1. Electronic communications
   1.1 Total fixed access lines
   1.2 Alternative operators’ fixed access lines
   1.3 Broadband fixed lines
   1.4 Broadband fixed lines by speed
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   1.6 Mobile subscribers
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   2.3 Media: regular economic reporting system in 2016
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The following figures are based on AGCOM’s elaborations on firms’ data and other sources (updated to September 2016)
1.1 Total fixed access lines

- Total access lines have decreased by 120 thousand units over the last twelve months.
- While Telecom Italia’s access lines have decreased by 540 thousand units, other operators’ access lines have increased by about 420 thousand units.
- Over the last four years, Telecom Italia’s access lines have decreased by 2.79 million units.

- Telecom Italia’s market share dropped to 56.2% at the end of September 2016 (compared to 58.6% at the end of September 2015).
- Wind’s market share has remained stable at 13.4%.
- Fastweb’s market share has reached 11.5%, with a growth of 0.7 pp (YoY).
- Other operators have, as a whole, increased their market share by 1.3 pp (YoY); the increase has been more evident for Fixed Wireless Access (FWA) operators.
1.2 Alternative operators’ fixed access lines

- Access lines provided by other operators have increased by 420 thousand units (YoY)
- A substantial part of this growth (450 thousand lines) is essentially due to the new NGA services offered by Telecom Italia (SLU and VULA) that compensate for the reduction in ULL and WLR lines (-280 thousand lines)
- FWA lines have increased by 150 thousand units (YoY), while fiber lines have increased by 70 thousand units

- Wind is still the first alternative operator, but its market share has shown a decrease of 1.6 pp (YoY)
- Vodafone’s market share has reached 25.5%, with a growth of 0.4 pp (YoY)
- The growth of other operators’ market share (1.3 pp YoY) is essentially due to the increase of the number of FWA lines
1.3 Broadband fixed lines

- Broadband lines have increased by about **630** thousand units YoY
- DSL lines have decreased by about **460** thousand units (YoY), now accounting for the **80.5%** of broadband lines (12.43 million lines)
- Other technologies, in particular NGA lines, have increased by **1.09** thousand units YoY (**+820** thousand units from the beginning of the year)
- Telecom Italia’s market share has reduced by **1.0** pp (YoY)
- Vodafone’s market share has reached **13.3%**, with a growth of **0.5** pp (YoY)
- The growth of other operators’ market share (**0.7** pp) is essentially due to the increase in the number of FWA lines
1.4 Broadband fixed lines by speed

- Broadband lines faster than 10 Mps have increased by more than 2.9 million units YoY and account for 48.5% of total broadband lines.
- Telecom has shown the most conspicuous growth of ≥10 Mbps lines YoY (1.4 million units).
- Broadband lines faster than 30 Mps have increased by 990 thousand units YoY and account for 12.8% of total broadband lines.
- Telecom Italia, Fastweb and Vodafone own together more than 94% of high-speed lines (faster than 30 Mps).

(*) 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 broadband access lines [*1000] (**)

NGA broadband lines as a share of total and broadband lines (**) 

- NGA lines account for 10.7% of total lines and for 14.0% of broadband lines, now accounting for more than 2.15 million units.
- On a yearly basis, Telecom Italia has shown the most conspicuous growth of high speed lines (+435 thousand units).

(*) Consistently with the definition given by the EU, NGA lines include, among others, the following type of access: vDSL, Fiber to the home and Fiber to the building.
(**) Due to changes in firms’ accounting methods, figures cannot be compared directly with those reported in previous issues.
On a yearly basis, mobile lines have increased by about 410 thousand units mainly due to MVNOs.

Over the last five years, «M2M» SIM have increased by 6.5 million units, now accounting for 11.4 million lines.

Telecom Italia’s market share has decreased by 0.6 pp (YoY), while Vodafone’s market share has increased by 0.5 pp.

Poste Mobile’s and other MVNOs’ market shares show an overall increase of 0.4 pp.

