

Italy Telecoms, Mobile and Broadband Market Upcoming Trends and Opportunities 2019-2023

WiseGuyReports.com "Italy - Telecoms, Mobile and Broadband - Statistics and Analyses" report has been added to its Research Database.

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Scope of the Report:

Italy - Telecoms

Italy's multi-spectrum auction paves the way for 5G services in 2019. Italy's large telecom market has one of the highest mobile penetration rates in Europe and has benefitted from progressive government programs aimed at developing the fibre broadband sector.

The broadband market has effective competition within the DSL sector and is supplemented by a vibrant fibre sector spearheaded by investment efforts from Telecom Italia, other telcos and municipal governments. Regulatory measures have also been introduced to facilitate access to NGNs, while the government is investing €4 billion to provide broadband across the country. The wholesale provider Open Fibre has extended fibre-based broadband access to underserved areas and signed wholesale access agreements with a number of operators, including Sky Italia which is expected to launch broadband services in the northern spring of 2019.

The vibrant mobile market has seen a fall in the number of subscribers in recent years as customers respond to attractive off-net pricing and bundled offers from the main providers. The market underwent considerable changes following the merger of Wind and 3 Italia (becoming Wind Tre). As a result of the merger the market gained a new entrant in the form of Iliad, which secured access to spectrum and to part of Wind Tre's infrastructure to enable it to offer services while its own network is being developed. The company launched services in May 2018 and by the following August had secured more than two million subscribers. The evident popularity of its offers has considerably disrupted the market, leading competitors to rethink their strategies. Wind Tre in particular struggled with customers losses in 2018, while the continuing effort to merge the networks of Wind and 3 Italia was disrupted by the brief ban on commercial ties with its principal vendor ZTE.

Network operators have been among the first in Europe to trial services based on 5G. To this end they have been helped by the regulator which made available spectrum in the 3.5GHz band for trial licenses. An auction of spectrum in a range of bands for 5G was completed in October 2018,



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raising €6.55 billion. The sum was higher than the government anticipated, and though the licence fees are payable over five years the cost will place a strain on licensees financing future network development. Operators are looking at cost-saving options and, in the case of Wind Tre, have considered the sale of their base station portfolio.

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This report analyses the key aspects of the Italian telecom market, providing key data and statistics on the country and the fixed network services sector. It also reviews the main regulatory issues including number portability and local loop unbundling. The report also covers the fixed and fixed-wireless broadband markets, including the burgeoning fibre sector. In addition the report analyses the mobile market, including statistics, regulatory issues and developments with mobile data services as operators plan for 5G in 2019.

Key developments:

Global Cloud Xchange building the EAGLE submarine cable system linking Italy to Hong Kong;
Fastweb's fibre network reaching about 60% of the population;
SINFI infrastructure registry helping to reduce cost of deploying fibre by a third;
Fastweb extends TIM fibre venture;
Regulator raises €6.55 billion in multi spectrum auction, considers 30% cut in MTRs;
CK Hutchison completes purchase of VEON's 50% stake in Wind Tre;
Vodafone Italy extends its 550Mb/s LTE-A service to seven cities;
TIM trials LTE broadcast technology, preps for 5G applications and services;
Regulator extends 3G licences to 2029 and GSM licences to 2027;
Report update includes the regulator's market data to March 2018, telcos' operating and financial data to Q2 2018, recent market developments.

Companies mentioned in this report:

Wind Tre (3 Italia / Wind Telecom), Telecom Italia (TIM), Vodafone Italia, VEON (VimpelCom), Metroweb, Fastweb, Tiscali, BT Italia.

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