



Telecoms market in Central and Eastern Europe 2007

Development forecasts 2007-2010

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A word from the autor



„Central and Eastern Europe continues to represent a very attractive region for investors interested in the telecommunications industry. New important trends and tendencies can be observed in the sector. The favourable climate on the broadband internet access market in over the past two years caused that numbers of both ADSL subscribers and CaTV internet access users are increasing apace in all CEE countries. Increasing marketplace competition, media convergence and provision of telecoms services in packages as well as content-oriented approach are all noteworthy. A derivative of the content-focused strategies is the operators' turn towards investing in NGN.

Telecoms market in Central and Eastern Europe 2007 gives a comprehensive overview of the telecommunications market in dynamically expanding Central and Eastern European economies. With detailed analysis of the most important trends and four year forecasts for each market segment, it represents an excellent tool for executives active in or investors eyeing the CEE telecoms sector.”

Pawel Olszynka, Head IT&Telecoms Analyst

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PMR
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Methodology

Report description

Telecoms market in Central and Eastern Europe 2007 examines the prevailing trends in the regional telecommunications market as well as those observed worldwide. It breaks down information by market segment, and provides historical data documenting the development of the market in the years since 1995.

This report provides an in-depth analysis and comparison of the state of the telecommunications market in Hungary, Poland, the Czech Republic and Russia, as well as valuable information concerning expansions planned by key market players over the next few years.

The specific procedures used to prepare industry forecasts for **Telecoms market in Central and Eastern Europe 2007** include a model using historical and forecasted data for the macroeconomic conditions in each of the four countries examined. It also considers market trends, both factors such as technological advances, prevailing market trends, both in these countries and worldwide, and available information on the planned initiatives of current participating companies in the markets.

Telecoms market in Central and Eastern Europe 2007 provides complete coverage in four main sections:

Section One, General Outlook, provides comparative macroeconomic information for all four countries, along with recent events that have influenced the telecommunications market and its development. Legal and institutional environments are outlined and compared, and information about active capital groups in the region and M&A operations build a solid foundation for comprehensive market forecasts, with commentary, to 2010.

Section Two focuses on fixed-line telephony, providing historical and current data for each country, including information on market size, trends, the influence of VoIP, and other dynamics observed in these markets. Key participants and their market shares are listed, along with comparative statistics of the largest fixed line providers operating in neighboring countries. Forecasts are formulated for each country and provided along with applicable commentary.

Section Three is dedicated to informing the reader on the performance and development of the **mobile telephony** market in each of the four countries, and outlines key trends, in addition to market size and dynamics. Comparisons are drawn between the mobile markets in each of the countries, as well as between key proponents of mobile services in these four countries and those located in neighboring countries. 3G and MNVO influences are detailed, along with applicable market shares and detailed forecasts to 2010.

Section Four deals with the **data transmission and the internet services sector** of the telecoms market. Forecasts to 2010 and commentary are supported by solid data on trends, historical data, broadband and internet use statistics, and the development of Wi-MAX in the region. Comparison between the four countries analysed in the report is given, along with market shares of the region's key service providers.

Report overview

Report summary and methodology

- Executive summary of the contents and aims of the report
- CEE demographic information and macroeconomic overview
- Explanation of methodology used in preparation of forecasts

Comprehensive overview of the telecommunications market in the CEE region

- Market size and structure
- Current conditions and trends
- Development history and trends of the future
- Comparison of the CEE market with Western European markets

Regulatory and investment environment

- Transparency of the market and associated business risk
- Policies of the various regulatory institutions at work in the region
- Current telecom regulations in force and future regulatory developments
- Appendix of capital groups and M&A activity in the CEE region

The mobile telephony markets in Poland, Hungary, Russia and Czech Republic

- Analysis of the mobile telecoms industry, including market size and dynamics
- Development of 3G services
- Current market conditions and the influence of trends
- Key participants in the sector
- Forecasts for future growth and development in the market

The fixed-line telephony markets in Poland, Hungary, Russia and Czech Republic

- Analysis of the fixed-line industry, including market size and dynamics
- Explanation of the impact of VoIP services
- Current market conditions and the influence of trends
- Key participants in the sector
- Forecasts for future growth and development in the market

The data transmission and internet services markets in Poland, Hungary, Russia and Czech Republic

- Analysis of the data transmission and internet services industry, including market size and dynamics
- Extent of internet usage
- Current market conditions and the influence of trends
- Key participants in the sector
- Forecasts for future growth and development in the market

The information provided in Telecoms market in Central and Eastern Europe 2007 is vital for:

- sales and marketing executives, shareholders and management personnel of companies operating in or planning to enter the telecoms market in Central and Eastern Europe and Russia
- international telecommunications companies with worldwide operations
- financial advisers, brokerage houses, investment banks and other institutions
- consultants and analysts that provide advice and intelligence to governmental and business organizations and those seeking investment opportunities
- government agencies and embassies.

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