Italy: Broadband markets

Italy has a relatively low take-up of fixed broadband and a low availability of Next Generation Access. The share of high speed connections (at least 30 Mbps) is significantly lower than average. Nevertheless, in mobile broadband, take-up on large screens remains above the average. Italy should foster further the investment in infrastructure in order to increase the availability of high-speed broadband.

In 2012, standard fixed broadband covered 98.4% of homes in Italy (95.5% in the EU). At the same time, Next Generation Access capable of providing at least 30 Mbps download was available to 14% of homes only (53.8% in the EU).

In January 2013, the incumbent operator had a market share well above the European average (51.4% compared to 42.3% in the EU). DSL was the most common technology to provide broadband access (96.3% of all subscriptions as opposed to 73.8% in the EU).

The take-up (subscriptions as a percentage of population) of fixed broadband was 22.5% in January 2013, 6.3 p.p. below the European average of 28.8% and 0.2 p.p. higher than in 2012. Meanwhile, the share of high speed connections (at least 30 Mbps) was significantly lower than average (0.1% compared to 14.8% in the EU) and ultra-fast connections (at least 100 Mbps) were also marginal.

On the mobile side, third generation mobile broadband (HSPA) was available to 96.5% of population in 2012 (96.3% in the EU) and there was no 4th generation (LTE) availability. The take-up rate (subscriptions as a percentage of population) of mobile broadband on large sceens was 14.3% in January 2013, well above the average of 9% in the EU.