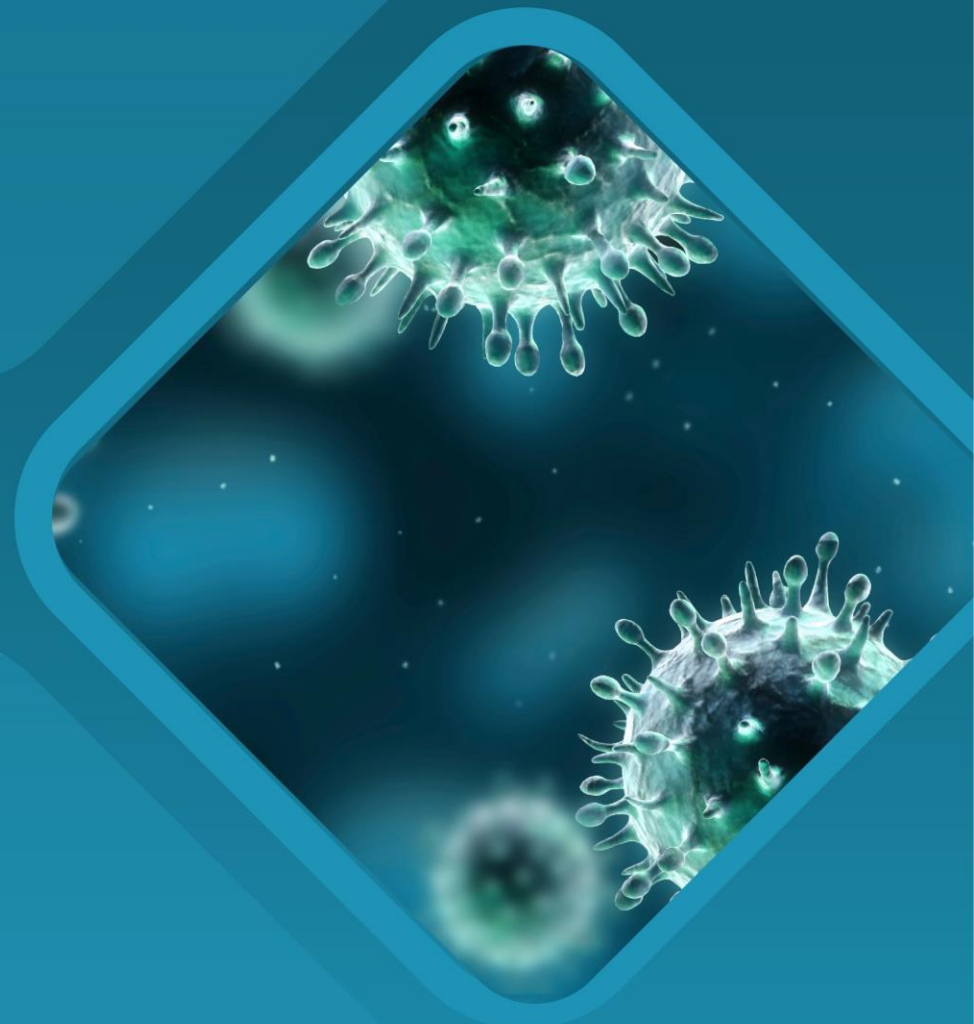




AUTORITÀ PER LE
GARANZIE NELLE
COMUNICAZIONI

COMMUNICATION MARKETS MONITORING SYSTEM

COVID-19 monitoring
January - May
2020



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The following figures are based on AGCOM's elaborations on firms' data. 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: THE ROLE OF AGCOM IN THE PANDEMIC

- ① 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 to deal with the health emergency, ensuring competition in the infrastructure and services markets and, at the same time, the protection of users.
- ② To this end, **permanent consultation panels** with sector operators and stakeholders have been set up in order to identify appropriate proposals to resolve the main critical issues that emerged during the weeks of the health emergency.
- ③ The lockdown period was a significant **stress test for the Italian communications system**, which has shown to be able to withstand the shock. The communications sector played a central role in managing the health crisis, having proved to be one of the key pillars of the economic and social system.
- ④ The **information presented** in the figures below are the result of a specific **monitoring activities 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 forums

Telco and consumers panel
<https://www.agcom.it/tavolo-telecomunicazioni-e-consumatori>

Postal services panel
<https://www.agcom.it/tavolo-servizi-postali>

Media services panel
<https://www.agcom.it/tavolo-servizi-media>

Digital platforms and big data panel
<https://www.agcom.it/tavolo-piattaforme-digitali-e-big-data>

Main issues addressed and monitored during the pandemic

the reinforcement and security of telecommunications networks and services; consumer protection and facilitation of the use of digital services;

post offices, postal and parcel delivery services reorganization;

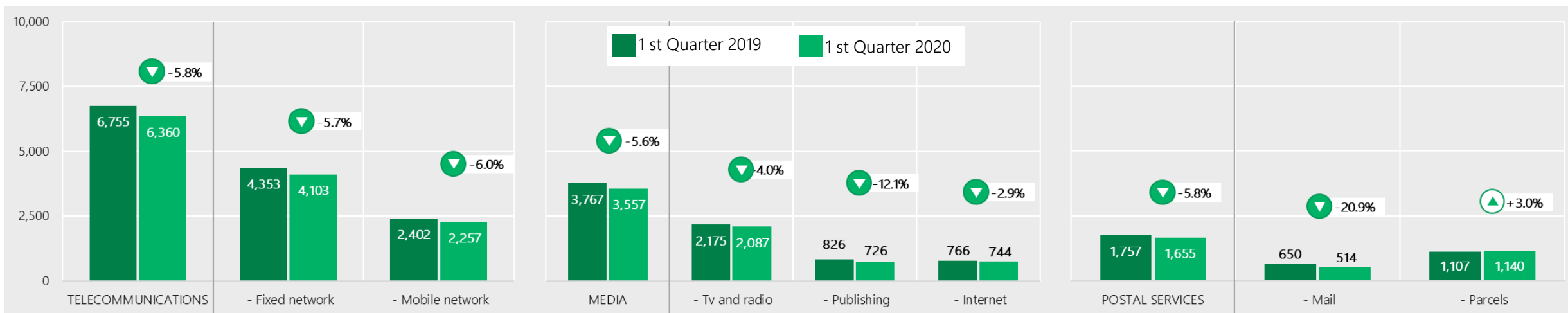
the role of audiovisual media services, with reference to the correctness of information concerning the pandemic and the health emergency;

the possible use of Big Data and the promotion of self-regulatory mechanisms by online platforms.

