The following figures are based on AGCOM’s elaborations on firms’ data. The data are updated until September 2020 where possible. The results are not directly comparable with those reported in other documents produced by the Authority. Percentages may not total 100 due to rounding.
1.1: COVID-19 MONITORING: AGCOM'S ROLE DURING COVID-19 EMERGENCY

The so-called "Cura Italia" decree reaffirmed AGCOM’s role as the competent authority for any modifications, integrations or derogations to the ordinary regulations which are required necessary to deal with the health emergency, ensuring competition in the infrastructure and services markets and, at the same time, the protection of users.

To this end, permanent consultation panels with sector operators and stakeholders have been set up in order to identify suitable proposals to resolve the main critical issues related to the COVID-19 emergency.

The data and information illustrated in the figures below represent the result of a specific monitoring activity conducted by the Authority, which has the general objective of providing an information base that can contribute to a better understanding of trends and any critical issues that may emerge from the current pandemic crisis.

The information presented in the figures below is the result of a specific monitoring activity carried out by the Authority, achieved also thanks to the effective collaboration with operators, with the aim of providing an information base that can contribute to a better understanding of the trends in progress in such a complex period.

### Permanent consultation panels

<table>
<thead>
<tr>
<th>Telco and consumers panel</th>
<th>Specific monitoring objectives</th>
<th>Indicators</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="https://www.agcom.it/tavolo-telecomunicazioni-e-consommati">https://www.agcom.it/tavolo-telecomunicazioni-e-consommati</a></td>
<td>Track the economic and financial sustainability of the sector</td>
<td>Revenues</td>
</tr>
<tr>
<td></td>
<td>Track the pressure on network infrastructures</td>
<td>Data traffic</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Media service panel</th>
<th>Specific monitoring objectives</th>
<th>Indicators</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="https://www.agcom.it/tavolo-servizi-media">https://www.agcom.it/tavolo-servizi-media</a></td>
<td>Track the economic and financial sustainability of the sector</td>
<td>Revenues</td>
</tr>
<tr>
<td></td>
<td>Supervise the quality if information</td>
<td>Osservatorio sulla disinformazione online</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Digital platforms an big data panel</th>
<th>Specific monitoring objectives</th>
<th>Indicators</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="https://www.agcom.it/tavolo-piattaforme-digitali-e-big-data">https://www.agcom.it/tavolo-piattaforme-digitali-e-big-data</a></td>
<td>Supervise the online disinformation</td>
<td>Osservatorio sulla disinformazione online - Speciale Coronavirus</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Postal services panel</th>
<th>Specific monitoring objectives</th>
<th>Indicators</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="https://www.agcom.it/tavolo-servizi-postali">https://www.agcom.it/tavolo-servizi-postali</a></td>
<td>Track the economic and financial sustainability of the sector</td>
<td>Revenues</td>
</tr>
<tr>
<td></td>
<td>Monitor the use of postal services</td>
<td>Mail and parcel delivery volumes</td>
</tr>
</tbody>
</table>
1.2: REVENUES: MAIN EVIDENCES

1. The communications system
   In the first half of 2020, the Authority’s reference ecosystem recorded less negative results compared to the overall macroeconomic framework:
   
<table>
<thead>
<tr>
<th>Total revenues in</th>
<th>GDP trends (*)</th>
</tr>
</thead>
<tbody>
<tr>
<td>AGCOM’s sectors</td>
<td></td>
</tr>
<tr>
<td>-7.1%</td>
<td>-10.6%</td>
</tr>
</tbody>
</table>

   (1st Half 2020 vs. 2019)

   This is mainly due to the positive contribution of online advertising and e-commerce.

2. Media
   The decrease in overall revenues, which in the first half of 2020 amounted to 10.1% compared to the same period of 2019, was affected by the particularly negative trend in the second quarter of 2020 (-16.8%) mainly due to the decline in advertising resources on traditional media (radio, television and publishing) particularly sensitive to the reduction in consumption due to the health crisis.

   Daily and periodical publishing (-19.0%) is the most penalized sector. Television, particularly pay tv, limits the damage thanks to the growth in resources deriving from the consumption of streaming video content, while online advertising (+1.9%) is the only segment to grow.

