



Polish cable operators on the background  
of telecommunication market in Poland and Europe

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Polish Chamber of Electronic Communication

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Following slides present the most important figures  
of Polish telecommunication market  
and cable industry in Poland and Europe

All figures refer **June 2012**  
(unless otherwise noted)



## Poland in Europe

Member of European Union from 2004  
also NATO, UN, OECD and WTO

(in brackets the place in Europe and world)

- Area 312.000 km<sup>2</sup> (9 - 68)
- People 38 m (8 - 34)
- Gross Domestic Prod. 14,200 USD  
(6 - 22) (agriculture 4%, industry 31%,  
services 65%)
- Economic growth 4,3% (yearly GDP)
- Inflation 3,1%
- Export 148 b USD
- Import 158 b USD
- Investment value 97 b USD



## Macroeconomic data

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- Number of households 13.8 m
- Average monthly salary 1.160 US\$
- Unemployment rate 12%
- Households with computer 76%
- Households with internet 48%
- Average time of TV watch 3.42 h (daily)



## Telecommunication market

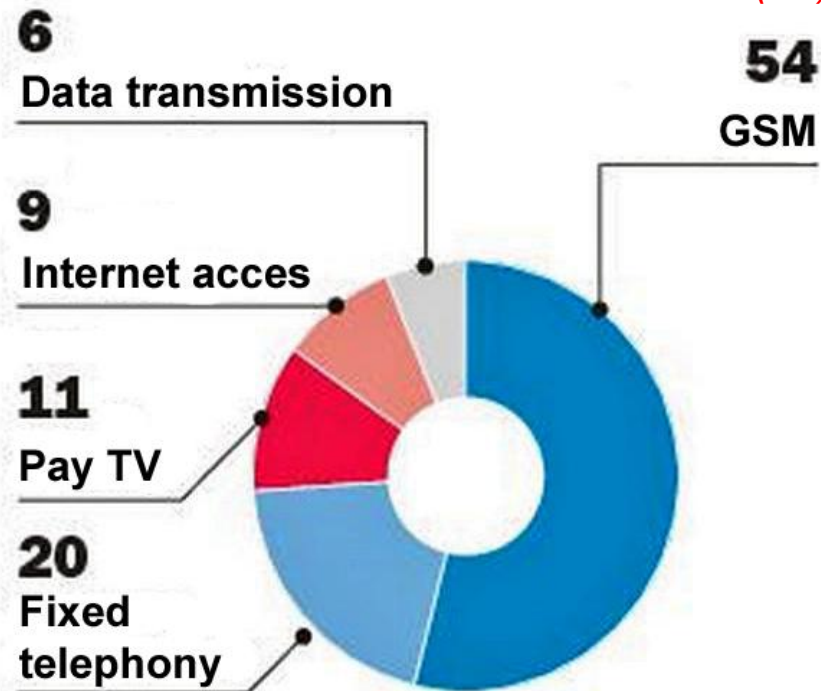
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- Registered telecom companies    6.100
  
- **Telephony:**
  - fixed                    6,86 m (lines)
  - mobile                 52,2 m (subscribers)
  
- **Internet:**
  - fixed acces    4,695 m (subscribers)
  - mobile            3,4 m (subscribers)
  
- **TV:**
  - pay platforms 11,27 m (subscribers)
  - free to air     2,21 m (viewers of satellite and terrestrial emission)

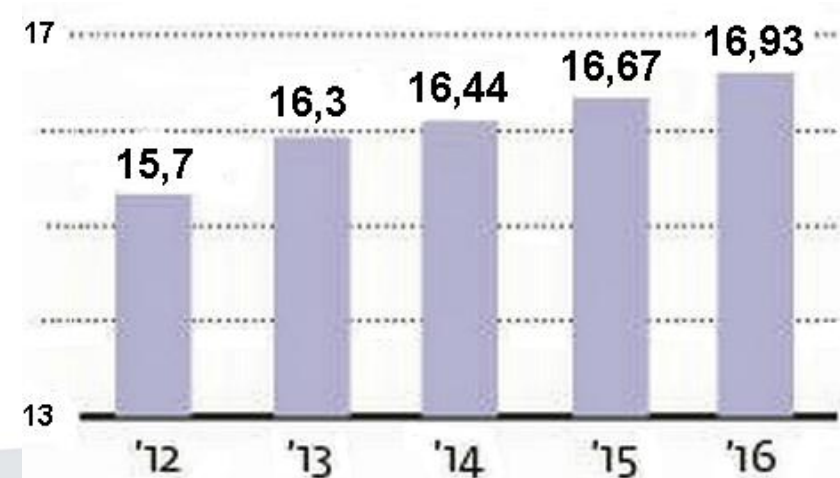
## Telecommunication market value

**CURRENT 46,9 billion US\$**

*what makes the current market value (%:)*



**FORECAST**  
(billion US\$)





## Telephony



## Fixed telephony – market share

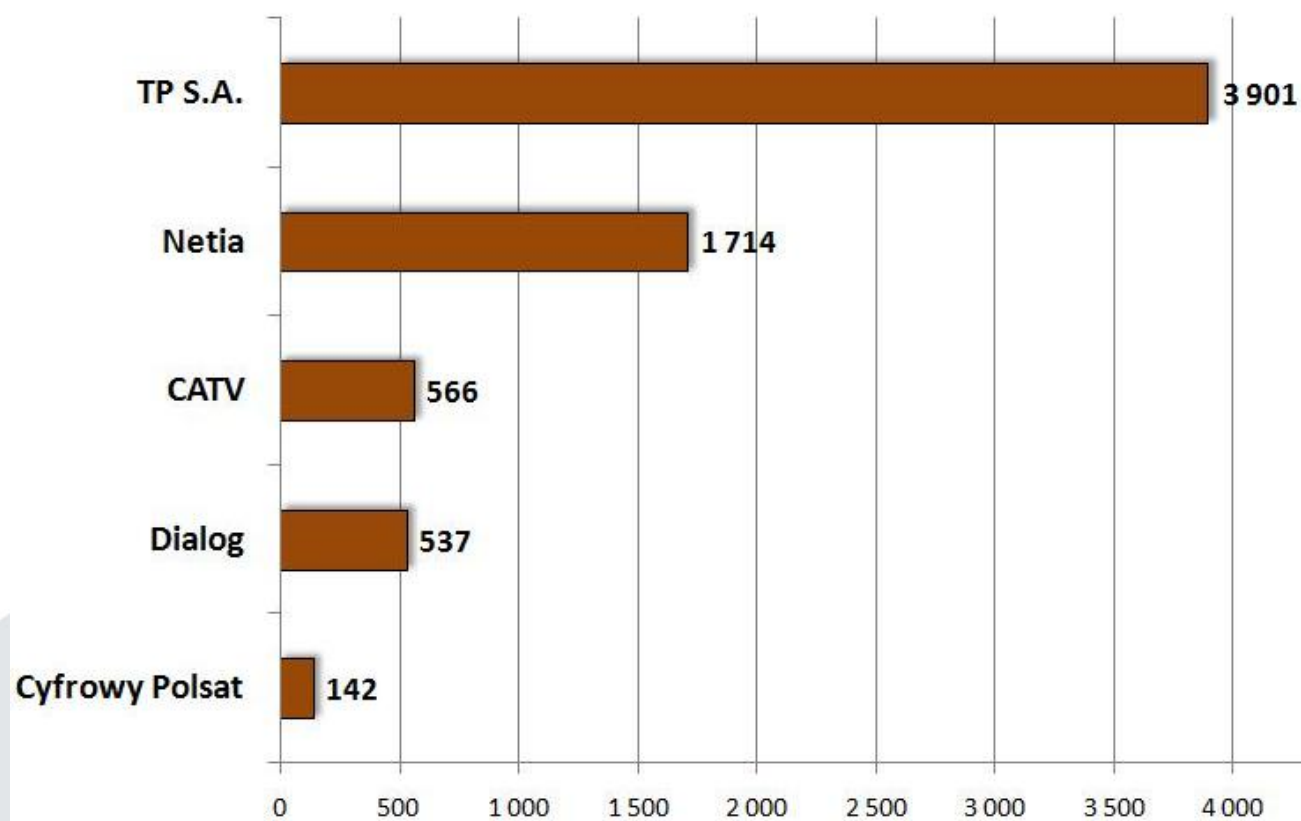
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Total                    6.858.441