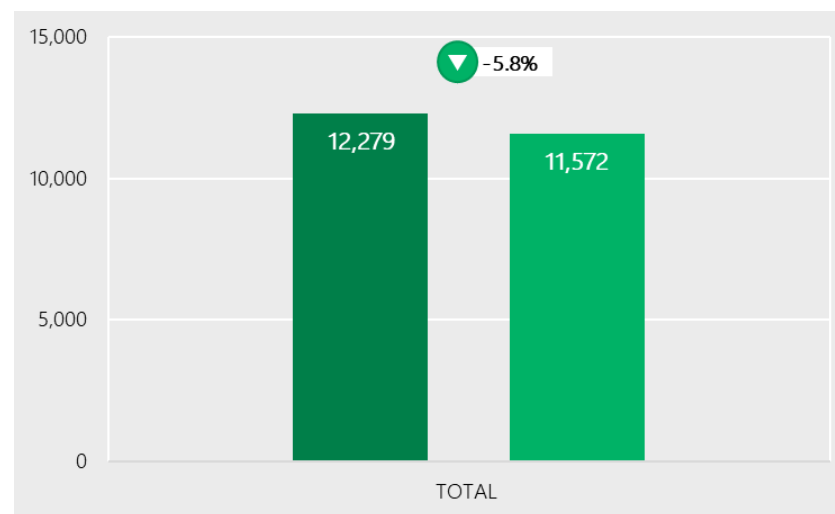
1.2: REVENUES: REVENUES IN AGCOM'S AREAS OF COMPETENCE

MILLIONS OF €

COMPARISON: 1st QUARTER 2019 - 1st QUARTER 2020



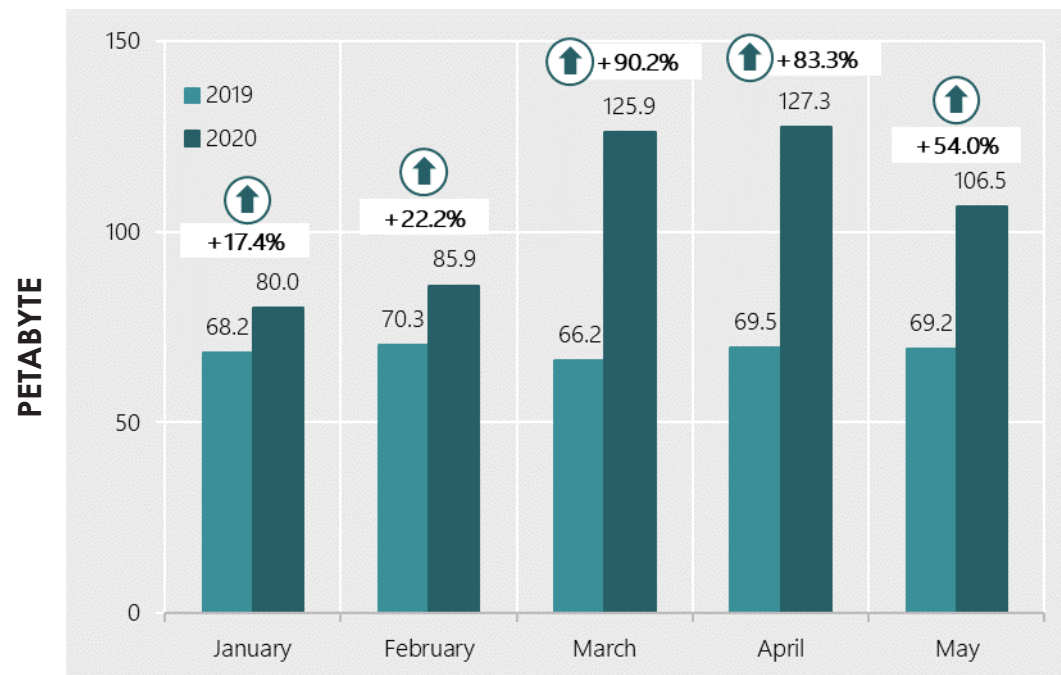
- 1 The reduction in revenues in **AGCOM's areas of competence** in the first quarter 2020 was 708 million euros compared to the same period in 2019.
- 2 The highest losses were recorded in the **Telecommunications** sector (-395 million euros) due to the reduction in both fixed network revenues (-250 million euros) and, to a lesser extent, mobile network revenues (-145 million euros).



- 3 In the **Media** sector (-210 million euros), there was a significant loss in the publishing sector (-100 million euros) and in television and radio (-€88 million euros), while internet advertising revenues seemed to be less affected (-23 million euros).
- 4 In the **Postal** sector (-103 million euros), the reduction in revenues was mainly due to the Universal Service mail services segment (-136 million euros), which was offset by the parcel delivery segment (+33 million euros), which is the only growing segment of all AGCOM's areas of competence.

2.1: FIXED AND MOBILE NETWORK: AVERAGE DAILY DATA TRAFFIC (download + upload)

FIXED NETWORK



① **Average daily data traffic:**
 (Jan.-May. 2019) 68.6 petabyte → (Jan.-May 2020) 105.2 petabyte
 ↑ **+53.3%**

