COMMUNICATION MARKETS MONITORING SYSTEM

no. 4/2020
The following figures are based on AGCOM's elaborations on firms' data and other sources (updated to September 2020). Due to changes in firms’ accounting methods, some figures cannot be compared directly with those reported in previous issues. Percentages may not total 100 due to rounding.
**1.1: FIXED LINES: TOTAL LINES**

<table>
<thead>
<tr>
<th>Distribution (%)</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sep.-2016</td>
<td>85.2</td>
</tr>
<tr>
<td>Sep.-2017</td>
<td>76.0</td>
</tr>
<tr>
<td>Sep.-2018</td>
<td>61.8</td>
</tr>
<tr>
<td>Sep.-2019</td>
<td>49.6</td>
</tr>
<tr>
<td>Last four quarters</td>
<td></td>
</tr>
<tr>
<td>Dec.-2019</td>
<td>47.0</td>
</tr>
<tr>
<td>Mar.-2020</td>
<td>44.3</td>
</tr>
<tr>
<td>Jun.-2020</td>
<td>41.4</td>
</tr>
<tr>
<td>Sep.-2020</td>
<td>39.1</td>
</tr>
</tbody>
</table>

**Copper** (Fixed Lines)  
**FWA** (Fixed Wireless Access)  
**FTTC** (Fiber to the Cabinet)  
**FTTH** (Fiber to the Home)

**MARKET SHARES (%)**  
SEPTEMBER 2020

<table>
<thead>
<tr>
<th>Operator</th>
<th>Share (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>TIM</td>
<td>45.1</td>
</tr>
<tr>
<td>Vodafone</td>
<td>15.8</td>
</tr>
<tr>
<td>Wind Tre</td>
<td>14.0</td>
</tr>
<tr>
<td>Fastweb</td>
<td>13.8</td>
</tr>
<tr>
<td>Linkem</td>
<td>3.4</td>
</tr>
<tr>
<td>Eolo</td>
<td>2.6</td>
</tr>
<tr>
<td>Others</td>
<td>5.2</td>
</tr>
</tbody>
</table>

**Total lines**  
(no of lines)  
| Quarterly change (March 2020 – September 2020) | +131 K accesses | -0.7% |
| Annual change (September 2019 – September 2020) | -391 K accesses | -2.0% |
| 4-Year change (September 2016 – September 2020) | -792 K accesses | -3.9% |

**Distribution (Δ 2019-2020)**  
**percentage points**

- **Copper**: -10.4
- **FWA**: +0.9
- **FTTC**: +7.0
- **FTTH**: +2.5

**TIM’s market share has dropped to 45.1%**

**The market shares of Vodafone, Wind Tre and Fastweb have increased**

**Other operators have increased their market share**

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**Note**: Due to changes in firms’ accounting methods and methodological refinements introduced by the Authority, the total number of fixed lines is not directly comparable with previous versions.
### MARKET SHARES (%) SEPTEMBER 2020

<table>
<thead>
<tr>
<th>Operator</th>
<th>Market Share (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>TIM</td>
<td>42.1</td>
</tr>
<tr>
<td>Vodafone</td>
<td>16.7</td>
</tr>
<tr>
<td>Fastweb</td>
<td>15.1</td>
</tr>
<tr>
<td>Wind Tre</td>
<td>14.0</td>
</tr>
<tr>
<td>Linkem</td>
<td>3.7</td>
</tr>
<tr>
<td>Eolo</td>
<td>2.9</td>
</tr>
<tr>
<td>Tiscali</td>
<td>2.4</td>
</tr>
<tr>
<td>Others</td>
<td>3.0</td>
</tr>
</tbody>
</table>

**Annual change (Sept. 2019 – Sept. 2020):**
- **TIM**: +1.0
- **Vodafone**: +0.5
- **Fastweb**: +0.2
- **Wind Tre**: +0.1
- **Linkem**: +0.1
- **Eolo**: +0.5
- **Tiscali**: +0.1
- **Others**: +0.1

**Quarterly change (Sept. 2020 – Sept. 2020):**
- **TIM**: -1.0
- **Vodafone**: +0.5
- **Fastweb**: +0.2
- **Wind Tre**: +0.1
- **Linkem**: +0.1
- **Eolo**: +0.5
- **Tiscali**: +0.1
- **Others**: +0.1

