[IT] Report on Italian Television Market

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Maja Cappello
Autorità per le garanzie nelle comunicazioni (AGCOM)

On 16 November 2004, the Autorità garante della concorrenza e del mercato (Italian Competition Authority AGCM) issued a report on the situation of the Italian television and advertising markets. The aim of the report was to monitor the functioning of the market during a transition phase towards digital terrestrial broadcasting, where some of the previously existing limitations to horizontal and diagonal concentrations have been eliminated by the recent law on broadcasting (see IRIS 2004-6: 12). Firstly, AGCM has monitored the commercial behaviour of advertising agencies, with particular reference to personalised discounts and all-in-one sales, which could cause permanent effects on the competitive advantage of the advertising market, if carried out by subjects with significant market power. Secondly, competition in the broadcasting sector might be impaired due to the existing network of shareholders leading the most relevant operators. The abolition of the thresholds concerning cross-ownership participation in the media could extend these effects to connected markets (eg. advertising and publishing). Thirdly, AGCM has highlighted the problems connected with access both to the networks of operators with a significant market power in the broadcasting sector and to audiovisual contents of particular interest for the viewers (especially sports). These aspects will be particularly relevant in the future for competition in the national market of attracting television advertising and for the diffusion of new technological transmissions (competition between platforms). Lastly, while awaiting the complete implementation of the digital frequency plan and the reallocation of the frequencies, AGCM will continue to verify the disposal of frequencies with the aim of the creation of new national multiplexes for new entrants.

Report on the television and advertising markets

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