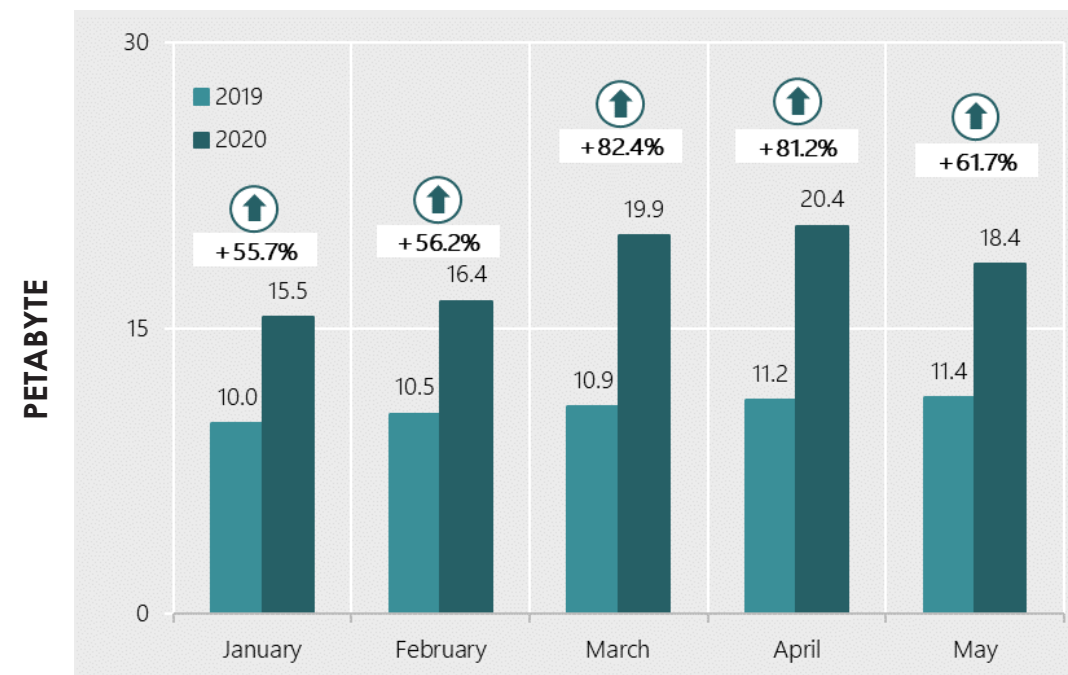
② **Monthly trend in 2020 (% change)**

January – February:	+7.4%
February – March:	+46.5%
March – April:	+1.1%
April – May:	-16.4%

③ **Pandemic impact (average values)**

March – April – May	
Year 2019	Year 2020
68.3 petabyte	119.8 petabyte
	↑ +75.5%

MOBILE NETWORK



① **Average daily data traffic:**
 (Jan.-May 2019) 10.8 petabyte → (Jan.-May 2020) 18.1 petabyte
 ↑ **+67.8%**

② **Monthly trend in 2020 (% change)**

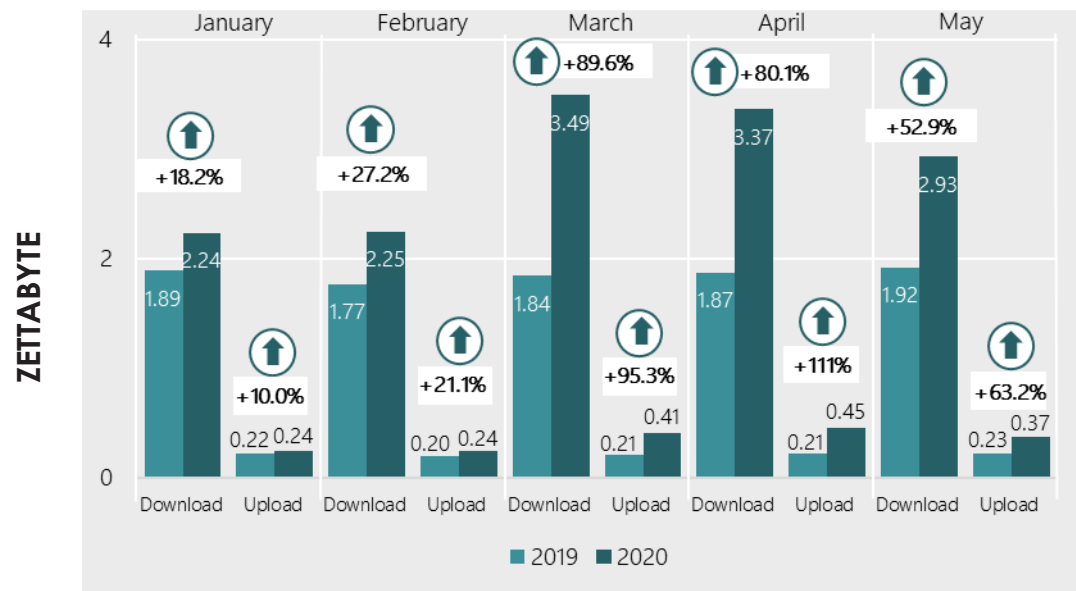
January – February:	+5.6%
February – March:	+21.0%
March – April:	+2.5%
April – May:	-9.7%

③ **Pandemic impact (average values)**

March – April – May	
Year 2019	Year 2020
11.2 petabyte	19.5 petabyte
	↑ +74.9%

2.2: FIXED AND MOBILE NETWORK: MONTHLY DATA TRAFFIC IN DOWNLOAD AND UPLOAD

FIXED NETWORK



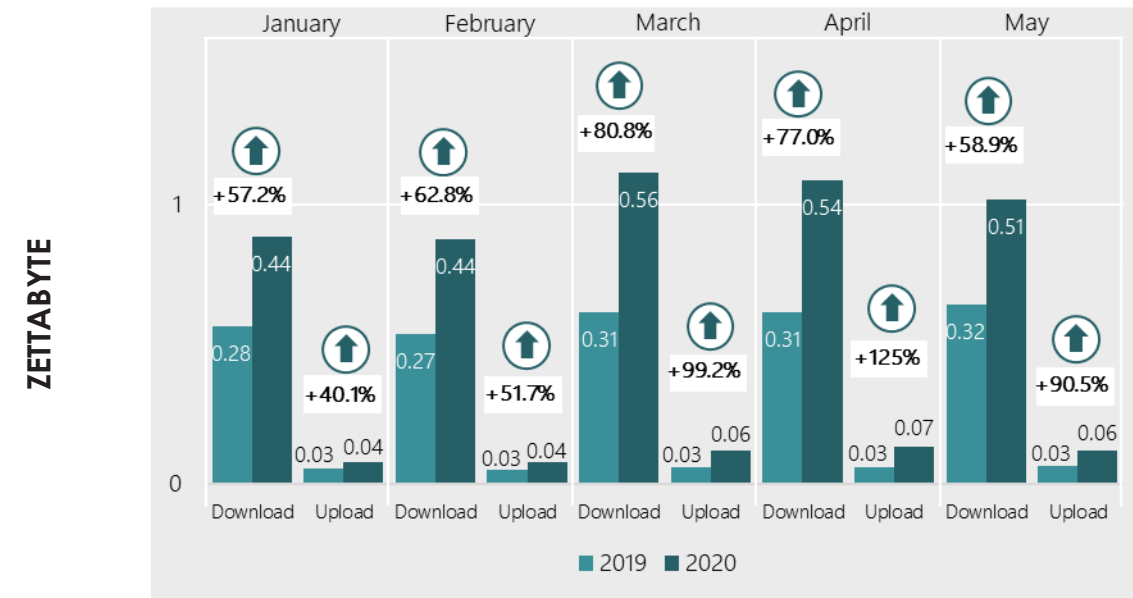
1 Download data traffic: average values

	Year 2019	→	Year 2020
(January – May)	1.86 zettabyte	↑ +53.7%	2.86 zettabyte
Pandemic impact (March – April – May)	1.88 zettabyte	↑ +73.9%	3.26 zettabyte

