32.5% and Vodafone with a share of 31.4%.

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- At the end of June 2019, **prepaid SIM** cards reached 70.3 million units (86.2% of total lines), with a decrease of 0.7 million units YoY (-4.8 million units since June 2015).
- At the end of June 2019, **postpaid SIM** cards reached 11.2 million units (13.8% of total lines), with a decrease of 0.6 million units YoY.
Since June 2015, the number of SIM cards with data traffic has increased from the 50% to the 70% of the overall SIM cards

Overall data traffic increased by about 62.1% compared to June 2017

At the end of June 2019, the average mobile data consumption per smartphone increased by over than 59.2% (YoY), from 3.67 to 5.85 Giga byte per month
At the end of June 2019, the total amount of mobile number portability operations exceeded **139** million of units.

On a yearly basis, the net «donating-recipient» balance has worsened for TIM (-499 thousand lines), for Wind Tre (-1,958 thousand lines) and Vodafone (-820 thousand lines) whereas it has improved for Iliad (+2,711 thousand lines) and for MVNO operators.

At the end of June 2019, the «Mobility Index»(*) was **13.5%** in line with last year and lower as compared to the previous values (2015 – 2017)

(*) – Ratio between (i) total donating lines plus total recipient lines since the beginning of the year, and (ii) the corresponding average customer base.
Over the whole period considered, from June 2015 to June 2019, the evening news program audience of the two most important players, Tg 1 and Tg5, has decreased for the first, from 24.0% to 21.9%, and increased for the latter form 18.1% to 18.6%

Rai, with over 3 million viewers on the average day, holds the leadership in terms of share (34.8%), with an increase of 1.5 pp YoY.

In the same period, the audience of Mediaset (-2.7 pp), Comcast (-0.1 pp) and La7 (-0.4 pp) have decreased, while the audience of Discovery (+1.1 pp) has increased.

Smaller operators maintain an audience of 15.1%.
Newspapers’ sales showed an overall 9% reduction YoY (-273 thousand units)

Only the leader in the sale of newspapers (Cairo/RCS Mediagroup) shows a positive changes YoY (+0.7 pp)

Printed newspaper sales show a structural reduction of 10% from June 2018 (-33% since June 2015)

The number of digital copies sold remained stable compared to June 2018, whereas, compared to June 2015, decreased by 26%
Overall, social networks have a greater ability to attract users in Spain, Italy and United Kindom

Among social networks, in all main EU countries, Facebook is the leader in terms of audience

Instagram (Facebook group) achieved good performances in Spain, Italy and United Kindom, exceeding 50% of Internet users

Twitter is particularly used in Spain and the United Kingdom

In the main EU countries, in June 2019, the average daily navigation time per person is increasing (+3% compared to March 2018)

Google and Facebook parent entities (brands aggregation) hold the leadership in terms of unique reach, confirming a trend of several year steady growth

In June 2019, Google and Facebook have experienced an increase in the monthly average time spent on its web page compared to March 2018
At the end of June 2019, overall revenues are about 3,382 million of €, with an increase of 1.8% YoY.

YoY, postal services’ market has shown a decline in revenues (-0.2%); over 55% of revenues are represented by “Domestic multiple items” (-0.3% YoY), while revenues from “Other” services increased YoY (+13.1%), mainly due to "exclusive services" and “parcels delivery”.

YoY, courier services’ market has shown a growth in revenues (3.1%); over 65% is represented by revenues from services with national sender and receiver (+3.5%); overall international deliveries increased by 2.5%.
3.2 Postal services and express couriers: revenues historical trend

- **Postal services**: over the last four years, revenues from Universal postal services (US) have decreased by 17.8% (from 1,995 to 1,640 million €), while revenues related to other postal services have grown by 13.6% (from 858 to 975 million €)

- **Courier services**: over the four years, it is possible to observe a 21.4% increase in revenues (from 3,448 to 4,186 million €)

- **Postal services**: over the whole period considered, revenues from Universal postal services have decreased by 17.1%, while revenues related to other postal services have grown by 6.4%

