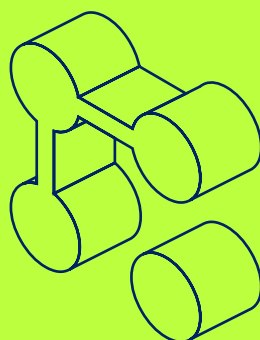




PMR DIGITAL
EXPERTS

TELECOMMUNICATIONS SERVICES FOR BUSINESS AND CARRIER SEGMENT IN POLAND 2025

Market analysis and development
forecasts for 2025-2030



© 1996–2025+ PMR MARKET EXPERTS

Table of contents

Executive summary » 7

Telecommunications services for the business and carrier segment – market overview » 17

Enterprises active in the Polish market » 17

Value and change of the market for telecommunications services in the business and carrier segment » 24

Forecasts for the telecommunications services market in the business and carrier segment » 27

Factors to influence the market for telecommunications services for the business and carrier segment in Poland » 27

General macroeconomic outlook > **27**

Overall price growth rate > **28**

Interest rates > **29**

EU funds – Multiannual Financial Framework and the National Recovery Plan > **30**

Labour market situation in Poland > **31**

Population's financial situation > **32**

Geopolitical environment > **32**

Value and change of the market for telecommunications services in the business and carrier segment » 34

Mobile telephony services for the business segment » 36

Market value and change » 36

Number of SIM cards and the market structure » 43

M2M communication » 48

Mobile internet access in the business segment » 51

Forecasts for the mobile telephony market in the business segment » 54

Market growth forecasts and structure in value and volume terms » 54

Factors influencing the market and situation in its different segments >> **59**

Phone-based mobile services > **61**

M2M services > **61**

Mobile internet access > **63**

Fixed-line telephony services for the business segment >> **65**

Market value and change >> **65**

Number of services and fixed-line telephony penetration >> **67**

Fixed-line telephony – key trends and market structure >> **73**

VoIP market >> **76**

Forecasts for the market for fixed-line telephony in the business segment >> **79**

Market growth forecasts and structure in value and volume terms >> **79**

Factors influencing the market and situation in its different segments >> **82**

DLISP services for the business segment >> **85**

Market value and change >> **85**

Internet access services >> **87**

Data transmission market >> **99**

Retail line rental >> **101**

Forecasts for the DLISP market in the business segment >> **102**

Market growth forecasts and structure in value terms >> **102**

Factors influencing the market and situation in its different segments >> **103**

Internet access > **104**

Data transmission > **108**

Retail line rental > **109**

Telecommunications services market for carriers (wholesale) >> **110**

Market value and change >> **110**

Wholesale mobile telephony market >> **112**

Wholesale broadband access >> **115**

Wholesale fixed-line telephony market >> **123**

Wholesale line rental >> **128**

Forecasts for the wholesale telecommunication services market >> **129**

Market growth forecasts and structure in value terms >> **129**

Factors influencing the market and situation in its different segments >> **130**

Supplement: International roaming in mobile telephony >> **133**

Methodology >> **139**

List of graphs and tables >> **144**

About PMR >> **154**

List of graphs and tables

Telecommunications services for the business and carrier segment – market overview » 17

- Number of REGON registered enterprises in Poland (million), 2015-2024 » 18
- Number of active enterprises in Poland and its change, 2015-2024 » 18
- Number of active economic operators paying health insurance contributions to the ZUS in Poland (thousand), by number of the insured, 2015-2024 » 19
- Shares of different types of enterprises in the total number of active enterprises in Poland (%), 2015-2024 » 20
- Number of active enterprises in Poland (thousand), by voivodship, 2015-2024 » 20
- New enterprises entered in CEIDG, REGON and KRS in Poland and their share (%), by legal form, 2024 » 21
- Number of company bankruptcies and liquidations recorded in Poland, 2015-2024 » 21
- Number of business restructuring cases in Poland, 2016-2024 » 22
- Share of enterprises employing 10 and more employees in the total number of enterprises in Poland (%), by sector, 2020-2024 » 22
- Number of active enterprises in Poland and its change, 2024-2030 » 23
- Number of active economic operators paying health insurance contributions to the ZUS in Poland (thousand), by number of the insured, 2024-2030 » 24
- Value and change of the market for telecommunications services in the business and carrier segment in Poland, 2015-2024 » 24
- Value structure of the market for telecommunications services in the business and carrier segment in Poland (%), by key segments, 2015-2024 » 25
- Value and change of the market for telecommunications services in the business segment in Poland, 2015-2024 » 25
- Shares of mobile telephony, fixed-line telephony and DLISP services in the value of the market for telecommunications services for the business segment in Poland (%), 2015-2024 » 26
- Growth rate of the market for telecommunications services for the business and carrier segment and of the entire market in Poland (% YoY), 2015-2024 » 26
- GDP per capita and real GDP change in Poland, 2021-2030 » 27

