



Investor presentation

Espirito Santo & The London Stock Exchange Emerging Markets Conference

20th November 2012

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1

The Leading Media Group in Poland

Overview – Investment highlights



Leading integrated media group

Strong brand and customer satisfaction



Attractive business model

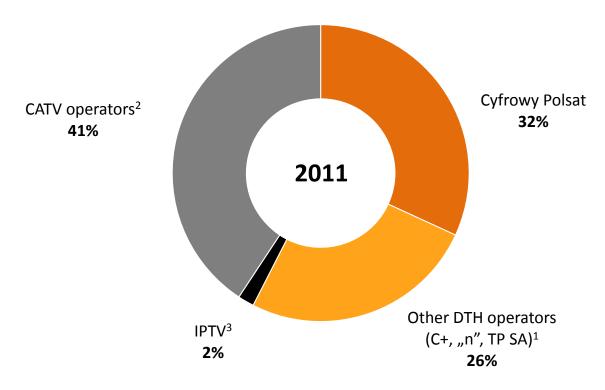
Strong content portfolio

No. 1 in pay TV....



Poland's pay-TV market leader with 3,55m subscribers

% share in the total number of paying subscribers at the EOY



Note: (1) Based on own estimates and data published by operators (Annual reports of TVN S.A. Group and TP S.A. Group for 2011)

⁽²⁾ Based on own estimates and data published by PIKE

⁽³⁾ Based on own estimates and data published by operators (Annual report of TP S.A. Group and the website of Telefonia Dialog S.A.)

...with unique multi-play product



PREVIOUSLY

NOW









100 Polish channels, 28 HD; more than 500 FTA



VOD, PPV, CatchUp TV, Multiroom



Own STB production





Mobile broadband network



HSPA+ up to 28.8 Mbit/s



LTE (Long Term Evolution) – up to 150 Mbit/s





Polkomtel mobile telephony



MVNO





Pay DTT and mobile offer





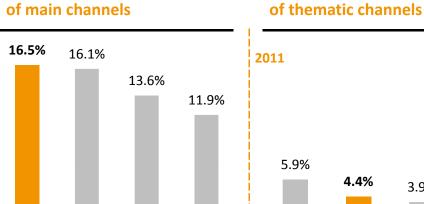
Online video platform



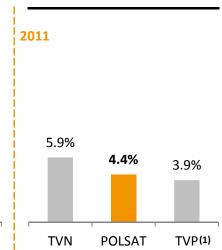
Strong broadcasting segment



- Diversified portfolio of 15 channels, addressing all main audience groups
- Group audience share at ca. 21%
- Nearly 23% of TV advertising market share



TVP 1



Audience share

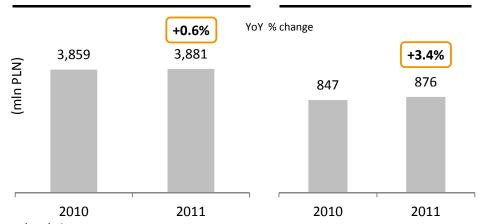
Expenditures on TV advertising and sponsoring

TVN

POLSAT

Audience share

Revenues from advertising and sponsoring of TV Polsat Group(2)

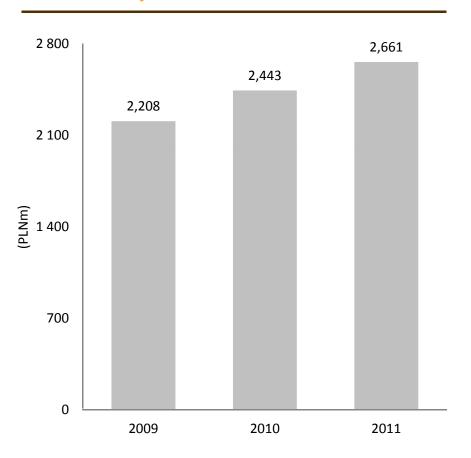


TVP 2

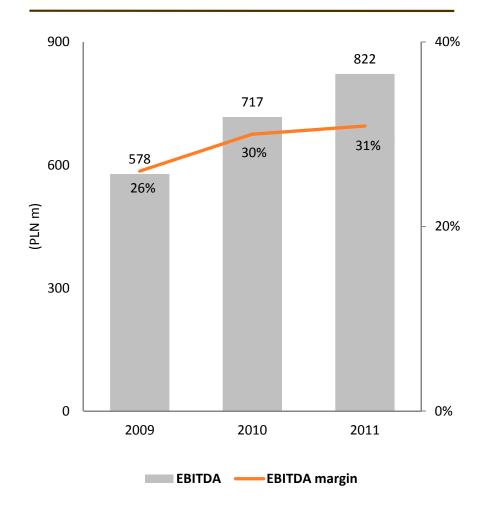
Growing revenues and profits



Revenues pro forma



EBITDA and **EBITDA** margin pro forma



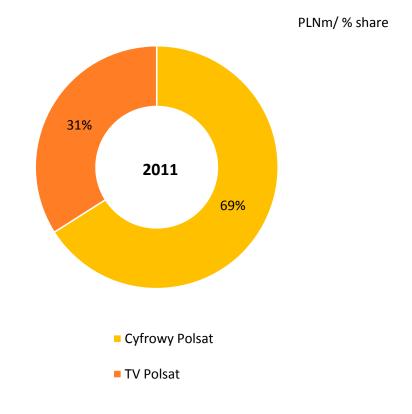
Diversified income mix in 2011



Revenues structure pro forma

PLNm/ % share 7% 33% 2011 60% Retail subscription ■ TV advertising ■ Other (mainly satelite and cable operators subscription fees)

EBITDA structure pro forma





2 Group Strategy

Our vision



We create and provide the most attractive content....

... using the best and latest technologies to deliver high quality multi-play services with the highest levels of customer satisfaction



Strengthening our leadership in entertainment in Poland.

We have a winning strategy



Key content secured

New TMT products

Distribution under control

A WINNING STRATEGY

Understanding current and future consumer needs



TECHNOLOGY CHANGES

ACCESS TECHNOLOGIES

(satellite, cable, Internet, DTT, mobility ...)

TERMINAL DEVICES

(TV, STB, laptop, tablet, smartphone...)