**Changes in millions of lines (Sept. 2019 – Sept. 2020):**
- **Total**: 42.1
- **DSL lines**: 15.37
- **Other technologies**: 16.28
- **Total lines**: 16.99
- **DSL lines**: 17.48
- **Other technologies**: 17.59
- **Total lines**: 17.68
- **DSL lines**: 17.81
- **Other technologies**: 17.86

**Differences vs. September 2019 (percentage points):**
- **TIM**: +2.1%
- **Vodafone**: +0.1%
- **Fastweb**: +18.3%
- **Wind Tre**: -19.5%
- **Linkem**: -0.1%
- **Eolo**: -1.0%
- **Tiscali**: -0.1%
- **Others**: -0.1%

**Note:**
- **K** = thousand
- **M** = million
1.3: FIXED LINES: BROADBAND AND ULTRABROADBAND LINES BY TECHNOLOGY AND OPERATORS

SEPTEMBER 2020

**DSL**

- **Total lines:** 6.01 million accesses
- **Annual change:** Sept. 2019 – Sept. 2020
  - **-19.5%**

**FWA**

- **Total lines:** 1.44 million access
- **Annual change:** Sept. 2019 – Sept. 2020
  - **+11.4%**

**FTTC**

- **Total lines:** 8.81 million access
- **Annual change:** Sept. 2019 – Sept. 2020
  - **+16.0%**

**FTTH**

- **Total lines:** 1.57 million access
- **Annual change:** Sept. 2019 – Sept. 2020
  - **+41.7%**

**Note:** Elaborations based on data provided by companies in the context of the preparation of European reporting. A few thousand lines allocated by the companies in the categories “Other non-NGA” and “Other NGA” are excluded from the analysis.
### 1.4: MOBILE LINES: TOTAL SUBSCRIBERS

#### Millions of lines

<table>
<thead>
<tr>
<th></th>
<th>Sim human</th>
<th>Sim M2M</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sep.-2016</td>
<td>86.3</td>
<td>11.4</td>
<td>97.7</td>
</tr>
<tr>
<td>Sep.-2017</td>
<td>84.1</td>
<td>15.3</td>
<td>99.4</td>
</tr>
<tr>
<td>Sep.-2018</td>
<td>83.3</td>
<td>20.3</td>
<td>103.6</td>
</tr>
<tr>
<td>Sep.-2019</td>
<td>80.8</td>
<td>23.5</td>
<td>104.3</td>
</tr>
</tbody>
</table>

#### Last four quarters

<table>
<thead>
<tr>
<th></th>
<th>Sim human</th>
<th>Sim M2M</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dec.-2019</td>
<td>79.6</td>
<td>24.3</td>
<td>103.9</td>
</tr>
<tr>
<td>Mar.-2020</td>
<td>78.4</td>
<td>24.7</td>
<td>103.1</td>
</tr>
<tr>
<td>Jun.-2020</td>
<td>78.1</td>
<td>25.5</td>
<td>103.6</td>
</tr>
<tr>
<td>Sep.-2020</td>
<td>77.8</td>
<td>26.3</td>
<td>104.1</td>
</tr>
</tbody>
</table>

(*) Note: Machine-to-Machine sims are based on the technologies that enable devices and sensors or “things” (within the IoT) to communicate with each other and with other Internet-enabled devices and systems.

#### Quarterly change (June 2020 – Sept. 2020)

- Total sim cards: +485 (+0.5%)
- Sim human: -279 (-0.4%)
- Sim M2M: +764 (+3.0%)

#### Annual change (Sept. 2019 – Sept. 2020)

- Total sim cards: -219 (-0.2%)
- Sim human: -3,008 (-3.7%)
- Sim M2M: +2,788 (+11.9%)

#### Differences vs. September 2019 (percentage points)

- Sim total: +0.4
- Sim human*: +0.5

(*) Note: Sim human refers to sim (voice and data or only voice or data) used by individual, excluding M2M sim cards.

