Italy Telecommunications Report Q3 2016

https://marketpublishers.com/r/IBB3E670A11EN.html
Date: June 2016
Pages: 66
Price: US$ 1,295.00 (Single User License)
ID: IBB3E670A11EN

Abstracts

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BMI View: With a penetration rate of over 137%, Italy's mobile market is already saturated. However, it also supports a large number of inactive prepaid accounts and the deduction of these accounts from the subscriber data reported by Italy's mobile operators will result in negative market growth for the duration of our five year forecast. Price competition is fierce and this has put downward pressure on APRUs. The upcoming merger between WIND and 3 Italia will help weaken price competition. Nevertheless, the mobile market will remain challenging environment in which to generate value, with four out of five users on prepaid plans. The migration of customers to postpaid plans, together with better economic conditions, will have a positive impact on ARPU, which we expect to grow from 2017, though at a level that will continue to be low compared to the regional average.

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There were 85.59mn subscribers in Italy at the end of 2015 and 84.58mn mobile subscribers at the end of March 2016, reflecting a continuing decline in the number of connections based on the deduction of inactive prepaid SIMs. We predict that the mobile subscriber base will decrease every year until 2020, reaching 82.22mn customers for a penetration rate of 137.6%.

3G/4G subscriptions numbered 41.15mn at the end of 2015, equivalent to 48.1% of the total mobile market. By the end of 2020, we predict that these figures will have risen to 47.26mn and 57.5% respectively.

According to new data from Italian regulator AGCOM, there were 14.92mn fixed broadband connections at the end of 2015. Including mobile broadband

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connections, we estimate that total broadband connections numbered 21.02mn at the end of 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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