Have an impact on changing consumer preferences as of content consumption: What? Where? How?

Our main priorities Building the business value





Building value of our customer base



Building channels value



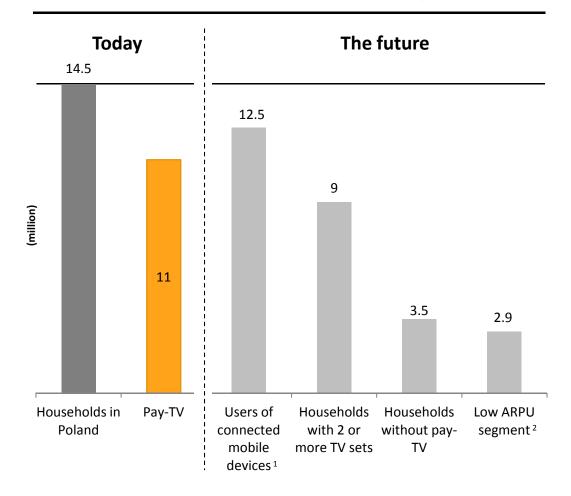
Effectively managing costs

Headroom for growth



Thanks to complete portfolio of our products (DTH, Internet, telephony, pay DTT, ipla) we can target a bigger addressable market and respond to more demand in the future

The addressable market for pay-TV

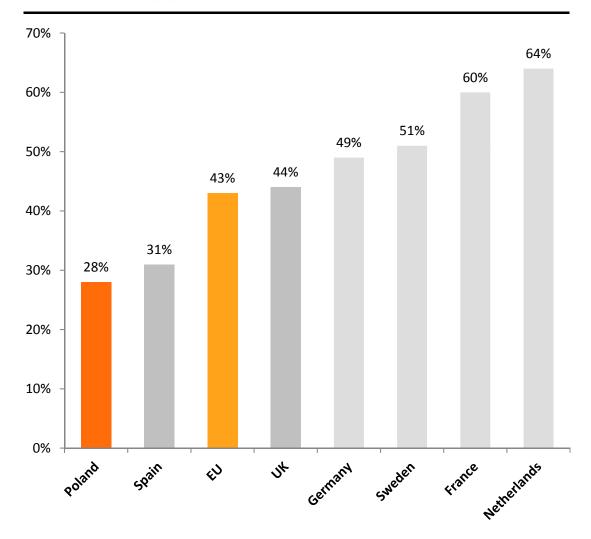


The multi-play potential



- Increasing role of multi-play services seen in all European countries
- Multi-play means TV, broadband and telephony for now – but the opportunity is greater than this
- The Polish market has enormous built-in potential catching up with the rest of Europe

Multi-play penetration

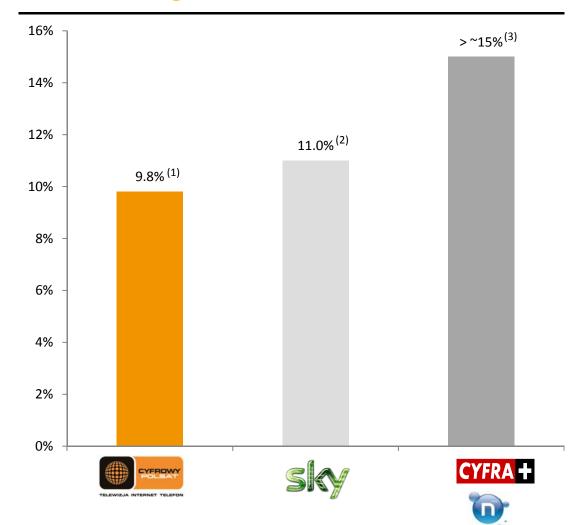


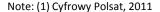
Maximising loyalty



- Ensuring customer satisfaction with
 - An attractive product mix
 - Excellent customer care
- Implementing effective retention programs
- Increasing numbers of multi-play customers

Maintaining best-in-class churn





⁽²⁾ Refers to BSkyB, investor presentation '2011 Results", 23 February 2012

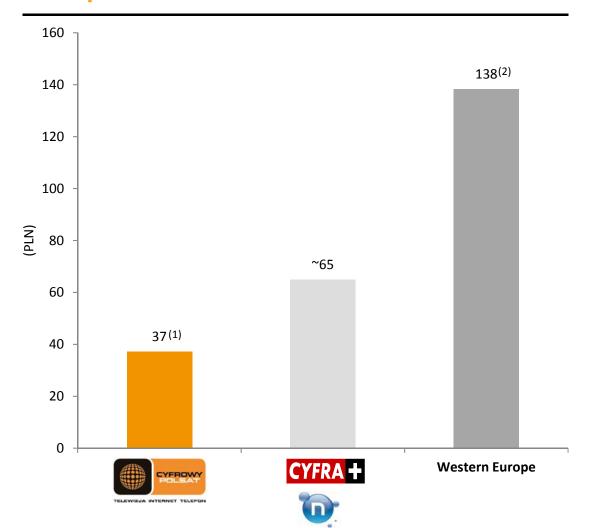
Improving ARPU



Several opportunities to increase ARPU over time

- Upgrade of existing customers
- Multi-play
- Selective price increases
- New products and services
- Migration of customers between the platforms

Scope to increase ARPU



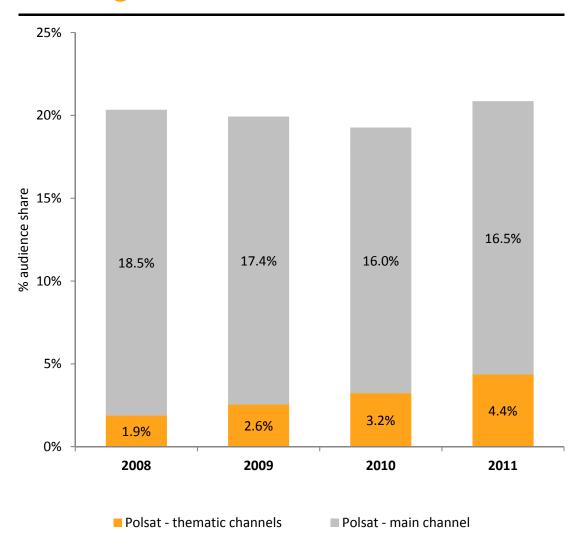
Source: Cyfrowy Polsat, 2011; Poland - internal estimates based on PMR's report "Value added and multimedia services in Poland 2011 - development forecasts for 2011-2015", (April 2011) and information published by local market players; Western Europe – Informa, "Western European TV", 14th edition Note: (1) Blended ARPU