---

#### MARKET SHARES (%)

**SEPTEMBER 2020**

<table>
<thead>
<tr>
<th></th>
<th>Vodafone</th>
<th>TIM</th>
<th>Wind Tre</th>
<th>Iliad</th>
<th>Poste Mobile</th>
<th>Other MVNOs</th>
<th>Other MVNOs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sim total</td>
<td>29.1</td>
<td>29.0</td>
<td>26.1</td>
<td>6.6</td>
<td>4.2</td>
<td>5.1</td>
<td></td>
</tr>
</tbody>
</table>

Differences vs. September 2019:

- Vodafone: +0.4
- TIM: -1.0
- Wind Tre: -2.1
- Iliad: +2.2
- Poste Mobile: -0.8
- Other MVNOs: +0.5

#### Differences vs. September 2019 (percentage points)

- Wind Tre: -2.5
- TIM: -0.8
- Iliad: +3.2
- Poste Mobile: +0.3
- Other MVNOs: +0.8

Note: the data collected on TIM and Vodafone include the lines of the subsidiaries, respectively Kena mobile and VEI (which offers mobile telephony services called .ho).
## 1.5: MOBILE LINES: SUBSCRIBERS BY TYPE OF CUSTOMER (sim human)

<table>
<thead>
<tr>
<th>Distribution (%)</th>
<th>Total (millions of sims)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sep.-2016</strong></td>
<td>11.2</td>
</tr>
<tr>
<td><strong>Sep.-2017</strong></td>
<td>11.6</td>
</tr>
<tr>
<td><strong>Sep.-2018</strong></td>
<td>11.4</td>
</tr>
<tr>
<td><strong>Sep.-2019</strong></td>
<td>11.9</td>
</tr>
<tr>
<td><strong>Sep.-2020</strong></td>
<td>12.4</td>
</tr>
</tbody>
</table>

#### Annual change (Sept. 2019 – Sept. 2020)
- Total human sim cards: -3,007 (3.7%)
- Residential sim card: -3,025 (4.3%)
- Business sim cards: +18 (0.2%)

#### 4-Year change (Sept. 2016 – Sept. 2020)
- Total human sim cards: -8,496 (9.8%)
- Residential sim card: -8,456 (11.0%)
- Business sim cards: -40 (0.4%)

### MARKET SHARES (%)

<table>
<thead>
<tr>
<th></th>
<th>SEPTEMBER 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Iliad</td>
<td>29.1</td>
</tr>
<tr>
<td>Poste Mobile</td>
<td>25.0</td>
</tr>
<tr>
<td>TIM</td>
<td>22.5</td>
</tr>
<tr>
<td>WindTre</td>
<td>10.0</td>
</tr>
<tr>
<td>Vodafone</td>
<td>5.9</td>
</tr>
<tr>
<td>Other MVNOs</td>
<td>7.4</td>
</tr>
</tbody>
</table>

#### Differences vs. September 2019 (percentage points)
- Residential
  - Poste Mobile: +3.7
  - TIM: -2.7
  - Vodafone: -1.1
  - WindTre: -1.2
  - Iliad: +1.0
  - Other MVNOs: +0.3

#### Business
- Poste Mobile: +0.1
- TIM: -0.1
- Vodafone: +0.6
- WindTre: +0.5
- Iliad: -1.1
- Other MVNOs: +0.6
1.6: MOBILE LINES: SUBSCRIBERS BY TYPE OF CONTRACT

### Distribution (%)

<table>
<thead>
<tr>
<th>Year</th>
<th>Total (millions of sims)</th>
<th>Prepaid</th>
<th>Postpaid</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sep.-2016</td>
<td>86.3</td>
<td>85.4</td>
<td>14.6</td>
</tr>
<tr>
<td>Sep.-2017</td>
<td>84.1</td>
<td>85.5</td>
<td>14.5</td>
</tr>
<tr>
<td>Sep.-2018</td>
<td>83.3</td>
<td>86.2</td>
<td>13.8</td>
</tr>
<tr>
<td>Sep.-2019</td>
<td>80.8</td>
<td>86.4</td>
<td>13.6</td>
</tr>
<tr>
<td>Sep.-2020</td>
<td>77.8</td>
<td>86.4</td>
<td>13.6</td>
</tr>
</tbody>
</table>

### Annual change (Sept. 2019 – Sept. 2020)

- **Total human sim cards:** -3,007 (-3.7%)
- **Prepaid sim cards:** -2,591 (-3.7%)
- **Postpaid sim cards:** -416 (-3.8%)

