COMMUNICATION MARKETS MONITORING SYSTEM

no. 4/2018
1. Electronic communications
   1.1 Total fixed access lines
   1.2 Access lines by infrastructure
   1.3 Broadband and ultrabroadband fixed lines
   1.4 Broadband fixed lines by speed
   1.5 Mobile subscribers
   1.6 Mobile subscribers by type of customer
   1.7 Mobile subscribers by type of contract
   1.8 Mobile data traffic
   1.9 Mobile number portability

2. Media
   2.1 Media: TV
   2.2 Media: Newspapers
   2.3 Media: Daily and periodical publishing volumes trend
   2.4 Media: Internet
   2.5 Integrated Communications System (SIC) – (1/3)
   2.6 Integrated Communications System (SIC) – (2/3)
   2.7 Integrated Communications System (SIC) – (3/3)

3. Postal services and express couriers
   3.1 Postal services and express couriers: revenues
   3.2 Postal services and express couriers: revenues historical trends
   3.3 Postal services and express couriers: volumes
   3.4 Postal services and express couriers: volumes historical trends
   3.5 Postal services and express couriers: competitive landscape
   3.6 Postal services and express couriers: per-unit revenues historical trends

4. Communication services’ prices
   4.1 Harmonised consumer price index and other utilities price indices
   4.2 Mobile and fixed telephony price indices
   4.3 Daily newspapers, magazines, TV and postal services price indices
   4.4 International benchmark

The following figures are based on AGCOM’s elaborations on firms’ data and other sources (updated to September 2018). Due to changes in firms’ accounting methods, some figures cannot be compared directly with those reported in previous issues.
1.1 Total fixed access lines

- A decrease in the total number of lines is recorded in the last quarter (-80 thousand lines)
- On a year over year basis, while TIM’s access lines have decreased by 690 thousand units, other operators’ access lines have increased by about 600 thousand units
- TIM’s market share dropped to 51.2% at the end of September 2018 (-3.1 pp)
- Vodafone’s market share has reached 13.3% with a growth of 1.5 pp, Wind Tre’s market share has reached 13.6%, with an increase of 0.1 pp, and Fastweb’s market share amounts to 12.7% with a growth of 0.7 pp
- Other operators have, as a whole, increased their market share by 0.9 pp (YoY); the increase has been more evident for Fixed Wireless Access (FWA) operators
### 1.2 Access lines by infrastructure

#### Lines [mln]

<table>
<thead>
<tr>
<th>Date</th>
<th>FTTC</th>
<th>FWA</th>
<th>FTTH</th>
<th>Copper</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sept.-14</td>
<td>0.52</td>
<td>0.31</td>
<td>0.83</td>
<td>0.36</td>
<td>1.83</td>
</tr>
<tr>
<td>Sept.-15</td>
<td>0.68</td>
<td>0.25</td>
<td>0.83</td>
<td>0.36</td>
<td>2.06</td>
</tr>
<tr>
<td>Sept.-16</td>
<td>1.74</td>
<td>1.10</td>
<td>0.83</td>
<td>0.36</td>
<td>3.03</td>
</tr>
<tr>
<td>Sept.-17</td>
<td>3.39</td>
<td>4.06</td>
<td>0.83</td>
<td>0.36</td>
<td>8.60</td>
</tr>
<tr>
<td>Dec.-17</td>
<td>1.05</td>
<td>0.56</td>
<td>0.83</td>
<td>0.36</td>
<td>2.60</td>
</tr>
<tr>
<td>March-18</td>
<td>4.06</td>
<td>4.72</td>
<td>0.83</td>
<td>0.36</td>
<td>9.97</td>
</tr>
<tr>
<td>June-18</td>
<td>5.29</td>
<td>5.69</td>
<td>0.83</td>
<td>0.36</td>
<td>12.57</td>
</tr>
<tr>
<td>Sept.-18</td>
<td>5.79</td>
<td>5.79</td>
<td>0.83</td>
<td>0.36</td>
<td>13.77</td>
</tr>
</tbody>
</table>

