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mobile entertainment europe ltd.

Case study: Poland

Speaker:

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VP Sales & Marketing



Omnigence Group

Mother company, brand Filmweb.pl
and companies Artegence & Efigence

mee

mobile entertainment europe sp. z o.o.

Brands Jabler.pl, Bombadoo.pl
owner of Gameleons LTD



gameleons

Developer of mobile
games &
applications



Aggregator and
distributor of mobile
games &
applications



Aggregator and
distributor of mobile
entertainment
content –
wallpapers, ring
tones etc.



Largest movie
portal. 1,7 mln
UU monthly and
35 mln page
views.

artegence

The most recognized
interactive media agency in
Poland. Scope of activities:
e-advertisement, e-
marketing, web design,
flash etc.

efigence

Technology &
Consultancy
company.
Specializes in
systems for
insurance
companies

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Case study: Poland

- Presenting the key players of the Polish mobile games market – operators, developers, aggregators
- Defining the Polish mobile gamer and the mobile games market
- Reviewing which game propositions are popular in Poland?
- Is Poland the next goldmine for the games industry?
- Calculating the revenue potential of the Polish market

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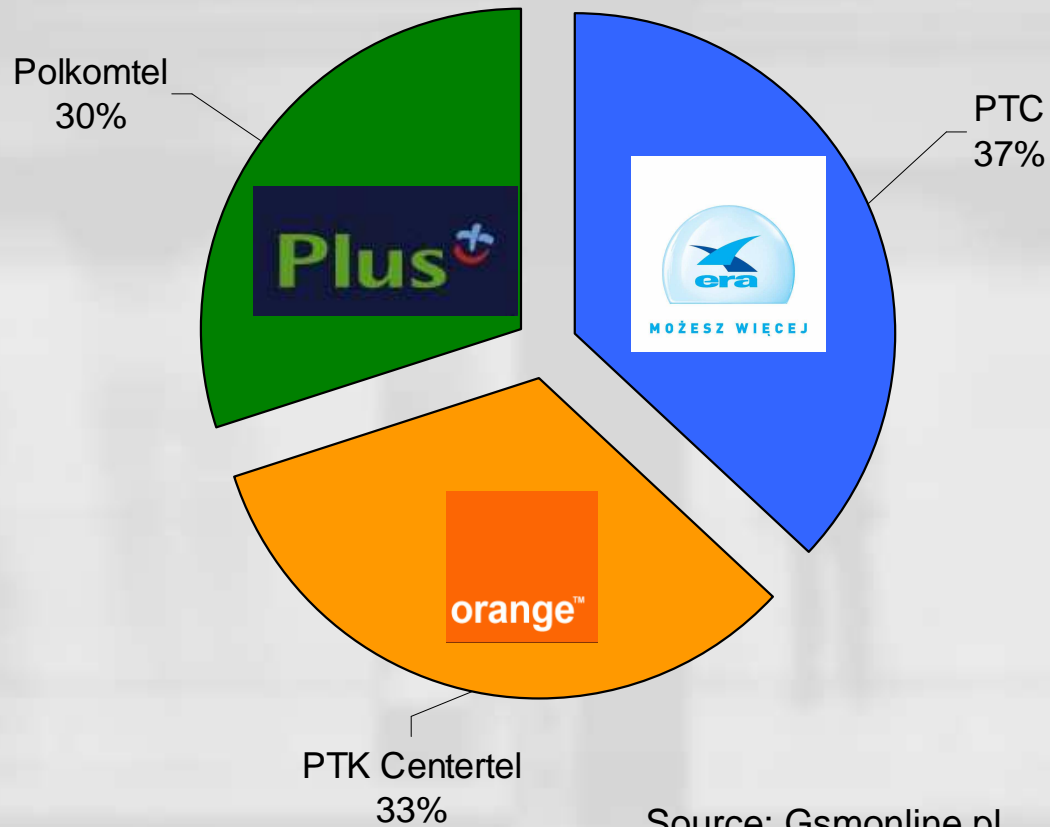
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Operators



Polish network operators' market share by percentage of users:

- PTC (37%)
- PTK Centertel (33%)
- Polkomtel (30%)

Source: Gsmonline.pl

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PTC Sp. z o.o. – the owner of operators – **ERA** and **Heyah** – in November 2005 the PTC had **10 mln users** – **37%** of the Polish mobile market.