Maintaining audience share



- Stable audience share supported by growing portfolio of channels
- Maintaining share through
 - Increased distribution for thematic channels
 - Effective investments in programming
- Grow our revenues at least in line with the advertising market

Leading audience share



Revenue from cable and satellite operator fees



- Attractive portfolio of the channels, with a strong reach across the market
- Current level of penetration of our thematic channels within pay-TV platforms of ca. 60% still implies a growth potential

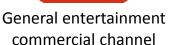






Business channel













Sports channel

SDOIT News

'Sport extra Premium sports channel

Sports news channel

Premium sports channel HD



Crime & investigation channel

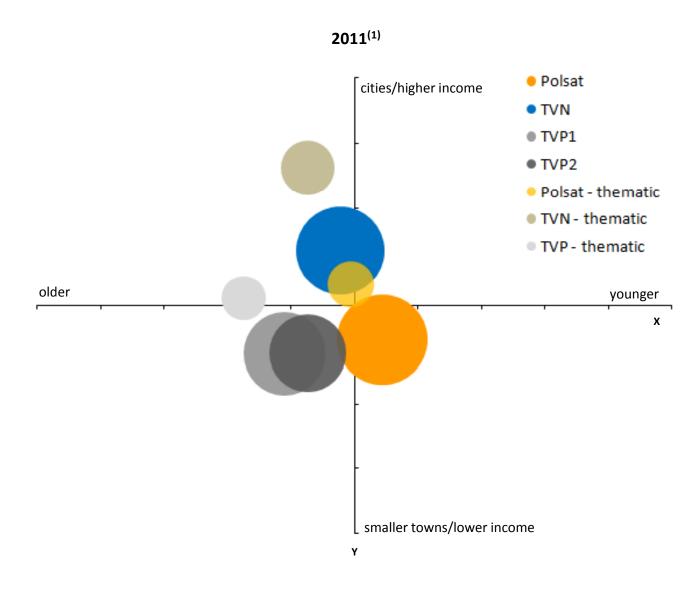




Enhancing our demographics



Improving audience profile results in the increase of our advertisement prices



Source: Nielsen Audience Measurement, internal analysis, 2011

Note: (1) X-axis: average age; crosscut: 45 years

Y-axis: % of group "residents of cities, average and high household income" in presented tv station/ tv group audience; crosscut 45% diameter: SHR%, all 16-49, all day

Effectively managing costs



Programming

- Leveraging the large scale of our content deals
- Control over local content production

Technology

- Satellite transponders
- In-house IT solutions
- STB's production

Finance

- Centralization of financial functions within the combined group
- Cash pooling
- Natural hedging

Back-office

Ongoing optimizing of the group structures and procedures

Outlook for the near future



External factors

- Pay TV market remains a growth opportunity
- Advertising market under pressure of world economic downturn
- Growing role of new media

Business

Finance

- Retained market leadership in pay TV
- Increased multi-play penetration
- Increasing ARPU
- Maintaining audience share
- Competing effectively for advertising market share
- Building revenue from cable and satellite operator fees

- Continued revenue growth
- Growth in profits and strong margins
- Deleveraging



Financial review

Very good financial results of the Group



in PLN m	2011	YoY change	
Revenue	2,380	♠ 59%	 The increase in revenue and EBITDA mainly resulting from consolidation of TV Polsat Group
EBITDA	735	A 81%	
EBITDA margin	31.1%	📤 3.6рр	EBITDA margin reflects also partially realized synergies
Net profit	160	 (38%)	Net profit reflects costs of servicing the debt related to financing of TV Polsat acquisition

Achieved thanks to growing results of pay TV business...



in PLN m	2011	YoY change	
Revenue	1,656	<u>•</u> 11%	Revenues growth based on the organic business growth
EBITDA	482	18%	EBITDA growth outperformed revenue growth thanks to effective cost management
EBITDA margin	29.3%	1 .9pp	Lower net profit due to finance costs (related to acquisition of TV Polsat)
Net profit	190	 (27%)	

...as well as improving broadcasting segment results



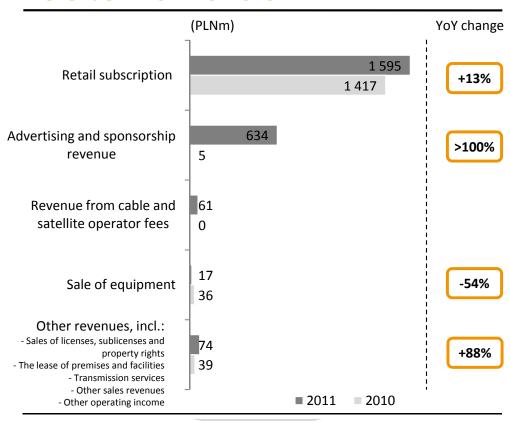
in PLN m	2011	YoY change	
Revenue	1,102	^ 7%	Increase in revenue from satellite and cable operators fees and stable level advertising and sponsoring revenue
EBITDA	340	4 8%	Insignificant increase in programming
EBITDA margin	30.9%	^ 0.2pp	costs, mainly related to amortization of film licenses and sport rights
Net profit	232	6 %	EBITDA margin improvement despite weaker than expected advertising market performance