### 4-Year change (Sept. 2016 – Sept. 2020)

- **Total human sim cards:** -8,496 (-9.8%)
- **Prepaid sim cards:** -6,525 (-8.9%)
- **Postpaid sim cards:** -1,971 (-15.7%)

### MARKET SHARES (%)

**SEPTEMBER 2020**

- **Prepaid**
  - Wind Tre: 27.0
  - TIM: 25.3
  - Vodafone: 23.6
  - Iliad: 10.2
  - Poste Mobile: 6.4
  - Other MVNOs: 7.5

- **Postpaid**
  - Wind Tre: 36.2
  - TIM: 34.3
  - Vodafone: 27.0
  - Iliad: 2.5

**Differences vs. September 2019 (percentage points)**

- Wind Tre: +2.5
- TIM: -1.7
- Vodafone: +3.7
- Iliad: +0.3
- Other MVNOs: +1.0
At the end of September 2020, the number of sim cards with data traffic has reached 73.1% of the total human sim cards.
1.8: Mobile lines: number portability

In one year (September 2019 – September 2020), there have been **12.2** million of Mobile Number Portability (MNP) operations

**Mobility index**: the ratio between (i) total donating lines plus total recipient lines since the beginning of the year, and (ii) the corresponding average costumer base (net off M2M sims)

**Totale lines** (cumulative value of number portability operations)

- Sep.-2016: 98.3
- Sep.-2017: 113.5
- Sep.-2018: 130.2
- Sep.-2019: 144.0
- Sep.-2020: 155.1

**DISTRIBUTION (%) OF DONOR AND RECIPIENT LINES (12 months)**

**SEPTEMBER 2020**

<table>
<thead>
<tr>
<th>Wind Tre</th>
<th>TIM*</th>
<th>Vodafone*</th>
<th>Iliad</th>
<th>MVNO</th>
</tr>
</thead>
<tbody>
<tr>
<td>26.6</td>
<td>13.4</td>
<td>21.2</td>
<td>22.9</td>
<td>20.9</td>
</tr>
<tr>
<td>21.2</td>
<td>19.4</td>
<td>18.2</td>
<td>10.1</td>
<td></td>
</tr>
<tr>
<td>31.5</td>
<td>26.6</td>
<td>19.4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>24.5</td>
<td>21.2</td>
<td>18.2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>22.1</td>
<td>21.2</td>
<td>18.2</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

(*) Note: the data collected on TIM and Vodafone include the lines of the subsidiaries, respectively Kena mobile and VEI (which offers mobile telephony services called .ho)
2.1: MEDIA: TV

AUDIENCE OF THE MAIN EVENING NEWSCASTS (%)
AVERAGE DAY (September 2016 – September 2020)

MARKET SHARES (%)
SEPTEMBER 2020

Delta percentage points
(September 2019 – September 2020)

Tg 1 +3.7 p.p. 
Tg 2 +0.8 p.p. 
Tg 3 +3.5 p.p. 
Tg 3 - Regionale +5.2 p.p. 

Source: Agcom elaboration on Auditel’s data (Nielsen)

Average daily television viewership

Newscasts
Tg 1: 4.9 M viewers
Tg 5: 3.8 M viewers

Broadcasters
Rai: 3.2 M viewers
Mediaset: 3.1 M viewers

M = million
**2.2: MEDIA: QUOTIDIANI**

**NEWSPAPERS’ TOTAL MONTHLY SALES BY EDITORIAL GROUPS (%)**

**SEPTEMBER 2020**

- **GEDI Gruppo Editoriale**
- **Cairo/RCS MediaGroup**
- **Caltagirone Editore**
- **Monrif Group**
- **Gruppo Amodei**
- **Gruppo 24 Ore**
- **Others**

**Total copies sold in September 2020**

**61,468,415**

**Annual change:**
(September 2019 – September 2020)
- **-14%**

**Source:** Agcom elaboration on data from ADS and IES
2.3: MEDIA: DAILY AND PERIODICAL PUBLISHING VOLUMES TREND (PAPER COPIES)*

