

Poland- Telecoms, Mobile, Broadband and Digital Media Market Analyses and Statistics 2017 to 2022

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PUNE, INDIA, April 13, 2017 /EINPresswire.com/

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[Poland - Telecoms, Mobile, Broadband and Digital Media Market 2017](#)

Poland anticipating further cable broadband market consolidation Poland's liberalised telecom market has seen considerable development in all sectors. The incumbent telco Orange Poland has seen its market share dwindle in the face of competition and a regulatory environment which has facilitated the market entry of new players and extended network to Orange Poland's fibre and copper networks.

The mobile market in recent years has been characterised by the rapid extension of LTE networks and the development of services. By early 2017 mobile penetration stood at around 142%, among the highest rates in the region. For many years the popularity among consumers for keeping two or more SIM cards distorted the mobile penetration rate. This has been addressed on to fronts: by the regulator encouraging network operators to disconnect dormant SIM cards, and by the government which passed legislation, effective from February 2017, which obliged prepaid SIM card holders to register their details with network providers. As a result there has been a significant readjustment in the number of subscribers in the market since 2015.



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Poland's fixed broadband market has benefited from excellent cross-platform competition, with comprehensive DSL infrastructure complemented by extensive cable networks and a growing fibre presence. Commercial considerations meant that fibre was for some years restricted to a number of urban areas, though more recently the sector has received considerable financial support from the government and the European Union. This support is aimed at building fibre-

based networks across the country (particularly in eastern areas) and promoting fibre connectivity to end-users. As a result, the proportion of broadband subscribers receiving a service of at least 100Mb/s has increased sharply in recent years. In the cable sector some market consolidation has continued with the acquisition by Liberty Global of the cable assets of Multimedia Polska.

This report covers key aspects of Poland's evolving telecom market, presenting comprehensive data and information on market players, fixed-line networks and technologies, the wholesale market, as well as an overview of key regulatory developments. The report also reviews the mobile market, providing profiles of the major operators together with updated operating and financial results. It details recent regulatory measures and spectrum auction results, and assesses the reach and capabilities of deployed mobile technologies. In addition the profiles the fixed broadband and digital media markets, including a review of the key market players, statistics and technology platforms, and an assessment of recent market developments. It also includes fixed-line broadband forecasts to 2022.

Key developments:

- Boltcomtel's LTE-A infrastructure providing 40% population coverage;
- Orange Poland elects not to renew 450MHz licence;
- Orange Poland launches commercial Wi-Fi Calling service;
- T-Mobile Poland expected to launch commercial NB-IoT services by mid-2017;
- Orange Poland and T-Mobile Poland extend LTE network sharing to additional spectrum bands;
- Regulator removes operator obligations on the SMS market;
- Regulator makes steps to annul results of the 2007 1800MHz auction;
- Vectra and Toya launch 1Gb/s FttP services; Orange tests Fibre-to-the-Distribution-point (FttDp) technology;
- Liberty Global acquires Multimedia's cable assets;
- National Broadcasting Council awards licences on the fifth multiplex;
- TVP continues DVB-T2 trial;
- Report update includes the regulator's market data report and 2015 infrastructure report for 2016, State

Statistics data for 2016, telcos' operating and financial data for Q4 2016, recent market developments.

Companies mentioned in this report:

Orange Poland (Telekomunikacja Polska), Netia, Telefonica Dialog, GTS Energis, Exatel, Telekomunikacja Kolejowa, CenterNet, Polkomtel (Plus), T-Mobile Poland, P4/Play, Orange Poland (PTK Centertel), Mobyland, UPC Poland, Orange Poland (Telekomunikacja Polska), Netia, Aster, Multimedia Polska, Vectra, Telefonica Dialog, Polkomtel, UPC Polska, Vectra, Multimedia Polska, Aster, Cyfra+, Cyfrowy Polsat, N/TNK, Orange Poland (Telekomunikacja Polska), TVP.

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