



PMR Industry Report

Integrated telecommunications services market in Poland 2018

Market analysis and development forecasts for 2018-2023

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PMR Report

- **Unique 5-year forecasts** prepared by the PMR team using a **proven and coherent methodology**
- **Expert commentary** allowing for a better **understanding of the current and future situation** and **opportunities and threats**
- Description of the main **trends and legal changes** affecting the market

What is the content of the report?

- The number of subscribers of integrated services in total and divided by individual types of bundles. Identification of the key market trends. SWOT analysis.
- The number of subscribers of bundled services and the number of RGUs sold in bundles broken down into individual operators (Cyfrowy Polsat, Orange, UPC, nc +, T-Mobile, P4, INEA, Netia, Toya). Cumulative data, showing the structure and breakdown into different types of bundles within the base of an individual operator.
- The analysis of an offer and portfolio of operators in the field of integrated services, primarily prices, ARPU. Shares of individual players in terms of value and volume.
- Prices of bundle services in Poland, discount policy and additional services.
- Financial services provided by telecommunications operators (RGUs divided into operators), electricity and gas sales.
- PMR forecasts for the integrated services market for 2018-2023 in terms of value and volume. The complete picture of the market: division into RGUs, which constitute the bundle offer in post-paid segment (pay TV, fixed-line internet access, mobile telephony – voice services, mobile telephony – mobile internet, fixed-line telephony – voice services) and a similar list of services sold separately (for comparison).
- Dedicated B2C survey (N = 1,000). Popularity of bundled services and saturation of services in Poland. Popularity of individual operators. Cumulative data, showing the services penetration in the cities of up to 100,000 inhabitants, over 100,000 and residents in the rural areas.
- Presentation of the key trends and KPI relating to the use of bundles in Poland compared to other EU countries.

5 Reasons to choose PMR

- 1 When **developing a strategy** for the coming years, it is necessary to know market trends, growth forecasts and potential
- 2 When **preparing a budget** or **making financial decisions**, hard data on bundled services must be taken into account
- 3 When **planning the use of you own customer base**, it is worthwhile to find out what the competition is doing
- 4 When **outlining the possibilities of cross-selling** services to existing customers, it is advisable to find out what the preferences of bundled service users are
- 5 When **preparing new offers**, companies may take into consideration the market opportunities presented in this report, e.g. alliances and connections between telecommunications services and other services for the mass market.



Who benefits from the PMR report?

We recommend the report to managers – including heads of business development, marketing and sales departments – of the following enterprises active on the telecommunications market in Poland or interested in entering the market:

- Telecommunications operators, regardless of their specialisation and segment of activity
- Cable television networks
- ISPs
- Suppliers of telecommunications and network devices.

The use of bundled and integrated offers goes beyond the telecommunications sector and extends to banking services, tourism, energy, gas sales, etc. With that in mind, we also address this report to enterprises from outside the telco sector, such as:

- Banks, insurers and energy companies
- Polish and international financial institutions (banks, brokerage houses, investment funds)
- Consulting, research and business intelligence companies
- Chambers of commerce, professional organisations.

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