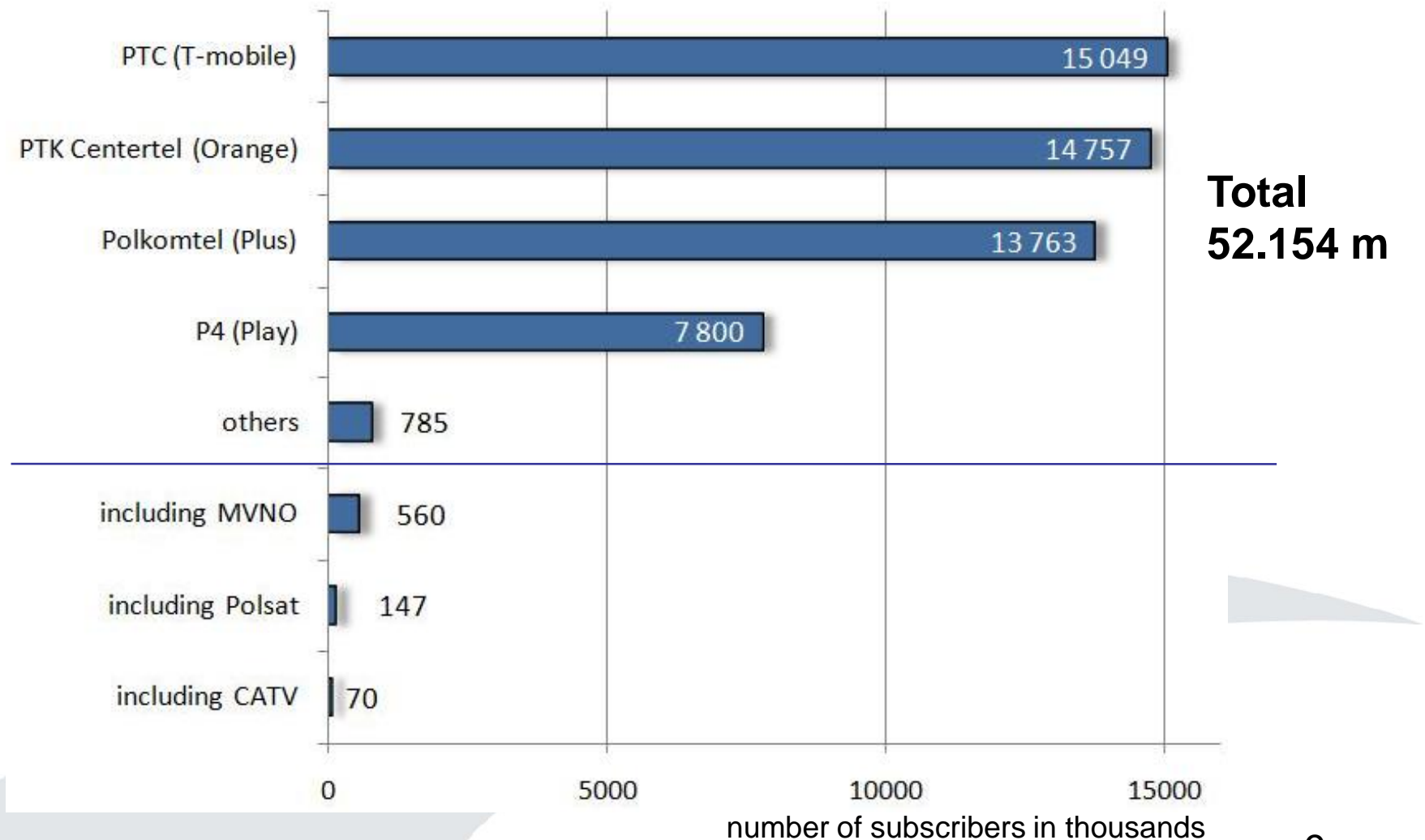
Consumer                4.552.278

number of lines

Business                2.305.288



## Mobile telephony – market share





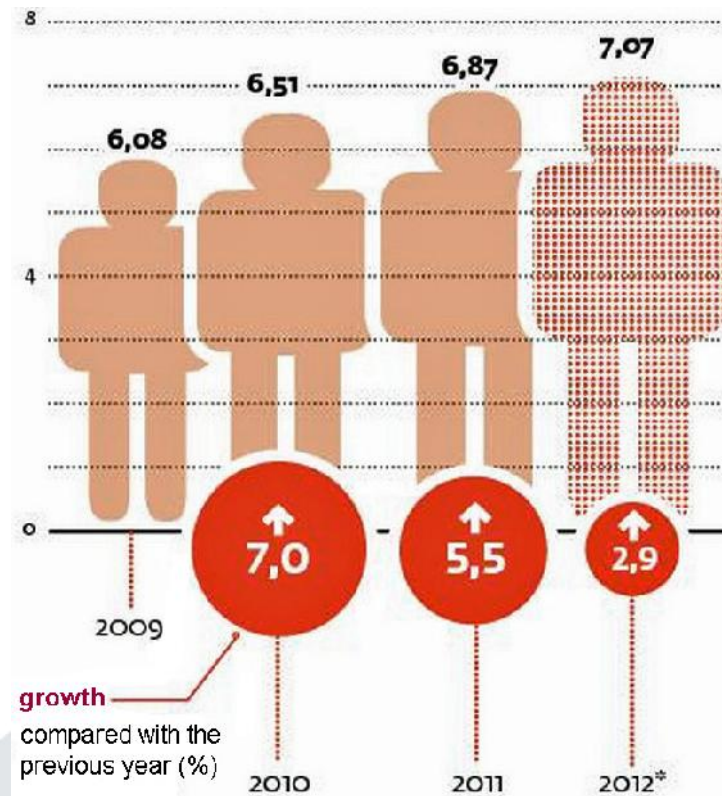
Internet



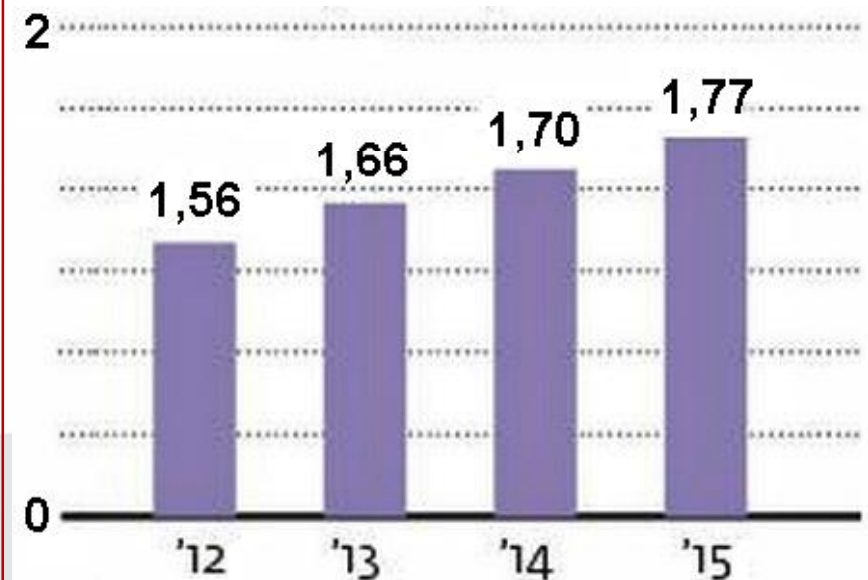
## Fixed internet – market value

**CURRENT 1,46 billion US\$**

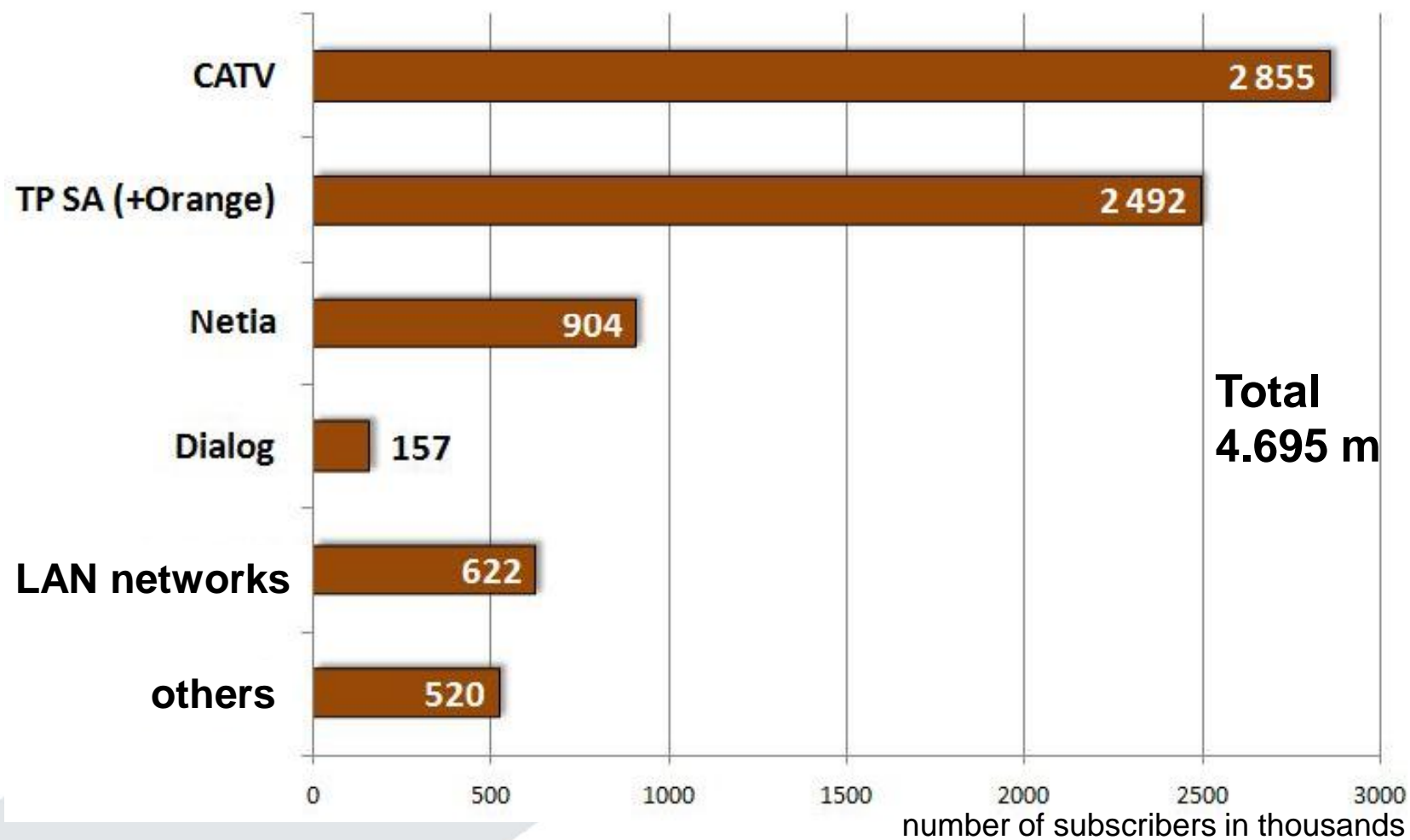
*increase the number of users :*



**FORECAST**  
(billion US\$)

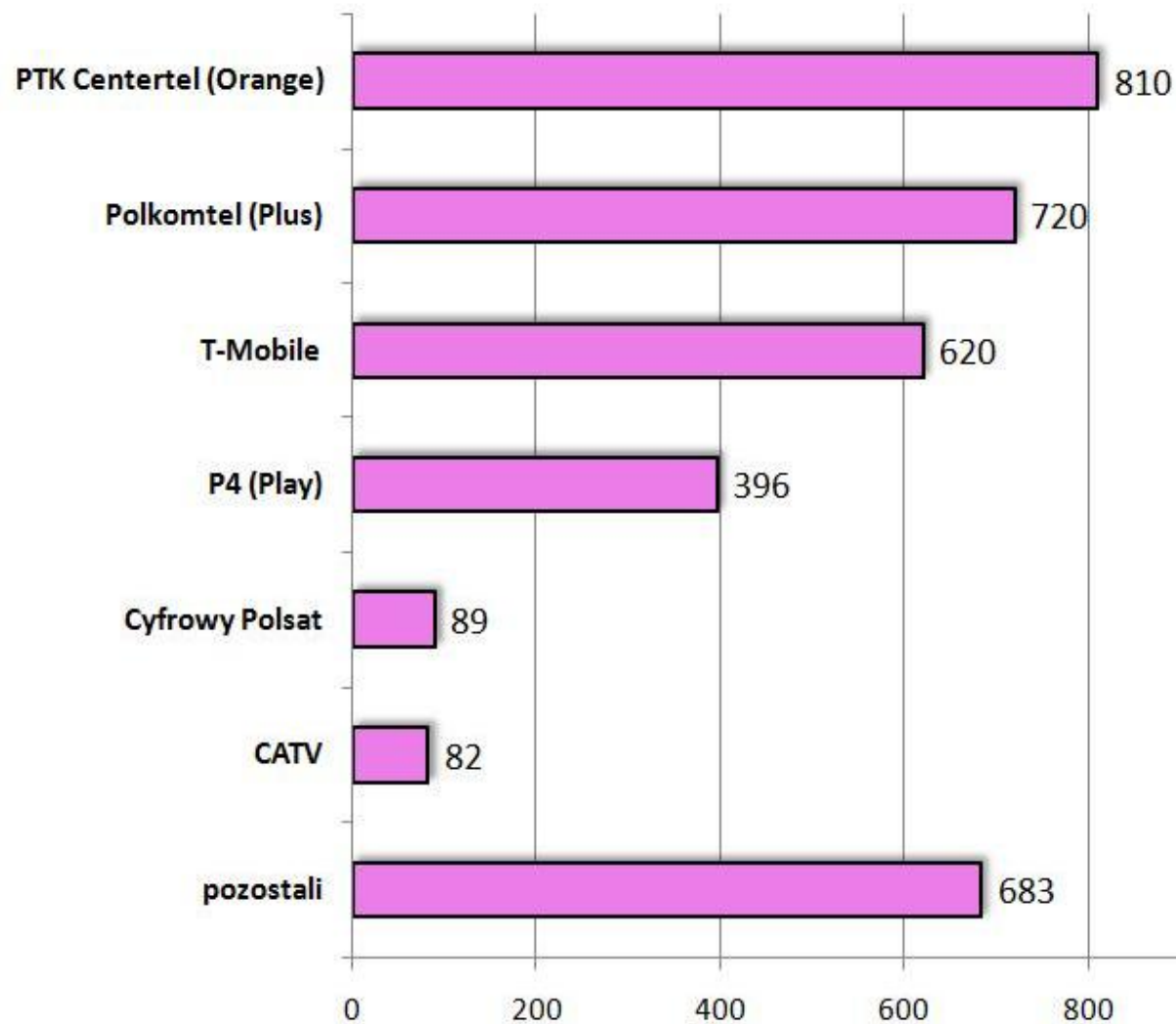


## Fixed internet – market share



## Mobile internet – market share

Total  
3.4 m



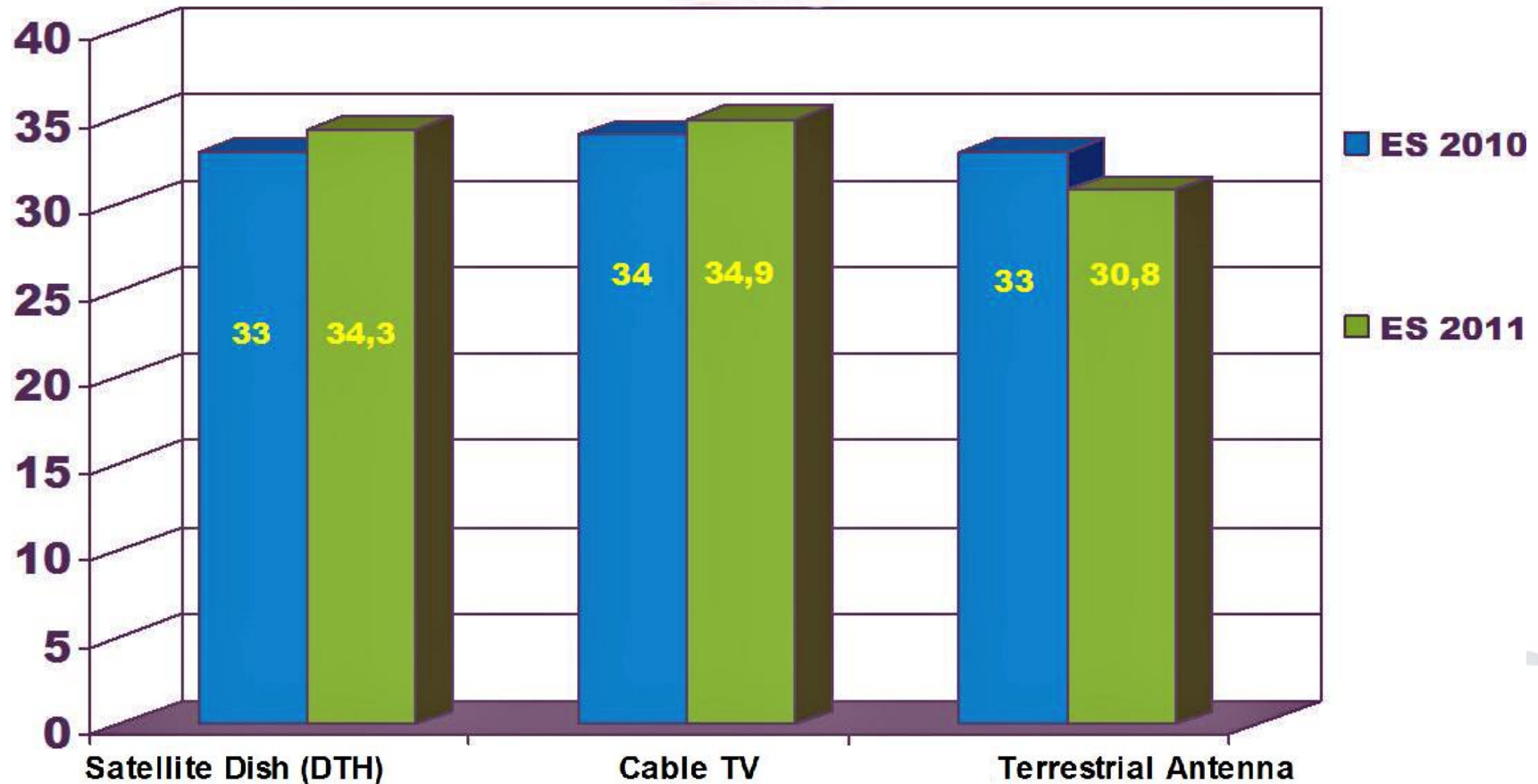
number of subscribers  
in thousands



## Television

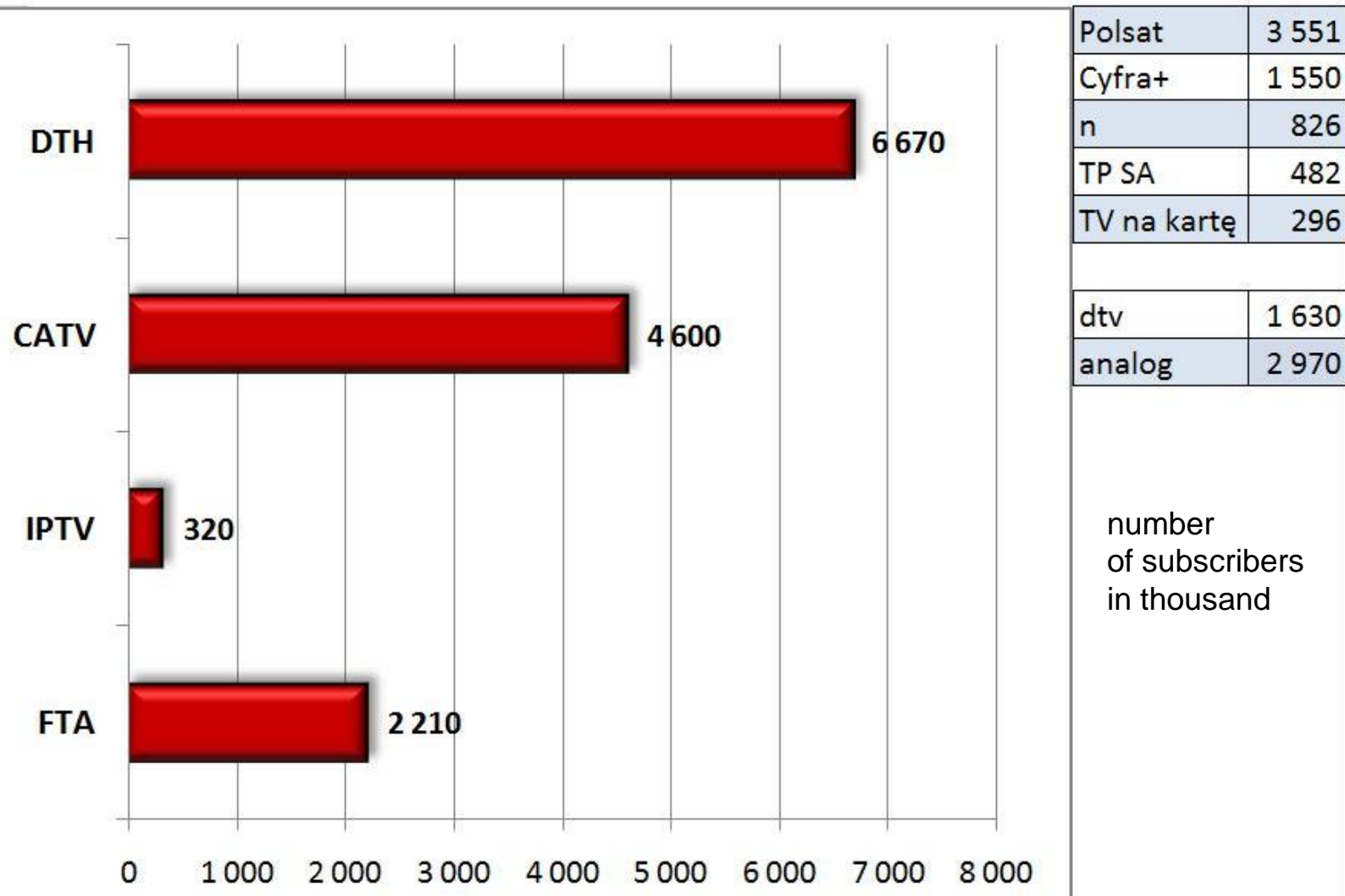


## TV programs - technical reach (%) according to AGB Nielsen Media Research



*Yearly Nielsen Audience Measurement on approx. 8 thousands of households*