Shareholders:

ELEKTRIM S.A.	48,0% *
T-Mobile Deutschland GmbH	22,5%
MediaOne International B.V.	22,5%
Polpager Sp. z o. o.	4,0%
CARCOM Warszawa Sp. z o.o.	1,9%
Elektrim Autoinvest S.A.	1,1,%



*official share holders information from PTC.

Source: www.era.pl



Mobile content is offered under the brand **Era Omnix** on www.eraomnix.pl and wap.eraomnix.pl.

PTC is a licensor of **akumiitti** m-commerce platform. Most of the games content is delivered to PTC directly through T-mobile group.

There are a few Polish aggregators and developers who deliver games directly to PTC, to name the biggest: *Avantis*, *Mobile Entertainment Europe (mee)*, *Breakpoint*.



PTK Centertel

PTK Centertel Sp. z o.o. – licensor of the **Orange** brand - **33%** of the Polish mobile market; **9,134 mln** users after third quarter of 2005.

Shareholder:

Telekomunikacja Polska S.A. – 100% *



* **France Telecom** is a main shareholder of Telekomunikacja Polska - 47,5%

Income after the first 9 months of 2005 - 4.212 billions PLN, which is about **1.091 billion EUR.**

Source: www.orange.pl, www.tp.pl



Mobile content is offered at **Orange World** through WWW and WAP sites.

Content is delivered by 5 aggregators: *Mobile Entertainment Europe, Mobile Media Consulting, Avantis/Emisja, Pulsar and MocoHub.*

Content is offered from aggregator's platforms as well as hosted by the games provider.

The screenshot shows the Orange World website interface. At the top, there are navigation links for 'Dla Ciebie', 'Dla Firm', 'Orange World', and 'sklep'. Below this is a search bar with 'szukaj' and a dropdown menu set to 'w grach'. The main content area is divided into several sections:

- witaj Tomasz!:** A personalized greeting with a login link and a 'Wybrany telefon' dropdown menu.
- POLECANE:** A grid of recommended games, each with a 'pobierz' button, price, and rating. Games include Conflict Global Storm (7,32 zł), Rambo on Fire (7,32 zł), Serenity - Renegades (10,98 zł), Black Shark (10,98 zł), Call of Duty 2 (10,98 zł), FIFA Football 2005 (10,98 zł), Tiger Woods PGA Tour 2005 (10,98 zł), LOTR. Trilogy (10,98 zł), Governator, and Robo 2.
- Gra dnia!:** A featured game section for Conflict Global Storm, offering a 30% discount.
- artykuły:** A list of articles with links for Pulsar, Emisja, MocoFun, Jabber, 3mobile, and Mobista.
- 10 hitów:** A list of top 10 games: 1. Colin McRae 2005, 2. Snake 2002, 3. 2 Fast 2 Furious, 4. Track and Furious, 5. World Fighting Heroes 2, 6. Pinball Monster, 7. Mad Mass, 8. Ultimate SpiderMan, 9. Fantasyczna 4, 10. Battle of Empires II.

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Polkomtel

Polkomtel S.A. - the owner of operators – **Plus GSM** and **Sami Swoi**, had **8,372 mln** users by the end of September of 2005, which is about **30%** of the Polish mobile market.

Income after the first 9 months of 2005 – 4.669 billions PLN, about **1.209 billion EUR**

Polkomtel stockholders:

KGHM Polska Miedź S.A.	19,61 %
PKN Orlen S.A.	19,61 %
TDC Mobile International a/s	19,61 %
Vodafone Americas Inc.	19,61 %
PSE S.A.	17,56 %
Węglkokoks S.A.	4,00 %



Source: www.polkomtel.pl



Mobile content is offered through **Plusmega** on WWW and WAP sites.

Polkomtel is a licensor of **Pulsar's** platform.

Java games are delivered by aggregators & developers. To name a few of the biggest: *Mobile Entertainment Europe (mee)*, *Avantis/Emisja*, *Mocohub*, *Pulsar*, *Breakpoint*, *Gameloft*, and *Overnet*.

mobile multimedia [plusmega] Plus

Rozrywka Usługi informacyjne Poczta PlusNet Bramka SMS Inne usługi

Rozrywka

- Dzwonki
- Grafika na telefon
- Gry Java
 - Arena gier Java
 - Kategorie gier
- Gra Xyber Mech
- Fotokartka MMS
- Poczty MMS
- Chat i Randki
- Humor
- Gry SMS
- Usługi dźwiękowe
- Spodziewanka

Gry JAVA

Zapraszamy do interaktywnej rozrywki przy grach Java. Grę dla siebie znajdzie tu każdy - wielbiciel platformówek, fani wyścigów, bohaterowie ratujący świat czy mistrzowie łamigłówek logicznych. Znajdziesz tu same światowe hity, tytuły znane z PC, filmowe hity. Zapraszamy!

