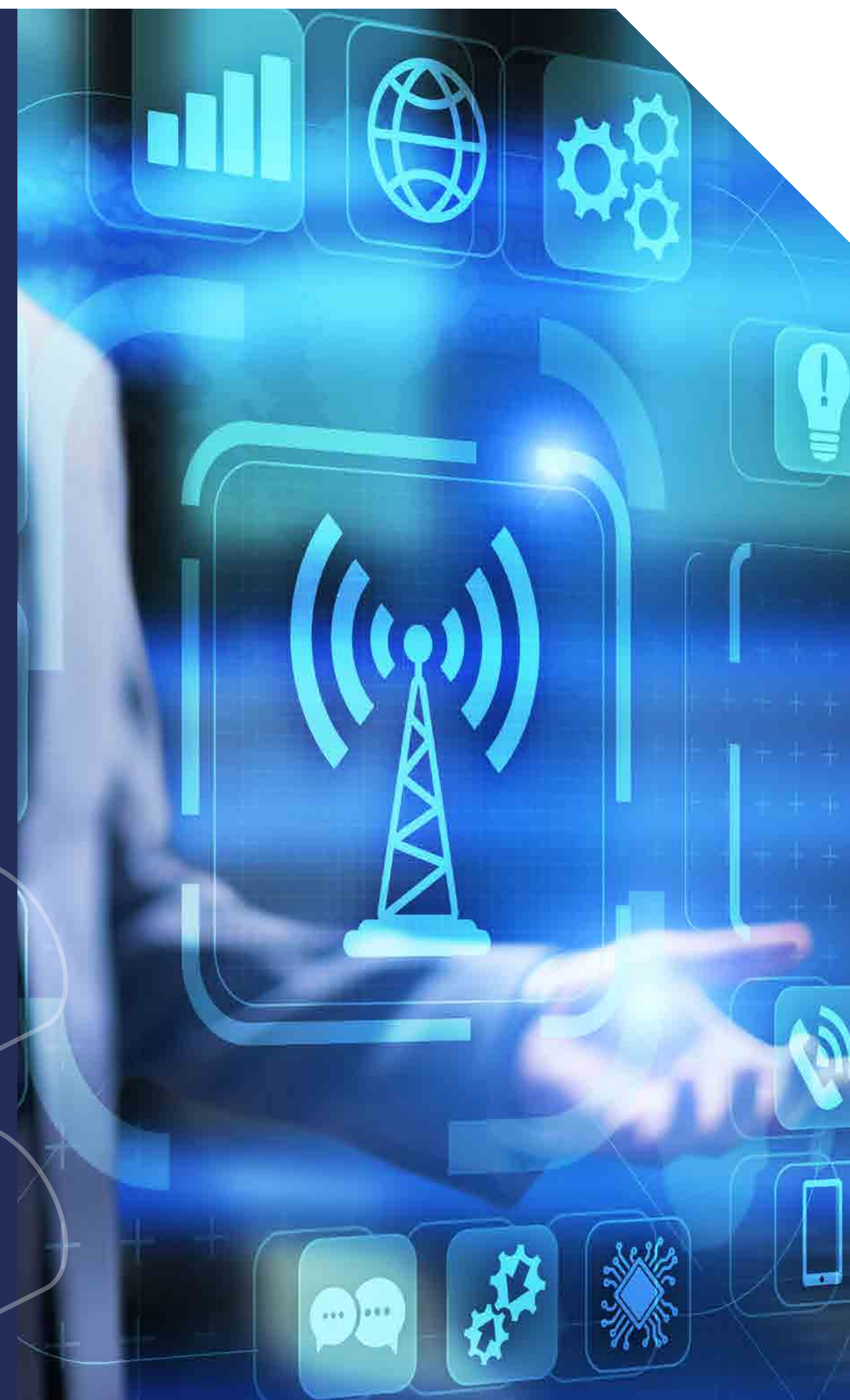


MOBILE INTERNET AND VALUE-ADDED SERVICES MARKET IN POLAND 2025

MARKET ANALYSIS AND DEVELOPMENT
FORECASTS FOR 2025-2030





Main objective

Providing a comprehensive description of the mobile internet and value-added services market in Poland, together with medium- and long-term forecasts for its development.

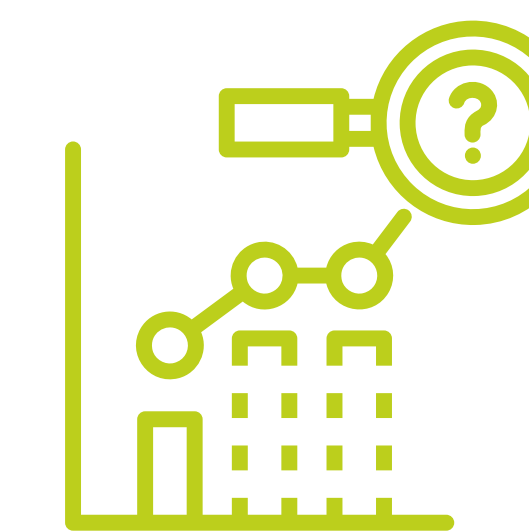
Additional objectives

- presentation of the mobile internet and value-added services market value
- presentation of the mobile internet services market volumes, including the number of mobile internet users via a mobile phone and the number of SIM cards with dedicated mobile internet access
- analysis of the mobile internet and value-added services market segments
- presentation of the major players operating in the individual segments of the mobile internet and value-added services market
- presentation of the main trends in the use of mobile internet and mobile value-added services in Poland and worldwide
- discussion of the macroeconomic and geopolitical situation's impact on the mobile internet and value-added services market and its growth rate in 2025-2030