3. Electronic communications
   In June 2020, the decrease in revenues (-5.7% on average compared to June 2019) was less intense for mobile network services (-4.7%) than for fixed network services (-6.5%).

   In terms of volumes, in the first nine months of the year, daily traffic grew by 44.4% in the fixed network and 55.6% in the mobile network. Correspondingly, the daily average traffic per broadband line is estimated at 5.8 GB (+40.2% on an annual basis) while it is 0.24 GB for a «human» sim card (+64.2%).

   (*) Agcom’s elaboration on ISTAT data - https://www.istat.it/it/archivio/246771

4. Postal services
   In the first half of 2020, total revenues decreased by 5.8% compared to the same period of 2019, with a substantially equivalent results looking distinctly at the first two quarters of the year. Including also the months of July and August, the decline in overall resources is slightly reduced (-3.6%). The results recorded in the January-August period by mail services (-29.4%) and parcel delivery services (+11.4%) differ significantly.

   In the first eight months of the year, volumes of traditional postal services decreased on average by 22.6% (by 27.8% the mail services included in the US), while those relating to the delivery of parcels services increased on average by 27.0% (a value that rises to 30.6% with reference to domestic parcels only).
The reduction in revenues in AGCOM’s areas of competence in the first half of 2020 was 1,743.3 million euros compared to the same period in 2019. In the second quarter of 2020 (April-May-June) there was a reduction of 9.1% compared to 2019.

The Telecommunications sector lost -€768.7 million due to a reduction in both fixed network revenues (-€481.2 million) and, to a lesser extent, mobile network revenues (-€287.6 million).

The Media sector recorded the most significant loss (-€771.7 million). Considerable losses were recorded in the publishing sector (-€326.4 million) and television and radio (-€473.8 million), while internet advertising revenues recovered slightly (+€28.5 million).

In the Postal sector (-€202.8 million), the reduction in revenues was mainly due to the Universal Service mail services segment (-€401.5 million), which was offset by growth in the parcel delivery segment (+€198.7 million).

### Quarterly Comparison (2019 vs. 2020)

<table>
<thead>
<tr>
<th>Sector</th>
<th>1st Half 2019</th>
<th>2nd Half 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>TELECOMMUNICATION</td>
<td>-5.8%</td>
<td>-5.5%</td>
</tr>
<tr>
<td>Fixed network</td>
<td>-5.8%</td>
<td>-7.2%</td>
</tr>
<tr>
<td>Mobile network</td>
<td>-5.9%</td>
<td>-3.5%</td>
</tr>
<tr>
<td>MEDIA</td>
<td>-3.0%</td>
<td>-16.8%</td>
</tr>
<tr>
<td>Television and radio</td>
<td>-3.9%</td>
<td>-17.4%</td>
</tr>
<tr>
<td>Publishing</td>
<td>-12.1%</td>
<td>-25.5%</td>
</tr>
<tr>
<td>Internet</td>
<td>+9.6%</td>
<td>-5.4%</td>
</tr>
<tr>
<td>POSTAL SERVICES</td>
<td>-5.8%</td>
<td>-5.9%</td>
</tr>
<tr>
<td>Mail services</td>
<td>-21.4%</td>
<td>-40.7%</td>
</tr>
<tr>
<td>Parcel delivery services</td>
<td>+15.1%</td>
<td></td>
</tr>
</tbody>
</table>
2.1: FIXED AND MOBILE NETWORK: AVERAGE DAILY DATA TRAFFIC (download + upload)

**Fixed Network**

- Average daily data traffic:
  - (Jan. - Sep. 2019): 68.0 petabyte
  - (Jan. - Sep. 2020): 98.2 petabyte
  - **Change**: +44.4%

- Monthly trend in 2020 (% change):
  - Jan. – Feb.: +7.4
  - Feb. – Mar.: +46.5
  - Mar. – Apr.: +1.6
  - Apr. – May: -16.4
  - May – Jun.: -10.8
  - Jun. – Jul.: -6.5
  - Jul. – Aug.: -2.5
  - Aug. – Sep.: +15.5

- Annual change (2019 – 2020) (%):
  - Jan.: +17.5
  - Feb.: +22.4
  - Mar.: +90.4
  - Apr.: +80.2
  - May: +51.5
  - Jun.: +37.3
  - Jul.: +32.2
  - Aug.: +34.5
  - Sep.: +33.3