Dostępne kategorie

wszystkie Znajdź 48 Wyślij

2005 Real Football Cannon Fodder Colin McRae Rally 2005? Garfield in Dreamland

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Java games developers

Leading Polish java games developers:

- **Breakpoint** (2003) **portfolio**: 22 java games. Limited company. **Employment**: 15 specialists
- **Gameleons** (60% of shares owned by Mobile Entertainment Europe) – (2005) Limited company. **Portfolio**: 16 java games, 3D game engine “GEM Xenotime 3D”. **Employment**: 7 specialists and one development team as a subcontractor.



Java games developers

Polish java games developers:

- **Element Studio – Portfolio:** 48 very simple java games, 12 simple Symbian games. Ltd company.
- **Frontline Studios** (2004), subsidiary company of NAWAR (1998). **Portfolio:** 10 java games, also develops for PS, GBA, Nintendo. Ltd company.
- **Qubic Games** – (2004) 3D mobile games. **Portfolio:** 2 java games. Privately owned. **Employment:** 2 specialists and subcontractors



Aggregators

Leading Polish java games aggregators:

- **Avantis/Emisja** – (2000), brands: **Mobista.pl** and **Papla.pl**.
- **CT Creative Team** – (1999), owner of brand: **Wapster.pl**.
- **Telecom Media** (owns **40% of CT Creative Team**) – part of the investment group **BB Investment**. Owner of brands: **Spotler** and **Bravo TV** (TV programme).
- **Mobile Entertainment Europe** – (2004) offices in Poland and Canada. Own development studio – **Gameleons**. Owner of brands: **Jabler** and **Bombadoo**. Part of **Omnigence** group.