2 Upload data traffic: average values

	Year 2019	→	Year 2020
(January – May)	0.21 zettabyte	↑ +60.2%	0.34 zettabyte
Pandemic impact (March – April – May)	0.22 zettabyte	↑ +89.3%	0.41 zettabyte

MOBILE NETWORK



1 Download data traffic: average values

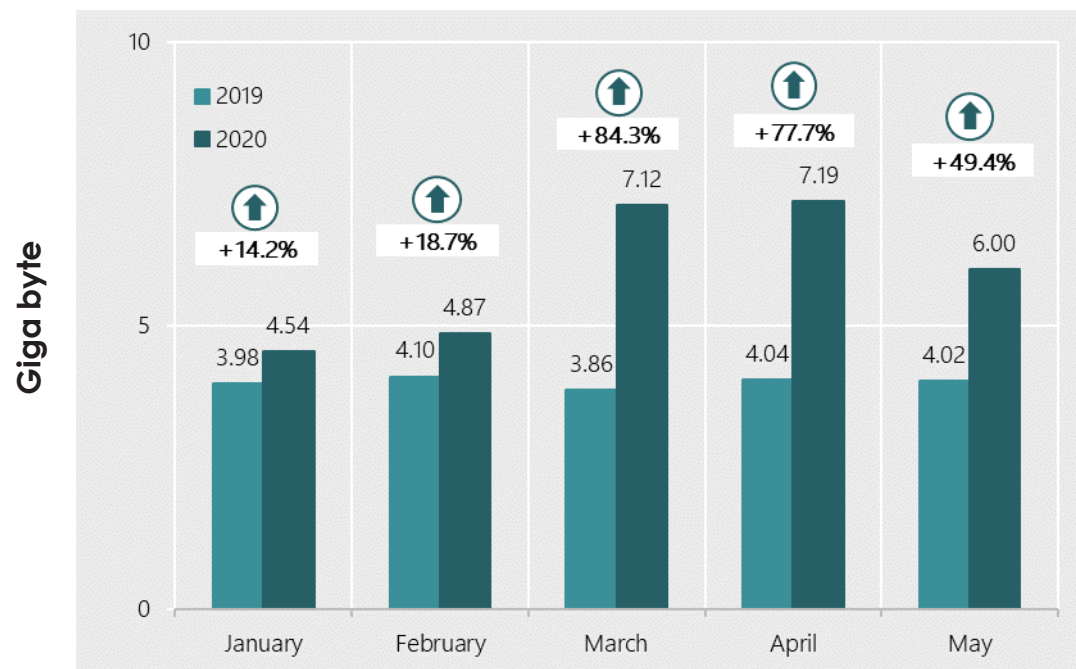
	Year 2019	→	Year 2020
(January – May)	0.30 zettabyte	↑ +67.5%	0.50 zettabyte
Pandemic impact (March – April – May)	0.31 zettabyte	↑ +72.0%	0.54 zettabyte

2 Upload data traffic: average values

	Year 2019	→	Year 2020
(January – May)	0.03 zettabyte	↑ +82.9%	0.05 zettabyte
Pandemic impact (March – April – May)	0.03 zettabyte	↑ +104.5%	0.06 zettabyte

2.3: FIXED AND MOBILE NETWORK: AVERAGE DAILY DATA TRAFFIC

AVERAGE DAILY DATA TRAFFIC PER BROADBAND LIINE

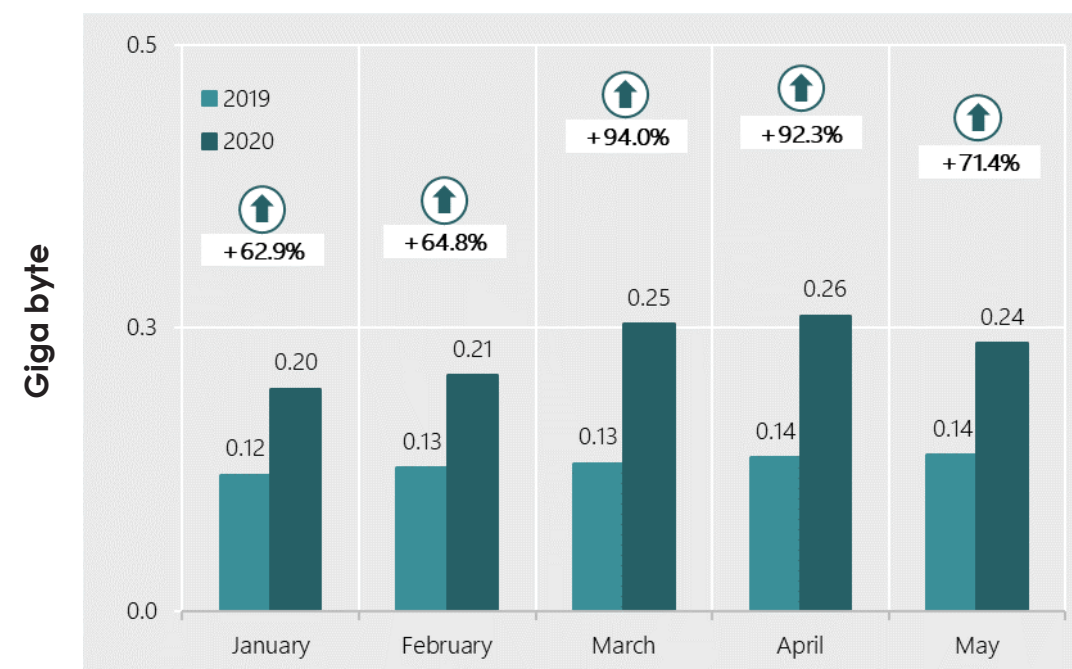


① Average daily data traffic per broadband line:
 (Jan.-May 2019) 4.00 giga byte → (Jan.-May 2020) 5.95 giga byte
 ↑ +48.8%

