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The following figures are based on AGCOM’s elaborations on firms’ data and other sources (updated to March 2016)
### 1.1 Total fixed access lines

#### Lines [mln]

- **Telecom Italia**
  - Mar.-12: 22.06
  - Mar.-13: 21.64
  - Mar.-14: 21.09
  - Mar.-15: 20.47
  - June-15: 20.36
  - Sept.-15: 20.25
  - Dec.-15: 20.23
  - Mar.-16: 20.19

- **Wind**
  - Mar.-12: 7.57
  - Mar.-13: 7.86
  - Mar.-14: 7.97
  - Mar.-15: 8.19
  - June-15: 8.29
  - Sept.-15: 8.34
  - Dec.-15: 8.47
  - Mar.-16: 8.59

- **Fastweb**
  - Mar.-12: 14.48
  - Mar.-13: 13.78
  - Mar.-14: 13.03
  - Mar.-15: 12.28
  - June-15: 12.08
  - Sept.-15: 11.91
  - Dec.-15: 11.74
  - Mar.-16: 11.60

- **Vodafone**
  - Mar.-12: 0
  - Mar.-13: 5
  - Mar.-14: 10
  - Mar.-15: 15
  - June-15: 20
  - Sept.-15: 25
  - Dec.-15: 30
  - Mar.-16: 35

- **Tiscali**
  - Mar.-12: 20
  - Mar.-13: 15
  - Mar.-14: 10
  - Mar.-15: 5
  - June-15: 0
  - Sept.-15: -5
  - Dec.-15: -10
  - Mar.-16: -15

- **Linkem**
  - Mar.-12: 25
  - Mar.-13: 20
  - Mar.-14: 15
  - Mar.-15: 10
  - June-15: 5
  - Sept.-15: 0
  - Dec.-15: -5
  - Mar.-16: -10

- **Other operators**
  - Mar.-12: 7.57
  - Mar.-13: 7.86
  - Mar.-14: 7.97
  - Mar.-15: 8.19
  - June-15: 8.29
  - Sept.-15: 8.34
  - Dec.-15: 8.47
  - Mar.-16: 8.59

**Total**
- Mar.-12: 14.48
- Mar.-13: 13.78
- Mar.-14: 13.03
- Mar.-15: 12.28
- June-15: 12.08
- Sept.-15: 11.91
- Dec.-15: 11.74
- Mar.-16: 11.60

**Note**: access lines include Telecom Italia’s fixed access lines, fully unbundled, SLU, VULA, DSL naked, WLR, fiber and FWA lines.

- **Telecom Italia’s market share** has fallen below **60%**, with a decrease of **2.5 pp** (YoY).
- **Fastweb’s market share** has reached **11.3%**, with a growth of **0.8 pp** (YoY); similarly, **Vodafone’s market share** has reached **10.9%**, with a growth of **0.9 pp** (YoY).
- **Other operators** have, as a whole, increased their market share by **0.3** pp (YoY); the increase has been more evident for Fixed Wireless Access (FWA) operators.

#### Market shares – March 2016 [%]

- **Telecom Italia**
  - 57.5
- **Wind**
  - 13.6
- **Fastweb**
  - 11.3
- **Vodafone**
  - 10.9
- **Tiscali**
  - 2.4
- **Linkem**
  - 1.7
- **Other**
  - 2.8

#### Difference vs. March 2015 (percentage points)

- **Telecom Italia**
  - -2.5
- **Wind**
  - +0.2
- **Fastweb**
  - +0.8
- **Vodafone**
  - +0.9
- **Tiscali**
  - -0.1
- **Linkem**
  - +0.4
- **Other**
  - +0.3

- **Total access lines** have decreased by **280 thousand units** over the last twelve months.
- While Telecom Italia’s access lines have decreased by **680 thousand units**, other operators’ access lines have increased by about **400 thousand units**.
- Over the last four years, Telecom Italia’s access lines have decreased by **2.9 million units**.
1.2 Alternative operators’ fixed access lines

- Access lines provided by other operators have increased by 400 thousand units (YoY)
- A substantial part of this growth (390 thousand lines) is essentially due to the new NGA services offered by Telecom Italia (SLU and VULA)
- FWA lines have increased by 110 thousand units (YoY)

- Wind is still the first alternative operator, but its market share has shown a decrease of 1.4 pp (YoY)
- Fastweb’s market share continues to grow (+0.3 pp YoY)
- The growth of other operators’ market share (+0.4 pp YoY) is essentially due to the increase of the number of FWA lines

(*) Due to changes in firms’ accounting methods, figures cannot be compared directly with those reported in previous issues
1.3 Broadband fixed lines

- Broadband lines have increased by about 580 thousand units YoY
- DSL lines have decreased by about 360 thousand units YoY, now accounting for the 84% of broadband fixed lines (12.69 million lines)
- Other technologies, in particular NGA lines, have increased by 930 thousand units YoY