CPI inflation in Poland (% YoY), 2021-2030 >> **28**

WIBOR 3M average annual interest rate in Poland (%), 2021-2030 >> **30**

Value of expenditure financed by the EU funds* in Poland (PLN bn) and its share in GDP (%), 2021-2030 >> **30**

Average annual LFS unemployment rate and real change of average monthly gross wage in Poland, 2021-2030 >> **31**

Real change in household disposable income in Poland and private consumption (% YoY), 2021-2030 >> **32**

Value and change of the market for telecommunications services in the business and carrier segment in Poland, 2024-2030 >> **34**

Value structure of the market for telecommunications services in the business and carrier segment in Poland (%), by key segments, 2024-2030 >> **34**

Value and change of the market for telecommunications services in the business segment in Poland, 2024-2030 >> **35**

Shares of mobile telephony, fixed-line telephony and DLISP services in the value of the market for telecommunications services for the business segment in Poland (%), 2024-2030 >> **35**

Mobile telephony services for the business segment >> 36

Value and change of the market for mobile telephony for the business segment in Poland, 2015-2024 >> **37**

Value and change of the market for phone-based mobile services for the business segment in Poland, 2015-2024 >> **37**

Average monthly revenue per user of phone-based mobile services for the business segment in Poland (PLN), 2015-2024 >> **38**

Value share of the mobile telephony market for the business segment in the total mobile telephony market in Poland (%), 2015-2024 >> **38**

Value structure of the market for mobile telephony for the business segment in Poland (%), by shares of different service types, 2015-2024 >> **39**

SWOT analysis of the mobile telephony market in the business segment in Poland, 2025 >> **39**

Overview of mobile telephony offers for small and medium-sized companies at selected telecommunications operators, 2025 >> **41**

Number of active SIM cards in the business segment in Poland and its change, 2015-2024 >> **43**

Net new additions in mobile telephony in the business segment in Poland (thousand), by type of the end-customer, 2015-2024 >>> **44**

Number of active SIM cards in telephones in the business segment in Poland and its change, 2015-2024 >>> **44**

Volume structure of the market for mobile telephony for the business segment in Poland (%), by shares of different service types, 2015-2024 >>> **45**

Share of the business segment in the mobile telephony market volume in Poland (%), broken down into different service types, 2015-2024 >>> **46**

Operators' shares in the market for mobile telephony for the business segment in Poland, by number of SIM cards (million, %), 2024 >>> **47**

Operators' shares in the market for mobile telephony for the business segment in Poland, by number of SIM cards (million, %), 2023 >>> **47**

Number of active M2M SIM cards in Poland and its change, 2015-2024 >>> **48**

Share of M2M cards in total SIM cards in Poland (%), 2015-2024 >>> **48**

Number of M2M SIM cards from different mobile operators in Poland (thousand), 2017-2024 >>> **49**

Shares of different mobile operators in the number of M2M SIM cards in Poland (%), 2017-2024 >>> **50**

Value and change of the M2M market in mobile phone networks in Poland, 2015-2024 >>> **50**

Value share of M2M services in the mobile telephony market in Poland (%), 2015-2024 >>> **51**

Mobile operators' ARPU generated from M2M services in Poland (PLN), 2015-2024 >>> **51**

