[IT] AGCOM’s evaluation of media pluralism in the Integrated Communications System (SIC) for 2017

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The Autorità per le garanzie nelle comunicazioni (Italian Communications Authority - AGCOM), pursuant to Article 43 of the Italian AVMS Code (Legislative Decree No. 177/2005), has to periodically conduct a specific analysis to estimate the resources included in the so-called SIC (Sistema Integrato delle Comunicazioni - Integrated Communications System). The provision aims at ensuring pluralism in the communications field by preventing dominant positions from being attained in the sector, meaning that providers registered as communications operators cannot collect, either directly or indirectly, more than 20% of the total revenues of the SIC.

The SIC is defined by the aforementioned Article 43 as the economic sector determined by the process of convergence between traditional broadcasting, newspapers and magazines, press and publishing (also online), radio and audiovisual media services, cinema, and advertising, both above and below the line. In 2012, the definition was amended following the explicit request of intervention made by AGCOM to the legislator in order to expand the scope, which now includes online advertisements and advertising on different platforms, including revenues derived from search engines, social networks and content-sharing platforms.

In January 2019, AGCOM approved, with Deliberation No. 9/19/CONS, the assessment regarding the economic dimensions of the SIC referred to for the year 2017. The resources included in the SIC in 2017 reached the amount of EUR 17.5 billion (1.01% of the gross domestic product), showing an overall decrease of 0.9% compared to the 2016 results.

The broadcasting sector is the best-performing one, accounting for 51% of the total, while the press sector (newspapers, magazines, press agencies) dropped to 22%. Electronic publishing and online advertising rose to 14%, while the cinematographic sector dropped below 5%. There were no major changes in the other sectors, such as external advertising (2%) and below-the-line advertising (7%).

On the basis of the information obtained, AGCOM determined the quotas of the main subjects in the SIC, proving that no one reached the maximum threshold

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allowed (20%).

The aggregated revenues of the top ten groups operating in the SIC represent 62% of the total, amounting to almost EUR 11 billion. The highest shares are held by Comcast Corporation/Sky (15.4%), Fininvest (15.2%), RAI Radiotelevisione Italiana (14.1%), Google (4.1%), Cairo Communication (3.8%), GEDI Gruppo Editoriale (3.2%), Facebook (2.7%), Discovery (1.3%), Italiaonline (1.3%) and Gruppo 24 Ore (1.1%).

Delibera No. 9/19/CONS - "Chiusura del procedimento per la valutazione delle dimensioni economiche del Sistema Integrato delle Comunicazioni (SIC) per l'anno 2017"

https://www.agcom.it/documentazione/documento?p_p_auth=fLw7zRht&p_p_id=101_INSTANCE_ls3TZlzsK0hm&p_p_lifecycle=0&p_p_col_id=column-1&p_p_col_count=1&_101_INSTANCE_ls3TZlzsK0hm_struts_action=%2Fasset_publisher%2Fview_content&_101_INSTANCE_ls3TZlzsK0hm_assetEntryId=13582797&_101_INSTANCE_ls3TZlzsK0hm_type=document

Agcom's Deliberation No. 9/19/CONS, Conclusion of the procedure for the evaluation of the economic dimensions of the integrated communications system (SIC) for 2017

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