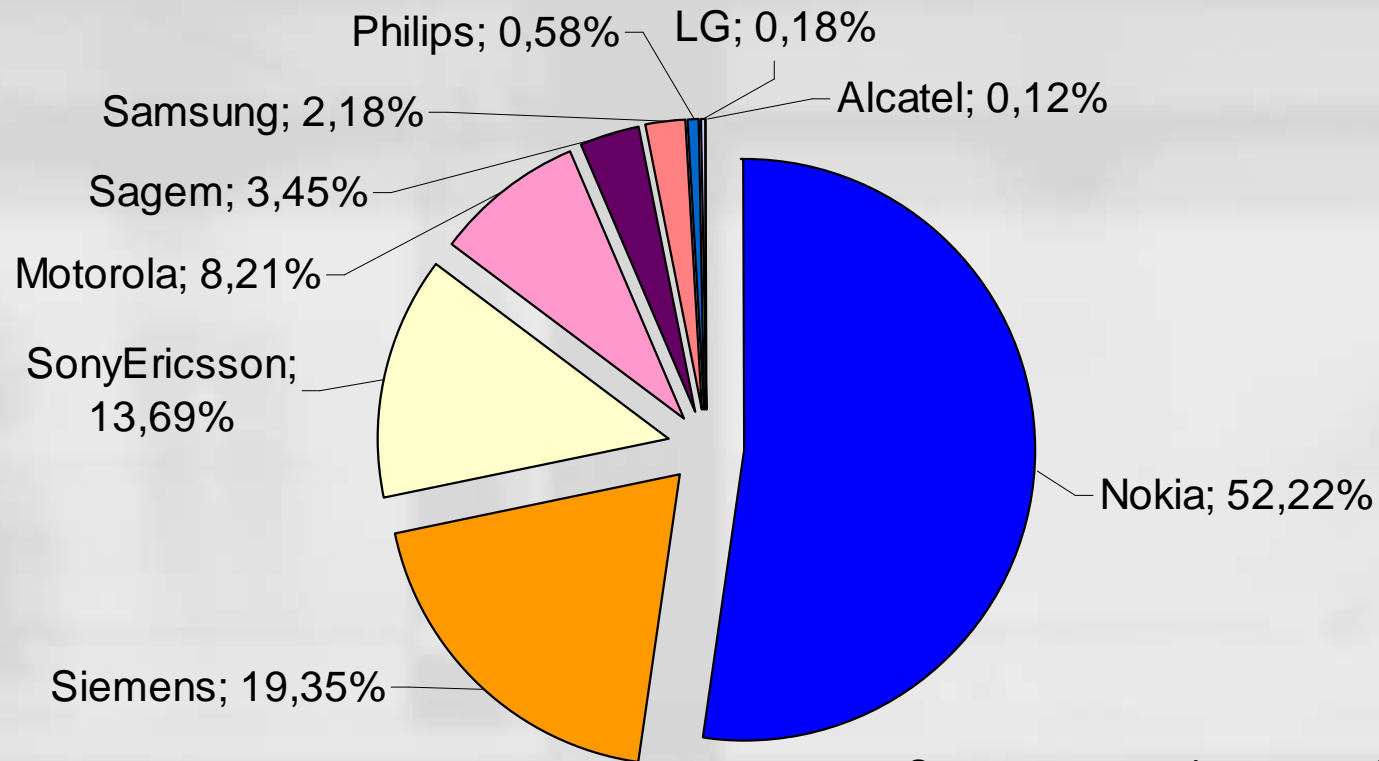
Aggregators

Leading Polish java games aggregators:

- **Bauer** – (1991 in Poland), publishing house, owner of brand: **Mobila.pl**
- **MNI S.A** – (1992), owner of brands : **iTV** (TV channel) and **Moje Logo**
- **EI2** - owner of brand: **Wapacz.pl**
- **Mocohub** – (2003), owner of brand: **Mocofun**.
- **Pulsar Electronics** – part of Qumak-Sekom S.A. group



Defining the Polish mobile gamer and the mobile games market:



Source: mee market research

The typical Polish gamer is a 15 to 24 year old male attending high school/college living in the city.

Games are typically played on lower end phones in Poland

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Top 10 mobile phones by java games downloads in 2005 (~80% of total downloads):

1.	Nokia series 40 midp1 (6100, 6610, 6610i, 7210 etc.)	31%
2.	Nokia 3510i	11%
3.	Siemens C65	9%
4.	SonyEricsson T610/T630	6%
5.	Siemens CX65/M65/S65/SK65	5%
6.	SonyEricsson K7XX	4%
7.	Nokia series 60 midp2 (6600, 6630, 6680 etc.)	4%
8.	Siemens S55/M55	3,5%
9.	Nokia series 40 midp2 (3220, 6020, 6030, 6230 etc.)	3%
10.	Motorola V300/V500/V600	3%

Source: mee market research



Java games billing models in Poland:

- pay per game – SMS Premium (internet portals, press advertisements) and WAP Premium (WAP portals)
- subscription - available only in PTC – Era Omnix
- credit card - less than 1% of internet portals transactions
- EVENTS: download for free – Polkomtel's java game „Volleyball” prepared by Gameleons is available for all Plus GSM users

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Reviewing which game propositions are most popular in Poland

Mobile Gameing market in Poland by Category: Mobile Gameing market in US by Category:

Action/Adventure/Shooters	31,1%
Sport/racing	23,5%
Classic/Arcade	11,1%
Strategy/Puzzle	8,0%
Film – branded titles	7,7%
Erotic	6,4%

Mobile Game Revenue Market Share in the US, by Category, Q2 2005

	% of revenues	% of free downloads	Average price paid
Puzzle/strategy	27.1%	48%	\$4.27
Sports/racing	15.8%	25%	\$3.67
Action/adventure	15.6%	32%	\$4.29
Card/casino	14.2%	44%	\$3.57
Classic/arcade	13.6%	18%	\$3.93