Among MVNOs, Poste Mobile holds a share of 51.4%.
1.7 Mobile subscribers by type of consumer

- Non residential SIMs (21.0 million at the end of September 2016) have increased on a yearly basis by 2.6 million units (**).
- Residential SIMs (77.1 million at the end of June 2015) have decreased by 3.2 million units (YoY).

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

(**) This result is partially affected by the rapid growth of M2M SIMs which are included as business SIMs.

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).

In the business segment Telecom Italia confirmed its leadership with a market share of 43.2% (-4.1 pp).

Vodafone’s and Wind’s market shares have increased by 3.8 and 0.4 pp, respectively.
At the end of September 2016, prepaid SIMs reached 73.3 million units (75.2% of total lines), with a decrease of 1.8 million units YoY.

At the end of September 2016, postpaid SIMs reached 24.1 million units (24.8% of total lines), with an increase of 2.2 million units YoY.

In the prepaid segment, H3G’s (+1.2 pp) and Poste Mobile’s (+0.3 pp) market shares have increased, whereas Vodafone’s (-0.9 pp) and Wind’s (-0.7 pp) market shares have decreased (YoY).

In the postpaid segment, with a share of 37.4% Telecom Italia has lost the leadership (-2.3 pp YoY); Vodafone leads the segment with a share of 39.1% (+4.1 pp YoY).

(*) Due to changes in firms’ accounting methods, figures cannot be compared directly with those reported in previous issues.
SIMs with data traffic have increased over the last year from 48.4 to 53.1 million units, with a growth rate of 9.7%. Since September 2012, the number of SIMs with data traffic has increased from 28.6% to 54.5% of the overall customer base. In September 2016, data traffic showed a 47.0% increase as compared to September 2015. In the first nine months of the year, the average mobile data consumption per smartphone increased by 33%, from 1.2 to 1.6 Giga byte per month.

(*) Due to changes in firms’ accounting methods, figures cannot be compared directly with those reported in previous issues.
At the end of September 2016, the total amount of mobile number portability operations reached a value of \textbf{98} million (cumulative figure)

On a yearly basis, the net «donating-recipient» balance has improved for H3G (+\textbf{549} thousand lines), whereas it has remained relatively stable for Vodafone, and it has worsened for Wind (-\textbf{388} thousand lines) and Telecom Italia (-\textbf{196} thousand lines)

At the end of September 2016, the «Mobility Index\(^(*)\) was 14.3, slightly down as compared to the previous 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 Media: TV audience and newspapers’ sales

Over the 2012-2016 period, the cumulative audience of the two most important players (Rai and Mediaset) has decreased significantly (by 7.0 pp, from 73.7% to 66.7%)

The audience of smaller operators (13.9%) is stable as compared to the previous year

Newspapers’ sales showed a 9.5% reduction YoY

Gruppo Editoriale l’Espresso and Rcs Mediagroup currently share the leadership of the market
2.2 Media: radio and Internet audience

Radio: listeners on an average day (1st half of 2016)

<table>
<thead>
<tr>
<th>Position 1st semester 2016</th>
<th>Change on previous year</th>
<th>Radio station</th>
<th>% share</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>(0)</td>
<td>RTL 102.5</td>
<td>19.6</td>
</tr>
<tr>
<td>2</td>
<td>(+1)</td>
<td>RADIO DEEJAY</td>
<td>13.6</td>
</tr>
<tr>
<td>3</td>
<td>(+1)</td>
<td>RADIO 105</td>
<td>13.0</td>
</tr>
<tr>
<td>4</td>
<td>(-1)</td>
<td>RDS 100% Grandi Successi</td>
<td>13.0</td>
</tr>
<tr>
<td>5</td>
<td>(0)</td>
<td>RADIO ITALIA Solomusicaitaliana</td>
<td>12.5</td>
</tr>
<tr>
<td>6</td>
<td>(0)</td>
<td>RAI RADIO 1</td>
<td>11.7</td>
</tr>
<tr>
<td>7</td>
<td>(0)</td>
<td>RAI RADIO 2</td>
<td>8.5</td>
</tr>
<tr>
<td>8</td>
<td>(0)</td>
<td>VIRGIN RADIO</td>
<td>6.6</td>
</tr>
<tr>
<td>9</td>
<td>(0)</td>
<td>RADIO 24 - IL SOLE 24 ORE</td>
<td>5.6</td>
</tr>
<tr>
<td>10</td>
<td>(+1)</td>
<td>RADIO KISS KISS</td>
<td>5.6</td>
</tr>
<tr>
<td>11</td>
<td>(+2)</td>
<td>RADIO R101</td>
<td>4.7</td>
</tr>
<tr>
<td>12</td>
<td>(0)</td>
<td>RADIO CAPITAL</td>
<td>4.6</td>
</tr>
<tr>
<td>13</td>
<td>(-2)</td>
<td>M2O</td>
<td>4.4</td>
</tr>
<tr>
<td>14</td>
<td>(0)</td>
<td>RAI RADIO 3</td>
<td>4.0</td>
</tr>
<tr>
<td>15</td>
<td>(0)</td>
<td>RMC - RADIO MONTE CARLO</td>
<td>3.2</td>
</tr>
</tbody>
</table>