Time span

2021-2024



Forecast horizon

2025-2030



Geographic coverage

Poland

What is included in the report?

- **market value and dynamics** in 2021-2024
- **market structure** in 2021-2024, by segment
- **trends** in the use of mobile internet and mobile value-added services in business and households
- **key events** exerting an impact on the mobile internet and value-added services market
- **major players** operating in the mobile internet and value-added services market
- **macroeconomic, demand-side, supply-side, and legal factors affecting** the mobile internet and value-added services market
- **forecasts up to 2030** for:
 - ↳ mobile internet and value-added services market in Poland,
 - ↳ main segments of the mobile internet and value-added services market,
 - ↳ key macroeconomic variables and data.



Scope

- **mobile internet market**
 - ↳ broken down into mobile access and dedicated access
 - ↳ broken down into post-paid and pre-paid model
 - ↳ broken down into major players
- **value-added services**
 - ↳ direct billing
 - ↳ A2P SMS
 - ↳ premium-rate SMS

Subject matters

- **macroeconomic situation** in the context of its impact on the mobile internet and value-added services market
- **value and growth rate of the market**, broken down by mobile internet and mobile value-added services
- **structure of the mobile internet market value**, broken down by segment
- **value of the value-added services market**, broken down by segment
- **number of subscribers** in the mobile internet market, broken down by segment
- **mobile data traffic** in mobile networks, broken down by operator
- **ARPU** - average revenue per user
- **price levels** in the mobile internet market in dedicated access
- **average data cost** in Poland compared to Europe
- **KPIs and profiles of the major players** in the mobile internet and value-added services market
- **5G network** coverage in Poland (also broken down by operator)
- **forecasts** for value and volume
- **legal acts** affecting the market



Forecasts

For the purpose of the report, long-term development forecasts were prepared using econometric models and historical time series.

The forecasts cover the period 2025-2030.

In addition to projections for the market value and its segments, the report also covers forecasts for 2025-2030 for selected demographic and macroeconomic indicators, including:

- GDP per capita and real GDP change,
- inflation,
- average annual BAEL unemployment rate and real dynamics of average monthly gross wages in Poland,
- value of expenditures financed from EU funds, along with the real dynamics of disposable household income and individual consumption in Poland,
- number of residents in Poland and the shares of individual demographic groups.

The forecasts by PMR Market Experts published in the reports are highly accurate - the typical error rate (MAPE) is usually below 3%





10 reasons to invest in the report „Mobile Internet and value-added services in Poland 2025“

1 **Overview of market value and dynamics through 2030**
Data on the value of the mobile internet and value-added services market in Poland for 2021-2024, along with five-year forecasts.

2 **Accurate forecasts of penetration and access numbers**
Detailed forecasts of the number of SIM cards, pre-paid vs. post-paid share, number of mobile internet users, and ARPU through 2030.

3 **Analysis of key macroeconomic and demographic factors**
Impact of inflation, wages, demographics, material situation of the population, and the war in Ukraine on the market - presented within a coherent quantitative and qualitative framework.

4 **Analysis of regulatory and legal barriers**
Impact of new regulations on operators' strategies and the market in the coming years.

5 **Operator benchmark with operational data**
Profiles of major players with unique operational and financial indicators (number of base stations, ARPU, data traffic by technology).

6 **Assessment of competition and market structure**
Market shares of operators, revenue structure from mobile internet - breakdown by segment and technology.

7 **Data on technology development and 5G infrastructure**
5G coverage and speed indicators, number of base stations, international comparisons, and Poland's readiness for 5G rollout within the EU.

8 **Forecasts for value-added services (VAS)**
Market value and dynamics for direct billing, SMS A2P, and premium SMS segments through 2030, along with market assessment by companies using A2P

9 **Additional materials - source data in Excel**
Enables independent data aggregation, in-house analysis, and internal model development within the organization.

10 **Proprietary research and expertise**
Combined data sources (primary and secondary), 20+ years of market experience, and a methodology based on dozens of variables.

What questions does the report provide answers to?

- What are the prevailing trends in the mobile internet and value-added services market?
- Which value-added services have prospects for growth and which are heading for decline?
- What are the prospects for the market in the face of negative macroeconomic and demographic forecasts and changes in the household structure?
- How does the development of 5G networks affect the mobile internet and value-added services market?
- What is the impact of the development of fibre optic networks on the mobile internet market?
- Which player dominates the mobile internet market?
- What are the development prospects for the dedicated access market?
- How does the regulatory environment affect the market?
- What is the mobile internet penetration rate in Poland?