**DAILY PUBLISHING**

<table>
<thead>
<tr>
<th>Year</th>
<th>Newspapers</th>
<th>Magazines</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>1,095</td>
<td>968</td>
</tr>
<tr>
<td>2016</td>
<td>943</td>
<td>930</td>
</tr>
<tr>
<td>2017</td>
<td>886</td>
<td>888</td>
</tr>
<tr>
<td>2018</td>
<td>826</td>
<td>777</td>
</tr>
<tr>
<td>2019</td>
<td>757</td>
<td>679</td>
</tr>
</tbody>
</table>

- **Total Copies Sold (mln. of units)**
  - Newspapers
  - Magazines

**PERIODICAL PUBLISHING**

<table>
<thead>
<tr>
<th>Year</th>
<th>Newspapers</th>
<th>Magazines</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>1,095</td>
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<td>888</td>
</tr>
<tr>
<td>2018</td>
<td>826</td>
<td>777</td>
</tr>
<tr>
<td>2019</td>
<td>757</td>
<td>679</td>
</tr>
</tbody>
</table>

- **DISTRIBUTION OF COPIES (%)**
  - Newspapers
  - Magazines

**Notes:**
- (*) **Note:** data are census and are, therefore, not directly comparable with similar sample-based analysis.
- (**) **Note:** the time 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.
2.4: MEDIA INTERNET: ACTIVE USERS OF THE MAIN OPERATORS

AUDIENCE ON AN AVERAGE DAY (%) (SEPTEMBER 2017 – SEPTEMBER 2020)

In September 2020, 42 million unique users connected to the internet.

AVERAGE MONTHLY TIME SPENT ON WEBSITE BY VISITORS (SEPTEMBER 2017 – SEPTEMBER 2020)

In September 2020, a total amount of 59 hours of surfing, on average, per person per month.

Note: Since March 2018, the Audeweb system has adopted a new methodology.

Source: Agcom elaboration on Audeweb’s data (Nielsen)
2.5: MEDIA INTERNET: ACTIVE USERS OF THE MAIN SOCIAL NETWORKS

MAIN SOCIAL NETWORKS USERS
SEPTEMBER 2017 – SEPTEMBER 2020
IN MILLIONS

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Reddit</td>
<td>+2.5%</td>
<td>-9.1%</td>
</tr>
<tr>
<td>TikTok</td>
<td>+400%</td>
<td>-0.4%</td>
</tr>
<tr>
<td>LinkedIn</td>
<td>+4.3%</td>
<td>+3.5%</td>
</tr>
<tr>
<td>Pinterest</td>
<td>+35.0%</td>
<td>-1.8%</td>
</tr>
<tr>
<td>Twitter</td>
<td>-9.1%</td>
<td>-1.4%</td>
</tr>
<tr>
<td>Reddit</td>
<td>-25.2%</td>
<td>-2.5%</td>
</tr>
<tr>
<td>TikTok</td>
<td>+400%</td>
<td>+35.0%</td>
</tr>
<tr>
<td>Instagram</td>
<td>+3.0%</td>
<td>-1.8%</td>
</tr>
<tr>
<td>Facebook</td>
<td>+1.5%</td>
<td>-2.2%</td>
</tr>
</tbody>
</table>

Source: Agcom elaboration on Audweb’s data (Nielsen)
3.1: POSTAL SERVICES: REVENUES

REVENUES SINCE THE BEGINNING OF THE YEAR
MILLIONS OF €

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Mail services</td>
<td>1,107</td>
<td>759</td>
<td>-28.1%</td>
</tr>
<tr>
<td>Parcel delivery services</td>
<td>1,906</td>
<td>733</td>
<td>+14.1%</td>
</tr>
<tr>
<td>Domestic multiple items</td>
<td>1,034</td>
<td>1,009</td>
<td>-2.1%</td>
</tr>
<tr>
<td>Domestic single items</td>
<td>2,346</td>
<td>2,364</td>
<td></td>
</tr>
<tr>
<td>Crossborder services</td>
<td>1,097</td>
<td>1,097</td>
<td></td>
</tr>
<tr>
<td>TOTAL</td>
<td>4,780</td>
<td>4,678</td>
<td></td>
</tr>
</tbody>
</table>

