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2022 Tariff Trend Report: The Key Trends in the Italian Mobile Market - Report finds changes in entry-level pricing since the launch of Iliad in 2018

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Abstracts

In this report published in June 2022, according to the Italian telecoms regulator AGCOM, as of the end of 2021, there were 106.2 million human (non-M2M) SIM cards in Italy, representing a 143 per cent mobile penetration rate, the market had grown by 2.2 million non-M2M SIMs during the year. Some 88.7 per cent of SIMs are Pre-Pay, the majority of current MNO SIMs are on an auto-pay mechanism (whereby a debit card or credit card is used for payment every 30 days).

A number of mobile sub-brands are active in Italy and were launched in 2018 in response to the launch of the fourth MNO Iliad Mobile at the end of May 2018. Sub-brands have raised their pricing and are focused on offering discounted rates to attract their direct rivals (such as Iliad or other MVNOs). In general entry-rates have increased from a low base since the introduction of Iliad, but MNO & MVNO rates at Euro €9 to Euro €10 per month offer large mobile data allowances, typically of 100 GB or above.

There is consolidation rumoured in the Italian market. Currently there are five MNOs (TIM, WindTre, Vodafone, Iliad and Fastweb). There are also a range of MVNOs available including Postemobile (reporting 4.9 million SIMs & fixed line accesses in total for 2021). Iliad and Apax have sought to acquire Vodafone Italy, which has not agreed to the merger bid but Vodafone has stated that it is still looking to play a role in consolidation.

Coverage - Products and Services plus their pricing offered by the following providers:

CoopVoce (MVNO)

Fastweb

Ho mobile

Iliad Mobile

Kena Mobile

Postemobile

TIM

Tiscali

Very Mobile

Vodafone

Wind

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