② Pandemic impact
 (monthly average values)

March – April – May
 Year 2019 3.97 giga byte → Year 2020 6.76 giga byte
 ↑ +70.2%

AVERAGE DAILY DATA TRAFFIC PER «HUMAN» SIM CARD



① Average daily data traffic per «human» sim card:
 (Jan.-May 2019) 0.13 giga byte → (Jan.-May 2020) 0.23 giga byte
 ↑ +77.4%

② Pandemic impact
 (monthly average values)

March – April – May
 Year 2019 0.13 petabyte → Year 2020 0.25 petabyte
 ↑ +85.7%

3.1: MEDIA: ACTIONS UNDERTAKEN BY AGCOM (dedicated links)

1 Amid of the health emergency, having taken note of some critical aspects in the dissemination of information, it was noted the need to remind audiovisual and radio media service providers to ensure, **in accordance with the principles established to protect correct and objective information, adequate information coverage on the Covid-19 issue**, making every effort to ensure the presence of qualified experts in the world of science and medicine in order to provide citizens with verified and well-founded information (**Resolution no. 129/20/CONS**).

2 Digital platforms, big data and the online information system play a key role in managing the Covid-19 emergency in Italy and worldwide. Among AGCOM's initiatives was the establishment of a **data science task force on online disinformation** and, starting from April 2020, the publication of a **special edition of the Observatory on online disinformation**, with a recurring character, dedicated to the theme of the coronavirus with the study of millions of news in order to analyze the growing trend of information and disinformation produced on the epidemic, the analysis of the consumption of coronavirus news and an in-depth analysis of threats detected for cyber security.

The activities undertaken by the Authority within the framework of the [Media Services panel](#)

- [Atto di richiamo - delibera n. 129/20/CONS](#);
- [Richieste e comunicazioni Agcom](#);
- [Iniziative degli stakeholder](#);
- [Pirateria online: il ruolo di Agcom durante l'emergenza sanitaria Covid-19](#);
- [Tempo di argomento dedicato al tema Coronavirus in tv e radio](#);
- [Platea televisiva: ascolti medi \(AMR\) per mese e fascia oraria](#);
- [Riconoscere le fake news in periodo di Covid-19](#);
- [Comunicati stampa](#).

The activities undertaken by the Authority within the framework of the [Digital platforms an big data panel](#)

- [Osservatorio sulla disinformazione online - Speciale Coronavirus n. 1/2020](#)
- [Osservatorio sulla disinformazione online - Speciale Coronavirus n. 2/2020](#)
- [Osservatorio sulla disinformazione online - Speciale Coronavirus n. 3/2020](#)
- [Agcom: coronavirus, Whatsapp avvia fact checking delle informazioni al tavolo di autoregolamentazione su "piattaforme digitali e big data"](#)
- [Comunicazione 22 maggio 2020: Tavolo permanente tra l'Autorità per le garanzie nelle comunicazioni e il Garante per la protezione dei dati personali per il coordinamento delle rispettive competenze in materia di diffusione di false informazioni anche on-line. Istituzione di un gruppo di lavoro](#)

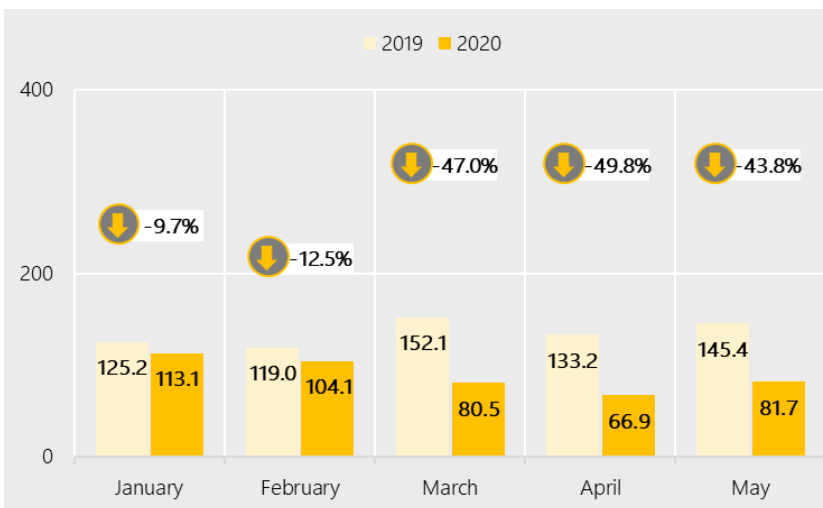
For the results of the analysis of the Authority's data science task force, please refer to:

- [github dedicated page](#)

4.1: POSTAL SERVICES: REVENUES (millions of €)

MAIL

UNIVERSAL SERVICE



Monthly revenues 2020 (% change)

Jan. – Feb. -7.9%
Feb. – Mar. -22.7%
Mar. – Apr. -16.9%
Apr. – May +22.2%

Jan. – Feb. -7.8%
Feb. – Mar. -4.7%
Mar. – Apr. +18.0%
Apr. – May +8.7%

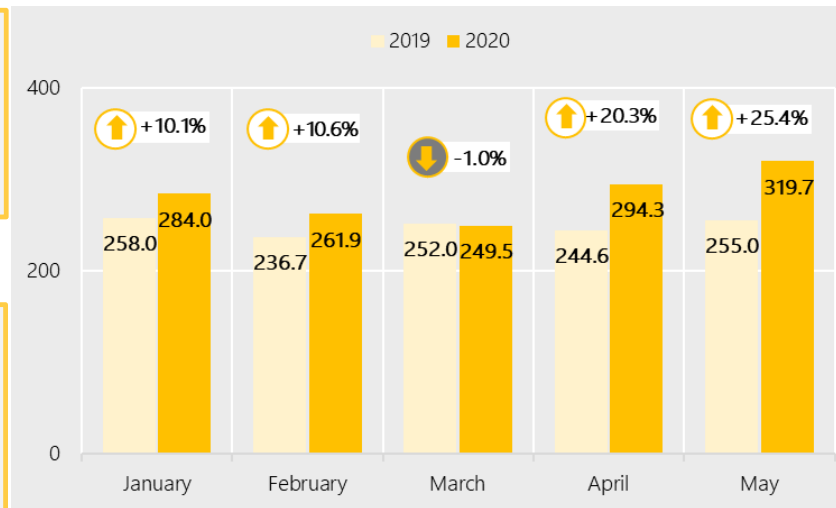
Pandemic impact (cumulated values in mln of € and % change)