REVENUES BY SOURCE TYPE SINCE THE BEGINNING OF THE YEAR (%)
JANUARY TO SEPTEMBER 2020

<table>
<thead>
<tr>
<th>Source</th>
<th>Domestic multiple items</th>
<th>Domestic single items</th>
<th>Crossborder services</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mail services</td>
<td>US</td>
<td>US</td>
<td>US</td>
<td>US</td>
</tr>
<tr>
<td></td>
<td>33.8%</td>
<td>24.6%</td>
<td>2.3%</td>
<td>10.9%</td>
</tr>
<tr>
<td>Parcel delivery services</td>
<td>US</td>
<td>US</td>
<td>US</td>
<td>US</td>
</tr>
<tr>
<td></td>
<td>69.3%</td>
<td>0.6%</td>
<td>0.3%</td>
<td>18.5%</td>
</tr>
</tbody>
</table>

Annual change (Sept. 2019 – Sept. 2020):

- Domestic multiple items: -24.3%
- Domestic single items: -29.2%
- Crossborder services: -26.4%
- Other: -37.9%
- Domestic: +23.1%
- Crossborder: -2.5%
3.2: POSTAL SERVICES: REVENUES HISTORICAL TRENDS

ON A YEARLY BASIS (12 months cumulative sum)
MILLIONS OF €

<table>
<thead>
<tr>
<th>Year</th>
<th>Mail services</th>
<th>Parcel delivery services</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015/16</td>
<td>-30.0%</td>
<td>+46.8%</td>
<td>5,960</td>
</tr>
<tr>
<td>2016/17</td>
<td>-40.4%</td>
<td>+71.0%</td>
<td>6,076</td>
</tr>
<tr>
<td>2017/18</td>
<td>-7.3%</td>
<td>+12.5%</td>
<td>6,342</td>
</tr>
<tr>
<td>2018/19</td>
<td>+19.3%</td>
<td>+57.7%</td>
<td>6,553</td>
</tr>
<tr>
<td>2019/20</td>
<td>+22.1%</td>
<td>+16.6%</td>
<td>6,603</td>
</tr>
</tbody>
</table>

- Mail services: +10.8% ↑
- Parcel delivery services: +46.8% ↑
- Total: +10.8% ↑

ON A QUARTERLY BASIS
MILLIONS OF €

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Mail services</th>
<th>Parcel delivery services</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>3° trim. 2016</td>
<td>-37.8%</td>
<td>-21.0%</td>
<td>1,340</td>
</tr>
<tr>
<td>3° trim. 2017</td>
<td>-26.0%</td>
<td>-17.0%</td>
<td>1,394</td>
</tr>
<tr>
<td>3° trim. 2018</td>
<td>-22.8%</td>
<td>-6.0%</td>
<td>1,466</td>
</tr>
<tr>
<td>3° trim. 2019</td>
<td>-20.8%</td>
<td>-7.9%</td>
<td>1,508</td>
</tr>
<tr>
<td>3° trim. 2020</td>
<td>-17.7%</td>
<td>+28.6%</td>
<td>1,598</td>
</tr>
</tbody>
</table>

- Mail services: +19.3% ↑
- Parcel delivery services: +57.7% ↑
- Total: +19.3% ↑

- Mail services: +15.6% ↑
- Parcel delivery services: +22.1% ↑
- Total: +15.6% ↑
3.3: POSTAL SERVICES: VOLUMES

VOLUMES SINCE THE BEGINNING OF THE YEAR
MILLIONS OF UNITS

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>US (Universal Service)</td>
<td>781</td>
<td>1,514</td>
</tr>
<tr>
<td>NO SU (Non rientranti nel Servizio Universale)</td>
<td>585</td>
<td>1,215</td>
</tr>
</tbody>
</table>


Annual change (Sept. 2019 – Sept. 2020):

-21.6% (US), +29.7% (NO SU), -13.7% (Total)

VOLUMES BY SOURCE TYPE (%)
SEPTEMBER 2020

Mail services

- Domestic multiple items:
  - no US: 61.1%
  - US: 25.2%

- Domestic single items:
  - no US: 0.3%
  - US: 2.1%

- Crossborder services:
  - no US: 4.0%
  - US: 7.4%

- Other:
  - no US: 0.4%
  - US: 0.1%

- Total: 86.8%

Parcel delivery services

- Domestic:
  - no US: 12.7%
  - US: 0.4%

- Crossborder:
  - no US: 0.1%
  - US: 0.1%

- Total: 86.8%

Annual change (Sept. 2019 – Sept. 2020):