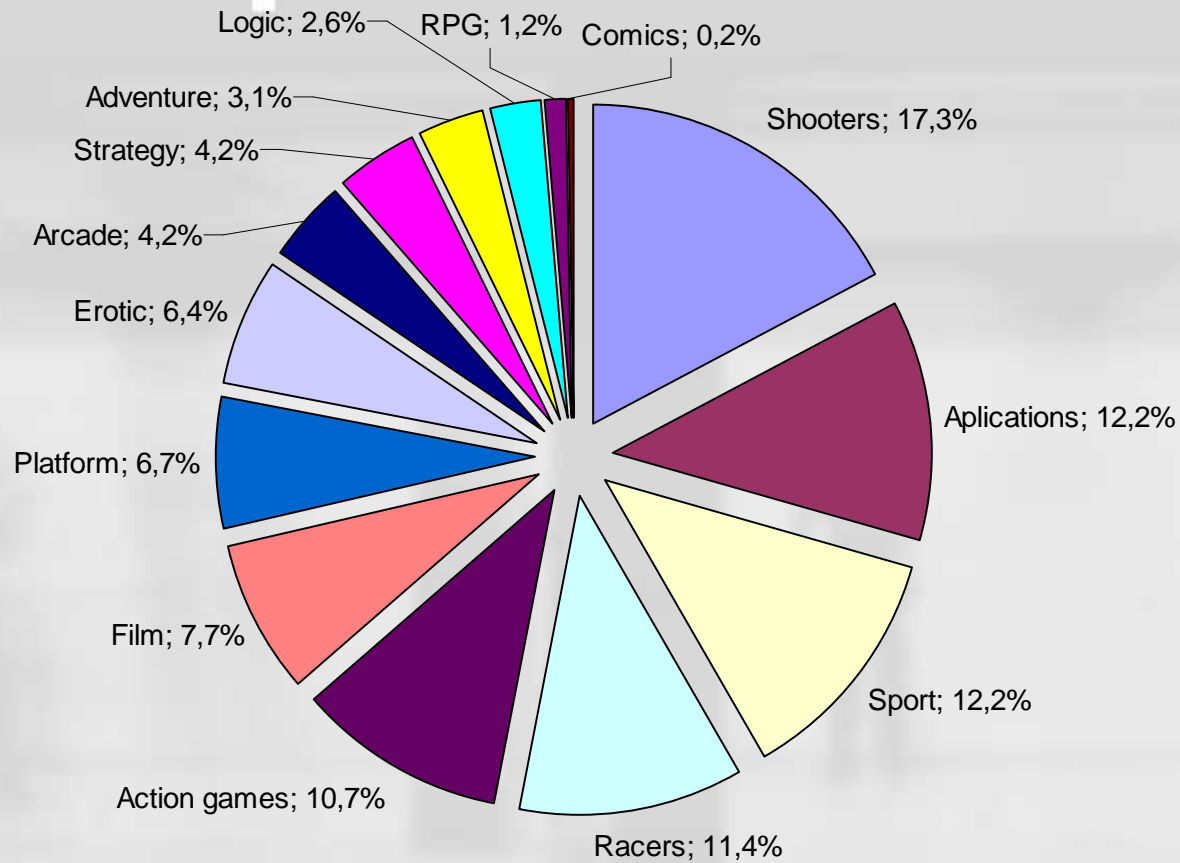
Source: Telephia, September 2005

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www.eMarketer.com

Source: mee market research





Most popular categories in Poland are:

- Shooters
- Sports
- Racers
- Action Games
- Film (branded)

Source: mee market research

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Is Poland the next goldmine for the mobile games industry?

Poland in numbers:

- 38 mln people
- penetration of mobile phones - 74%
- 28 mln mobile users
- about 4 mln users per year buy java games (14%)
- average game user buys 1,5 games monthly
- 3 GSM/UMTS network operators with 8 brands
- 1 UMTS operator is preparing to enter the market – P4 (owned by Netia)
- 14 companies are ready to operate as MVNO
- 14 companies offering java games (most of them from Poland, right now only **Jamster** with Jamba.pl enter the Polish market)

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Figure 6 The charging pyramid, 2005–2006



Note: Percentages are of mobile data connections in the third market development phase (2005–2006)

Source: Ovum (Wireless Games: Playing to Win/Chapter F)

„about 4 mln users per year buy java games (14%) in Poland”

This statement is quite equal to that pyramide prepared by Ovum in 2001

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Calculating the revenue potential of the Polish market:

Network operators – around 100k games monthly

Press advertisement – around 300k games monthly:

Main players: Bauer, CT Creative Team, Telecom Media and Avantis/Emisja.

All companies have pretty equal share of that part of the market.

Internet portals, TV - ~100k games monthly:

Main portals: Wapster.pl, Jamba.pl, Jabler.pl, Wapacz.pl, Papla.pl, Mobista.pl, Mobila.pl, Spotler.pl and affiliated portals: Onet.pl, WP.pl

TV: MTV, 4funTV, VIVA

Source: mee market research



Summary:

There are **500k** games sold monthly on the Polish market – average price for java game **7 PLN**. It means that market is worth ~3,5 mln PLN monthly (**920k EUR**) and about 42 mln PLN a year (**11 mln EUR**).

