

SCHEDULED FOR JUNE 2007

**bmp TC Central Eastern Europe Broadband Atlas 2007****a compact analysis of Eastern European markets (new EU members)****&****regional snapshot of the broadband dynamics**

by leading international strategy consultants

involved in (inter)national Broadband Access Projects since 1993

Though still emerging, **Broadband in Central and Eastern Europe** has experienced impressive dynamics, showing high growth, significant investments by private operators and concrete measures undertaken by the regulatory authorities.

The growth has been mostly driven by the **DSL** deployments of the incumbents, **Local Loop Unbundling** and **Bitstream, Wholesale Line Rental** are starting to be implemented, **Wimax** licences have been attributed, regulators have been increasing the pressure on incumbents to open their networks and propose fair tariffs.

The implementation of programs of the European Union to develop information and communication technologies will support these trends in the coming years.

Broadband development yet will have a different pattern of uptake than seen in Western European countries. The significance of LLU – as experienced in more mature markets- may solely be an interim solution for altnets in the region, cable internet being specific in each country. Currently many players enter the broadband markets in CEE, mobile operators will significantly influence the dynamics, wimax based deployments and first deployments on **Fiber to the Home or the Curb** are also being initiated...

The overall picture nevertheless hides significant discrepancies. Some of these markets, such as Slovenia or Estonia have an important penetration rate, in the EU27 average and do follow the trends of more mature markets. But other countries still suffer from a lack of infrastructures and a limited broadband penetration rate.

**bmp TC CEE Broadband Atlas provides a detailed and comprehensive review of the current status of the Broadband markets in CEE.**

The report first gives a concise overview of the CEE broadband market, including statistical data and a view of the general trends. Then, it focuses on each country, including statistical data, the regulatory developments, a presentation of the key players and of the services offered. The report aims at covering the strategies and developments for each of these countries as well infrastructure/technologies as services related.

Beside the description of the broadband markets, bmp TC's consultants have included their personal analysis as they regularly work in these markets.

In total **more than 150 operators** are being featured!

**Scope of the study:**

**Bulgaria, Croatia, Cyprus, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Romania, Slovakia, Slovenia.**

...with some examples of western Europe included, as being reference model for the broadband dynamics: **Ireland, France...**

**Benefits:**

- Understand the dynamics through the comparison with other European markets
- Detailed market data-regulatory points, coverage, subscribers, technology services...
- Gather an analysis by country showing specificities and newest developments
- Identify main players and assess their strategies: incumbent and altnets
- Hands-on Analysis by the consultants according to their experience in these markets
- Be up-to-date: latest trends being included with a personal consultants' analysis

**STUDY OUTLINE**

**CONTENTS:**

**Introductory words**  
**Summary**

- Market evolution and regional analysis
- Key issues and trends
- Statistical overview

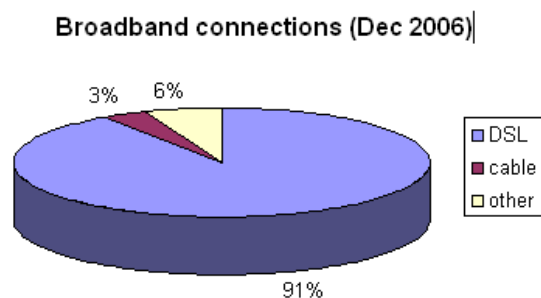
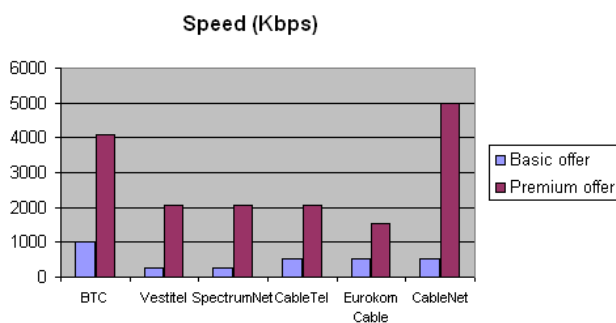
**For each country:**

- Overview and general analysis
- Analysis of key developments, issues and trends
- Relevant figures of the telecom market
- Description of the players and their strategies/positioning
  - Incumbent
  - Alternative operators
  - Cable Operators
  - Wireless Operators
  - Mobile Operators
- Analysis of the service offerings and their tariffs

**Key questions addressed:**

- How is the Eastern European broadband market evolving, compared to Western European markets? Which are the key developments and factors influencing these emerging markets?
- What is the current broadband regulation in each Eastern European country? Can NRA take benefit from the more mature markets?
- How are altnets developing and what is the weight of the incumbent in each country?
- How can mobile broadband contribute to the expansion of broadband access?
- Which is the significance of triple play services?
- Which strategies/technical platforms will support successful operators?

**Examples of FIGURES:**



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