#### Last four quarters

- Access lines through TIM's copper network have decreased by **18.9%** (YoY), and by **35%** as compared to September 2014.
- FTTC access services increased by **70.7%** (YoY), and, most of all, due to services offered by TIM; a similar trend was observed also for FTTH access services (+48%), driven by the growth of services offered by Open Fiber.
- Over the entire period observed, the weight of FTTC + FTTH accesses has increased from less than **2.5%** to around **32%** of total access lines.
- FWA lines have increased by **20.3%** (YoY), reaching an amount of **1.18** million units.

#### Distribution of fixed access lines by infrastructure and its trend compared to September 2017 [%]

- Total lines:
  - September 2018: 20.40 million access
  - Rate of change Sept. 2018 - Sept. 2017: **-0.1%**
- Rate of change:
  - Copper: **-18.9%**
  - FWA: **+20.3%**
  - FTTC: **+70.7%**
  - FTTH: **+51.5%**

![Graph showing distribution and trend of fixed access lines](image-url)
1.3 Broadband and ultrabroadband fixed lines

- Broadband lines have increased by about **710** thousand units YoY
- DSL lines (**9.22** million lines) have decreased by about **2.15** million units (YoY), now accounting for the **54%** of broadband lines (**70%** in September 2017)
- Other technologies, in particular NGA lines, grew from **4.9** to **7.77** million units (YoY)
- TIM’s market share (**44.5%**) has reduced by **1.1** pp (YoY)
- Fastweb’s and Wind Tre’s market shares have decreased by **0.1** and **0.4** pp (YoY), respectively, while Vodafone’s market share has increased by **1.3**
- The cumulative growth of Linkem and other operators’ market share (+**0.2** pp) is essentially due to the increase in the number of FWA lines

### Market shares – September 2018 [%]

<table>
<thead>
<tr>
<th>Operator</th>
<th>Market Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>TIM</td>
<td>44.5</td>
</tr>
<tr>
<td>Vodafone</td>
<td>15.4</td>
</tr>
<tr>
<td>Fastweb</td>
<td>14.8</td>
</tr>
<tr>
<td>Wind Tre</td>
<td>14.4</td>
</tr>
<tr>
<td>Linkem</td>
<td>3.3</td>
</tr>
<tr>
<td>Tiscali</td>
<td>2.8</td>
</tr>
<tr>
<td>Others</td>
<td>4.7</td>
</tr>
</tbody>
</table>

### Lines [mln]

<table>
<thead>
<tr>
<th>Quarter</th>
<th>DSL</th>
<th>Other technologies</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sept.-14</td>
<td>1.16</td>
<td>1.91</td>
<td>3.00</td>
</tr>
<tr>
<td>Sept.-15</td>
<td>1.28</td>
<td>1.81</td>
<td>3.09</td>
</tr>
<tr>
<td>Sept.-16</td>
<td>1.37</td>
<td>1.37</td>
<td>2.74</td>
</tr>
<tr>
<td>Sept.-17</td>
<td>1.38</td>
<td>4.90</td>
<td>6.28</td>
</tr>
<tr>
<td>Dec.-17</td>
<td>10.84</td>
<td>5.69</td>
<td>16.53</td>
</tr>
<tr>
<td>March-18</td>
<td>10.29</td>
<td>6.46</td>
<td>16.75</td>
</tr>
<tr>
<td>June-18</td>
<td>9.72</td>
<td>7.15</td>
<td>16.87</td>
</tr>
<tr>
<td>Sept.-18</td>
<td>9.22</td>
<td>7.77</td>
<td>16.99</td>
</tr>
</tbody>
</table>