Source: Telewizja Polsat Sp. z o.o. and internal analysis

Revenue structure

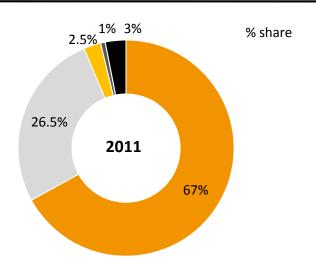


Revenue in 2011 vs. 2010



Total 2011 PLN 2,380 m 2010 PLN 1,496 m +59%

Revenue breakdown

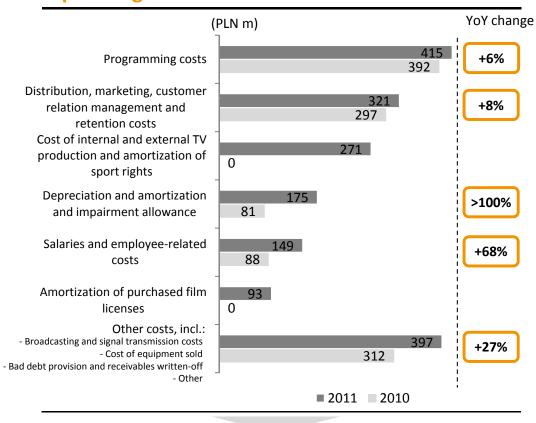


- Retail subscription
- Advertising and sponsorship revenue
- Revenue from cable and satellite operator fees
- Sale of equipment
- Other revenues

Costs structure

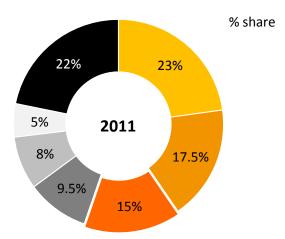


Operating costs in 2011 vs. 2010



Total 2011 PLN 1,820 m 2010 PLN 1,171 m +55%

Operating costs breakdown

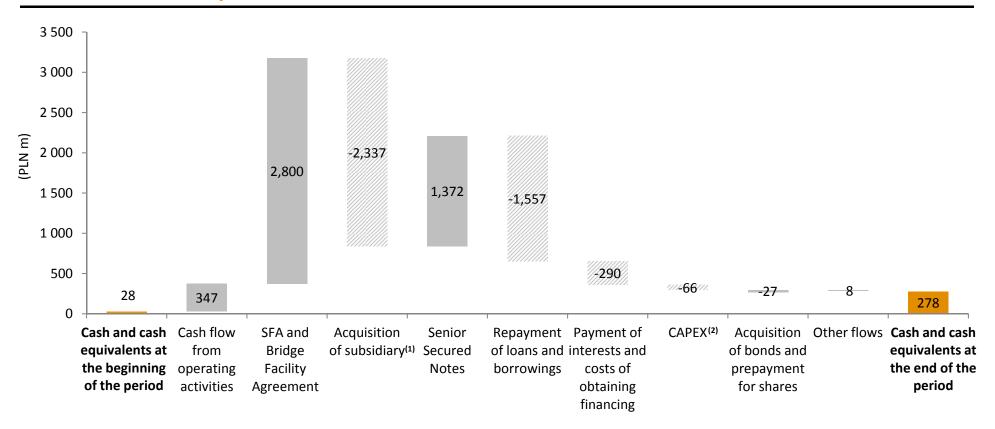


- Programming costs
- Distribution, marketing, customer relation management and retention costs
- Cost of internal and external TV production and amortization of sport rights
- Depreciation and amortization and impairment allowance
- Salaries and employee-related costs
- Amortization of purchased film licenses
- Other costs

Cash flow



Net cash flow, cash position and debt – 2011



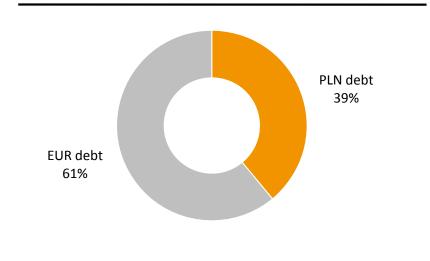
Total debt at the end of the period amounted to PLN 2.728 m (Term loan/Senior Secured Notes)

Financial indebtedness



in PLN m	30.09.2012	Maturity
Senior facility ⁽¹⁾	919	2015
Senior Notes (1)	1,447	2018
Finance lease	1	2016
Cash and equivalents	225	-
Net Debt	2,142	
Comparable 12M EBITDA (2)	983	
Net Debt / 12M EBITDA	2.18	

Currency structure of debt



Senior Notes Rating

Standard & Poor's	BB, stable outlook
Moody's	Ba2, stable outlook

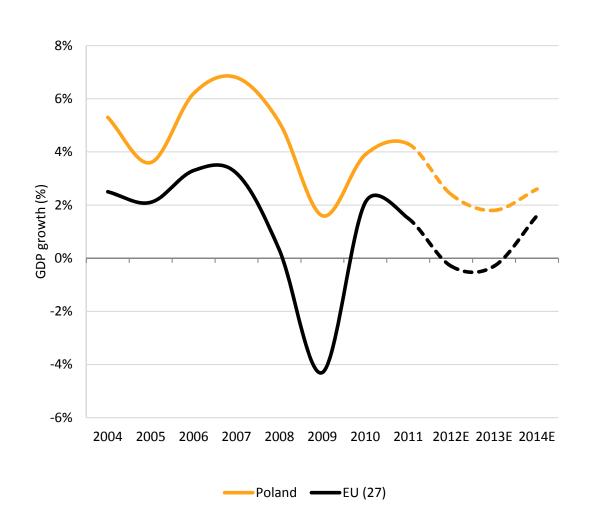


5 Appendix

Polish market overview



Poland still outperforms EU average



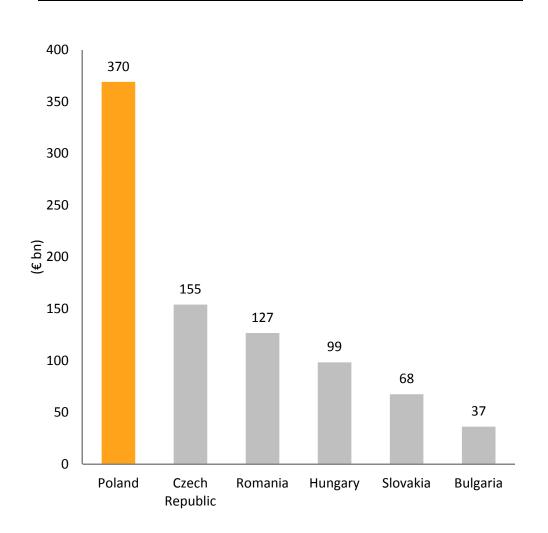
Poland – Key Metrics		
Population	38.3mn	
Households	14.5mn	
Rural & suburban population	15.4mn	
GDP	€370bn	
GDP/capita	€9,653	
Inflation	4.3%	
Unemployment	12.5%	
Public debt/GDP	53.8%	
Credit ratings	A2 / A-	