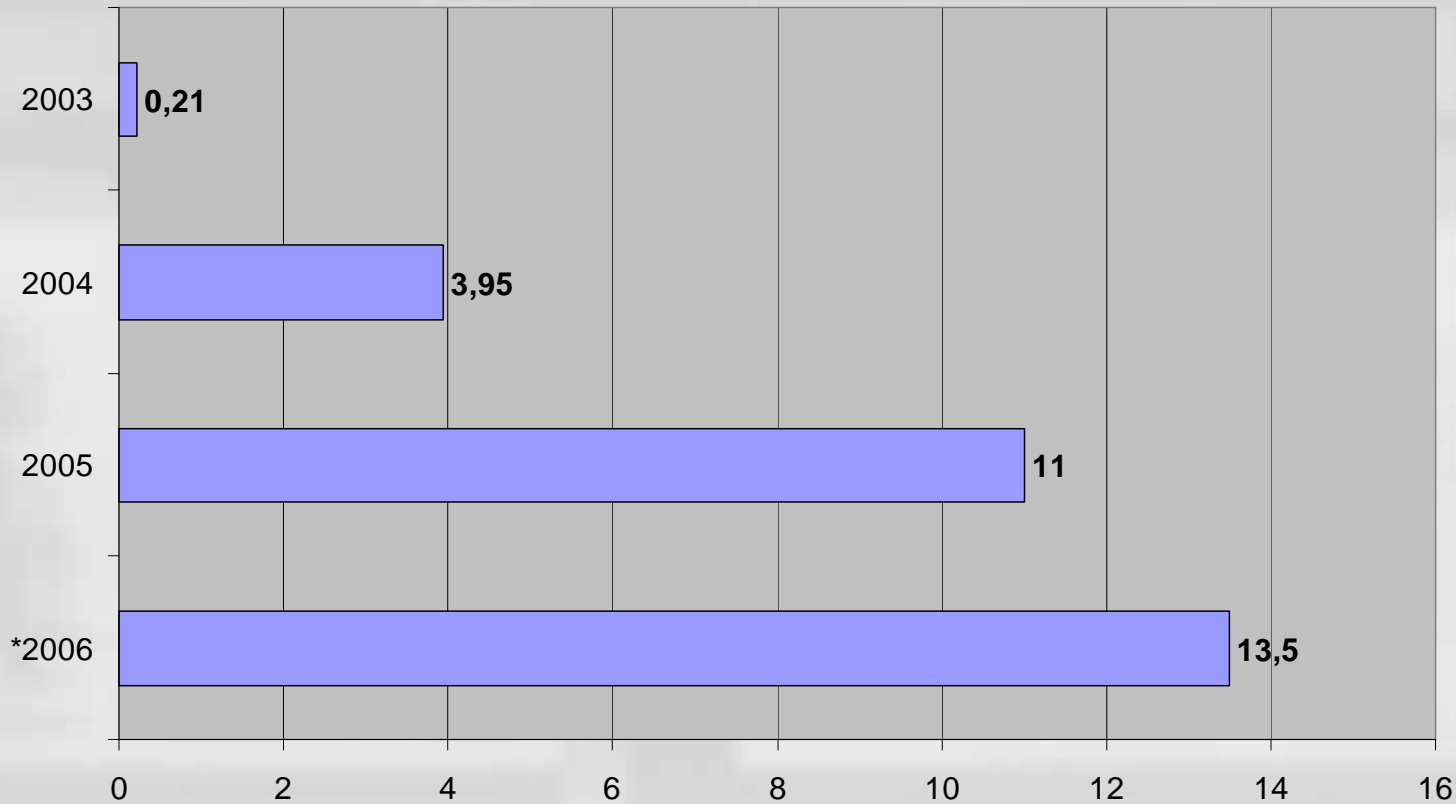
According to Informa Telecoms & Media report the worlds mobile market is worth 2 140 mln EUR, so Polish market is about **0,5%** of the global market.

We estimate that the Polish market will grow up in 2006 by 25% and the revenue should be around **13,5 mln EUR**.

Source: mee market research



Revenue of the Polish games market in mln EUR



* Estimated revenue



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Thank you!

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