Source: data collected as a part of the RadioMonitor survey

- RTL 102.5 keeps the leading position, followed by RDS and Radio Deejay (belonging to the Espresso group, owner also of M2O and Radio Capital)

Internet: active reach (September 2016)

<table>
<thead>
<tr>
<th>Position September 2016</th>
<th>Change on previous year</th>
<th>Parent*</th>
<th>Active Reach** (%)</th>
<th>Average time spent on website by visitors (hh:mm)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>(0)</td>
<td>Google</td>
<td>96.7</td>
<td>06:01:38</td>
</tr>
<tr>
<td>2</td>
<td>(0)</td>
<td>Facebook***</td>
<td>86.2</td>
<td>23:06:15</td>
</tr>
<tr>
<td>3</td>
<td>(0)</td>
<td>Microsoft</td>
<td>69.5</td>
<td>01:22:18</td>
</tr>
<tr>
<td>4</td>
<td>(+3)</td>
<td>Amazon</td>
<td>60.1</td>
<td>00:56:10</td>
</tr>
<tr>
<td>5</td>
<td>(0)</td>
<td>ItaliaOnline</td>
<td>59.4</td>
<td>01:22:19</td>
</tr>
<tr>
<td>6</td>
<td>(+20)</td>
<td>Mondadori***</td>
<td>56.9</td>
<td>00:15:27</td>
</tr>
<tr>
<td>7</td>
<td>(+2)</td>
<td>eBay</td>
<td>51.2</td>
<td>00:40:58</td>
</tr>
<tr>
<td>8</td>
<td>(+2)</td>
<td>Wikimedia Foundation</td>
<td>47.3</td>
<td>00:14:10</td>
</tr>
<tr>
<td>9</td>
<td>(-1)</td>
<td>Yahoo</td>
<td>47.1</td>
<td>00:42:42</td>
</tr>
<tr>
<td>10</td>
<td>(+1)</td>
<td>Gruppo Espresso</td>
<td>44.6</td>
<td>00:25:44</td>
</tr>
<tr>
<td>11</td>
<td>(+1)</td>
<td>RCS MediaGroup</td>
<td>42.5</td>
<td>00:23:42</td>
</tr>
<tr>
<td>12</td>
<td>(+1)</td>
<td>Triboo</td>
<td>39.2</td>
<td>00:09:48</td>
</tr>
<tr>
<td>13</td>
<td>(+1)</td>
<td>Mediaset</td>
<td>37.1</td>
<td>00:29:54</td>
</tr>
<tr>
<td>14</td>
<td>(+8)</td>
<td>Galtagirone Editore</td>
<td>33.4</td>
<td>00:19:27</td>
</tr>
<tr>
<td>15</td>
<td>(+1)</td>
<td>Telecom Italia</td>
<td>32.1</td>
<td>00:28:19</td>
</tr>
</tbody>
</table>

*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.