### Difference vs. September 2017 (percentage points)

<table>
<thead>
<tr>
<th>Operator</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>TIM</td>
<td>-1.1</td>
</tr>
<tr>
<td>Vodafone</td>
<td>+1.3</td>
</tr>
<tr>
<td>Fastweb</td>
<td>-0.1</td>
</tr>
<tr>
<td>Wind Tre</td>
<td>-0.4</td>
</tr>
<tr>
<td>Linkem</td>
<td>+0.4</td>
</tr>
<tr>
<td>Tiscali</td>
<td>-0.4</td>
</tr>
<tr>
<td>Others</td>
<td>+0.3</td>
</tr>
</tbody>
</table>

### Last four quarters

<table>
<thead>
<tr>
<th>Quarter</th>
<th>DSL Line Change</th>
<th>Other Technology Line Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sept.-14</td>
<td>+0.06</td>
<td>+0.81</td>
</tr>
<tr>
<td>Sept.-15</td>
<td>+0.03</td>
<td>+0.98</td>
</tr>
<tr>
<td>Sept.-16</td>
<td>+0.00</td>
<td>+0.91</td>
</tr>
<tr>
<td>Sept.-17</td>
<td>+0.00</td>
<td>+3.90</td>
</tr>
<tr>
<td>Dec.-17</td>
<td>+0.00</td>
<td>+5.02</td>
</tr>
<tr>
<td>March-18</td>
<td>+0.00</td>
<td>+6.11</td>
</tr>
<tr>
<td>June-18</td>
<td>+0.00</td>
<td>+6.74</td>
</tr>
<tr>
<td>Sept.-18</td>
<td>+0.00</td>
<td>+7.47</td>
</tr>
</tbody>
</table>
In September 2018, lines faster than 30 Mbps have increased by 3.2 million units (YoY) and now account for 40% of total broadband lines.

This trend is attributable, in equal measure, to the growth of lines faster than 30 Mbit/s but below 100 Mbit/s (+1.93 million of lines YoY) and of lines with speeds faster than 100 Mbit/s (+1.3 million of lines YoY), now accounting for 25% and 16.4% of total broadband lines, respectively.

Broadband lines faster than 10 Mbit/s but below 30 Mbit/s have decreased by 1.3 million units YoY and now account for approximately 32% of total broadband lines.

Lines below 10 Mbit/s have decreased by 1.23 million units YoY, and by about 6.35 million units over the entire period observed (Sept.-2014 - Sept.-2018).
Mobile lines have increased by about **3.8** million units YoY (**+5.4** million units compared to September 2014)

During the period considered, «M2M» SIM cards have increased by **12.7** million units, now accounting for **19.8** million lines

TIM’s market share has increased by **0.5** pp (YoY), while Vodafone’s and Wind Tre’s market share have reduced by **0.8** pp and by **2.3** pp, respectively

With regard to the “human” SIM cards, at the end of the first quarter of activity, Iliad reaches a market share of **2.7%**

Among MVNOs, Poste Mobile holds a share of **47.2%**, while Fastweb confirms the second position (**20.4%**) with a growth of **2.2** pp

(*) - 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)

(**) - Data do not include Kena mobile and .ho (see note (*)
1.6 Mobile subscribers by type of consumer

- Non residential SIM cards (9.5 million units at the end of September 2018) remain stable on a yearly basis, whereas residential SIM cards (73.8 million units at the end of June 2017) have decreased by 550 thousand units (YoY).

- In the residential segment, the shares of the first three operators have decreased, while other operators have, as a whole, increased their market share by 1.4 pp (YoY).

- In the business segment TIM and Vodafone hold a similar share of around 36%, while Wind Tre’s market share has is around 22.8%.
1.7 Mobile subscribers by type of contract

- At the end of September 2018, prepaid SIM cards reached 71.8 million units (86.2% of total lines), with a decrease of 88 thousand units YoY.
- At the end of September 2018, postpaid SIM cards reached 11.5 million units (13.8% of total lines), with a decrease of 671 thousand units YoY.

