

Completely revised and updated

The latest edition of RBR's authoritative survey and analysis of the ATM market in central and eastern Europe. A vital source of strategic information for ATM deployers and suppliers

ATMs and Cash Dispensers Central and Eastern Europe 2010



"Outstanding professional experience in the area of banking and payment systems"

The European Commission



RETAIL BANKING RESEARCH

ATMs and Cash Dispensers Central and Eastern Europe 2010

Recognised as the most authoritative source of information on the ATM market in central and eastern Europe

This recent addition to RBR's report portfolio provides the most comprehensive and up-to-date picture of the ATM sector in central and eastern Europe. It follows in the tradition of RBR's flagship western Europe study, and is the most detailed and reliable source of information on the ATM market in the region today.

The report provides comprehensive information on the size, growth and structure of the ATM market in each country, as well as trends in location, facilities, transaction volumes, manufacturer shares and software. As with its sister report, it includes an analysis of the extent to which deployers outsource cash replenishment and first and second line maintenance, and to whom.

Methodology: Assembled from direct contact with the leading operators of ATMs in central and eastern Europe, this primary research included a comprehensive survey backed up by a programme of telephone interviews and desk research.

The report offers in-depth information on 15 countries and comprises 750 pages and 750 tables and charts.

An invaluable tool for strategic planning

This report is an invaluable tool and database for planning new products, improving existing services, developing market strategies, and deciding how to enter new markets.

Suppliers gain an independent assessment of the market shares of competitors, insights into the different needs of deployers in each country, and detailed market information, carefully structured to allow comparisons between countries.

Deployers both bank and non-bank, can evaluate their self-service delivery strategies in the light of competitors' activity, and benchmark their provision and performance against leading deployers at home and across the region.

Each country report addresses key questions such as:

- How large is the market and how fast is it growing?
- How does the level of provision of ATMs compare with other countries in the region?
 - What services are being delivered through ATMs?
 - Who are the leading deployers?
 - Who are the leading ATM manufacturers?
 - What usage levels do machines attract?
 - Who carries out ATM service and maintenance?
 - What proportion of terminals are located off-site?
- Which hardware and software solutions are favoured?
- How many machines are EMV and Triple DES compliant?

Outline of the report

International Overview

This extensive section compares the size and shape of the 15 markets surveyed. Numerous charts and tables draw together data from each section of the individual country reports, allowing quick and easy comparison between markets, and highlighting key features.

Country Reports

The full study contains 15 country reports:

- Bulgaria • Croatia • Czech Republic • Estonia • Hungary • Kazakhstan • Latvia
- Lithuania • Poland • Romania • Russia • Serbia • Slovakia • Slovenia • Ukraine

Country reports are presented in 14 sections, each focusing on a separate aspect of the market and accompanied by numerous statistical tables:

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|------------------------------------|------------------------------|------------------------------------|
| 1 Overview and Latest Developments | 6 Locations | 11 Manufacturer Market Shares |
| 2 Banking Structure | 7 Facilities Offered | 12 Hardware and Software |
| 3 Development of ATM Networks | 8 Hardware Features | 13 Service and Maintenance |
| 4 Market Size and Growth | 9 Volume of Cash Withdrawals | 14 Network Details by Organisation |
| 5 Density Measures | 10 Value of Cash Withdrawals | |

The information in ATMs and Cash Dispensers Central and Eastern Europe 2010 is not available from any other source.

About RBR

RBR is recognised as a leading strategic research and consulting firm with over two decades of experience in retail banking, banking automation and payment systems.

Research

Our research is independent and specialised, leveraging an extensive network of experts around the world. We publish detailed, industry-leading, strategic market research reports:

ATMs and Cash Dispensers Western Europe/CEE
Global ATM Market and Forecasts
Off-Site ATMs Europe
Deposit Automation
Teller Assist Units
Payment Cards Western Europe/CEE
Prepaid Cards
Merchant Acquiring in Europe
Interchange Fees
Future of Cash and Payments
Branch Banking

For more information please visit www.rbrlondon.com/reports

Consulting

Our consulting is facts-based and analytically rigorous, something that sets us apart from other firms. We support our clients with information, analysis and advice that allows them to make better, more informed, decisions. RBR regularly undertakes the following types of assignment:

Conducting strategic reviews
Assessing international market opportunities
Evaluating business cases for new products and services
Forecasting demand for products and services
Undertaking case study research and regulatory analysis

For more information please visit www.rbrlondon.com/consulting

Banking Automation Bulletin

Our research newsletter, Banking Automation Bulletin, is published 12 times per year. It presents objective analysis and insight by experienced consultants on developments in banking and payment automation worldwide.

Every issue carries exclusive extracts from RBR primary research and features a detailed country profile. If you would like to subscribe to the Bulletin, or discuss advertising opportunities, please contact us.

For more information please visit www.rbrlondon.com/bulletin

Events

As well as speaking at numerous high profile conferences and corporate events, RBR jointly organises the ATM industry's largest independent conferences in both Europe and the Middle East, and also a specialist ATM security event.

On a bespoke basis RBR organises seminars on a range of ATM, cards and payments topics.

For more information please visit www.rbrlondon.com/events

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