- Domestic multiple items: -19.8%
- Domestic single items: -35.9%
- Crossborder services: -31.9%
- Other: -28.7%
- Domestic: +33.4%
- Crossborder: +9.4%
3.4: POSTAL SERVICES: VOLUMES HISTORICAL TRENDS

ON A YEARLY BASIS (12 months cumulative sum)
MILLIONS OF UNITS

ON A QUARTERLY BASIS
MILLIONS OF UNITS


Total: -21.9% -12.5%
Mail services: -33.6% -19.7%
- Universal Service: -51.4% -26.5%
- No Universal Service: -18.8% -15.9%
Parcel delivery services: +105.3% +27.6%
- Domestic: +120.0% +30.9%
- Crossborder: +41.9% +8.9%


Total: -16.7% -7.2%
Mail services: -30.7% -15.5%
- Universal Service: -48.1% -12.7%
- No Universal Service: -18.1% -16.7%
Parcel delivery services: +120.7% +33.1%
- Domestic: +136.3% +35.5%
- Crossborder: +54.2% +18.5%
3.5: POSTAL SERVICES: COMPETITIVE LANDSCAPE

SEPTEMBER 2020

MAIL AND PARCEL DELIVERY SERVICES

MAIL SERVICES
not included in Universal service

PARCEL DELIVERY SERVICES COURIERS
not included in Universal service

Differences vs. September 2019
(percentage points)
### 3.6: POSTAL SERVICES: PER-UNIT REVENUES HISTORICAL TRENDS IN €

**MAIL SERVICES**

- **Average unit revenue:**
  - Mail no US: +22.8% → +0.7%
  - Mail US: +14.2% → -2.2%

**PARCELS DELIVERY SERVICES**

- **Average unit revenue:**
  - Crossborder parcels: -28.5% → -9.4%
  - Domestic parcels: -22.3% → -6.7%

- **Change in Crossborder parcels:**
  - US: -20.7% → -4.9%
  - No US: -20.5% → -5.0%

- **Change in Domestic parcels:**
  - US: -3.2% → -6.5%
  - No US: -22.4% → -6.7%
4.1 PRICE: HARMONISED CONSUMER PRICE INDEX AND OTHER UTILITIES PRICE INDICES (2010=100)

GENERAL PRICE INDEX

UTILITIES PRICE INDEX

Source: Agcom elaboration on data from Istat

ISA (Agcom summary price index):
- Regulated services - local:
  - 4-Year change: -13.6%
  - Annual change: -5.3%
- General price index:
  - 4-Year change: +2.1%
  - Annual change: -0.6%
- Regulated services - national:
  - 4-Year change: +8.4%
  - Annual change: +1.1%

(*) Note: 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 (for a total of 10 items).

COICOP - Classification of Individual Consumption by Purpose

Water (04.4.1): +13.6%  +2.1%  
Waste (04.4.2): +1.8%  -0.1%  
Power (04.5.1): +2.2%  -8.0%  
Gas (04.5.2): -11.5%  -13.3%
4.2 **PRICE: MOBILE AND FIXED TELEPHONY PRICE INDICES (2010=100)**

**Fixed Telephony Price Indices**

- **Access / basic services (08.3.0.1):**
  - 4-Year change: +10.8%
  - Annual change: -0.4%

- **Devices (08.2.0.1):**
  - 4-Year change: +10.4%
  - Annual change: +3.7%

- **Broadband / internet (08.3.0.3.0.01):**
  - 4-Year change: -23.4%
  - Annual change: +1.0%

**Mobile Telephony Price Indices**

- **Services (08.3.0.2):**
  - 4-Year change: -13.8%
  - Annual change: -1.7%

- **Devices (08.2.0.2):**
  - 4-Year change: -44.1%
  - Annual change: -23.6%

**Source:** Agcom elaboration on data from Istat

*(COICOP - Classification of Individual Consumption by Purpose)*
4.3 PRICE: DAILY NEWSPAPERS, MAGAZINES, TV AND POSTAL SERVICES PRICE INDICES (2010=100)

