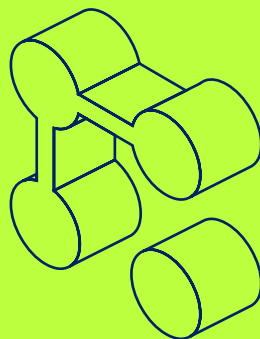


**PMR** DIGITAL  
EXPERTS

# MOBILE INTERNET AND VALUE-ADDED SERVICES MARKET IN POLAND 2025

Market analysis and development  
forecasts for 2025-2030

© 1996–2025+ PMR MARKET EXPERTS



# Table of contents

**Executive summary » 7**

**Value of the mobile internet and value-added services market in Poland in 2021-2024 and PMR forecast for 2025-2030 » 18**

**Main trends and key factors influencing the mobile internet and value-added services market in Poland » 22**

**Macroeconomic and demographic factors » 22**

General macroeconomic outlook » 23

Overall price growth rate » 24

Labour market situation in Poland » 25

Population's financial situation » 26

Demographics » 26

Geopolitical environment » 27

Global trade tensions > 27

War in Ukraine > 27

Other risks > 28

**Demand-side factors » 29**

Smartphone penetration » 29

Number of networked devices – IoT market in Poland » 31

Data consumption » 32

Unlimited mobile internet access » 35

Rich digital content on mobile devices » 35

Replacement of traditional telecommunications services with alternative solutions » 38

User migration from pre-paid to post-paid offers » 38

Users' expectations regarding quality parameters of mobile internet access services » 39

Mobile traffic in Wi-Fi networks	»»	40
Prices	»»	40
Competition from classic broadband	»»	43
<b>Supply-side factors</b>	<b>»»</b>	<b>45</b>
Infrastructure expansion and modernisation for mobile internet services	»»	46
Development of VoLTE and other technologies	»»	50
Service bundling	»»	50
Price increases	»»	51
Development of mobile internet offers for home	»»	52
<b>Regulatory factors</b>	<b>»»</b>	<b>52</b>
Electronic Communications Law	»»	52
Digital Networks Act	>	54
Unified duration of frequency reservations	»»	54
End of the “zero rating” model	»»	54
Gigabit Infrastructure Act (GIA)	»»	54
Roam Like At Home	»»	55
Act on combating the abuse of electronic communications	»»	58

## **Detailed analysis of the mobile internet market in 2021-2024 and PMR forecast for 2025-2030** »» 59

<b>Number of mobile internet access services in Poland</b>	<b>»»</b>	<b>59</b>
<b>Value of the mobile internet market in Poland</b>	<b>»»</b>	<b>68</b>
<b>Profiles of suppliers in the mobile internet market in Poland</b>	<b>»»</b>	<b>75</b>
Orange Polska	»»	75
Resources and network development	>	76
Key events and development plans in mobile internet services	>	78
Polsat Plus Group (PPG)	»»	82
Resources and network development	>	83
Key events and development plans in mobile internet services	>	84

**P4 » 86**

Resources and network development > **87**

Key events and development plans in mobile internet services > **88**

**T-Mobile Polska » 90**

Resources and network development > **91**

Key events and development plans in mobile internet services > **93**

**Megatrends and international comparisons » 94**

**Detailed analysis of the mobile value-added services market in 2021-2024 and PMR forecast for 2025-2030 » 100**

**Direct billing » 102**

**A2P SMS » 106**

**Premium-rate SMS » 109**

**Methodology of the report » 112**

**List of graphs and tables » 116**

**About PMR » 122**

# Spis grafik i tabel

## Value of the mobile internet and value-added services market in Poland in 2021-2024 and PMR forecast for 2025-2030 » 18

Value of the mobile internet and mobile value-added services market in Poland (PLN bn), 2021-2030 » 19

Annual change in the value of the different segments of the mobile internet and mobile value-added services market in Poland (% YoY), 2021-2030 » 19

Value structure of the mobile internet and value-added services market in Poland (%), 2021-2030 » 20

Compound annual growth rate (CAGR) for the mobile internet and mobile value-added services market in Poland (%), 2019-2024 and 2025-2030 » 20

## Main trends and key factors influencing the mobile internet and value-added services market in Poland » 22

Impact of macroeconomic and demographic factors on the mobile internet and value-added services market in Poland, 2021-2030 » 22