Number of active SIM cards in the segment of mobile internet access in the business segment in Poland and its change, 2015-2024 >>> **52**

Value and change of the market for mobile internet access in the business segment in Poland, 2015-2024 >>> **53**

Share of the business segment in the value of the market for dedicated mobile internet access services in Poland (%), 2015-2024 >>> **53**

Average monthly revenue per user of mobile internet access in the business segment in Poland (PLN), 2015-2024 >>> **53**

Number of active SIM cards in the business segment in Poland (million), by type of service, 2024-2030 >>> **54**

Change in the volume of the market for mobile telephony solutions for the business segment in Poland (% YoY), by type of service, 2024-2030 >>> **55**

Number of net new additions in the mobile telephony in the business segment in Poland (thousand), by type of service, 2024-2030 >> **55**

Volume structure of the market for mobile telephony for the business segment in Poland (%), by type of service, 2024-2030 >> **56**

Share of the business segment in the mobile telephony market volume in Poland (%), by type of service, 2024-2030 >> **56**

Value of the market for mobile telephony solutions for the business segment in Poland (PLN bn), by type of service, 2024-2030 >> **57**

Change in the value of the market for mobile telephony solutions for the business segment in Poland (% YoY), by type of service, 2024-2030 >> **57**

Value structure of the market for mobile telephony for the business segment in Poland (%), by type of service, 2024-2030 >> **58**

Monthly ARPU in the business segment in Poland (PLN), by type of service, 2024-2030 >> **58**

Factors influencing the value of the mobile telephony market in the business segment in Poland, 2024-2030 >> **59**

Plans regarding installation of smart meters among the largest energy providers in Poland, 2025 >> **62**

Technology migration after 3G network switch-off for M2M devices in Orange, 2023 >> **63**

Fixed-line telephony services for the business segment >> 65

Value and change of the retail market for fixed-line telephony for the business segment in Poland, 2015-2024 >> **66**

SWOT analysis of the fixed-line telephony market in the business segment in Poland, 2025 >> **67**

Number (million) of fixed telephony lines and services in Poland and its change (% YoY), 2015-2024 >> **68**

Share of the business segment in the total number of fixed-line telephony services in Poland (%), 2015-2024 >> **68**

Number of WLR lines in Poland (thousand), by business and individual customer segments, 2015-2024 >> **69**

Annual change in the number of WLR lines in the business segment in Poland (% YoY), 2015-2024 >> **69**

Net increase in the number of fixed telephony lines and services in the business segment in Poland (thousand), 2015-2024 >> **69**

Shares of PSTN, VoIP and WLL lines in the total number of fixed-line telephony services in the business segment in Poland (%), 2015-2024 >>> **70**

Change in the number of PSTN lines and fixed-line telephony services in the business segment and in households in Poland (% YoY), 2015-2024 >>> **70**

Structure of the market for fixed-line telephony in the business segment in Poland, by number of key players' services (thousand, %), 2024 >>> **72**

Structure of the market for fixed-line telephony in the business segment in Poland, by number of key players' lines (thousand, %), 2024 >>> **72**

Growth rate of the market for fixed-line telephony for the business segment in Poland (% YoY), in terms of value and volume, 2015-2024 >>> **73**

Aggregate value of average monthly revenue per user of fixed-line telephony services in the entire market, in the business segment and in households in Poland (PLN net), 2015-2024 >>> **74**

Volume and change of the market for domestic calls in traditional fixed-line telephony networks in the B2B segment in Poland, 2015-2024 >>> **74**

Volume and change of the market for F2M calls in traditional fixed-line telephony networks in the B2B segment in Poland, 2015-2024 >>> **75**

Volume and change of the market for international calls in traditional fixed-line telephony networks in the B2B segment in Poland, 2015-2024 >>> **75**

Share of the business segment in traffic generated from different call types in traditional fixed-line telephony networks in Poland (%), 2015-2024 >>> **75**

Number of VoIP telephony lines in the business segment in Poland and its change, 2015-2024 >>> **76**