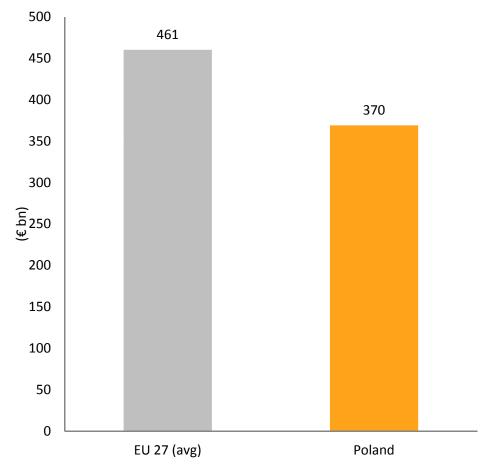
Polish market overview Leading European economy



Leading CE economy by GDP

7th largest in EU

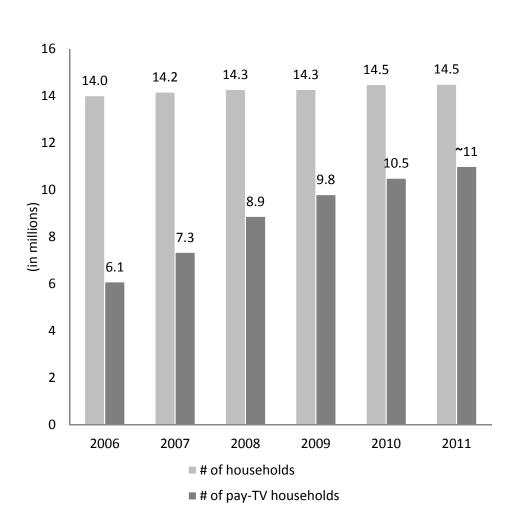




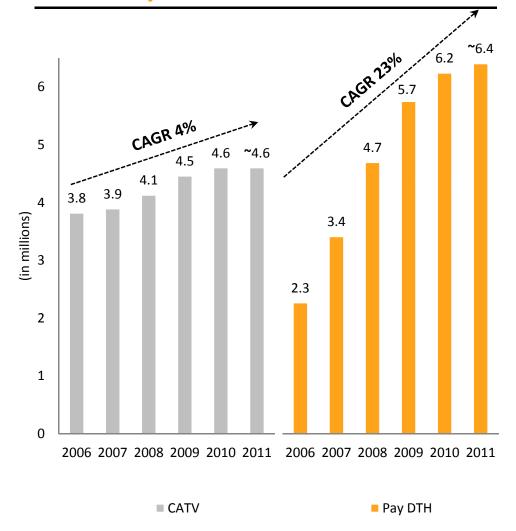
Polish market overview With a strong Pay TV market



Growing Pay TV market



Driven by DTH

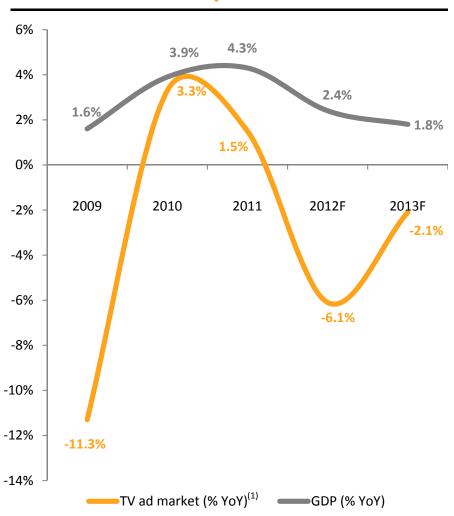


Polish market overview

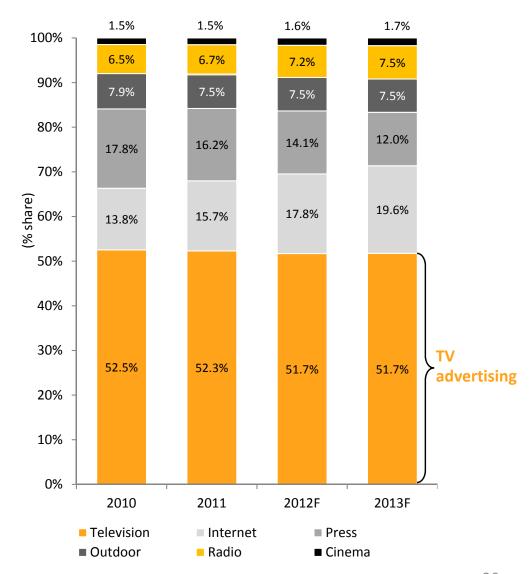




Rebound in ad spend



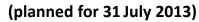
Stable share for TV (1)