**NEWSPAPERS, MAGAZINES, TV PRICE INDICES**

<table>
<thead>
<tr>
<th>Category</th>
<th>Price Index</th>
<th>4-Year Change</th>
<th>Annual Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Newspapers (09.5.2.1.0):</td>
<td>139.5</td>
<td>+6.1%</td>
<td>-0.4%</td>
</tr>
<tr>
<td>Pay TV (09.4.2.3.0.02):</td>
<td>126.8</td>
<td>+6.3%</td>
<td>-0.9%</td>
</tr>
<tr>
<td>Magazines (09.5.2.2.0):</td>
<td>110.0</td>
<td>+2.0%</td>
<td>+0.7%</td>
</tr>
</tbody>
</table>

**POSTAL SERVICES PRICE INDEX**

<table>
<thead>
<tr>
<th>Category</th>
<th>Price Index</th>
<th>4-Year Change</th>
<th>Annual Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Postal services (08.1):</td>
<td>164.6</td>
<td>+11.0%</td>
<td>+0.2%</td>
</tr>
<tr>
<td>Letters handling services (08.1.0.1.0.00):</td>
<td>139.2</td>
<td>=</td>
<td></td>
</tr>
<tr>
<td>Other postal services (08.1.0.9.0.00):</td>
<td>126.0</td>
<td>+3.6%</td>
<td>+0.5%</td>
</tr>
</tbody>
</table>

Source: Agcom elaboration on data from Istat

(COICOP codes - Classification of Individual Consumption by Purpose)
### 4.4 PRICE: INTERNATIONAL BENCHMARK

**TLC – SERVICES AND EQUIPMENTS**  
*(COICOP 08.2 - 08.3)*

<table>
<thead>
<tr>
<th>Country</th>
<th>1-Year Change %</th>
<th>5-Year Change %</th>
<th>10-Year Change %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ita</td>
<td>-6.7</td>
<td>-18.4</td>
<td>-32.4</td>
</tr>
<tr>
<td>Fra</td>
<td>-3.2</td>
<td>-10.4</td>
<td>-30.0</td>
</tr>
<tr>
<td>GER</td>
<td>-1.7</td>
<td>6.3</td>
<td>-17.7</td>
</tr>
<tr>
<td>SPA</td>
<td>-1.4</td>
<td>-5.9</td>
<td>-15.5</td>
</tr>
<tr>
<td>UK</td>
<td>3.2</td>
<td>10.6</td>
<td>29.9</td>
</tr>
</tbody>
</table>

**NEWSPAPERS AND MAGAZINES**  
*(COICOP 09.5.2)*

<table>
<thead>
<tr>
<th>Country</th>
<th>1-Year Change %</th>
<th>5-Year Change %</th>
<th>10-Year Change %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ita</td>
<td>14.0</td>
<td>4.6</td>
<td>0.0</td>
</tr>
<tr>
<td>SPA</td>
<td>3.0</td>
<td>9.8</td>
<td>1.4</td>
</tr>
<tr>
<td>FRX</td>
<td>3.5</td>
<td>15.4</td>
<td>3.0</td>
</tr>
<tr>
<td>GER</td>
<td>4.1</td>
<td>17.2</td>
<td>5.9</td>
</tr>
<tr>
<td>UK</td>
<td>6.3</td>
<td>20.0</td>
<td>3.5</td>
</tr>
</tbody>
</table>

**POSTAL SERVICES**  
*(COICOP 08.1)*

<table>
<thead>
<tr>
<th>Country</th>
<th>1-Year Change %</th>
<th>5-Year Change %</th>
<th>10-Year Change %</th>
</tr>
</thead>
<tbody>
<tr>
<td>GER</td>
<td>-0.3</td>
<td>6.9</td>
<td>-7.2</td>
</tr>
<tr>
<td>Ita</td>
<td>0.2</td>
<td>11.1</td>
<td>0.0</td>
</tr>
<tr>
<td>SPA</td>
<td>3.2</td>
<td>14.7</td>
<td>3.9</td>
</tr>
<tr>
<td>UK</td>
<td>5.5</td>
<td>14.8</td>
<td>19.0</td>
</tr>
<tr>
<td>FRA</td>
<td>26.3</td>
<td>20.0</td>
<td>24.8</td>
</tr>
</tbody>
</table>

Source: Agcom elaboration on data from Eurostat.