- In the prepaid segment, Wind Tre, despite a reduction (-2.9 pp), retained the leadership position with a market share of 33%.
- Similarly, in the postpaid segment, with a share of 34.1%, thanks to the increase (+1.7 pp), Wind Tre leads the segment, followed by Vodafone with a share of 33.9% (-2.1 pp) and TIM with a share of 30.5% (+0.6 pp).
Since September 2014, SIM cards with data traffic have increased from the 45.6% to the 70.9% of the overall SIM cards.

At the end of September 2018, the number of SIM cards with data traffic has increased by 3.5% (YoY) reaching 57.3 million units.

Overall data traffic increased by about 60% compared to September 2017.

At the end of September 2018, the average mobile data consumption per smartphone increased by 51%, from 2.58 to 3.88 Giga byte per month.

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"
At the end of September 2018, the total amount of mobile number portability operations exceeded 130 million units.

On a yearly basis, the net «donating-recipient» balance has improved for TIM (+63 thousand lines), for MVNO operators (+323 thousand lines) and for Iliad (+1,671 thousand units), whereas it has worsened for Wind Tre (-1,519 thousand lines) and Vodafone (-538 thousand lines).

At the end of September 2018, the «Mobility Index» (*) was 31.5% greater than the value of previous year.

(*) – Ratio between (i) total donating lines plus total recipient lines since the beginning of the year, and (ii) the corresponding average costumer base.
Over the whole period considered, from September 2014 to September 2018, the evening news program audience of the two most important players, TG 1 and TG5, has increased for the former (from 24% to 24.7%), whereas it decreased for the latter (from 19% to 16.2%)

Rai, with over 3.4 million viewers on the average day, holds the leadership in terms of share (36.5%), with an increase of 1.5 pp YoY

In the same period, the audience of Mediaset (-2.2 pp) and Comcast (-0.1 pp) have decreased, while the audience of Discovery has remained stable and that of La7 has increased (+0.7 pp)

Smaller operators maintain an audience of 15.5% (+0.1 pp YoY)

(*) In September 2018, Comcast Corporation acquired the control of Sky plc. The data refer to the corporate configuration before the merger.
2.2 Media: Newspapers

- Newspapers’ sales showed an overall **8%** reduction YoY (-250 thousand units)
- Cairo/Rcs Mediagroup and GEDI currently share the leadership of the market with a similar share

Printed newspaper sales of the major editorial brand show a structural reduction of **8%** from September 2017 (-34% from September 2014)

In September 2018, the number of digital copies sold remained stable compared to September 2017, whereas, compared to September 2014, they decreased by **52%**
2.3 Media: Daily and periodical publishing volumes trend(*)

- The average annual reduction of total copies sold in daily publishing (Newspaper), in the years between 2013 and 2017, is equal to 9.5% (-33% from 2013 to 2017)
- Similar results can be observed for periodical publishing (Magazines), with an average annual reduction rate of 8.4%, and a decrease rate of 29.7% from 2013 to 2017
- In 2017, for the first time, the number of copies of magazines sold exceeded that of newspapers

- In 2017, in terms of copies sold, the main operator in the daily publishing sector is the Gruppo GEDI (22.8%), followed by the Gruppo Cairo/RCS (18.3%) and Monrif (8.7%)
- The periodical publishing sector, by its nature, is characterized by a greater number of publishers, consequently smaller companies represent more than 50% of the volumes
- In 2017, in terms of copies sold, the main operator in the periodical publishing sector is the Gruppo Gruppo Cairo/RCS (23.3%), followed by Mondadori (12.2%) and Bresi (5%)

---

(*) - Data are census and are, therefore, not directly comparable with similar sample-based analysis
(**) - Data refer to paper copies
(*** - The historical series, to ensure the comparability of values, was built with the same market boundaries, in order to overcome the problems related to mergers and acquisitions involving the publish companies Gruppo Cairo/RCS Mediagroup and GELE/Itedi

---

Source: AGCOM elaborations on data from IES (Informativa Economica di Sistema)
2.4 Media: Internet

