



# Telecommunications market in Poland 2007

## Development forecasts for 2007-2010

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## A word from the author



“Increasingly, trends on the Polish telecommunications market demonstrate that movement from a phase of dynamic development to a phase of maturity. If operators' revenues are increasing at all, they are not growing as rapidly as they were few years ago. Market players put more and more emphasis on maintaining customers and the quality of provided services. Consequently, the trend of offering greater value for the same price is prevalent. Operators strive to encourage customers to use telecommunications services more intensely.

In parallel, convergence and mutual dependencies between market segments is proceeding. Business plans are more frequently based not on single offers but on solution packages delivered by one provider. The slogan “content is king” is repeated as a mantra.

Competition is growing, which is at the same time both an opportunity and a great challenge for market participants. Alternative operators already have the real possibility of wholesale purchase of telephone and Internet subscriptions in TP's network. Consolidation on the small ISP market is continuing. Wireless solution operators more and more boldly join the rivalry for internet users. We also witness emerging companies taking their chance as virtual operators. Time will show how many of these companies will be absorbed in a few years by operators possessing their own networks.

The key question concerns forecasts – assessment of the rate of changes and the intensity of new trends. One thing is for sure – the telecommunications market in Poland will not let us get bored in the coming years.”

**Pawel Olszynka**, Head IT&Telecoms Analyst

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## Report description

**Telecommunications market in Poland 2007 analyses the prevailing trends in the Polish telecommunications market** and predicts the directions those trends will carry the market in the next three years. It breaks down information by market segment, providing the latest data on the mobile, fixed line and internet access segments, along with reports on the largest companies operating as service and equipment providers and investors in the Polish telecommunications marketplace. Forecasts to 2010 include growth potential and examine strategies for attracting and retaining customers.

**Telecommunications market in Poland 2007** also information is also presented graphically in the form of indexed tables and charts.

### **Telecommunications market in Poland 2007 provides complete coverage in five sections:**

**Section One reviews recent events that have demonstrated an impact on the telecommunications market in Poland.** It explores the value of the market in total and by segment, as well as the dynamics at work amid changing conditions. This section compares the Polish market with other specific European markets, and details the legal regulatory, and institutional environments, including the consequences of implementation of the Telecommunications Law. This section also reports on the main capital groups active in the market and presents market development forecasts for 2007-2010.

**Section Two encompasses the results of an extensive survey conducted by PMR Research,** the research arm of PMR Ltd, compiling detailed information from the largest telecommunications companies currently operating in Poland. Results assess the current obstacles and opportunities of the market, the operation of the Office of Electronic Communications, and more. The survey provides an added dimension to the report in term of understanding current market conditions from an insider viewpoint.

**Section Three focuses on the mobile telephony segment** of the telecommunications market in Poland, providing detailed data on its value, prevailing trends, and forecasts for 2007-2010. It describes the degree of penetration and number of users of mobile telephony and lists the major players in the current market. It also includes bonus information concerning 3G telephony in Poland, as well as the status of the market for mobile telephones.

**Section Four** is dedicated to informing the reader on the performance and development of the **fixed line telephony market in Poland**, and outlines key trends, in addition to market size, dynamics and structure. It provides data on the markets for local, inter-zone and international connections, as well as for connections from fixed-line to mobile networks. Main market participants are introduced, and forecasts for the Polish fixed line telephony market for 2007-2010 are given.

**Section Five** deals with the **data transmission, leased lines and internet access** market in Poland. Market value and structure are examined, and pertinent data is provided for the DLISP, data transmission, leased lines and Internet access markets. Main players on the DLISP market are described, and forecasts for DLISP market conditions in 2007-2010 are supplied.

## Report overview

### Report summary and methodology

- Executive summary of the contents and aims of the report
- Explanation of methodology used in preparation of forecasts

### Comprehensive overview of the telecommunications market in Poland, including:

- Market value and dynamics
- Current conditions, trends and main capital groups involved in the market
- Key events that have influenced recent market developments
- Comparison of the Polish market with other Western European markets
- Legal, regulatory and institutional environments
- Market development forecasts for 2007-2010

### Results of PMR research survey of Poland's 100 largest telecommunications companies, including:

- Overview of current market conditions – obstacles and opportunities
- Operational assessment of the office of Electronic Communications
- Products and services with the best chance for success in the market
- Third generation mobile telephony market
- Long term forecast for mobile and fixed line telephony market penetration.

## Analysis of the mobile telephony market in Poland

- Value of the market, number of users and penetration of mobile telephony
- Active trends and events that influence market conditions
- Key players in the market and development forecasts for 2007-2010
- Extra information on 3G telephony and Polish market for mobile phones

## The fixed-line telephony market in Poland

- Analysis of the fixed-line market, including market size and dynamics
- Number of fixed-line users and degree of penetration
- Current market conditions and the influence of trends
- Key participants in the sector
- Markets for local, inter-zone, international, and fixed-line to mobile network connections
- Forecasts for fixed-line telephony market development 2007-2010

## The data transmission, leased lines and internet access market in Poland

- Analysis of the data transmission and internet services market, including its value and structure
- Structure and conditions for DLISP, data transmission, leased lines and internet access markets
- Information on the main participants in the DLISP market
- Market development forecasts for 2007-2010

## The information provided in Telecommunications market in Poland 2007 is essential to:

- marketing managers and employees of companies active in the Polish telecommunications market or considering entry
- companies that engage in business research, consulting and analysis
- financial advisers, brokerage houses, investment banks and other institutions
- government agencies, embassies and professional organizations.

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