- **Courier services**: quarterly revenues shows a 13.7% increase compared to the first half of 2016
3.3 Postal services and express couriers: volumes

- At the end of June 2019, volumes of universal services (US) amounted to 562 million units, showing a contraction of 11.9% YoY and for other postal services by -4.2% YoY, while volumes have increased by about 5.9% YoY for the courier services segment (230 million units from the beginning of the year)

- Postal services: “domestic multiple items” account for about 85% of total volumes

- Courier services: volumes on a national basis grew by 6.9 pp YoY, now accounting for 82% of total volumes; over the same period, the volumes of services based on delivery or reception to and from foreign countries show a lower growth rate (+1.8% pp)
Postal services: over the last four years, volumes from Universal postal services have decreased by more than 34%; the volumes related to other postal services remained quite stable.

Courier services: over the last four years, it is possible to observe a 37.1% increase in volumes (from 340 to 466 million units).

Postal services: over the whole period considered, it is possible to observe an average reduction of 16.3%, due to the decrease in universal services volumes (-31.6%).

Courier services: quarterly volumes show a 27% increase compared to the quarterly value of June 2016.
3.5 Postal services and express couriers: competitive landscape

- Poste Italiane is still the first postal operator, and its share has shown an increase of 0.2 pp (YoY)
- The aggregate market shares of GLS, DHL, BRT, UPS and TNT-FedEx is 49.4%
- In the segment of services not included among the universal postal services, Poste Italiane, as a consequence of its historical monopolistic position, still holds 78.1%
- The market share’s scenario of express courier services at the end of June 2019 shows a stronger competition among operators
Over the last four years, the average unit revenue has grown by **10.8%** and is equal, for the period June 2018 – June 2019, to **€ 0.81**.

The unit revenue of services included in the universal services is above the average (**€ 1.37**), while that of other services is below the average (**€ 0.48**).

Over the last four years, the average unit revenue has decreased by **11.4%** and is equal to **€ 8.98** for the period June 2018 – June 2019.

Unit revenue of international services is above the average (**€ 17.09**), while that of national services is below the average (**€ 7.14**), and both show a reduction as compared to the period June 2015 – June 2016.
4.1 Harmonised consumer price index and other utilities price indices

Average price index (2010=100)

Utilities price index (2010=100)

The ISA (‘Indice Sintetico Agcom’) price index includes postal services, services and devices for fixed and mobile telephony, public TV license fee, pay TV, newspapers and magazines (10 items). In compliance with the procedure adopted by ISTAT for the indices of consumer prices, the aggregate communications index is calculated by the "method of chaining", by which the system of weights assigned to the items is updated yearly.
4.2 Mobile and fixed telephony price indices

**Fixed telephony price indices (2010=100)**

- Devices (1): 100.5
- Access / basic services (2): 130.0
- Broadband / Internet (3): 73.7

**Mobile telephony price indices (2010=100)**

- Devices (4): 70.5
- Services (5): 33.7

**Istat services codes:**

1. 08 20 10
2. 08 30 10
3. 08 30 30
4. 08 20 20
5. 08 30 20
4.3 Daily newspapers, magazines, TV and postal services price indices

**Newspapers, magazines, TV price indices (2010=100)**

**Postal services price index (2010=100)**

**Istat services codes:**

- (6) 09 52 10
- (7) 09 52 20
- (8) 09 42 30
- (9) 08 10.00
- (10) 08.1.0.1.0.00
- (11) 08.1.0.9.0.00

![Graphs showing price indices for newspapers, magazines, TV, and postal services over time.](image-url)
• Since June 2009, in Italy the communications price index has decreased at a faster pace than the EU average: -28.4 and -10.5 pp, respectively

• Since June 2009, the Italian inflation rate of postal services (+54.8 pp) is greater that of EU; among the countries analyzed, Germany show the lowest increase (+6.2 pp)

• Since June 2009, in Italy the newspapers and periodicals price index has increased (+24 pp) less than the EU average (+44.4 pp)