



Telecommunications market in Poland 2008

Development forecasts for 2008-2012

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A word from the author



„Each year, the Polish telecommunications market needs to be looked at afresh. Forecast models must be redefined. Today the models have to foremost keep pace with the frequent regulatory changes. Research firms have no change to grow bored calmly watching as long-term trends unfold. The key question is often not by how much will the market expand but whether next year will not see a trend reversal and a contracted market value. As far as analysts are concerned, it primarily comes down to manipulating dry figures. Much greater responsibility rests on market participants. For them, telecommunications comprises their core business, they are the ones who have to make the decisions; they are the ones whose plans must account for the ever-new reality; they are the ones who must stay up to date nonstop.

For PMR, the formulation of in-house forecasts on market development is extremely important. The key challenge we face is that it is impossible in any way to guarantee that a given development forecast is the right one. As a consequence, forecasting is a task that is equally interesting as it is difficult and burdened with the great risk of error. During the preparation of our latest report on the telecommunications market, much time went into the development and formulation of forecasts. I am certain that what we have prepared for you represents, at minimum, sound material to compare and confront with your own opinions and predictions.”

Paweł Olszynka, Head IT&Telecoms Analyst

PMR MarketInsight Methodology

These reports were prepared using PMR's MarketInsight Methodology. **PMR MarketInsight is a methodology developed by PMR which assists in the complex preparation of industry reports.** It defines the ways in which data should be collected for such reports and outlines the methods to be used in analysing the information collected in order to obtain a true picture of the market in question. **It also contains special procedures to follow in the case of incomplete market.**

PMR MarketInsight precisely defines report content and structure. Industry reports prepared using PMR MarketInsight are based on information from a variety of available statistical, industry (specialist press, the internet), general and official sources as well as information from PMR's own database and primary research independently carried out by PMR. The sources we use are individually tailored to each project. **PMR MarketInsight is the result of over 10 years of experience in conducting industry analysis on Central and Eastern European markets.**

PMR
MarketInsight
Methodology

In 2007 the Polish telecommunications market grew by around 2%.

Description

Telecommunications market in Poland 2008 analyses the current situation and discusses the trends and development directions on the Polish telecommunications market in the years ahead.

Each chapter contains the most up-to-date information on individual segments of the market and presents **profiles of the largest players** in the industry. The report forecasts the development of the key market indicators and looks at the growth opportunities in each segment for the years to come. In addition, current trends in technology (**broadband internet and 3G Telephony**) and business (**new operators and legal regulations**) are analysed in detail, and findings of a targeted PMR survey conducted especially for this report are revealed. This report covers **market news, analysis and forecasts** completely and insightfully, functioning as a solid base from which companies, consultants and investors can evaluate the market and make informed business decisions.

The report is based on analysis of data from the following sources:

- PMR own data, analyses and forecasts
- sources in the public domain: professional press and specialist internet services, general press, reports on the telecoms markets in Poland and Europe,
- financial reports of operators, and their owners, documents published by brokerage houses, investment funds and public institutions, as well as available on the internet
- interviews with experts on the telecommunications market
- survey conducted among telecommunications companies specially for the purposes of the report.

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Strengths of the report:

- detailed analysis of the fixed-line and mobile telephony markets
- description of the current situation on the ISP market in Poland
- accurate and reliable forecasts and growth prospects for 2008-2012
- findings of the survey conducted among the largest telecommunications companies in Poland.

The telecom
market in Poland
may contract
in value in 2009.

The analysis of the telecommunications market, contained in the report, describes:

- the overall market situation and possible effects of emergence of new players
- the consequences of implementation of the new regulatory changes
- broadband internet access (including access based on DSL, CaTV and other technologies)
- 3G telephony
- virtual operators' market development (MVNOs and FVNOs).

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Poor infrastructure is the key barrier to growth of the Polish telecoms market.

Reliable forecasts

Most of the forecasts concerning the value of the telecommunications market in Poland or its individual segments were prepared using a model based on historical information, macroeconomic data (both historic and forecast) and information on trends that emerge in the telecommunications sector and its individual segments.

The report presents forecasts for 2008-2012. They concern:

- size of the market as a whole
- size of individual segments (fixed-line telephony, mobile telephony, internet access, data transmission)
- penetration rates of fixed-line and mobile telephony
- penetration rate of internet access and number of broadband users (by type of access).

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Findings of the survey conducted among the largest telecommunications firms in Poland

The survey was carried out by PMR Research, the research division of PMR, amongst the management staff of the largest telecommunications companies operating in Poland.

The findings of the survey present:

- current situation on the market, including the barriers and development opportunities
- assessment of the steps taken by the Office of Electronic Communications
- telecommunication technologies and services that are most likely to succeed on the Polish market
- 3G telephony market
- long-term forecast for penetration rates of the mobile telephony market (3G included) and fixed-line telephony market.

With the responses given, we were able to better understand the current situation on the telecommunications market. They proved very helpful sources of information on the industry.

The triple play services market still has growth prospects.

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The mobile market in Poland slowed to single-digit growth as a consequence of MTRs reduction.

The report target audience:

- management staff and marketing departments of companies either already active or considering launching of operations on the telecommunications market in Poland
- consulting, research and analytical firms
- government institutions, embassies and sector organisations
- financial institutions, including banks, brokerage houses and investment funds.

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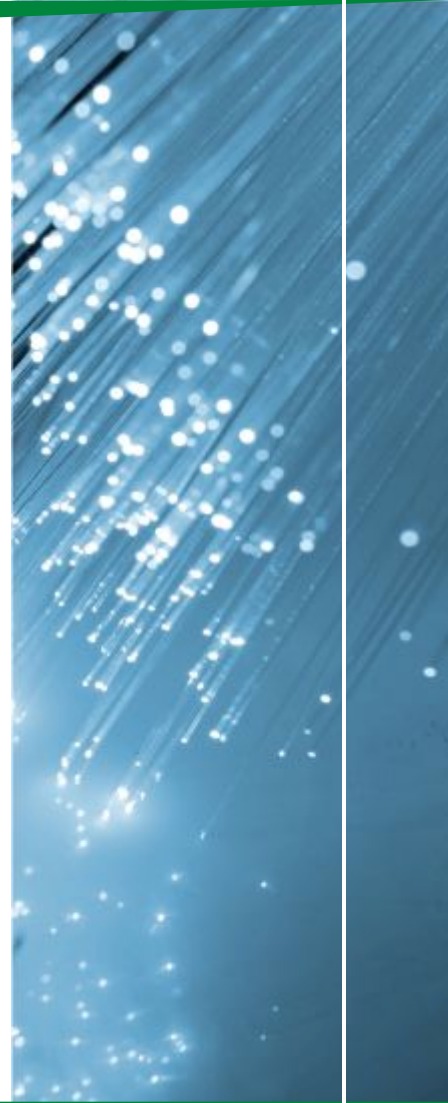
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