**Mobile Network**

- Average daily data traffic:
  - (Jan. - Sep. 2019): 11.7 petabyte
  - (Jan. - Sep. 2020): 18.2 petabyte
  - **Change**: +56.4%

- Monthly trend in 2020 (% change):
  - Jan. – Feb.: +5.6
  - Feb. – Mar.: +20.7
  - Mar. – Apr.: +3.2
  - Apr. – May: -9.8
  - May – Jun.: +4.1
  - Jun. – Jul.: +6.7
  - Jul. – Aug.: +6.7
  - Aug. – Sep.: -5.0

- Annual change (2019 – 2020) (%):
  - Jan.: +52.8
  - Feb.: +53.3
  - Mar.: +79.0
  - Apr.: +78.9
  - Mag.: +55.7
  - Giu.: +51.9
  - Lug.: +49.1
  - Aug.: +48.6
  - Set.: +45.8
2.2: FIXED AND MOBILE NETWORK: MONTHLY DATA TRAFFIC IN DOWNLOAD AND UPLOAD

**FIXED NETWORK**

**Download data traffic:**
- Total traffic (Jan. – Sep.)
  - Year 2019: 16.30 zettabyte
  - Year 2020: 23.56 zettabyte
    - +44.5%

- Average monthly traffic (Jan. – Sep.)
  - Year 2019: 1.81 zettabyte
  - Year 2020: 2.62 zettabyte
    - +45.2%

**Upload data traffic:**
- Total traffic (Jan. – Sep.)
  - Year 2019: 1.83 zettabyte
  - Year 2020: 2.71 zettabyte
    - +48.1%

- Average monthly traffic (Jan. – Sep.)
  - Year 2019: 0.20 zettabyte
  - Year 2020: 0.30 zettabyte

**MOBILE NETWORK**

**Download data traffic:**
- Total traffic (Jan. – Sep.)
  - Year 2019: 2.83 zettabyte
  - Year 2020: 4.43 zettabyte
    - +56.8%

- Average monthly traffic (Jan. – Sep.)
  - Year 2019: 0.31 zettabyte
  - Year 2020: 0.49 zettabyte
    - +58.3%

**Upload data traffic:**
- Total traffic (Jan. – Sep.)
  - Year 2019: 0.28 zettabyte
  - Year 2020: 0.45 zettabyte
    - +58.3%

- Average monthly traffic (Jan. – Sep.)
  - Year 2019: 0.03 zettabyte
  - Year 2020: 0.05 zettabyte
    - +56.8%
2.3: FIXED AND MOBILE NETWORK: AVERAGE DAILY DATA TRAFFIC FOR BROADBAND LINE AND FOR "HUMAN" SIM

**Average daily data traffic per broadband line:**

   **+40.2%**

2. (Jan. - Mar. 2019) 4.10 giga byte → (Gen. - Set. 2020) 5.68 giga byte  
   **+38.6%**

   **+51.8%**

   (Jul. - Sep. 2019) 4.09 giga byte → (Jul. - Sep. 2020) 5.31 giga byte  
   **+29.7%**

**Average daily data traffic per "human" sim card:**

1. (Jan. - Sep. 2019) 0.15 giga byte → (Jan. - Sep. 2020) 0.24 giga byte  
   **+66.0%**

2. (Jan. - Mar. 2019) 0.13 giga byte → (Jan. - Sep. 2020) 0.22 giga byte  
   **+71.0%**

   (Apr. - Jun. 2019) 0.14 giga byte → (Apr. - Jun. 2020) 0.25 giga byte  
   **+70.1%**

   (Jul. - Sep. 2019) 0.17 giga byte → (Jul. - Sep. 2020) 0.27 giga byte  
   **+54.2%**
3.1: MEDIA: total revenues trend

On a half-yearly basis, revenues show a decrease of 10.1% compared to the corresponding half of 2019. Advertising on internet platforms is the only segment to show a growth, while revenues in the other segments are all lower than in the first half of 2019, albeit at different rates.