GDP per capita and real GDP change in Poland, 2021-2030 » 23

CPI inflation in Poland (% YoY), 2021-2030 » 24

Average annual LFS unemployment rate and real change in average monthly gross wage in Poland, 2021-2030 » 25

Real change in household disposable income in Poland and private consumption (% YoY), 2021-2030 » 26

Number of residents in Poland, share of individual demographic groups and number of residents including refugees from Ukraine, 2021-2030 » 27

Impact of demand-side factors on the mobile internet and value-added services market in Poland, 2021-2030 » 29

Number of smartphone users and smartphone penetration in Poland, 2015-2024 » 29

Share of mobile phone owners accessing the mobile internet on their phones in Poland (%), 2022-2024 » 30

Number of 5G-enabled smartphones among P4's users in Poland (million), Q1 2024-Q4 2024 » 30

- Number of devices connected to the internet in Poland and its change, 2021-2030 >> **31**
- Per capita number of devices connected to the internet in Poland, 2021-2030 >> **32**
- Total mobile data traffic in the MNOs' networks in Poland and its change, 2021-2030 >> **32**
- Average monthly mobile data transmission per MNO customer in Poland (GB), 2015-2024 >> **33**
- Structure of the total data traffic in mobile networks in Poland (million GB), broken down into the different MNOs, 2019-2024 >> **34**
- Average monthly mobile data transmission per customer in the different MNOs' networks in Poland (GB), 2019-2024 >> **35**
- Share of households in Poland watching pay TV on different devices (%), 2021-2025 >> **36**
- Households viewing VOD content in Poland (%), by device, 2022-2025 >> **37**
- Shares of pre-paid and post-paid segments in the total number of SIM cards in Poland (%), 2015-2024 >> **39**
- Comparison of costs per 1 GB of data transferred by users of mobile internet offers in mobile networks in Poland, September 2025 >> **41**
- Average monthly subscription cost for mobile and home internet access in mobile networks in Poland (PLN), 2019-2025 >> **42**
- Average cost per 1 GB in mobile and home internet access offers available in mobile networks in Poland (PLN), 2019-2025 >> **42**
- Average cost per 1 GB of mobile data transmission in selected European countries (\$), 2019-Q1 2024 >> **43**
- Coverage of operators offering broadband infrastructure access services exclusively wholesale, 2021-2024 >> **44**
- Impact of supply-side factors on the mobile internet and value-added services market in Poland, 2021-2030 >> **45**
- Distribution of frequency resources among the MNOs in the 700-2,600 MHz and 3.4-3.8 GHz bands in Poland, July 2025 >> **46**
- Distribution of frequency resources among the MNOs in the 3.6 GHz band in Poland, 2025 >> **47**
- Quantitative and qualitative requirements for the construction of 5G networks in Poland, 2025 >> **48**
- Download speeds in mobile networks in Poland (Mb/s), September 2023-July 2025 >> **48**
- Distribution of frequency resources among the MNOs in the 700 MHz band in Poland, 2025 >> **49**

- 4G/LTE and 5G mobile network coverage in Poland (%), 2024 >> **49**
- Average number of RGUs per subscriber to bundled services in Poland, 2021-2030 >> **51**
- Impact of regulatory factors on the mobile internet and value-added services market in Poland, 2021-2030 >> **52**
- Total data transmission in active roaming in Poland and its change, 2015-2024 >> **55**
- Total data transmission in passive roaming in Poland and its change, 2015-2024 >> **55**
- Total revenue generated from international roaming services provided in Poland (PLN m), 2015-2024 >> **56**
- Share of active subscribers roaming in the EU/EEA (%), Q4 2023-Q3 2024 >> **57**
- Share of active subscribers who exceeded the Fair Use Policy data limit (%), Q4 2023-Q3 2024 >> **57**
- Average wholesale prices for telecoms roaming services in EEA countries, Q4 2023-Q3 2024 >> **57**