- Telecom Italia’s market share has reduced by 1.2 pp (YoY)
- Fastweb’s and Vodafone’s market shares have increased by +0.2 and +0.7 pp, respectively
- The growth of other operators’ market share (+0.7 pp) is essentially due to the increase in the number of FWA lines

(*) Due to changes in firms’ accounting methods, figures cannot be compared directly with those reported in previous issues
At the end of March 2016, NGA lines exceeded 1.7 million units (+279 thousand units from the beginning of the year)

Broadband lines faster than 10 Mps have increased by more than 1.5 thousand units YoY and account for 31.5% of total broadband lines

Broadband lines faster than 30 Mps have increased by 620 thousand units YoY and account for 8.2% of total broadband lines

Telecom Italia owns less than 55% of faster than ≥10 Mbps

Wind has shown the most conspicuous growth of ≥10 Mbps lines YoY (+400 thousand)

(*) Due to changes in firms’ accounting methods, figures cannot be compared directly with those reported in previous issues
1.5 NGA broadband fixed lines

- NGA lines account for 8.5% of total fixed lines and for 11.4% of broadband fixed lines
- More than 83% of NGA lines are provided by Fastweb and Telecom Italia
- Vodafone has shown the most conspicuous growth of high speed lines YoY, increasing its market share from 5.9% to 18.5% YoY

(*) Consistently with the definition given by the EU, NGA lines include the following type of access: vDSL, Fiber to the home, Fiber to the building, Ethernet+Lan, Cable and Other NGA
1.6 Mobile subscribers

- On a yearly basis, mobile lines have decreased by about **0.3** million units
- MNOs’ lines have decreased by **0.7** million units, whereas MVNO’s lines have increased by **0.4** million units
- MVNOs’ lines account for **7.5%** of total lines

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MVNO = Virtual Operators
MNO = Network Operators

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- Telecom Italia’s market share has decreased by **-0.2** pp (YoY), while Vodafone’s market share has remained stable at **28.9%**
- Poste Mobile’s and other MVNOs’ market shares show an overall increase of **+0.5** pp
- Among MVNO operators, Poste Mobile holds a share of **52.1%** (**+0.4** pp)

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(*) Due to changes in firms’ accounting methods, figures cannot be compared directly with those reported in previous issues
1.7 Mobile subscribers by type of consumer

- Non residential SIMs (19.5 million units at the end of March 2016) have increased on a yearly basis by 1.7 million units.
- Residential SIMs (77.3 million units at the end of March 2016) have decreased by 1.9 million units (YoY).

\(^{\text{(*)}}\) Due to changes in firms' accounting methods, figures cannot be compared directly with those reported in previous issues.

- In the residential segment, the market shares of the three main players are comparable; Vodafone's market share has reduced by 0.7 pp (YoY), while Poste Mobile's market share has increased by 0.4 pp.
- In the business segment Telecom Italia confirmed its leadership with a market share of 44.8%; Vodafone's market share has increased by 2.0 pp (YoY).
At the end of March 2016, prepaid SIMs reached 74 million units (76.4% of total lines), with a decrease of 1.1 million units YoY.

At the end of March 2016, postpaid SIMs reached 22.8 million units (23.6% of total lines), with an increase of 0.9 million units YoY.

In the prepaid segment, H3G’s (+0.8 pp) and Poste Mobile’s (+0.4 pp) market shares have increased (YoY).

Telecom Italia leads the postpaid segment with a share of 39% (+0.1 pp YoY).

(*) Due to changes in firms’ accounting methods, figures cannot be compared directly with those reported in previous issues.
1.9 Mobile data traffic

- SIMs used to exchange data have increased over the last year from 45.7 to 51 million units, with a growth rate of 11.6%.
- In March 2016, data traffic increased by 51.9% as compared to March 2015.
- In March 2016, the monthly data traffic consumption reached 1.5 Giga, with a 36% growth YoY.
- Since March 2011, the number of SIMs with data traffic has increased from 27.8% to 55% of the overall customer base.

(*) Due to changes in firms’ accounting methods, figures cannot be compared directly with those reported in previous issues.

According to European Commission definitions (CoCom):
- **Type 1**: “dedicated data subscriptions for add-on data package to a voice service requiring an additional subscription”
- **Type 2**: “dedicated data subscriptions for stand-alone services”
- **Type 3**: “actual usage of standard mobile subscriptions”
1.10 Mobile number portability

- At the end of March 2016, the total amount of mobile number portability operations reached a value of **92.1** million (cumulative figure)
- Mobile virtual operators, in line with the previous year, were able to gain **1.7** million net adds in the number of lines
- On a yearly basis, the net «donating-recipient» balance has improved for H3G (+346 thousand lines), whereas it has remained relatively stable for Vodafone, and it has worsened for Wind (-273 thousand lines) and Telecom Italia (-405 thousand lines)
- At the end of March 2016, the «Mobility Index»(*) is in line with the trend observed over recent years

(*) – Ratio between (i) total donating lines plus total recipient lines since the beginning of the year; and (ii) the corresponding average customer base
2.1 Revenues trend and composition

