

Italy Telecommunications Report Q2 2016

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Abstracts

Includes 3 FREE quarterly updates

BMI View: At the end of 2015 Telecom Italia unveiled its 2016-18 investment plan, including projected spending of EUR12bn in Italy over the next three years, with EUR1.2bn going on the rollout of LTE mobile ultra-broadband services. LTE customers are expected to account for around 70% of mobile broadband customers by 2018, thanks to almost blanket coverage of the country at 75Mbps, with peaks of 300Mbps in the eight main cities thanks to the use of carrier aggregation technologies. Within the wider market BMI notes the continuation of strong demand for mobile content and services based on 3G and 4G technologies. Along with the development of fixed fibre optic ultra-broadband infrastructure, 3G and 4G technologies present the greatest growth opportunities within the Italian telecoms sector, with BMI predicting strong growth in the number of 3G/4G subscribers and broadband connections through to 2020.

Latest Updates & Industry Developments

We estimate that there were 85.83mn subscribers in Italy at the end of 2015, with the market in constant decline since 2013, having lost an additional 1.1mn connections in the 12 months to December; this was due to strong competition and inactive prepaid SIMs.

3G/4G subscriptions numbered 41.15mn at the end of 2015, equivalent to 47.9% of the total mobile market. By the end of 2020 we predict that these figures will have risen to 47.86mn and 58.1% respectively.

We also estimate that there were just over 21mn broadband internet subscribers in 2015, a figure we forecast to continue to grow, reaching 23.11mn in 2020.

However the majority of these are ADSL connections, and we believe the market will continue to struggle to develop more advanced technologies.

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