*** Whatsapp, since december 2015, was included in the Facebook brand

**** Banzai, since July 2016, was included in the Mondadori brand

Source: Audiweb (September 2015 – September 2016)

- Google parent entity remains the leader with about 96.7% of the active reach
- The main portals to web navigation show the higher active reach
- In September 2016, about 29.4 mln people used the Internet, up by 4.4 mln people as compared to September 2015
2.3 Media: regular economic reporting system in 2016 (IES)

IES distribution by industry (% - 2016)

- The sum of the shares of the firms is more than 100% because some firms may serve more than one sector.
- Revenue shares are calculated on the total amount of revenues yielded in the different communications areas.

- More than 4,200 notifications received in 2016: approximately half of them comes from firms operating in the publishing sector (magazines and newspapers).
- Over half of IES revenues (53.8%) comes from the broadcasting sector.
- It is possible to observe a high level of revenues concentration: the 70% of total revenues is produced by the first 20 operators.
2.4 Media: daily newspapers and magazines circulation

- During the period considered (2011 – 2015), for newspapers’ paper copies it’s possible to observe a significant decline in unit sales (-35%)
- At the end of 2015, digital copies have increased by 95 million units compared to 2012, now accounting for 15.4% of paper copies
- Il Sole 24 Ore, Gruppo Editoriale l’Espresso and RCS Mediagroup own together about 80% of digital copies

- During the period considered (2011 – 2015), for magazines’ paper copies it’s possible to observe a significant decline in unit sales (-33%)
- At the end of 2015, digital copies have increased by 12 million units compared to 2012, now accounting for 2.5% of paper copies
3.1 Postal services and express couriers: revenues

At the end of September 2016, overall revenues are about 4,761 million of euros, with an increase of 2.5% YoY.

YoY, postal services’ market has shown a decline in revenues (3.8%), whereas the courier services’ market has shown a growth in revenues (8.1%).

The revenues of courier services’ market (2,652 mln €) are higher than those of the postal services’ market (2,109 mln €).

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

In September 2016, volumes of universal services amounted to 1,190 million units, showing a contraction of 15.2% YoY.

Other postal services have shown a 6.3% decrease in volumes YoY.

As for the courier services’ segment (260 million units from the beginning of the year), volumes have increased by about 12.5% YoY.
### 4.1 Harmonised consumer price index and other utilities price indices

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

- The ISA price index has decreased at a faster pace as compared to the 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 2010, whereas for the Gas services the price index decline started at the begin of 2016.

*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.*

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

<table>
<thead>
<tr>
<th>Service</th>
<th>Istat Services Codes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Water (1)</td>
<td>04 41</td>
</tr>
<tr>
<td>Waste (2)</td>
<td>04 42</td>
</tr>
<tr>
<td>Power (3)</td>
<td>04 51</td>
</tr>
<tr>
<td>Gas (4)</td>
<td>04 52</td>
</tr>
<tr>
<td>Train (5)</td>
<td>07 31</td>
</tr>
<tr>
<td>Urban transport (6)</td>
<td>07 32</td>
</tr>
<tr>
<td>Communications (7)</td>
<td>07 31</td>
</tr>
<tr>
<td>Agcom Summary Price Index - ISA</td>
<td>08</td>
</tr>
</tbody>
</table>

---

19
4.2 Mobile and fixed telephony price indices

Fixed telephony price indices (2010=100)

Mobile telephony price indices (2010=100)

Istat services codes:
(1) 08 20 10
(2) 08 30 10
(3) 08 30 30

Istat services codes:
(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:
- Newspapers (6) 09 52 10
- Magazines (7) 09 52 20
- Rai subscription (8) 09 42 30
- Pay TV (8) 09 42 30

Istat services codes:
- Postal services (9) 08 10 00
4.4 International benchmark

Since September 2000, in Italy the communications price index has decreased at a faster pace than the EU average: -43.0 and -20.0 pp respectively.

Since September 2000, the Italian inflation rate of postal services (+62.3 pp) has increased slightly more than the EU average increase (+60.8 pp); Germany showed a lower increase (+19.2 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 equipments have decreased slightly more than the EU average.

Since 2000, in Italy the newspapers and periodicals price index has increased (+50.1 pp) less than the EU average (+71.8 pp).
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ses@agcom.it

Roma
Via Isonzo 21/b - 00198

Napoli
Centro Direzionale Isola B5 - 80143