Mar. – Apr. – May
2019 → 2020
430.7 → 229.2
-46.8%

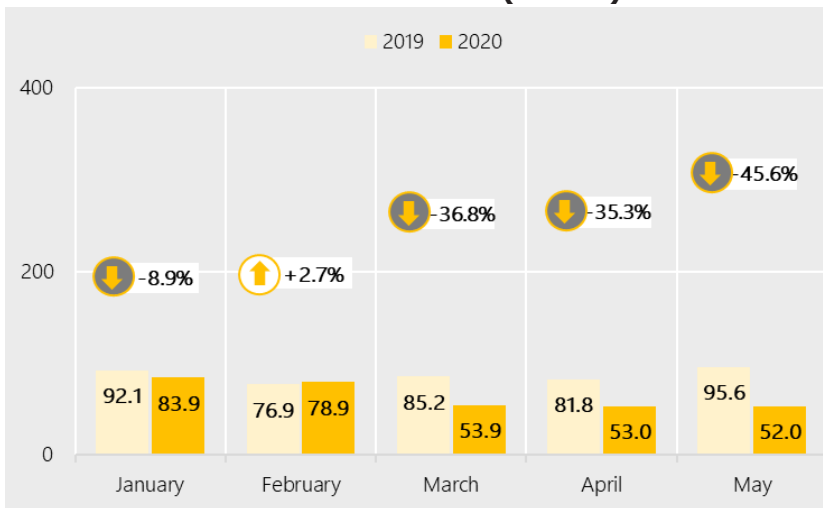
Mar. – Apr. – May
2019 → 2020
751.6 → 863.5
+14.9%

PARCEL

NATIONAL



OTHER SERVICES (NO US)



Monthly revenues 2020 (% change)

Jan. – Feb. -5.9%
Feb. – Mar. -31.8%
Mar. – Apr. -1.7%
Apr. – May. -1.9%

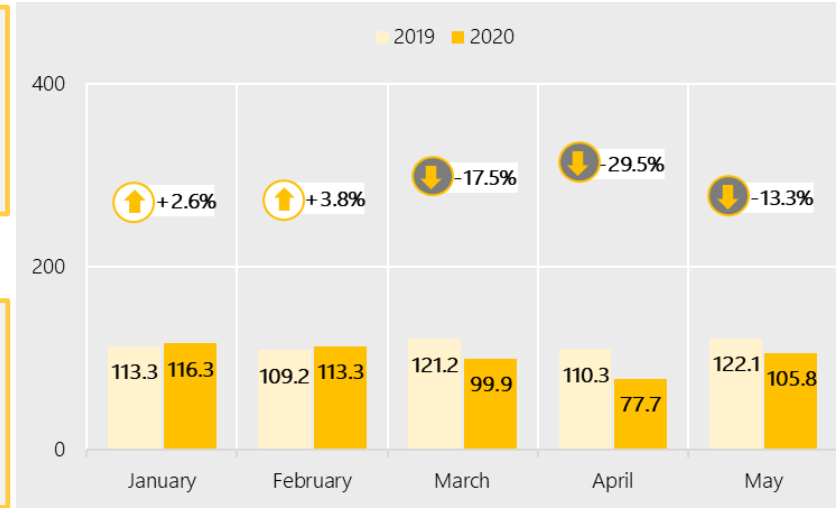
Jan. – Feb. -2.5%
Feb. – Mar. -11.8%
Mar. – Apr. -22.2%
Apr. – May. +36.1%

Pandemic impact (cumulated values in mln of € and % change)

Mar. – Apr. – May.
2019 → 2020
262.7 → 158.8
-39.6%

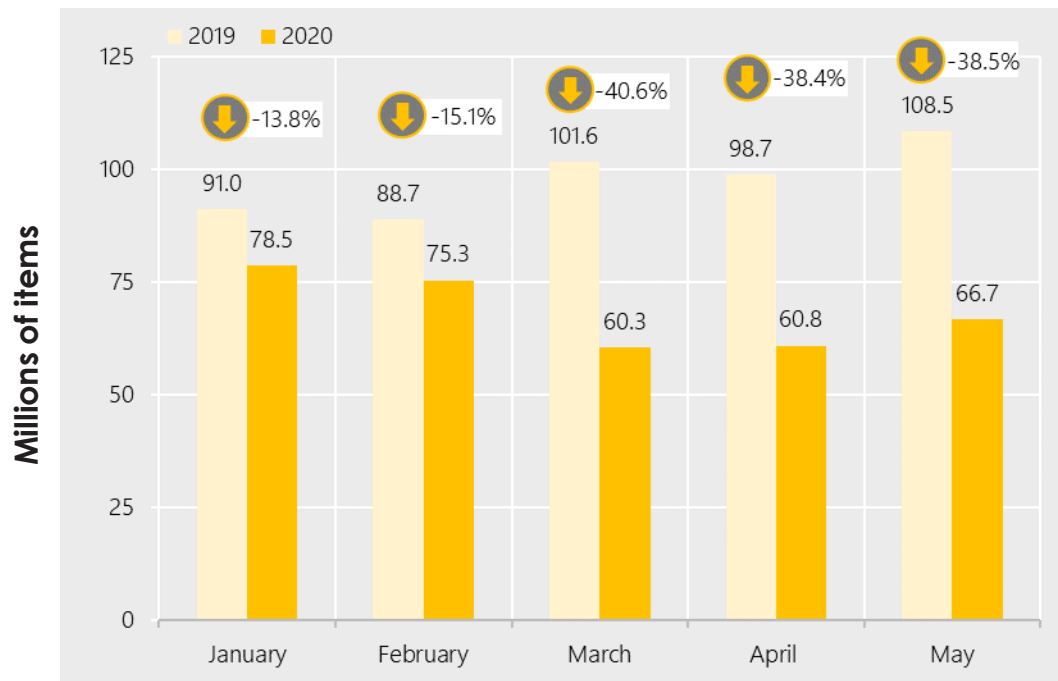
Mar. – Apr. – May.
2019 → 2020
353.6 → 283.5
-19.8%

