Value added and multimedia services in Poland 2009

Development forecasts for 2009-2012

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A word from the author

"The telecommunications market in Poland has matured. The downward-bound service prices and the regulator's sustained intervention have led to a progressively lower rate of revenue growth for the operators. Some are increasingly more active in defending themselves against the thinning of earnings. A greater focus on developing value added services is one way of defense. In principle, every operator is looking to augment, to a greater or lesser degree, its offering and to launch new services, also through the establishment of partnerships with other entities. One of the goals of such partnerships is to secure a strong position relative to competitors as operators bid for frequencies (in the case of mobile television) or also to lower the total costs of launching services on the market (m-payments).
Another trend which can be observed on the market is the growing popularity of packaged services. Today, the sale of packaged services is no longer exclusive to cable TV operators. Telecoms, in incorporating television services into their offering, would like to be noticed on the "triple play" market. On the other hand, digital platform operators also plan to get in the game by broadening their service offering with telecommunications services, such as telephony or the internet.
As a result, in order to compete with new players, even the smaller telecoms will have to elevate multimedia and value added services to a key business area".

Edyta Kosowska, Telecommunications Analyst

PMR Marketinsight Methodology

This report was 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.

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PMR MarketInsight is the result of over 10 years of experience in conducting industry analysis on Central and Eastern European markets.

PMR MarketInsight Methodology

There are approx. 600 cable TV operators in Poland.

Report description

Our report **Value added and multimedia services in Poland 2009** offers an analysis of the current situation in the telecommunications and television market in Poland. The focus is on **value added services (VAS) for mobile and fixed-line telephony markets, and on the paid television market**. These are upcoming segments that represent significant development for Polish telecommunication firms. The report presents the values and structure of these market segments, as well as the prevailing market trends.

Value added and multimedia services in Poland 2009 also forecasts future development in the Polish market up to 2012. The report is crafted with MarketInsight, PMR proprietary research methodology.

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Key sections

1. General overview of the value added and multimedia services market

- Market trends in particular segments
  - Mobile value added services
  - Fixed-line value added services
  - Pay TV
- Comparative analysis of Polish market versus selected European markets
- Regulatory authorities and sector institutions on the value added and multimedia services market

2. Mobile and stationary telephony value added services markets

- Horizontal structure of the mobile value added services market
  - Entertainment and information
  - Mobile finances
  - Mobile marketing
- Vertical structure of the mobile value added services market
  - Main players
  - Mobile operators
  - Content producers
  - Distributors

TP SA has the largest number of IPTV subscribers.

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In 2008, pay TV penetration in Polish households reached 66%.

- Development forecasts for mobile value added services market
- Fixed-line telephony value added services market
  - Types of services
  - Key providers
  - Market trends
- Development forecasts for fixed-line telephony value added services market

3. Pay TV market

- Digital platforms market
- Cable television market
  - Analogue television
  - Digital television
- IPTV
- Supplement: TV Digitalisation
- Supplement: VoD
- Development forecasts for pay TV market

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An essential read for:

- management and marketing staff of companies active on the Polish telecommunications and television markets as well as of larger VAS providers
- consulting, research and analysis firms
- financial institutions, including banks, brokerage homes and investment funds interested in investing in the IT&T sector
- government institutions, embassies and trade organisations.

This report is an invaluable resource for any company active in or considering entry to the pay TV and telecoms industry in Poland.

The market entry of subsequent MVNOs might well have a bearing on the development of the MVAS market.

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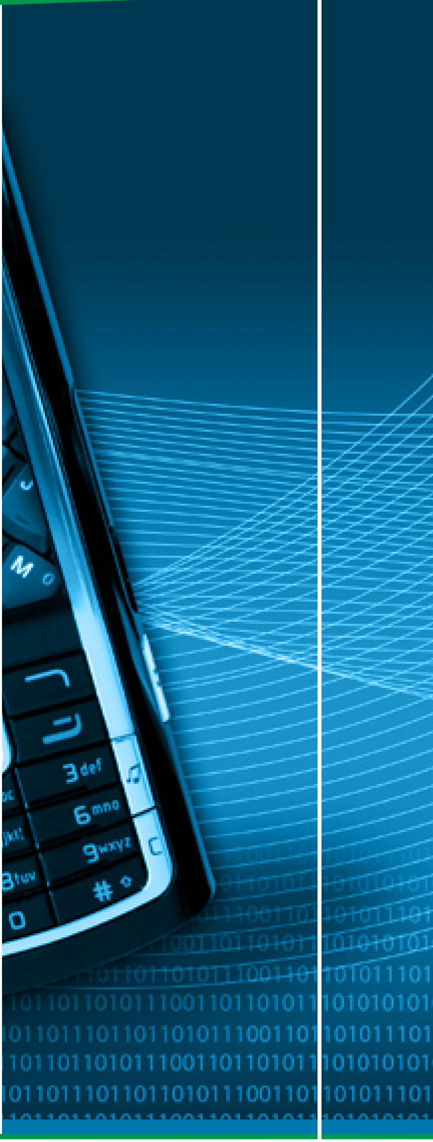

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