Audience on an average day [%] and the average monthly time [hh.mm.ss.] spent on website by visitors

- **Audience of the major social network in % – September 2018**
  - **Facebook**: 35.7
  - **Instagram**: 22.3
  - **Linkedin**: 15.3
  - **Pinterest**: 10.5
  - **Twitter**: 7.2
  - **Tumblr**: 9.8
  - **Google+**: 7.9

- **Average time spent on website by visitor (hh:mm:ss)**
  - Google
  - Facebook
  - Amazon
  - ItaliaOnline
  - Mondadori
  - GEDI
  - Microsoft

- **Unique audience (mln.)**
  - Google
  - Facebook
  - Amazon
  - ItaliaOnline
  - Mondadori
  - GEDI
  - Microsoft
  - RCS Media Group
  - Caltagirone Editore
  - Wikimedia F.

- **Google and Facebook parent entities (brands aggregation) hold, with a growth trend, the leadership in terms of unique reach.**
- **Overall, the unique audience of national platforms (Italiaonline, Mondadori, GEDI, RCS Mediagroup) show a growth.**
- **In September 2018, Facebook has experienced an increase in the average time.**
- **In September 2018, 42.7 million unique users connected to the Internet, for around a total amount of 70 hours of surfing per person per month.**
- **Among social networks, in September 2018, Facebook, with over 35.7 million unique users equal to 80% of surfers, confirms its position as a market leader, while Instagram follows in the second place with 22.3 million unique users equal to 52% of surfers.**
- **In September 2018, among the social networks considered, Google+ and Snapchat show a decrease trend in the number of unique users, compared to September 2016.**
2.5 Integrated Communications System (SIC) - (1/3)

**Total SIC revenues by main economic areas [bln €]**

<table>
<thead>
<tr>
<th>Year</th>
<th>Audiovisuals</th>
<th>Newspaper, magazines and news agencies publishing</th>
<th>Electronic publishing and online advertising</th>
<th>Yearly publishing</th>
<th>Cinema</th>
<th>Out of Home advertising</th>
<th>Below the line</th>
<th>Total SIC</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>17.64</td>
<td>8.65</td>
<td>4.78</td>
<td>1.58</td>
<td>4.78</td>
<td>17.64</td>
<td>17.64</td>
<td>17.64</td>
</tr>
<tr>
<td>2014</td>
<td>17.14</td>
<td>8.44</td>
<td>4.45</td>
<td>1.73</td>
<td>4.45</td>
<td>17.14</td>
<td>17.14</td>
<td>17.14</td>
</tr>
<tr>
<td>2015</td>
<td>17.08</td>
<td>8.45</td>
<td>4.17</td>
<td>1.86</td>
<td>4.17</td>
<td>17.08</td>
<td>17.08</td>
<td>17.08</td>
</tr>
<tr>
<td>2016</td>
<td>17.64</td>
<td>8.95</td>
<td>3.95</td>
<td>2.16</td>
<td>3.95</td>
<td>17.64</td>
<td>17.64</td>
<td>17.64</td>
</tr>
<tr>
<td>2017</td>
<td>17.48</td>
<td>8.85</td>
<td>3.76</td>
<td>2.43</td>
<td>3.76</td>
<td>17.48</td>
<td>17.48</td>
<td>17.48</td>
</tr>
</tbody>
</table>

**INTEGRATED COMMUNICATIONS [SIC] SYSTEM**

- Below the line
- Out of Home advertising
- Cinema
- Yearly publishing
- Electronic publishing and online advertising
- Newspapers, magazines and news agencies publishing
- Audiovisuals
- Total SIC