Share of the business segment in the total number of VoIP services in Poland (%), 2015-2024 >>> **77**

Value and change of the market for VoIP telephony for the business segment in Poland, 2015-2024 >>> **78**

Aggregate value of average monthly revenue from VoIP telephony services (PLN), 2015-2024 >>> **78**

Number (million) of fixed telephony lines and services in Poland and its change (% YoY), 2024-2030 >>> **79**

Volume structure of the Polish fixed-line telephony services market in the business segment (thousand), by the manner of service provision, 2024-2030 >>> **79**

Growth rate of the segment of traditional telephony lines and alternative services in the business segment in Poland (% YoY), 2024-2030 >>> **80**

Structure of the market for fixed-line telephony services in the business segment in Poland (%), broken down into traditional lines and alternative services, 2024-2030 >> **80**

Value and change of the market for fixed-line telephony in the business segment in Poland, 2024-2030 >> **81**

Value and change of the market for VoIP telephony in the business segment in Poland, 2024-2030 >> **81**

Change in the number of fixed-line telephony services overall, in the business segment and in households in Poland (% YoY), 2024-2030 >> **82**

Factors influencing the value of the fixed-line telephony market in the business segment in Poland, 2024-2030 >> **83**

DLISP services for the business segment >> 85

Value and change of the market for DLISP services for the business segment in Poland, 2015-2024 >> **86**

Value structure of the market for DLISP services for the business segment in Poland (%), 2015-2024 >> **86**

SWOT analysis of the DLISP market in the business segment in Poland, 2025 >> **87**

Value and change of the market for internet access in the business segment in Poland, 2015-2024 >> **87**

Aggregate average monthly revenue per user of internet access services in the business segment in Poland (PLN net), by segment, 2015-2024 >> **88**

Number of subscribers to internet access services in the business segment in Poland and its change, 2015-2024 >> **89**

Shares of different types of companies in the number of broadband internet subscribers in the business segment in Poland (%), 2022-2024 >> **89**

Penetration of different internet connection bandwidth ranges in companies in Poland (%), 2018-2024 >> **90**

Penetration of different internet connection bandwidth ranges in small companies in Poland (%), 2018-2024 >> **91**

Penetration of different internet connection bandwidth ranges in medium-sized companies in Poland (%), 2018-2024 >> **92**

Penetration of different internet connection bandwidth ranges in large companies in Poland (%), 2018-2024 >> **93**

Share of the B2B segment in the total number of subscribers to fixed-line broadband internet access in Poland (%), 2015-2024 >> **94**

Share of the B2B segment in the total number of subscribers to mobile broadband internet access in Poland (%), 2015-2024 >> **95**

Share of companies in Poland with internet access (%), 2015-2024 >> **95**

Penetration of internet access services in the business segment in Poland (%), by type of company, 2015-2024 >> **96**

Number of enterprises of different types using internet access services in the business segment in Poland (thousand), 2015-2024 >> **96**

Number of business users of internet access services in Poland (thousand), by technology, 2016-2024 >> **97**

Revenue generated from internet access services used by business users in Poland (PLN m), by technology, 2016-2024 >> **97**

Overview of fixed-line internet offers for small and medium-sized companies at selected telecommunications operators, 2025 >> **98**

Value and change of the data transmission market in Poland, 2014-2023 >> **99**

Use of SD-WAN network in companies in Poland (%), 2024-2025 >> **100**

Use of IP VPN MPLS/VPLS data transmission services in companies in Poland (%), 2024 >> **100**

Value and change of the retail line rental market in Poland, 2015-2024 >> **102**

Value of the DLISP market for the business segment in Poland (PLN bn), by segment, 2024-2030 >> **102**

Value structure of the market for DLISP services for the business segment in Poland (%), 2024-2030 >> **103**

Factors influencing the value of the DLISP market in the business segment in Poland, 2024-2030 >> **103**

Number of subscribers to internet access services in the business segment in Poland and its change, 2024-2030 >> **105**

Share of FTTx technologies in the total number of fixed-line broadband lines used in Poland (%), 2024-2030 >> **105**