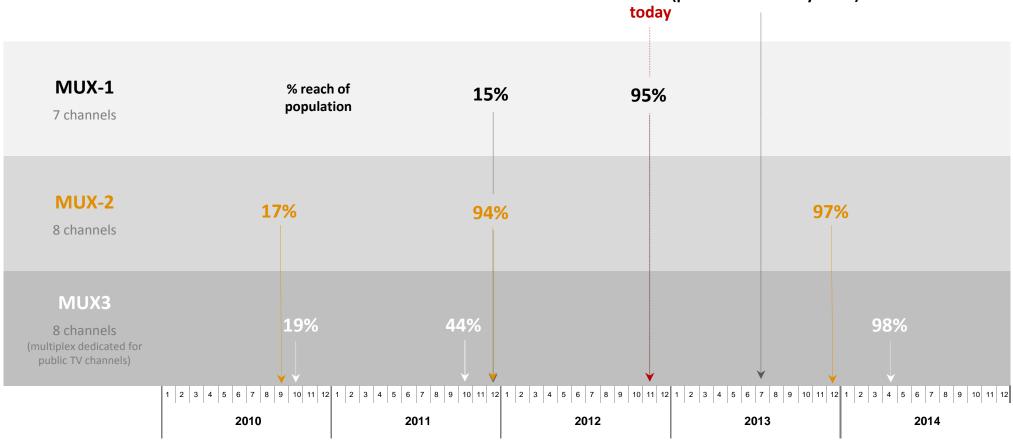


Timing of DTT in Poland









Source: Cyfryzacja.gov.pl, Emitel

Exploiting DTT capacity



- MUX-1, MUX-2, MUX-3 are dedicated to FTA channels
 - MUX-1 TVP1¹, TVP2 ¹, TVP Info ¹, Polo TV, Eska TV, ATM Rozrywka TV, TTV
 - MUX-2 Polsat, Polsat Sport News, TVN, TVN7, TV Puls, TV Puls2, TV4, TV6
 - MUX-3 TVP1, TVP2, TVP Info (2x regional), TVP Kultura, TVP Historia, TVP Polonia
- MUX-5 and MUX-6 are expected in the future (but no specific plans have been revealed yet)

MUX-4 is owned by Info TV FM, a subsidiary of Cyfrowy Polsat, and reserved for mobile pay TV

New developments Our new pay TV offering



- "TV MOBILNA" provides access to all FTA channels¹ and additionally to pay channels: 8 TV and 12 radio
- "TV MOBILNA" is available for a wide range of devices:
 - Smartphones
 - Tablets
 - PCs/laptops
 - STBs
- Subscription model, with subsidised devices (respective to DTH)
- "TV Mobilna" is offered on a wholesale basis to all elco operators







New developments

Acquisition of ipla



- ipla is the leader in online video market in Poland in terms of availability on different devices:
 - PCs/laptops
 - Tablets
 - Smartphones
 - Connected TVs (approx 95%)
 - STBs
 - Game consoles and home cinemas
- ipla is also a leader in content in the Polish market having deals with, amongst others, Polsat, TVP and film studios
- ipla leads the market in terms of number of users and time spent watching video content





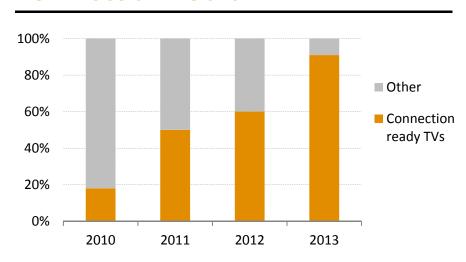


New developments ipla – growth potential

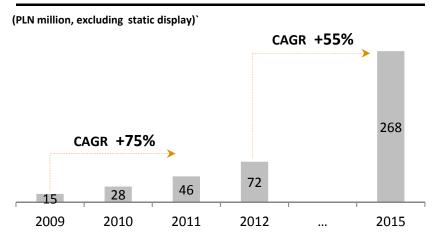


- Approx. 1.8m users¹, compared to 0.5m in 2009
- Growing installed base of devices
 - In 2013 the majority of new TVs to be connection ready
 - Forecasted sale of smartphones to grow by 20% CAGR 2011-2014
- Two revenue streams:
 - Advertising (approx. 90%)
 - Subscription/VOD (approx. 10%)
- ipla's advertising revenues mostly come from the fastest growing segment in Poland – online video
- ipla's financial results are incremental from day one

New TVs sold in Poland



Online video ad spend in Poland



New developments

Co-operating with Polkomtel



Cross selling

- Agreement to work together from April 2012 supports our multi-play strategy
- We offer:
 - Cyfrowy Polsat TV
 - Cyfrowy Polsat mobile internet
 - Polkomtel telephony
- Clear benefits to Cyfrowy Polsat subscribers stronger telephony offering to approx. 11m clients (3.5m households)
- Potential new subscriber acquisitions leveraging Polkomtel's clients and sales network
- Effective cross-selling should improve our customer loyalty and mitigate churn

Distribution network

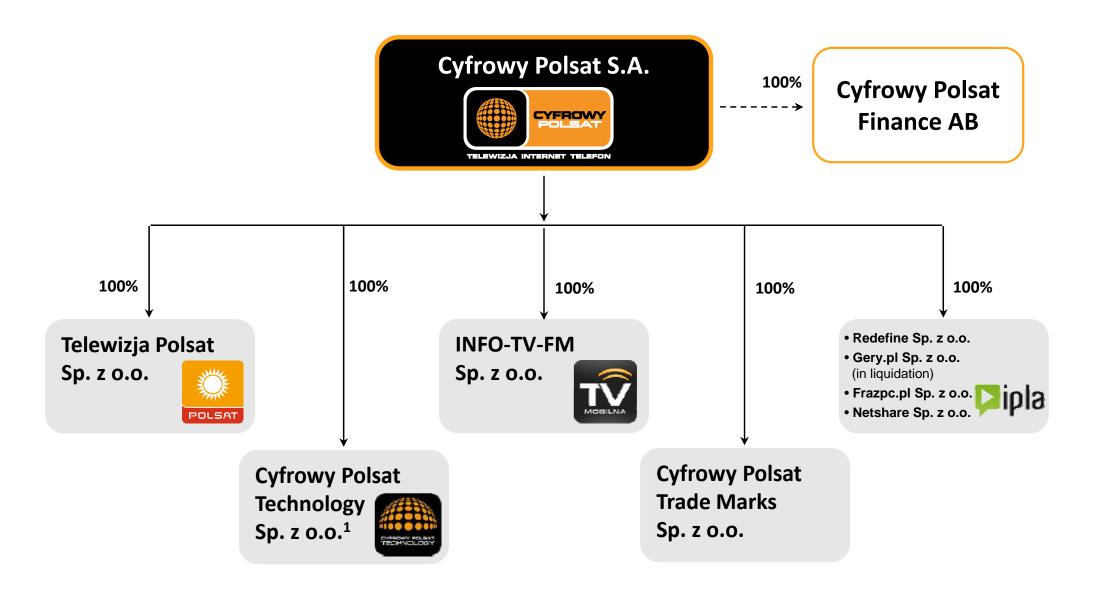
- Optimalization of number of Points of Sales
- Joint management and cross selling of products