## TV programs – ways of accessing



## Digital TV

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161 - number of digital television services,  
which provide the following entities:

### 7 DTH platforms:

Cyfrowy Polsat

Cyfra+

Platforma Satelitarna n

Platforma Satelitarna Orange TV

Telewizja na kart (wersja SD)

Telewizja na kart (wersja HD)

Telewizja N na kart

132 CATV operators

22 IPTV operators

## Digital TV – cont.

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In Poland, we have the following number of available TV channels?  
Offered digitally:

470 SD channels

96 HD channels

6 3D channels

### Smart TV

about 1 million Smart TV devices have now the customers.

Many purchased TV sets with Smart TV is not yet connected to the Internet.

### VOD

VOD services are now provided by 17 service providers of digital television.

## DVB-T implementation - current status

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- Analogue terrestrial TV signal in Poland will be completely replaced with all the digital, not later as 31 July 2013
- As in most countries, Poland adopted DVB-T and MPG-4 standards
- Responsibility for DTT implementation:
  - laws and regulations: the National Broadcasting Council (KRRiT) and Office of Electronic Communications (UKE)
  - realization: Emitel company, a leading operator of terrestrial broadcasting in Poland (more than 750 broadcast and telecommunications objects including masts with a height of over 300 meters)

## DVB-T implementation - current status (cont.)

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- currently operate three multiplexes (MUX), and the range of available digital TV continues to grow throughout the Polish market
- currently there are 18 TV programs (some also in HD)
- most of DVB-T programs is available to 94% of the population.
- first turn off the analog signal will be November 7, 2012 in southeastern Poland



## Cable operators (CATV) market



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### CATV data:

- registered companies 466
- subscribers 4,6 m
- households with CATV acces (HP) 7 m  
= penetration 65%
- coverage of the country - the presence in all major cities (over 40 thousand people, which is home to approximately 60% of the population) and approximately 40% of the other cities

Most CATV operators (including all the largest companies) use EuroDOCSIS 3.0 standard.

## Main CATV services

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Number of CATV subscribers:

■ Digital TV 1,63 m

■ Internet:

- fixed access 2,86 m

- mobile 82,000

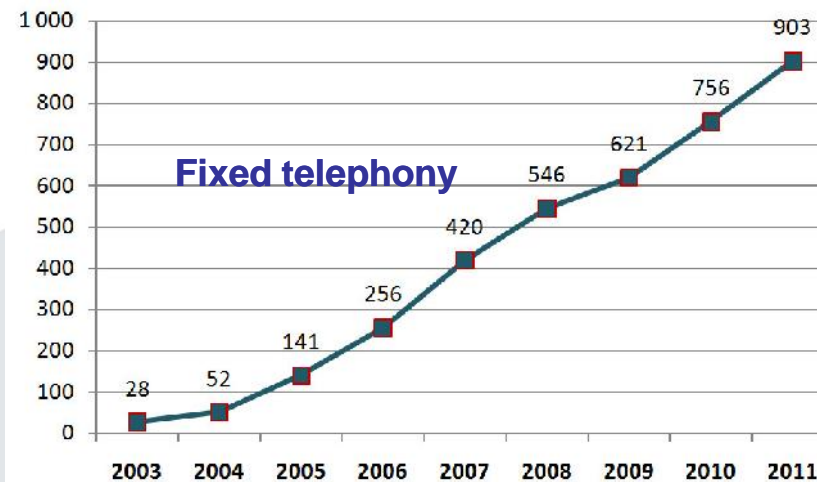
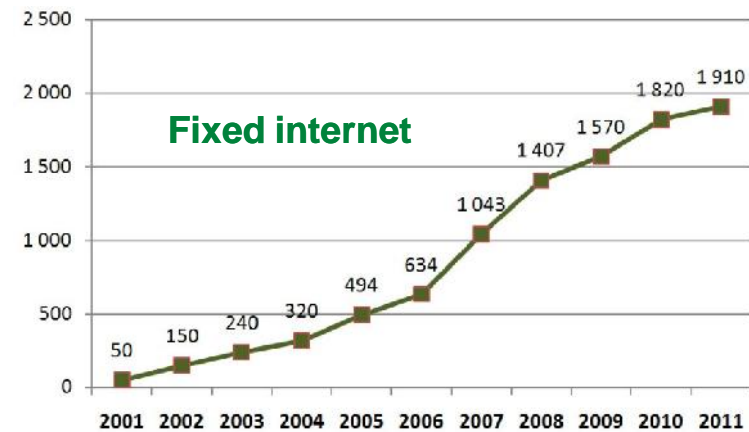
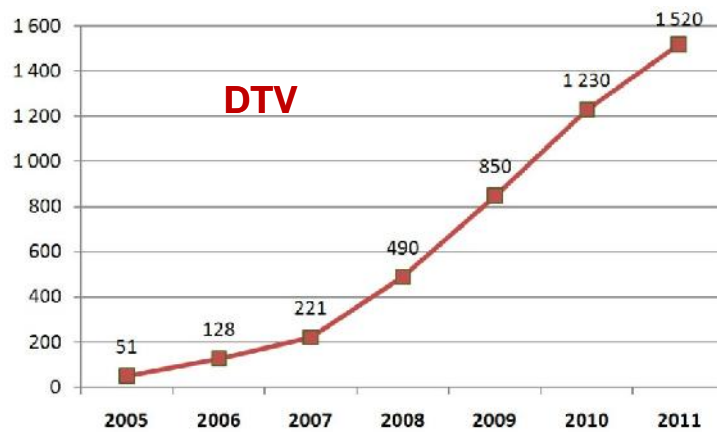
■ Telephony:

- fixed 566,000

- mobile 70,000

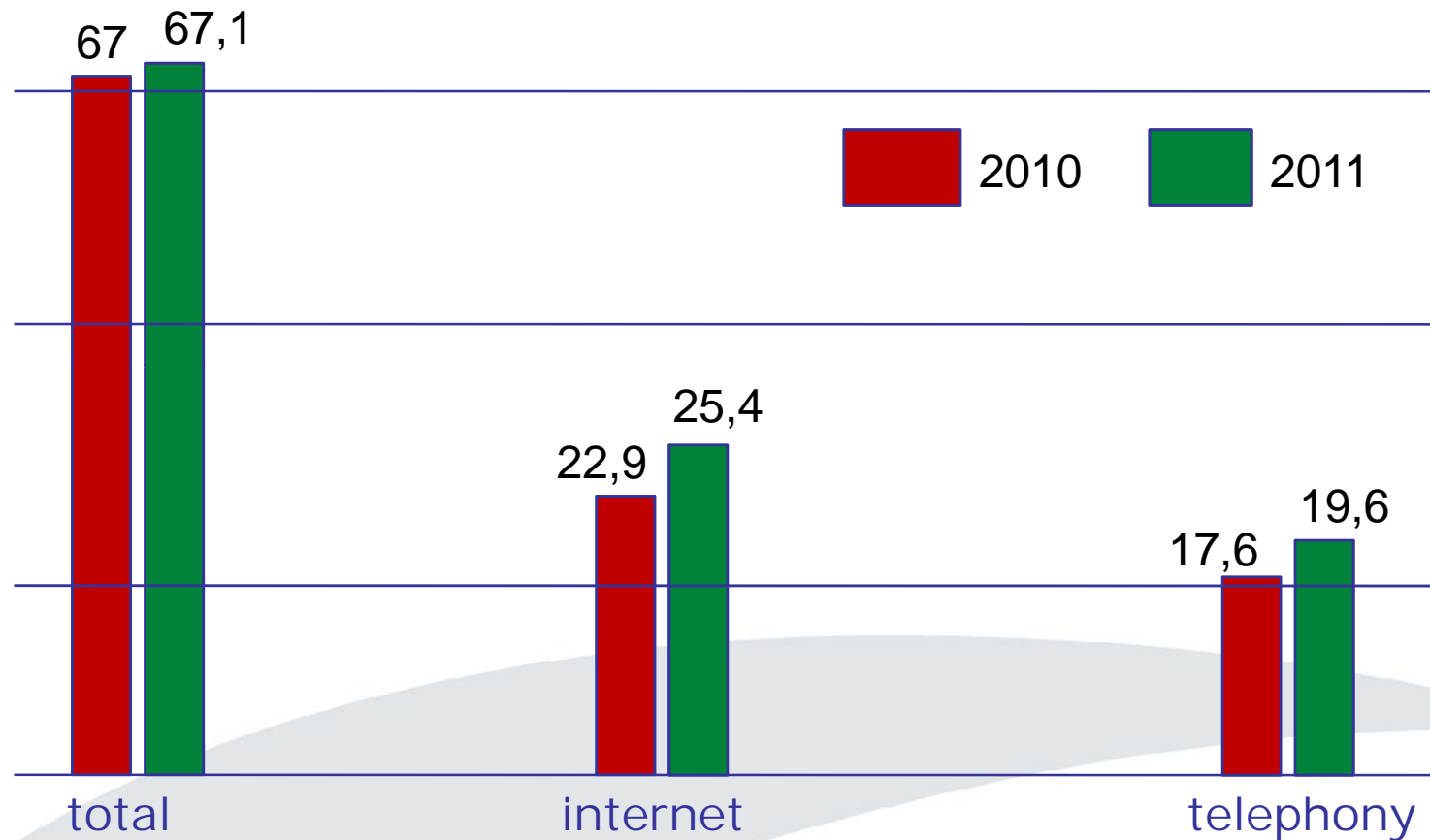
■ Local TV programs – 86 local broadcasters provide their programs to more than 3 million households