DATASET – together with the report, we provide the most important data in an Excel spreadsheet for independent aggregation.

PMR Market Experts is a brand of market reports prepared by Hume's Institute

At PMR Market Experts, we have been preparing cyclical industry reports for over 20 years. Our core specialisations:

- Digital & ICT
- Retail
- Pharma & Healthcare
- Construction

Our reports are more than just a compilation of facts - they are reliable knowledge based on proven methodology. We combine primary and secondary data, proprietary algorithms and econometric models to provide precise information about the market, its values, growth rates, segments and key players.

We are part of Hume's Institute - a 360° research agency specialising in quantitative and qualitative research, forecasting and market predictions.

PMR Market Experts' **data analysis and verification expertise, unique insights and proven forecasts** provided by Hume's Institute give real insight and advantage to our Clients.

More than 600 clients worldwide have already benefited from our services. **We have analysed more than 5,000 brands, operating in over 50 markets.** We are trusted by major companies - **we work with 70% of the prestigious Fortune 500 brands.**

20+

years of experience

600+

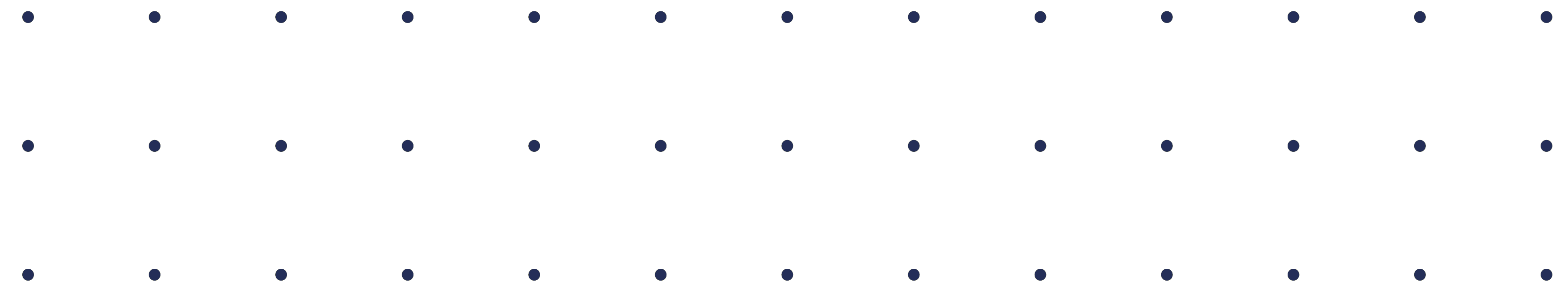
global clients

5,000+

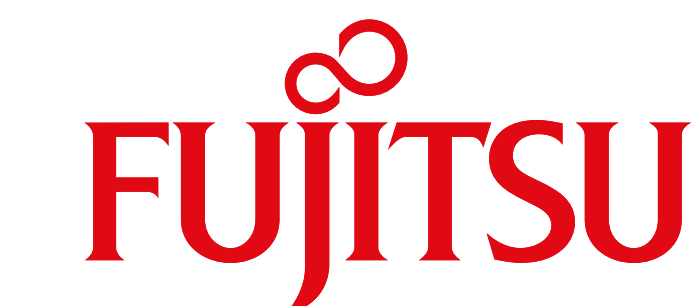
brands studied

50+

analysed countries



They trusted us





DIGITAL & ICT

MARKET ANALYSIS AND 5-YEAR
DEVELOPMENT FORECASTS

- **AI market in Poland**
 - **Cloud computing market in Poland**
 - **IT equipment and consumer electronics resale market in Poland**
 - **Internet of Things market in Poland**
 - **Data centre market in Poland**
 - **Online services market in Poland**
 - **Gaming market in Poland**
 - **Pay TV and VOD market in Poland**
 - **Integrated telecommunications services market in Poland**
 - **Telecommunications services for business and carrier segment in Poland**
 - **ICT market in Poland**
 - **Mobile internet and value-added services market in Poland**
 - **Cybersecurity market in Poland**
 - **Telecommunications market in Poland**
 - **Digital transformation market in Poland (2024)**
- **Business systems and applications market in Poland**
 - **IT services market in Poland**
 - **Labour market and IT wage structure in Poland**
 - **ESG reporting – challenges and development prospects in Poland**
 - **Smart home market in Poland**
 - **Wearables market in Poland**

**NEW
REPORTS**



CONTACT:

Monika Szczypta

Senior Sales & Business Development Manager

tel.: +48 607 979 580

monika.szczypta@pmrmarketexperts.com



OFFICE

Królewska 57
30-081 Kraków, Poland



CONTACT

tel.: +48 609 290 093
+48 782 011 000
sales@pmrcorporate.com
info@pmrcorporate.com



WWW

pmrmarketexperts.com
mypmr.pro
humes.pl