The breakdown of total revenues in the first half of 2020 shows a significant change compared to 2019. Due to the stronger reduction in advertising revenues compared to the user side revenues, the two components in the first half of 2020 are almost equal, while in 2019 the advertising revenue component was about 500 million euros higher.
3.2: MEDIA: ANDAMENTO DEI RICAVI DA PUBBLICITÀ

Advertising revenues of traditional media

<table>
<thead>
<tr>
<th>Platforms</th>
<th>Publishers and advertising agencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>1,198.9</td>
<td>1,279.1</td>
</tr>
<tr>
<td>1,831</td>
<td>327.0</td>
</tr>
<tr>
<td>2,495</td>
<td>275.3</td>
</tr>
</tbody>
</table>

Advertising revenues of internet

<table>
<thead>
<tr>
<th>Internet</th>
<th>Television</th>
<th>Newspapers</th>
<th>Radio</th>
<th>Magazines</th>
</tr>
</thead>
<tbody>
<tr>
<td>37.9%</td>
<td>41.5%</td>
<td>7.5%</td>
<td>6.6%</td>
<td>6.6%</td>
</tr>
</tbody>
</table>

Composition of advertising revenues by means

<table>
<thead>
<tr>
<th>1 semestre 2019</th>
<th>1 semestre 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet</td>
<td>37.9%</td>
</tr>
<tr>
<td>Television</td>
<td>41.5%</td>
</tr>
<tr>
<td>Newspapers</td>
<td>6.6%</td>
</tr>
<tr>
<td>Radio</td>
<td>4.9%</td>
</tr>
<tr>
<td>Magazines</td>
<td>6.6%</td>
</tr>
</tbody>
</table>

% change in percentage points

| Internet   | +8.0 p.p. |
| Television | -3.2 p.p. |
| Newspapers | -1.0 p.p. |
| Radio      | -1.7 p.p. |

Change %

(1st half 2019) → (1st half 2020)

- Advertising revenues of traditional media: -26.6%
- Advertising revenues of internet:
  - Platforms: +6.7%
  - Publishers and advertising agencies: -15.8%
3.1: POSTAL SERVICES: MAIL REVENUES (millions of €)

**UNIVERSAL SERVICE (US)**

- **Cumulative revenues for the entire period**
  - (Jan. - Aug. 2020) 664.2 mln. €
  - **-33.2%**

- **Monthly revenues 2020 (%)**
  - Jan. – Feb. -8.0
  - Feb. – Mar. -21.8
  - Mar. – Apr. -18.2
  - Apr. – May +21.2
  - May – Jun. +5.7
  - Jun. – Jul. +4.1
  - Jul. – Aug. -20.3

- **Annual change (2019 – 2020) (%)**
  - Jan. -10.7
  - Feb. -13.8
  - Mar. -47.4
  - Apr. -50.6
  - May -45.1
  - Jun. -33.5
  - Jul. -29.7
  - Aug. -25.7

**OTHER SERVICES (NO US)**

- **Cumulative revenues for the entire period**
  - **-23.5%**

- **Monthly revenues 2020 (%)**
  - Jan. – Feb. -5.9
  - Feb. – Mar. -31.9
  - Mar. – Apr. -1.7
  - Apr. – May -1.9
  - May – Jun. +9.6
  - Jun. – Jul. +23.9
  - Jul. – Aug. -26.1

- **Annual change (2019 – 2020) (%)**
  - Jan. -8.9
  - Feb. +2.7
  - Mar. -36.8
  - Apr. -35.3
  - May -45.6
  - Jun. -27.0
  - Jul. -14.1
  - Aug. -18.2
3.2: POSTAL SERVICES: PARCELS DELIVERY SERVICES REVENUES (millions of €)

**NATIONAL**

Cumulative revenues for the entire period

(Jan. – Aug. 2019) $1,925.4$ mln. €

(Jan. – Aug. 2020) $2,283.5$ mln. €

+18.6%

Monthly revenues 2020 (% change)

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<tr>
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</thead>
<tbody>
<tr>
<td>2019</td>
<td>-7.8</td>
<td>-5.0</td>
<td>+18.0</td>
<td>+8.8</td>
<td>-3.4</td>
<td>+2.2</td>
<td>-27.3</td>
</tr>
<tr>
<td>2020</td>
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Annual change (2019 – 2020) (%)

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</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>+10.5</td>
<td>+11.0</td>
<td>-1.1</td>
<td>+20.6</td>
<td>+25.4</td>
<td>+37.2</td>
<td>+19.4</td>
<td>+32.0</td>
</tr>
<tr>
<td>2020</td>
<td></td>
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</table>