INTERNATIONAL



4.2: SERVIZI POSTALI: CORRISPONDENZA (milioni di invii)

UNIVERSAL SERVICE



1 Cumulative items (January – May)

(2019) 488.5 milioni → (2020) 341.6 milioni
-30.1%

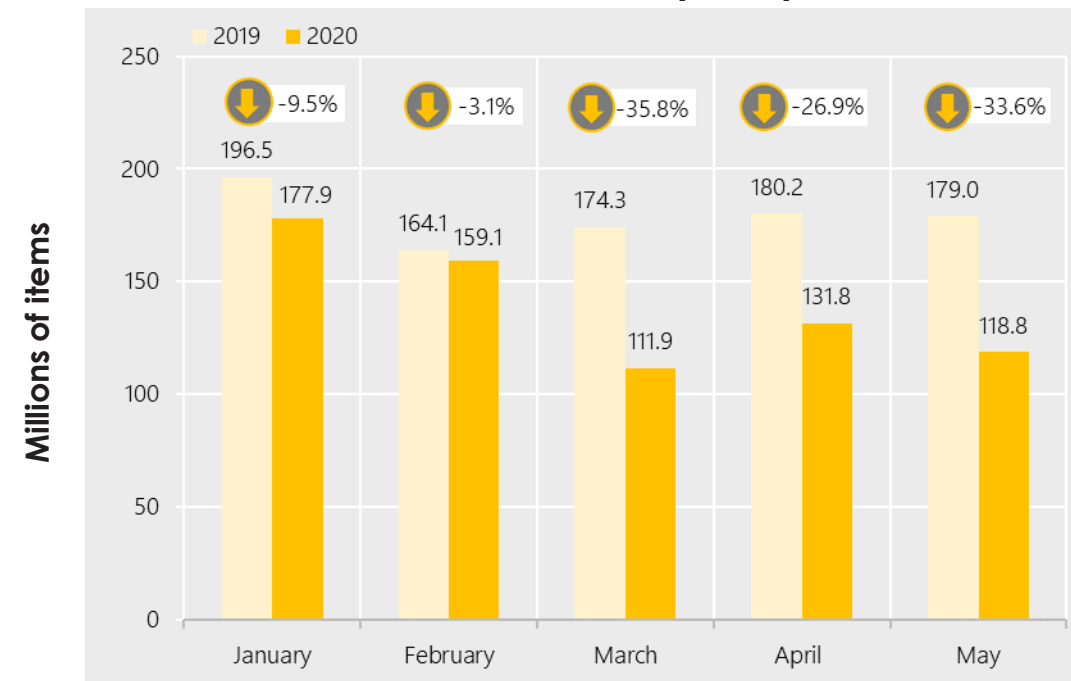
2 Monthly items sent in 2020 (% change)

January – February: -4.0%
 February – March: -19.9%
 March – April: +0.7%
 April – May: +9.7%

3 Pandemic impact (cumulated items and % change)

March – April – May
 Year 2019 308.8 million
 Year 2020 187.8 million
-39.2%

OTHER SERVICES (NO US)



1 Cumulative items (January – May)

(2019) 894.2 million → (2020) 699.4 million
-21.8%

2 Monthly items sent in 2020 (% change)

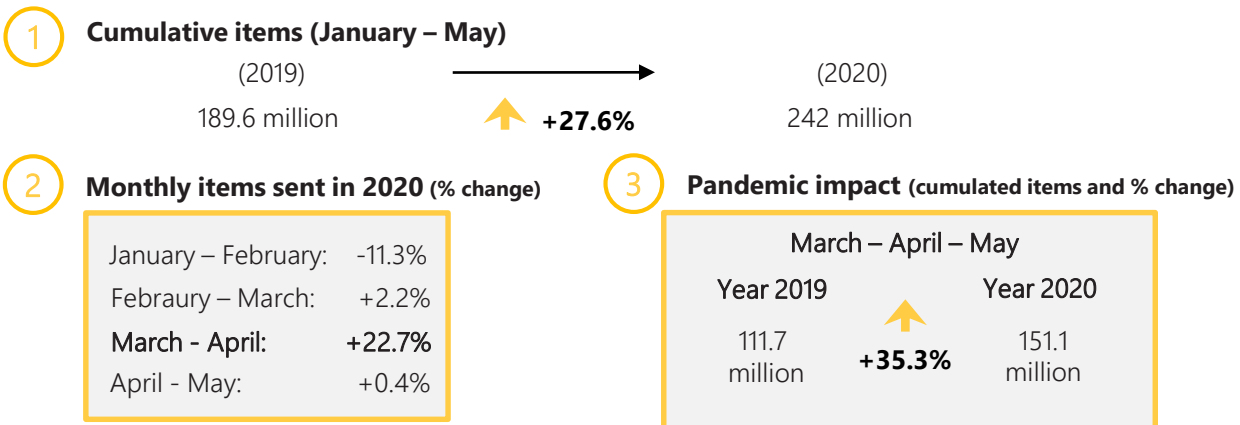
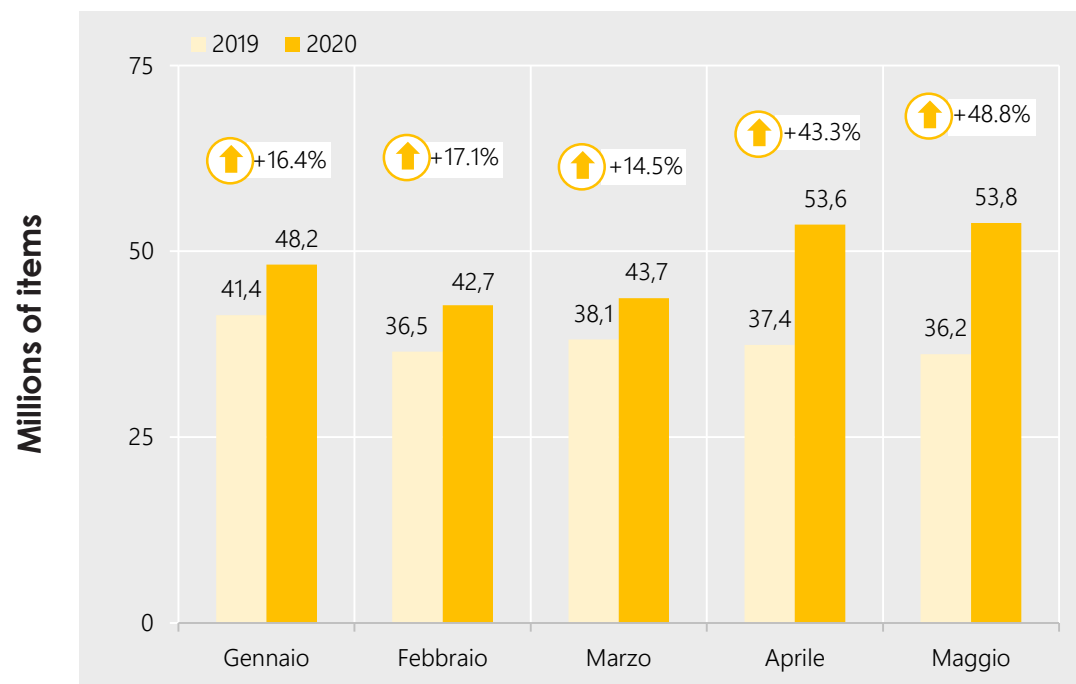
January – February: -10.6%
 February – March: -29.7%
 March – April: +17.8%
 April – May: -9.8%

