

## Media Concentration Around the World

### *The media concentration level in Italy*

Prof. Giuseppe Richeri

Dr. Marta Cola

Dr. Benedetta Prario

Institute of Media and Journalism

University of Lugano(CH)

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## Daily newspaper

	1984	1988	1992	1996	2001	2006
Gruppo Espresso	17	12	14.6	14	14	15.6
RCS Quotidiani	8	14	6	15	15	14.9
Caltagirone Editore	4	4	6	6	5.6	6.9
QN - Poligrafici Editore	4	5.9	4	6	6	5.8
La Stampa	3	5.7	4	6	5.9	4.8
Corriere dello Sport	4	4.8	3.69	3.6	3.8	3.7
Società Europea di Edizioni	2.7	2.1	2.1	3.6	3.2	3.3
Il Sole 24 Ore	3	3	4	5	5.9	3
S.E.P.	2.2	1.9	2	2	1.7	1.7
Nuova Editoriale Italiana	1.2	1.2	1.2	1.2	1.3	1.5
Montedison				3.9		
Others	50.90	45.31	52.32	33.53	37.42	38.19
<b>C4</b>	<b>33</b>	<b>38</b>	<b>41</b>	<b>41</b>	<b>40</b>	<b>43</b>
<b>HHI</b>	<b>455</b>	<b>492</b>	<b>578</b>	<b>609</b>	<b>561</b>	<b>623</b>
<b>Noam</b>	<b>104</b>	<b>98</b>	<b>115</b>	<b>124</b>	<b>114</b>	<b>127</b>

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## Broadcast Networks

	1984	1992	1996	2001	2006	2007
RAI	52.7	56.3	55.3	51.2	49	51
Mediaset	41.3	33.5	35.6	39.4	42.3	45
Telecom Italia Media		1.9	2.2	2	3	3.5
Other broadcasters	n.a.	0.6	n.a.	0.4	n.a.	n.a.
Rete A				0.3	n.a.	n.a.
Local televisions	n.a.	7.7	6.9	6.7	5.7	0.5
Number local televisions	n. 600	n. 562	n. 570	n. 558	n. 551	n. 301
<b>C4</b>	<b>94</b>	<b>99</b>	<b>100</b>	<b>99</b>	<b>100</b>	<b>100</b>
<b>C2</b>	<b>100</b>	<b>89</b>	<b>90</b>	<b>90</b>	<b>91</b>	<b>96</b>
<b>HHI</b>	<b>4518</b>	<b>4355</b>	<b>4377</b>	<b>4222</b>	<b>4231</b>	<b>4638</b>
<b>Noam</b>	<b>184</b>	<b>183</b>	<b>183</b>	<b>178</b>	<b>180</b>	<b>267</b>

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## Film industry

	1996	2001	2006	2008
Medusa Film	11.5	19.9	13	16.6
UIP	19	17.2	13	19.7
Warner Bros Italia	11.6	11.2	7.5	9.6
Buena Vista	10	8.6	12	7.7
20th Century Fox	8.8	5.1	11.8	6.4
01 Distribution		2.5	9.5	11
Sony	5.5	7.8	9.3	5.1
Filmauro	7.8	6.8	8.2	8
Eagle Pictures		6.2	6	3.9
Bim Distribuzione		1.5	2.4	2.5
Sacher Distribuzione		1.3	1.3	0.2
Mikado	1.8	1.8	1	1.6
Lucy Red Distribution	3	2.3	0.8	
Cecchi Gori Group		1.8		
Nexo		2.7	0.6	
Fandango		0.17	0.4	0.4
Key Films		1.2		
Istituto Luce	0.1	1.2	0.2	
Lady Film	0.7			
Life International	0.5			
Mediafilm			0.7	0.7
Dnc Distribution			0.4	0.2
Moviemax				2.3
Teodora Film				0.3
Archibald				
Bolero Film Distribuzione				
Others	n:193	n: 175	n: 130	n: 64
<b>C4</b>	<b>55</b>	<b>47</b>	<b>49</b>	<b>57</b>
<b>HHI</b>	<b>1141</b>	<b>1095</b>	<b>968</b>	<b>511</b>
<b>Noam</b>	<b>193</b>	<b>175</b>	<b>130</b>	<b>64</b>

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## Telecommunications (1)

<b>Fixed</b>	<b>2001</b>	<b>2006</b>	<b>2007</b>
Telecom Italia	76.8	73.6	70
Wind		6.3	6.8
Fastweb		5.3	6.9
BT Italia		5	5.4
Tele 2		3.1	3.5
Tiscali		1.2	1.6
Altri operatori		5.5	5.9
Albacom, Tele2, Wind, Infostrada	21.3		
Atlanet, Colt, Edisonetel, Eplanet	1.9		
<b>C4</b>	<b>100</b>	<b>90</b>	<b>89</b>
<b>C2</b>	<b>98</b>	<b>74</b>	<b>76</b>
<b>HHI</b>	<b>6355</b>	<b>5551</b>	<b>6203</b>
<b>Noam</b>	<b>3669</b>	<b>1850</b>	<b>2067</b>

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## Telecommunications (2)

<b>Mobile</b>	<b>2001</b>	<b>2006</b>	<b>2007</b>
Telecom Italia	51	42.8	41.9
Wind		13.6	36.3
Vodafone		36	14.3
H3G		7.6	7.5
Blu-OmintelProntoItalia-Wind	49		
<b>C4</b>	<b>100</b>	<b>100</b>	<b>78.2</b>
<b>C2</b>	<b>100</b>	<b>79</b>	<b>100</b>
<b>HHI</b>	<b>5002</b>	<b>3364</b>	<b>3334</b>
<b>Noam</b>	<b>3536</b>	<b>1682</b>	<b>1667</b>

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No data available – no national association in charge of collecting data about revenues of book publishers.  
Source: AIE (Associazione Italiana Editori)

A remote possibility: Demoskopiea (research institute) can provide data about sold copies by each publisher (payment)

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### **Internet Service Providers (ISPs)**

- ✓ Many operators in the market (max. 5% market share)
- ✓ No systematic data available
- ✓ Data available for Telecommunication groups listed on the Stock Exchange

### **Radio Stations and Networks**

- ✓ on going

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