Roaming services

Access to frequencies and coverage of 3G and 2G networks for our mobile broadband services

The Cyfrowy Polsat Group A diversified media platform





Shareholding structure



Shareholder	Number of shares	% of shares	Number of votes	% of votes
Pola Investments Ltd. ¹ , incl.:	154 204 296	44.27%	306 709 172	58.11%
- privileged registered shares	152 504 876	43.78%	305 009 752	57.79%
- bearer shares	1 699 420	0.49%	1 699 420	0.32%
Sensor Overseas Ltd. ² , ncl.:	25 341 272	7.27%	50 382 647	9.55%
- privileged registered shares	25 041 375	7.19%	50 082 750	9.49%
- bearer shares	299 897	0.09%	299 897	0.06%
Others	168 807 268	48.46%	170 678 518	32.34%
Total	348 352 836	100.00%	527 770 337	100.00%

^{1.} Pola Investments' holding entity is Mr. Zygmunt Solorz-Żak, President of the Supervisory Board of Cyfrowy Polsat.

^{2.} Sensor Overseas' holding entity is Mr. Heronim Ruta, Member of the Supervisory Board of Cyfrowy Polsat.

Key Performance Indicators



	2006	2007	2008	2009	2010	2011
DTH						
Average number of Subscribers ¹⁾	854,095	1,590,520	2,307,413	2,869,676	3,263,905	3,488,784
Average number of Family Package Subscribers ¹⁾	813,958	1,424,187	1,998,180	2,340,351	2,606,082	2,734,951
Average number of Mini Package Subscribers ¹⁾	40,137	166,333	309,233	529,325	657,823	753,834
Number of Subscribers at end of the period	1,273,648	2,068,328	2,726,993	3,202,319	3,436,231	3,551,671
Number of Family Package Subscribers at the end of the period	1,168,913	1,827,011	2,286,191	2,609,567	2,720,154	2,785,016
Number of Mini Package Subscribers at the end of the period	104,735	241,317	440,802	592,752	716,077	766,655
Churn rate of Subscribers ²⁾	5.1%	5.1%	7.5%	10.7%	_	_
Churn rate of Family Package Subscribers ²⁾	5.4%	5.7%	8.6%	12.2%	_	_
Churn rate of Mini Package Subscribers 2)	0.0%	0.0%	0.1%	4.0%	_	_
Net churn rate of Subscribers ³⁾	_	_	6.0%	8,0%	10.3%	9.8%
Net churn rate of Family Package Subscribers ³⁾	_	_	6.9%	9,2%	11.8%	10.6%
Net churn rate of Mini Package Subscribers 3)	_	_	0.1%	2.9%	4.6%	7.0%
Average Revenue per User (ARPU) ⁴⁾ (PLN)	34.3	34.7	35.3	34.6	35.9*	37.3*
Average Revenue per User (ARPU) ⁴⁾ of Family Package (PLN)	35.9	37.8	39.4	40.3	42.1*	44.2*
Average Revenue per User (ARPU) ⁴⁾ of Mini Package (PLN)	2.0 ⁽⁶⁾	8.4	8.6	9.2	11.1*	12.7*
Subscriber Acquisition Cost (SAC) ⁵⁾ (PLN)	105.9	143.8	116.4	132.0	128.1	123.2
NUMBER OF MOBILE TELEPHONY SERVICE USERS AT THE END OF THE PERIOD	_	_	_	29,325	95,870	142,651
NUMBER OF INTERNET SERVICE USERS AT THE END OF THE PERIOD	_	_	_	_	25,615	73,190
TELEVISION						
Audience share	19.8%	21.2%	20.3%	19.9%	19.3%	20.8%
Polsat – main channel	18.7%	19.9%	18.5%	17.4%	16.0%	16.5%
thematic channels	1.1%	1.3%	1.9%	2.6%	3.2%	4.4%
Ad market share	25.6%	26.4%	26.3%	22.9%	21.9%	22.6%

Source: consolidated financial statements according to IFRS; audience share - Nielsen Audience Measurement, all 16-49, all day; ad market share: internal analysis based on Starlink

⁽¹⁾ Calculated as the sum of the average number of subscribers in each month divided by the number of months in the period. Average number of subscribers per month is calculated according to the following formula: (subscribers at the end of the month + subscribers at the beginning of the month)/2.

⁽²⁾ The percentage of terminated agreements calculated as the ratio of the number of terminated agreements in 12 months period ended at the last day of the reported quarter to the average number of agreements in that period

^(2*) The percentage of terminated agreements calculated as the ratio of the number of terminated agreements in a 3 month period to the average number of agreements in the period.

⁽³⁾ Calculated as the ratio of the number of contracts terminated during a 12-month period to the average number of contracts during such 12-month period. The number of terminated contracts is net of churning subscribers entering into a new contract with us no later than the end of the same 12-month period.

⁽⁴⁾ Revenues from DTH subscription fees recognized according to IFRS for the period divided by the average number of subscribers in such period and the number of months in the period.

^(4*) Revenues from DTH subscription fees recognized according to IFRS for the period divided by the average number of subscribers, to whom we provided services in such period and the number of months in the period.

⁽⁵⁾ Calculated by dividing commissions due to distributors for the period per one new subscriber acquired.