**Change in revenues [%]**

- Audiovisuals: 2.3% (Change 2013-2017), -21.3% (Change 2016-2017)
- Newspaper, magazines and news agencies publishing: -1.1% (Change 2013-2017), 12.6% (Change 2016-2017)
- Electronic publishing and online advertising: -4.7% (Change 2013-2017), -43.9% (Change 2016-2017)
- Yearly publishing: -9.6% (Change 2013-2017), -11.8% (Change 2016-2017)
- Out of Home advertising: -3.3% (Change 2013-2017), -3.3% (Change 2016-2017)
- Below the line: -0.9% (Change 2013-2017), -0.9% (Change 2016-2017)

**Integrated communications system (SIC):** Law No. 112 of the 3rd of May 2004, regarding the reform of the Italian audiovisual system (so called «Gasparri law»), introduces the SIC as a measure of the total amount of communication system revenues in order to ascertain that no operator earns more than the limit of 20% of the total revenues.

- In 2017, the SIC main areas’ revenues decrease by **0.9%** as compared with 2016, for a total value of **17.48 bln €** (1.01% of national GDP)
- Newspapers’ and magazines’ revenues and yearly publishing’ revenues have experienced the greatest decrease during the period 2013 – 2017, down **21.3%** and **43.9%**, respectively.
Audiovisual services account for nearly 51% of SIC revenues, and represent the main component.

In the last five years, the relevance of newspaper and magazine, in terms of revenues, decreased from 27.1% in 2013 to 21.5% in 2017.

Electronic publishing and online advertising represents 13.9% of SIC’s revenues, with a growth of 4.9 pp compared to 2013.

As regards the source of the SIC areas’, advertising revenues account for nearly 52% of SIC revenues.

The sale of products and services account for 36.7% of SIC revenues, while public funds, that include public television fee, account for 11.6%.
2.7 Integrated Communications System (SIC) - (3/3)

- At the end of 2017, the digital component relevance rise to **16.2%** of SIC revenues (**+5.2 pp** compared to 2013)

- In 2016, among the digital components, online advertising accounts for **2.23 bln €** (**+14.1%** compared to 2016), thanks mainly to the growth of advertising sales on digital platforms

### Influence of the digital component on the total SIC’s revenues [%]

<table>
<thead>
<tr>
<th>Year</th>
<th>Online advertising</th>
<th>Editorial contents sales</th>
<th>Audiovisual contents sales</th>
<th>Public Funds</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>8.4</td>
<td>0.3</td>
<td>2.3</td>
<td>2.1</td>
<td>15.0</td>
</tr>
<tr>
<td>2014</td>
<td>9.5</td>
<td>0.3</td>
<td>2.1</td>
<td>2.3</td>
<td>15.5</td>
</tr>
<tr>
<td>2015</td>
<td>9.7</td>
<td>0.3</td>
<td>2.3</td>
<td>2.2</td>
<td>15.5</td>
</tr>
<tr>
<td>2016</td>
<td>11.1</td>
<td>0.3</td>
<td>2.2</td>
<td>2.3</td>
<td>17.1</td>
</tr>
<tr>
<td>2017</td>
<td>12.7</td>
<td>0.3</td>
<td>2.3</td>
<td>0.9</td>
<td>16.2</td>
</tr>
</tbody>
</table>

- As the figure shows, none of the companies included in the SIC as of 2017 has breached the **20% threshold**

- ComCast Corporation (Sky), Fininvest and RAI, are the market leaders with a market share that range from **14%** to **15.4%**

- In terms of market concentration, the first ten corporate groups account for **62.3%** of the SIC market (**10.88 bln €**)
3.1 Postal services and express couriers: revenues

At the end of September 2018, overall revenues are about 5,066 million of €, with an increase of 3.3% YoY.

YoY, postal services’ market has shown a decline in revenues (-1.1%); nearly 55% of revenues are represented by “Domestic multiple items” (-2.2% YoY), while revenues from "Other" services increased YoY (+3.4%), mainly due to "exclusive services" and “parcels delivery”.

YoY, courier services’ market has shown a growth in revenues (6.2%); over 55% is represented by revenues from services with national sender and receiver (+5.0%); overall international deliveries increased by 7.7%, due to the increase in revenues from both “ingoing” (+12%) and "outgoing” (+6.4%) deliveries.