## Detailed analysis of the mobile internet market in 2021-2024 and PMR forecast for 2025-2030 >> **59**

- Number of mobile internet access services in Poland and its change, 2021-2030 >> **60**
- Number of SIM cards for mobile internet access via a computer in Poland and its change, 2021-2030 >> **61**
- Number of SIM cards for mobile internet access via a computer in Poland (million), by post-paid and pre-paid access, 2021-2030 >> **62**
- Structure of the number of SIM cards for mobile internet access via a computer in Poland (%), by post-paid and pre-paid access, 2021-2030 >> **62**
- Number of mobile access services in fixed locations in mobile networks in Poland and its change, 2021-2030 >> **63**
- Number of SIM cards for mobile internet access via a computer in Poland (thousand), by operator, 2015-2024 >> **64**
- Number of post-paid SIM cards for mobile internet access via a computer in Poland (thousand), by operator, 2015-2024 >> **64**
- Number of pre-paid SIM cards for mobile internet access via a computer in Poland (thousand), by operator, 2015-2024 >> **65**
- Number of users of mobile internet services on a mobile phone in Poland and its change, 2021-2030 >> **65**

Number of dedicated data bundles supplied on telephones and its change, 2015-2024 >>> **66**

Penetration of mobile internet services per number of residents in Poland (%),  
2021-2030 >>> **67**

Penetration of mobile internet services per number of residents aged 15+ in Poland (%),  
2021-2030 >>> **67**

Share of the mobile internet segment in mobile telephony operators' revenues in Poland (%),  
2021-2030 >>> **68**

Value of the mobile internet market in Poland (PLN bn), by terminal device, 2021-2030 >>> **69**

Annual change in the value of the mobile internet market in Poland (% YoY), by terminal device,  
2021-2030 >>> **69**

Value structure of the mobile internet market in Poland (%), by terminal device,  
2021-2030 >>> **71**

Average monthly ARPU from mobile internet services in Poland (PLN), by terminal device,  
2021-2030 >>> **71**

Shares of the pre-paid and post-paid segments in the total value of the dedicated mobile internet  
access market in Poland (%), 2021-2030 >>> **72**

Value structure of the dedicated mobile internet access market in Poland (PLN m, %),  
by operator, 2024 >>> **72**

Average monthly ARPU from dedicated mobile internet access services (PLN),  
by operator, 2021-2024 >>> **73**

Value structure of the mobile internet market in Poland (PLN m, %), by revenues of different players,  
2024 >>> **73**

Revenues of mobile operators generated from dedicated data bundles supplied on telephones and  
their change, 2015-2024 >>> **74**

Orange Polska: Key operational and financial indicators in the mobile data transmission segment,  
2015-2024 >>> **75**

Number of Orange's active 4G LTE BTSs in Poland (thousand), 2017-H1 2025 >>> **76**

Number of active BTSs enabling bandwidth aggregation in Orange's network in Poland (thousand),  
2020-H1 2025 >>> **76**

Number of Orange's active 5G BTSs in Poland (thousand), H1 2024-H1 2025 >>> **76**

Number of customers using Orange's mobile dedicated internet access in Poland and its change,  
broken down into fixed wireless access and the standard service, 2015-2024 >>> **78**

Number of fixed wireless access services in Orange's network (thousand),  
Q2 2020-Q2 2025 >>> **78**

Post-paid ARPO generated from mobile internet services in Orange's network in Poland (PLN), Q2 2020-Q2 2025 >>> **79**

Total mobile data traffic in Orange's mobile network in Poland and its change, 2015-2024 >>> **80**

Total mobile data traffic in Orange's network in Poland (GB million), by access technology, 2015-2024 >>> **80**

Structure of data transmission in Orange's mobile and fixed-line networks in Poland (%), by type of network, 2015-2024 >>> **81**

Polsat Plus Group: Key operational and financial indicators in the mobile data transmission segment, 2015-2024 >>> **82**

Number of the Polsat Plus Group's active BTSs in Poland, by technology, 2017-2023 >>> **83**

Number of the Polsat Plus Group's active 5G BTSs in the 2,600 MHz band in Poland (thousand), 2020-2024 >>> **83**

Total mobile data traffic in the Polsat Plus Group's mobile network in Poland and its change, 2015-2024 >>> **85**

P4: Key operational and financial indicators in the mobile data transmission segment, 2015-2024 >>> **86**

Poland's population coverage with P4's 4G LTE, 4G LTE Ultra and 5G networks (%), 2017-2024 >>> **87**

Number of P4's active BTSs in Poland (thousand), 2016-H1 2025 >>> **87**

Number of P4's active 5G LTE BTSs in Poland and their coverage, 2022-H1 2024 >>> **87**