## CATV – an increase in services



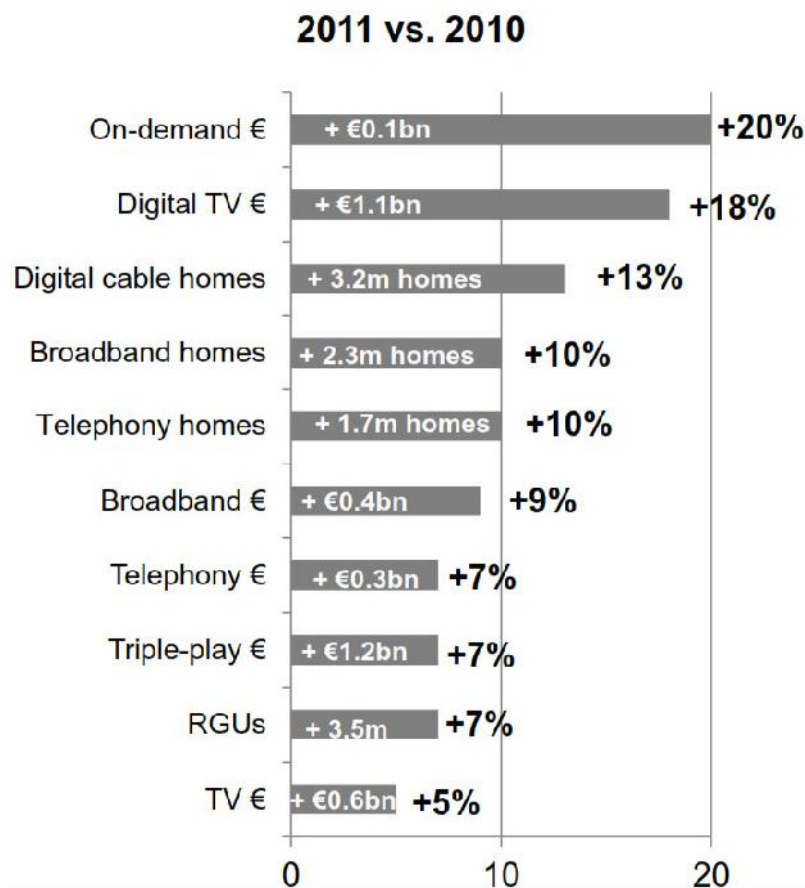
number  
of subscribers  
in thousand

## CATV in Europe (27 EU countries)



Number of CATV subscribers (millions)  
of 203 m total households

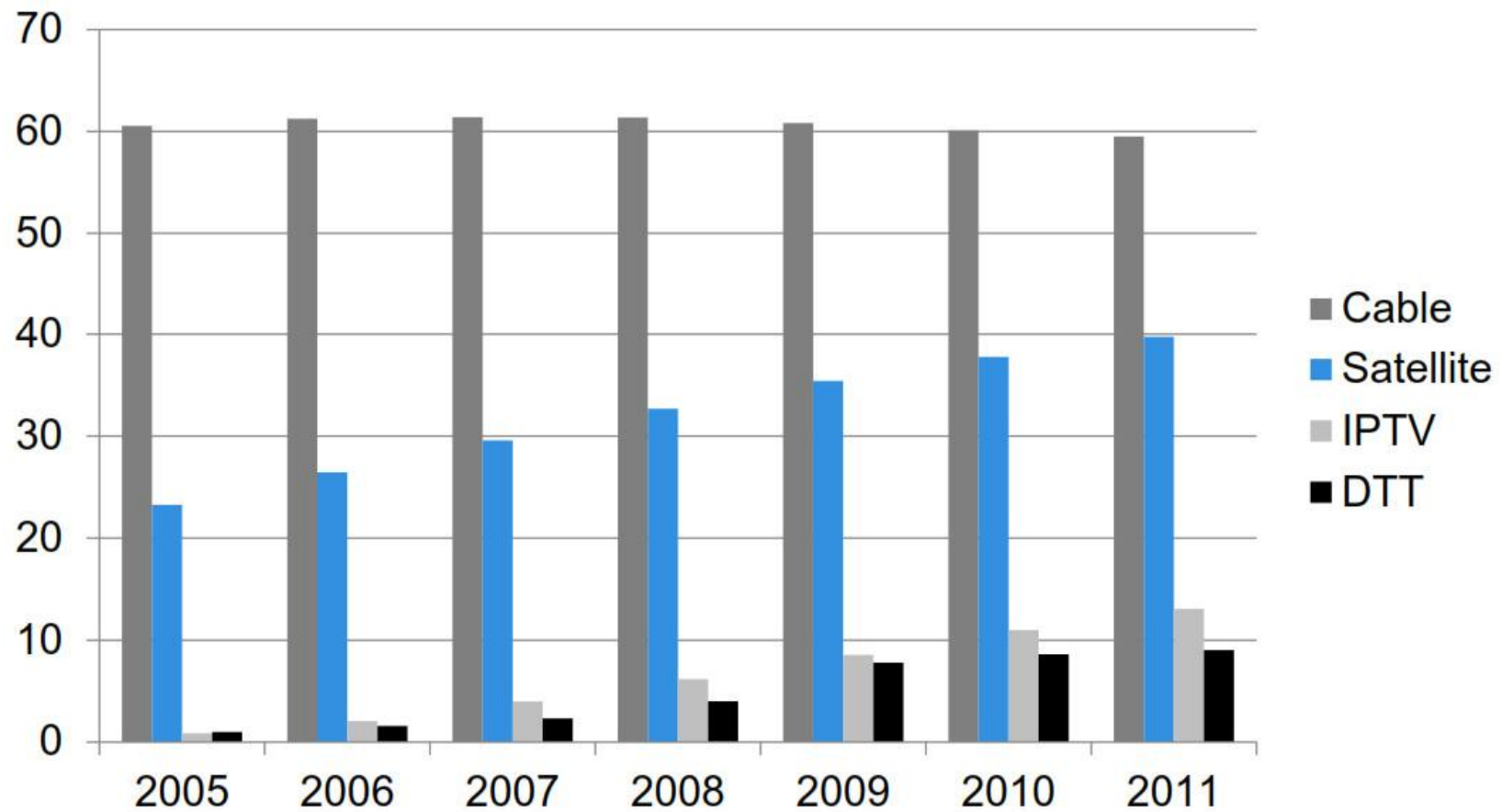
## Cable trends in 27 EU countries



- Strongest growth in digital and broadband with telephony follow-along
- Digital cable homes reached 28m (46% of total).
- Broadband and telephony connections both grew more than 10%.
- Telecoms services accounted for 45% of revenue.
- Cable revenue topped €19.9bn.
- Very strong growth in on-demand income, up 20%.
- EU ARPU reached €25.20
- 29m homes in EU27 now use cable Internet.