Note: The figures relate to the following companies: Bartolini, Citypost, DHL Express, Federal Express Europe, Fulmine Group, GLS Italy, Nexive, Poste Italiane, SDA, TNT Global Express, UPS.
Postal services: over the last four years, revenues from Universal postal services (US) have decreased by 18.2% (from 2,049 to 1,675 million €), while revenues related to other postal services have grown by 16% (from 841 to 973 million €).

Courier services: over the four years, it is possible to observe a 26.2% increase in revenues (from 3,375 to 4,261 million €).

Postal services: over the whole period considered, revenues from US have decreased by 12.6%, while revenues related to other postal services have grown by 6.8%.

Courier services: quarterly revenues shows a 21.8% increase compared to the first half of 2015.
3.3 Postal services and express couriers: volumes

- At the end of June 2018, volumes of universal services (US) amounted to 901 million units, showing a contraction of 12.9% YoY, while volumes have increased by 7.6% YoY for the courier services segment (345 million units from the beginning of the year) and for other postal services by 3.7% YoY.

- Postal services: despite a reduction of 2.2%, “domestic multiple items” account for about 83% of total volumes.

- Courier services: volumes on a national basis grew by 6.9% YoY, now accounting for 80% of total volumes; over the same period, the volumes of services based on delivery or reception to and from foreign countries show a higher growth rate (+10.8 pp).
3.4 Postal services and express couriers: volumes historical trend

- **Postal services**: over the last four years, volumes from US have decreased by more than 32.7%; the volumes related to other postal services remained quite stable.

- **Courier services**: over the four years, it is possible to observe a 45.0% increase in volumes.
3.5 Postal services and express couriers: competitive landscape

- Poste Italiane is still the first postal operator, but its share has shown a decrease of 1.0 pp (YoY)
- The aggregate market shares of DHL, UPS, BRT and TNT is 42.5%
- In the segment of services not included among the universal postal services, Poste Italiane, as a consequence of its historical monopolistic position, still holds 74.7%
- The market share’s scenario of express courier services at the end of September 2018 shows a stronger competition among operators
Over the last four years, the average unit revenue has grown by 8.6% and is equal, for the period September 2017 – September 2018, to € 0.78.

The per-unit revenue of services included in the US is above the average (€ 1.29), while that of other services is below the average (€ 0.46).

Over the last four years, the average unit revenue has decreased by 13% and is equal to € 9.16 for the period June 2017 – June 2018.

Unit revenue of international services is above the average (€ 21.00), while that of national services is below the average (€ 6.31), and both show a reduction as compared to the period September 2014 – September 2015.
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)

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
4.3 Daily newspapers, magazines, TV and postal services price indices

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

- Newspapers (6) 136.3
- Magazines (7) 127.3
- Pay TV (8) 107.3

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

- Postal services (9) 164.6
- Letters handling services (10) 137.3
- Other postal services (11) 122.6

**Istat services codes:**

- (6) 09 52 10
- (7) 09 52 20
- (8) 09 42 30
- (9) 08 10.00
- (10) 08.1.01.00
- (11) 08.1.0.9.00
4.4 International benchmark

Change in prices – September 2018 vs. September 2002 [%]

- Since September 2002, in Italy the communications price index has decreased at a faster pace than the EU average: -44.5 and -21.5 pp, respectively.
- Since September 2002, the Italian inflation rate of postal services (+72.4 pp) is in it is slightly higher than that of EU; among the countries analyzed, Germany show the lowest increase (+16.6 pp).
- Since September 2002, in Italy the newspapers and periodicals price index has increased (+42.4 pp) less than the EU average (+71.6 pp).

Change in prices - September 2018 vs. September 2017 [%]
Servizio Economico Statistico
ses@agcom.it

Roma
Via Isonzo 21/b - 00198

Napoli
Centro Direzionale Isola B5 - 80143