**INTERNATIONAL**

Cumulative revenues for the entire period

(Jan. – Aug. 2019) $866.8$ mln. €

(Jan. – Aug. 2020) $903.5$ mln. €

-4.1%

Monthly revenues 2020 (% change)

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</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>-2.4</td>
<td>-12.5</td>
<td>-22.0</td>
<td>+36.6</td>
<td>+16.1</td>
<td>+2.4</td>
<td>-23.7</td>
</tr>
<tr>
<td>2020</td>
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</table>

Annual change (2019 – 2020) (%)

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</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>+2.3</td>
<td>+3.8</td>
<td>-18.0</td>
<td>-29.9</td>
<td>-13.4</td>
<td>+12.2</td>
<td>+4.1</td>
<td>+11.2</td>
</tr>
<tr>
<td>2020</td>
<td></td>
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</tr>
</tbody>
</table>
3.3: POSTAL SERVICES: MAIL REVENUES (millions of items)

**UNIVERSAL SERVICE (US)**

- Cumulative items for the entire period
  - (Jan. - Aug. 2019) 719.9 mln. of items
  - (Jan. - Aug. 2020) 520.0 mln. of items
  - **-27.8%**

- Monthly revenues 2020 (% change)
  - Jan. – Feb. -8.0
  - Feb. – Mar. -21.8
  - Mar. – Apr. -18.2
  - Apr. – May +21.2
  - May – Jun. +5.7
  - Jun. – Jul. +4.1
  - Jul. – Aug. -20.3

- Annual change (2019 – 2020) (%)
  - Jan. -14.0
  - Feb. -15.2
  - Mar. -40.6
  - Apr. -38.5
  - May -38.7
  - Jun. -25.4
  - Jul. -22.6
  - Aug. -19.1

**OTHER SERVICES (NO US)**

- Cumulative items for the entire period
  - (Jan. - Aug. 2019) 1,351.3 mln. of items
  - (Jan. - Aug. 2020) 1,083.7 mln. of items
  - **-19.8%**

- Monthly revenues 2020 (% change)
  - Jan. – Feb. -10.6
  - Feb. – Mar. -29.7
  - Mar. – Apr. +17.8
  - Apr. – May -9.8
  - May – Jun. +3.1
  - Jun. – Jul. +22.2
  - Jul. – Aug. -25.1

- Annual change (2019 – 2020) (%)
  - Jan. -9.5
  - Feb. -3.1
  - Mar. -35.8
  - Apr. -26.9
  - May -33.6
  - Jun. -17.4
  - Jul. -14.1
  - Aug. -16.8
3.4: POSTAL SERVICES: PARCELS DELIVERY SERVICES VOLUMES (millions of items)

**NATIONAL**

Cumulative items for the entire period

(Jan. - Aug. 2019) 290.8 mln. of items

(Jan. - Aug. 2020) 379.9 mln. of items

+30.6%

- Monthly revenues 2020 (% change)

(Jan. – Feb.) -11.3

(Feb. – Mar.) +2.0

(Mar. – Apr.) +22.7

(Apr. – May) +0.5

(May – Jun.) -8.1

(Jun. – Jul.) -1.4

(Jul. – Aug.) -22.7

- Annual change (2019 – 2020) (%)

(Jan.) +16.7

(Feb.) +17.3

(Mar.) +14.4

(Apr.) +43.1

(May) +48.7

(Jun.) +48.1

(Jul.) +24.6

(Aug.) +38.6

**INTERNATIONAL**

Cumulative items for the entire period

(Jan. - Aug. 2019) 55.9 mln. of items

(Jan. - Aug. 2020) 60.3 mln. of items

+7.8%

- Monthly revenues 2020 (% change)

(Jan. – Feb.) -8.9

(Feb. – Mar.) -13.0

(Mar. – Apr.) +2.3

(Apr. – May) +32.1

(Apr. – May) +6.2

(Jun. – Jun.) +1.7

(Jul. – Jul.) -23.7

- Annual change (2019 – 2020) (%)

(Jan.) +4.1

(Feb.) +5.5

(Mar.) -14.4

(Apr.) -7.8

(May) -12.4

(Jun.) -31.1

(Jul.) -12.5

(Aug.) -22.3