Value and change of the market for internet access in the business segment in Poland, 2024-2030 >> **106**

Aggregate average monthly revenue per user of internet access services in the business segment in Poland (PLN net), 2024-2030 >> **106**

Number of business users of internet access services (thousand), by technology,
2024-2030 >> **107**

Revenue generated from internet access services used by business users (PLN m), by technology,
2024-2030 >> **107**

Value and change of the data transmission market in Poland, 2024-2030 >> **108**

Value and change of the retail line rental market in Poland, 2024-2030 >> **109**

Telecommunications services market for carriers (wholesale) >> 110

Value and change of the market for wholesale telecommunications services in Poland,
2015-2024 >> **111**

Structure of the wholesale telecommunications services market in Poland (%), by key segments,
2015-2024 >> **111**

SWOT analysis of the wholesale telecommunications services market in Poland, 2025 >> **112**

Value and change of the wholesale mobile telephony market in Poland, 2015-2024 >> **112**

Share of wholesale revenues in the total mobile telephony market value in Poland (%),
2015-2024 >> **113**

Mobile termination rates in MNOs' networks in Poland (PLN per minute net),
2015-2025 >> **113**

Structure of the wholesale mobile telephony market in Poland (PLN m, % YoY), by operators' source
of revenue, 2015-2024 >> **113**

Volume and change of the market for call termination in mobile telephony in Poland,
2015-2024 >> **114**

Shares of the largest players in the wholesale mobile telephony market in Poland,
by revenue (PLN bn, %), 2024 >> **115**

Shares of the largest players in the wholesale mobile telephony market in Poland,
by revenue (PLN bn, %), 2023 >> **115**

Number of end users of the BSA and LLU service and its change, 2015-2024 >> **116**

Share of end users of the service provided via BSA and LLU in the total number of subscribers to
internet access services (%), 2015-2024 >> **116**

Coverage of operators offering broadband infrastructure access services exclusively in the
wholesale model, 2025 >> **117**

Number of retail subscribers in the networks of individual wholesale operators
in Poland (thousand, %), 2023-2024 >> **119**

- Allowable subscription price level for BSA Ethernet services with ONT effective from 2 April 2025 >>> **120**
- Allowable subscription price level for BSA Ethernet services without ONT effective from 2 April 2025 >>> **120**
- Subscription fees for internet access service in the BSA model at selected operators, 2024-2025 >>> **120**
- Value and change of the wholesale broadband access market in Poland, 2018-2024 >>> **121**
- Shares of the largest players in the wholesale broadband access market in Poland (PLN m, %), 2024 >>> **122**
- Shares of the largest players in the wholesale broadband access market in Poland (PLN m, %), 2023 >>> **122**
- Value and change of the wholesale fixed-line telephony market in Poland, 2015-2024 >>> **123**
- Value structure of the wholesale market in fixed-line telephony in Poland (PLN m), by category, 2015-2024 >>> **124**
- Growth rate of different categories of revenue generated by operators in the wholesale fixed-line telephony market in Poland (% YoY), 2015-2024 >>> **124**
- Fixed termination rates in fixed-line networks in Poland (PLN per minute net), 2021-2025 >>> **125**
- Volume and change of the market for F2F calls in traditional fixed-line telephony networks in Poland, 2015-2024 >>> **125**
- Volume and change of the market for call termination in fixed-line telephony in Poland, 2015-2024 >>> **126**
- Volume and change of the market for call transit in operators' own networks in fixed-line telephony in Poland, 2015-2024 >>> **126**
- Share of the segment of transit and wholesale services in the value of the wholesale market for fixed-line telephony in Poland (%), 2015-2024 >>> **127**
- Number of minutes transited to operators at NOM interconnection points (million), 2015-2024 >>> **127**
- Volume and change of the market for call origination in fixed-line telephony in Poland, 2015-2024 >>> **128**
- Value structure of the wholesale market for fixed-line telephony in Poland (%), by regulated and commercial segments, 2015-2024 >>> **128**
- Value and change of the wholesale line rental market in Poland, 2015-2024 >>> **128**
- Value of the wholesale telecommunications services market in Poland (PLN bn), by segment, 2024-2030 >>> **129**