⁽⁶⁾ For period from October to December 2006

Competitive positioning of Cyfrowy Polsat Undisputed leader in the DTH segment



Side-by-side comparison of pay digital DTH satellite television operators⁽¹⁾

	CAEBOWA	CYFRA +	D :	orange ⁻	
Launch year	• 2000	1997 (Wizja TV)1998 (Cyfra+)	• 2006	2008 (TP)2012 (Orange)	
Subscribers (000s, 2011YE)	• 3,552	• 1,600	• 929 ³ (+345 of tnk)	• 527 (139 pay³)	
Channels ⁽²⁾	105 channels in PolishAccess to over 500 FTA channels via Hotbird	133 channels in PolishAccess to FTA channels via Hotbird	104 channels in PolishAccess to FTA channels via Hotbird	79 channels in PolishAccess to FTA channels via Hotbird	
Content	 Key content: 4 exclusive Polsat sports channels, 28 HD channels in total All Polsat and all key TVN, TVP channels 	 Key content: 5 Canal+ and 7 exclusive HD channels (own production), 37 HD channels in total Polsat (apart from sports), TVN, TVP channels 	 Key content: 'n premium' and HD channels from TVN, 36 HD channels in total All TVN, TVP and Polsat (apart from sports) channels 	 Key content: free package for all broadband Internet customers, pay packages from 'n' 	
Packages (monthly fees)	Entry: PLN 14.9Middle: PLN 39.9Full: PLN 89.9	Entry: PLN 19Middle: PLN 77Full: PLN 199	Entry: PLN 39Middle: PLN 69Full: PLN 159	Available only with broadband InternetMiddle: PLN 65Full: PLN 104	
New services (launch dates)	 DVR (Nov 2006) HDTV (Nov 2007) MVNO (Sep 2008) VoD (Nov 2008) Internet (Feb 2010) Multi-play (Jun 2010) Multiroom (Oct 2011) IPLA (Apr 2012) 	 HDTV (Q4 2006) IPTV in cooperation with TPSA (2006) DVR (2008) VoD (Dec 2008) Multiroom (Aug 2009) 	 HDTV (Q4 2006) DVR (Dec 2006) VoD (Sep 2007) Multiroom (Sep 2008) nVOD (Mar 2012) 	 VoD (Sep 2009) HDTV (May 2010) Agreement with 'n' (Jun 2011) 	

Source: Cyfrowy Polsat, Annual Reports and presentations

Note: (1) Based on Cyfrowy Polsat know-how as at November 16, 2012

⁽²⁾ excl. FTA, foreign language, VOD and erotic

^{(3) 69}k joint customers resulting from partnership agreement between TP SA and 'n'

Sample of our DTH offer(1)

> 500 TV channels, 9 Polish radio channels, Video on Demand, catch-up TV and Multiroom HD



FAMILY HD IVP1 IVP2 Rews Corine Calc IV Corine Sport	# of channels ⁽²⁾	Price (PLN)
TVP IND TVP	62	39.90
SPORTS HD SPORTS HD SPORT ND SPOR	62 + 10	Family HD + 10.00
EXTRA HD SPINION FOX life © SOURCE TO TOMATICAL TOWNS OF THE SHOWCASE FOX life POX	62 + 23	Family HD + 10.00
HBO HD HBO	62 + 6	Family HD + 25.00
CINEMAX HD cinemax cinemax2 cinemax HD cinemax2 cinemax HD cinemax2 cinemax HD cinemax2	62 + 4	Family HD + 15.00
Premium offer		
PLN 89.90		
Mini HD W W TVP1 TVP2 PRO TVP2 PRO TVP 10 T	27	14.90

Competitive positioning of Cyfrowy Polsat Highest speed offered, network roll-out ongoing



Side-by-side comparison of main mobile broadband offers in Poland⁽¹⁾

	CYFROWY VELEWIZJA INTERNET VELEFON	orange [*]	T ··Mobile· blu∈connect	iplus≎	PLAY	netia	multi /√ edia	VECTRA Telewizja - Internet - Telefon
Subscription	PLN 14.9	PLN 22	PLN 2 9.9	PLN 14.9	PLN 29, 9	PLN 34.9	PLN 19	PLN 20
	PLN 29 .9	PLN 42	PLN 49.9	PLN 29.9	PLN 49,9	PLN 44.9	PLN 29	PLN 30
	PLN 49.9	PLN 62	PLN 59.9	PLN 49.9	PLN 59,9	PLN 61.9	PLN 34	PLN 40
	PLN 59.9	PLN 82	PLN 79.9	PLN 59.9	PLN 69,9	PLN 91.9		PLN 45
	PLN 79.9	PLN 102		PLN 79 .9	PLN 89,9			PLN 55
	PLN 99.9	PLN 162		PLN 99.9				
	PLN 139.9			PLN 139.9				
Loyalty period (months)	12, 24	12, 16, 24, 30, 36	18, 24	12, 24	12, 18, 24	Any	12	24
Data transfer	1 GB	0 GB	2 GB	1 GB	2 GB	2 GB	1 GB	1 GB
limit	3 GB	2 GB	8 GB	3 GB	4 GB	4 GB	2 GB	2 GB
IIIIIC	10 GB	4 GB	14 GB	10 GB	10 GB	10 GB	4 GB	4 GB
	15 GB	14 GB	16 GB	15 GB	15 GB	20 GB		7 GB
	20 GB	20 GB		20 GB	20 GB			10 GB
	25 GB	38 GB		25 GB				
	35 GB			35 GB				
Speed transfer	150 Mb/s	42 Mb/s	42 Mb/s	150 Mb/s	1 Mb/s	1 Mb/s	From 1 Mb/s;	1 Mb/s
(maximum)					2 Mb/s	4 Mb/s	dependent on the	
,					4 Mb/s		cable broadband	
					6 Mb/s		Internet speed	
Technology	HSPA+/LTE	HSPA (HSPA+ DC), CDMA	HSPA (HSPA+ DC)	HSPA+/LTE, CDMA	HSPA+	HSPA+	HSPA+	HSPA+
Activation fee	PLN 4 9	PLN 61	PLN 49	PLN 1 9	pln 99	PLN 99	PLN 1	PLN 2 9
Additional services	50 GB from 00.00 to 8.00 (excl. package for 14,9 PLN)	Unlimited transfer (00.00-8.00am) (excl. package for 39,5 PLN– then extra charge of PLN 20)	Unlimited transfer (00.00-9.00am) for 9,08 PLN	50 GB from 00.00 to 8.00 (excl. package for 14,9 PLN)	Unlimited transfer (00.00-9.00am), free in the two highest tariffs	Modem freely given in lease; Unlimited transfer (11.45pm- 9.45am) for 8 PLN in the two highest tariffs	Prices available only for customers using the cable broadband Internet	Unlimited transfer (11.45pm-9.45am) for 5 PLN (excl. package for 20 PLN)
Coverage	99% population	99.8 % population	99.5% population	99% population	99% population	79% population	79% population	79% population

Source: Cyfrowy Polsat, press clippings

Note: (1) Data collected by CP on November 15, 2012