Total mobile data traffic in P4's mobile network in Poland and its change, 2015-2024 >>> **89**

T-Mobile Polska: Key operational and financial indicators in the mobile data transmission segment, 2015-2024 >>> **90**

Number of BTSs in T-Mobile's network in Poland (thousand), 2020-Q2 2025 >>> **91**

Number of BTSs using the Carrier Aggregation technology in T-Mobile's network in Poland (thousand), 2017-2024 >>> **91**

Number of T-Mobile's 5G BTSs in Poland (thousand), 2020-2024 >>> **91**

Number of T-Mobile's active 5G BTSs in Poland (thousand), H1 2024-H1 2025 >>> **92**

Total mobile data traffic in T-Mobile's network in Poland and its change, 2015-2024 >>> **94**

Number of mobile internet access services worldwide and its change, 2021-2030 >>> **94**

Share of smartphones in the number of mobile internet access devices (%), 2021-2030 >>> **95**

Shares of the different technologies in mobile internet access (%), 2021-2030 >>> **95**

Share of 5G in mobile internet access services (%), by selected regions worldwide, 2021-2030 >> **96**

Europe 5G Readiness Index, 2025 >> **96**

Ranking of CEE countries in terms of mobile internet speeds, June 2025 >> **97**

Top 20 countries in terms of mobile internet speeds, June 2025 >> **98**

## Detailed analysis of the mobile value-added services market in 2021-2024 and PMR forecast for 2025-2030 >> **100**

Value and change of the market for mobile value-added services in mobile telephony in Poland, 2021-2030 >> **101**

Structure of the market for mobile value-added services in mobile telephony in Poland (%), by segment, 2021-2030 >> **101**

Value and change of the direct billing market in Poland, 2021-2030 >> **102**

Share of internet users in Poland using the different forms of payment to buy e-services (%), 2025 >> **104**

Share of internet users in Poland who pay for the different e-services through direct billing (%), 2025 >> **104**

Portfolio of direct billing services offered by MNOs, August 2025 >> **105**

Number of A2P SMS messages sent through MNOs in Poland and its change, 2021-2030 >> **106**

Share of A2P SMS messages in the total number of SMS messages sent in Poland (%), 2021-2030 >> **106**

MNOs' revenues from A2P SMS services in Poland and their change, 2021-2030 >> **108**

Rate per SMS in A2P traffic (PLN net), 2021-2030 >> **108**

Share of revenue from A2P SMS services in the total revenue from SMS messages sent in Poland (%), 2021-2030 >> **108**

Number of SMS and MMS messages sent to premium-rate service numbers in Poland (million), 2015-2024 >> **109**

Change in the number of SMS and MMS messages sent to premium-rate service numbers in Poland (% YoY), 2015-2024 >> **109**

Shares of premium-rate SMS and MMS in the total number of SMS and MMS sent in Poland (%), 2015-2024 >> **110**

Value and change of the premium-rate SMS services market in Poland, 2021-2030 >> **111**

Average price per premium-rate SMS in Poland (PLN net), 2015-2024 >> **111**

# PMR MARKET EXPERTS

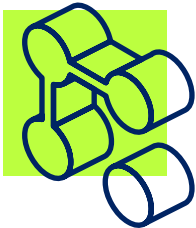
by Hume's

**WE UNDERSTAND THAT DATA IS NOT JUST ABOUT NUMBERS.**

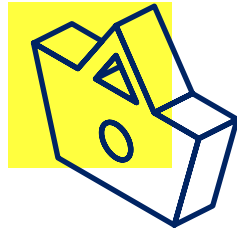
**IT IS THE FOUNDATION OF THE DECISIONS SHAPING THE FUTURE OF YOUR BUSINESS.**

At PMR Market Experts, we have been preparing cyclical industry reports for over 20 years, refining our sector knowledge.

Our core specialisations:



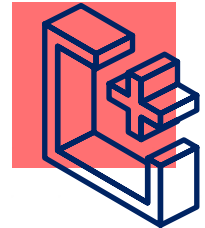
**Digital & ICT**



**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**. The trust placed in us by the major players is confirmed by the fact that we work with **70% of the prestigious Fortune 500 companies.**



tel.: +48 609 290 093  
info@pmrcorporate.com  
[www.pmrmarketexperts.com](http://www.pmrmarketexperts.com)



Krolewska 57  
30-081 Krakow  
Poland