- The economic crisis has hit the newspapers market severely (-33.2% in revenues over the five year period)
- The downturn has been more contained for Free TV (about -19.4%), while Pay TV has experienced a revenues’ decrease of 2.4%
- As compared to 2010, in 2015 Internet advertising figures experienced a revenues’ growth of 45.1%, from 1,1177 to 1,708 million
- As compared to 2014, in 2015 an overall decrease of the media sector of around 1.2% is estimated
2.2 Media: TV audience and newspapers’ sales

- Over the 2012-2015 period, the audience of the two most important players (Rai and Mediaset) has decreased (by more than 3 pp, from 73.7% to 70.0%)
- The audience of smaller operators shows a progressively decreasing trend
- Gruppo Editoriale l’Espresso and Rcs Mediagroup currently share the leadership of the market with 20.5% and 18.9%, respectively
- Newspapers market’s competitive structure is nearly stable as compared to the previous year
### 2.3 Media: radio market shares and Internet audience

#### Radio: market shares 2015 [%]

- **RAI (public service TV),** despite a YoY fall by **2.4 pp,** preserve its position of leader of the market.
- **Gruppo Fineclo (including Radio 105, Radio Montecarlo and Virgin Radio)** has a market share of **12.9%**, stable as compared to the previous year.

#### Internet: active reach (March 2016)

- **Google remains the leader with about **95.5%** of the active reach.**
- The most popular portals show the higher active reach.
- In March 2016, about **28.3 mln people used the Internet,** up by **2 mln people** as compared to March 2015.

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**Source:** AGCOM Annual Report 2016

**Parent:** name of the website's parent entity. Parent provides the Parent-level information for a Brand or Channel.

**Active Reach (%)** is the percentage of all active unique persons who visited the site or used the application.

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**Whatsapp, since december 2015, was included in the facebook brand.

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**Source:** Audiweb (March 2015 – March 2016)
At the end of March 2016, overall revenues reached 1,529 million euros, up by 1.0% compared with the same period in 2015.

YoY, postal services’ market has shown a decline in revenues (5.1%), whereas the courier services’ market has shown a growth in revenues (7.5%).

The revenues of courier services’ market (790 mln) are higher than those of the postal services’ market (739 mln).

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**Note:** The figures relate to the following companies: Bartolini, DHL Express, Federal Express Europe, Nexive, Poste Italiane, SDA, TNT Global Express, UPS.
3.2 Postal services and express couriers: volumes

In March 2016, volumes of universal services amount to 430 million units, showing a contraction of 12.8% YoY.

Other postal services have shown a 10.8% decrease in volumes YoY.

As for the courier services segment (67 million units from the beginning of the year), volumes have increased by about 8.9% YoY.

Note: The figures relate to the following companies: Bartolini, DHL Express, Federal Express Europe, Nexive, Poste Italiane, SDA, TNT Global Express, UPS.
4.1 Harmonised consumer price index and other utilities price indices

- The ISA price index has decreased at a faster pace than other price indices.
- The growth rate of the prices of services regulated at the national level is comparable to the general price index, whereas the prices of services regulated at the local level show a steeper growth.
- Among regulated services, communications price index is the only one showing a decrease since 2012, but recently the trend reversed and shows a slight growth.

*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. 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.*

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**Average price index (2010=100)**

- General price index
- Regulated services - local
- Regulated services - national
- Agcom Summary Price Index - ISA

**Utilities price index (2010=100)**

- Water (1)
- Waste (2)
- Power (3)
- Gas (4)
- Train (5)
- Urban transport (6)
- Communications (7)

**Istat Services Codes:**

- (1) 04 41
- (2) 04 42
- (3) 04 51
- (4) 04 52
- (5) 07 31
- (6) 07 32 11
- (7) 08

**Harmonised consumer price index and other utilities price indices**

- Regulated services - local
- Regulated services - national
- Agcom Summary Price Index - ISA
4.2 Mobile and fixed telephony price indices

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

- Devices (1)
- Access / basic services (2)
- Broadband / Internet (3)

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

- Devices (4)
- Services (5)

Istat services codes:

1. 08 20 10
2. 08 30 10
3. 08 30 30
4. 08 20 20
5. 08 30 20

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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

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Since March 2000, in Italy the communications price index has decreased at a faster pace than the EU average: -39.6 and -19.6 pp respectively.

Since March 2000, the Italian inflation rate of postal services (+62.3 pp) has increased slightly more than EU average increase (+61.3 pp); Germany showed a lower increase (+19.5 pp).

Over the previous year, in Italy the postal services price index has increased at a faster pace than the EU average, while Italian prices for telecommunication services and equipment have decreased slightly more than the EU average.

Since 2000, in Italy the newspapers and periodicals price index has increased (+49.3 pp) less than the EU average (+71.0 pp).

(*) From the 29th of January 2016, the reference year for the Consumer Price Index is 2015.
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