3 Pandemic impact (cumulated items and % change)

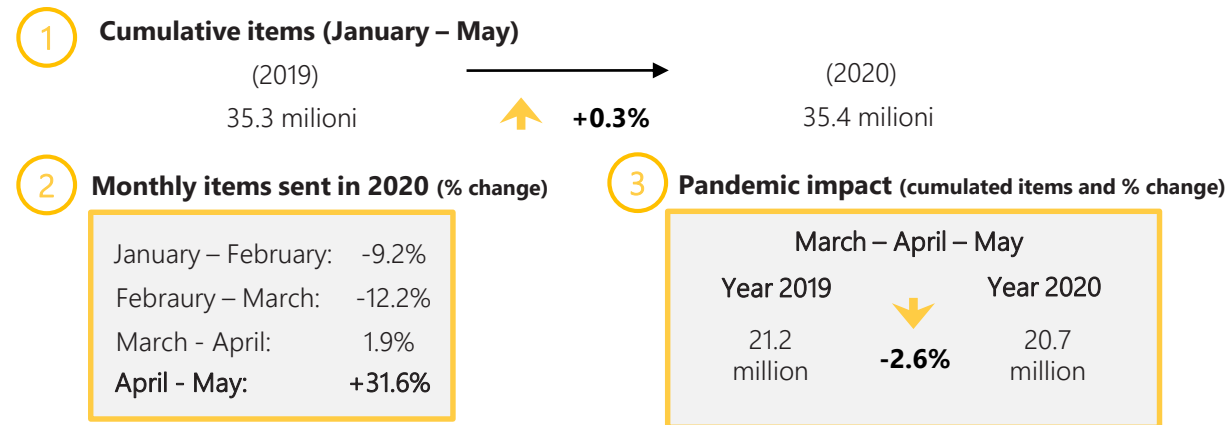
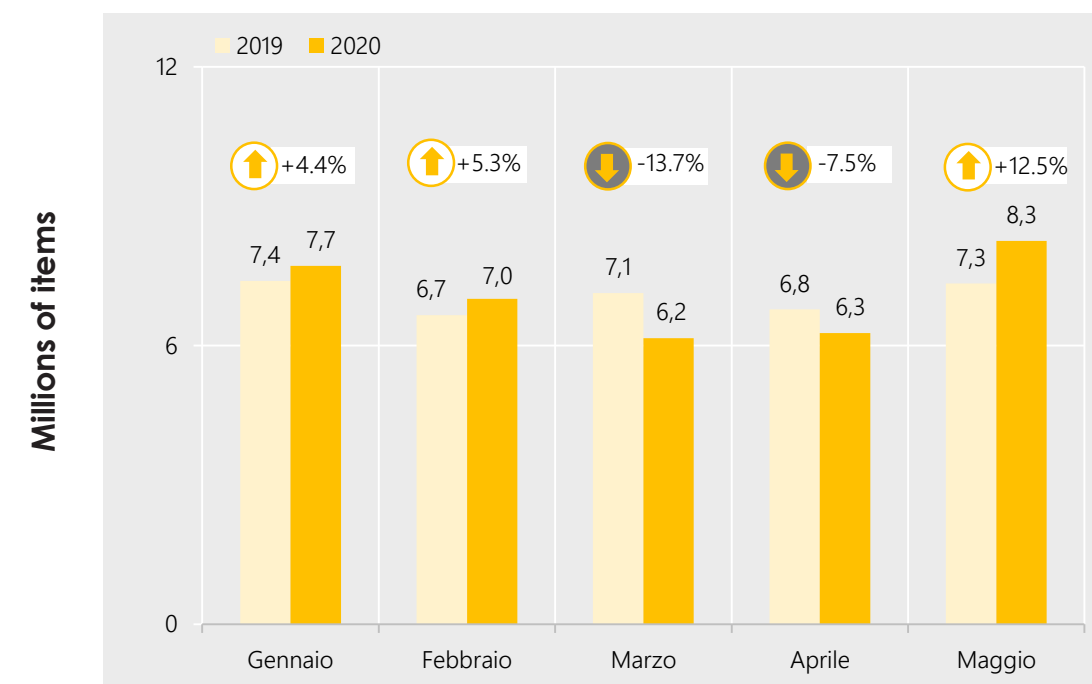
March – April – May
 Year 2019 533.5 million
 Year 2020 362.5 million
-32.1%

4.3: POSTAL SERVICES: PARCELS (millions of items)

NATIONAL



INTERNATIONAL (inbound and outbound)





COMMUNICATION MONITORING MARKETS SYSTEM

COVID-19 monitoring

January - May
2020

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