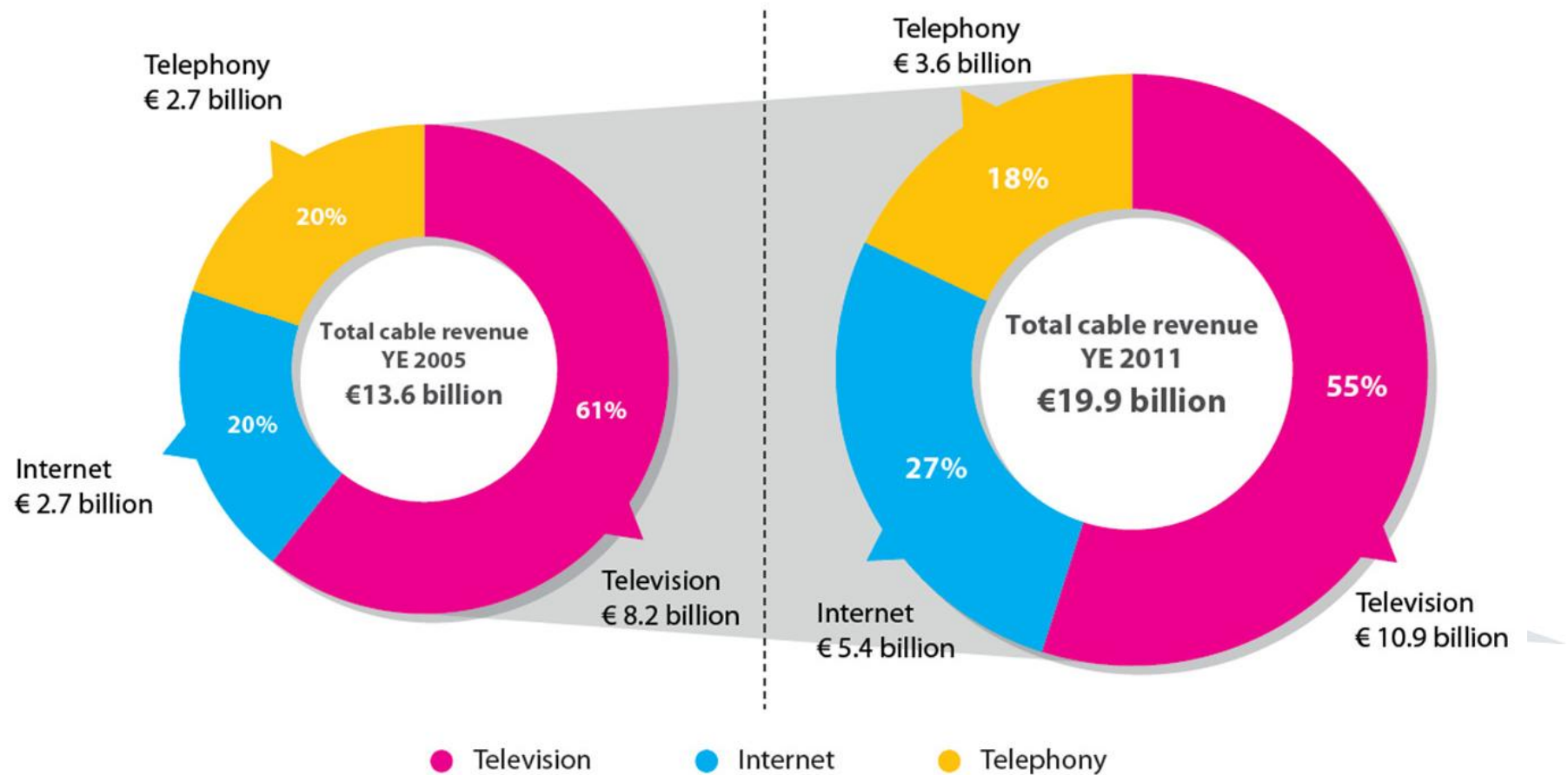
Source: IHS Screen Digest

## Cable dominates the Pay TV market in EU



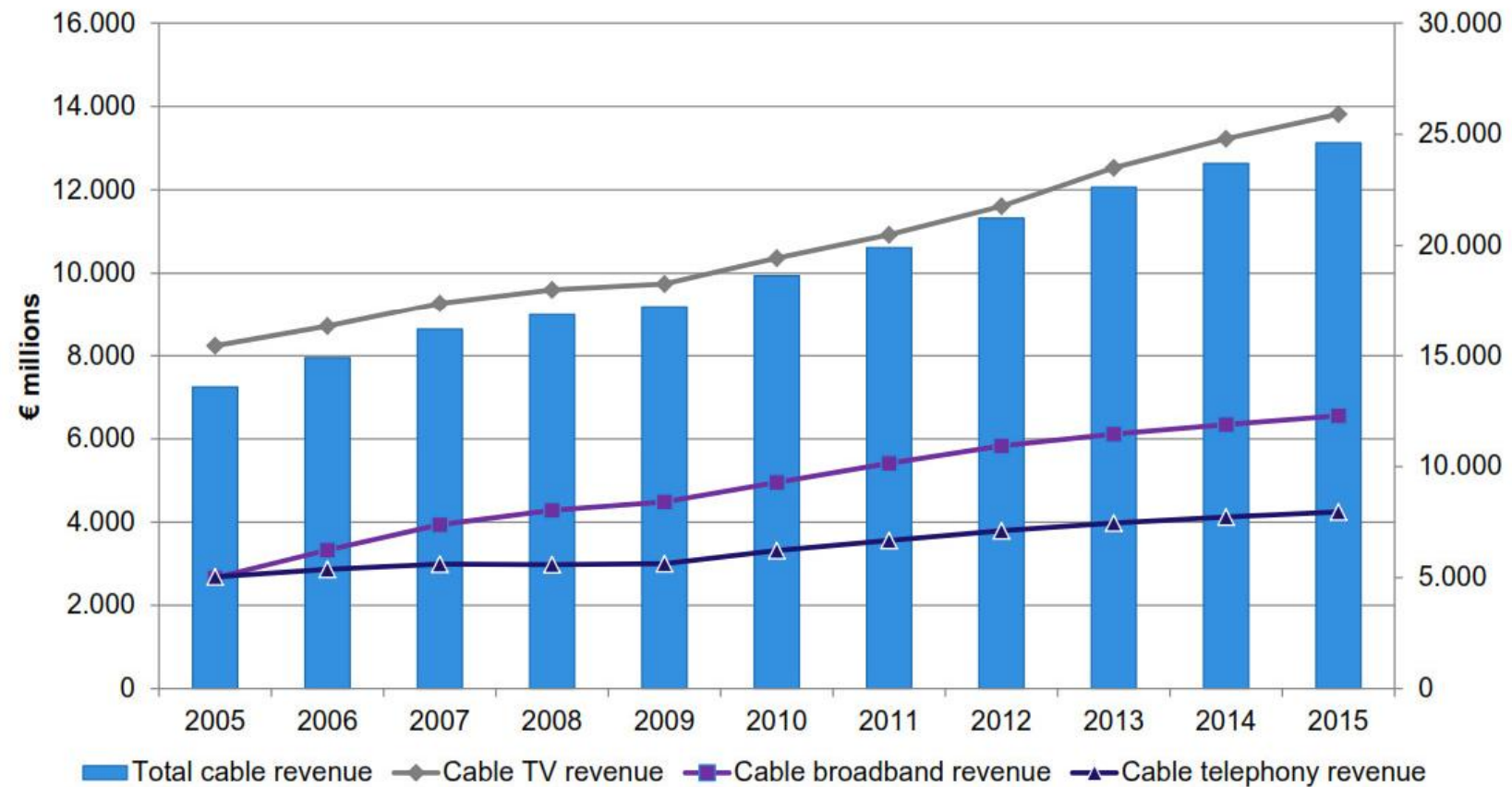
Source: IHS Screen Digest

## European cable revenue – 20 b €



Source: IHS Screen Digest – 2011 EU 27

## EU cable revenue development



Source: IHS Screen Digest



Thank you for your attention

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