Change in the value of the wholesale telecommunications services market in Poland (% YoY), by segment, 2024-2030 >> **129**

Structure of the wholesale telecommunications services market in Poland (%), by shares of the main segments, 2024-2030 >> **130**

Factors influencing the value of the wholesale telecommunications services market in Poland, 2024-2030 >> **130**

Number of end users of the BSA and LLU service and its change, 2024-2030 >> **132**

Total call time in active roaming in Poland and its change, 2015-2024 >> **133**

Total incoming call time in active roaming in Poland and its change, 2015-2024 >> **134**

Total number of SMS messages sent in active roaming in Poland and its change, 2015-2024 >> **134**

Total number of MMS messages sent in active roaming in Poland and its change, 2015-2024 >> **134**

Total data transmission in active roaming in Poland and its change, 2015-2024 >> **135**

Total call time in passive roaming in Poland and its change, 2015-2024 >> **135**

Total number of SMS messages sent in passive roaming in Poland and its change, 2015-2024 >> **136**

Total data transmission in passive roaming in Poland and its change, 2015-2024 >> **136**

Total revenue generated from international roaming services provided in Poland (PLN m), 2015-2024 >> **136**

Wholesale roaming charges for telecommunications services in EU Member States, 2022-2027 >> **137**

Shares of active subscribers roaming in the EU/EEA (%), Q4 2023-Q3 2024 >> **137**

Share of active subscribers who exceeded the Fair Use Policy data limit (%), Q4 2023-Q3 2024 >> **138**

Average wholesale prices for telecoms roaming services in EEA countries, Q4 2023-Q3 2024 >> **138**

Methodology >> **139**

Impact of macroeconomic and demographic factors on the telecommunications services market for the business and carrier segment in Poland, 2021-2030 >> **141**

PMR MARKET EXPERTS

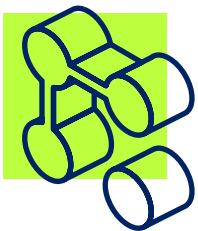
by Hume's

WE UNDERSTAND THAT DATA IS NOT JUST ABOUT NUMBERS.

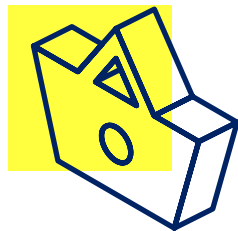
IT IS THE FOUNDATION OF THE DECISIONS SHAPING THE FUTURE OF YOUR BUSINESS.

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

Our core specialisations:



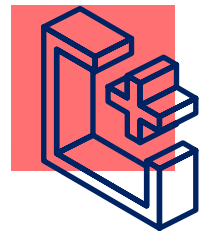
Digital & ICT



Retail



Pharma & Healthcare



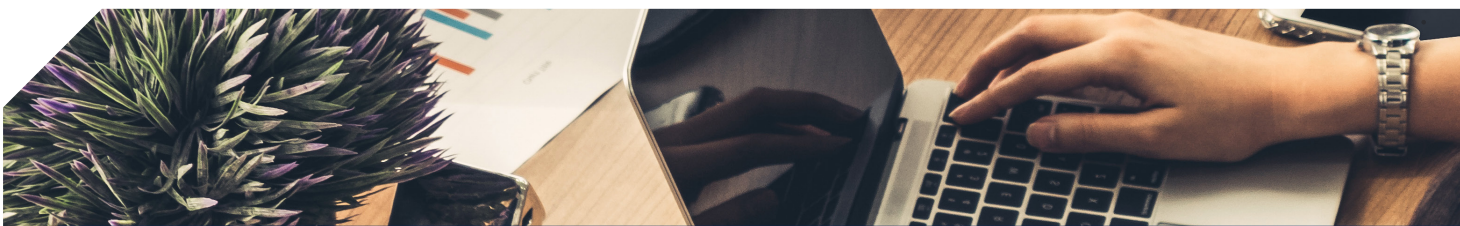
Construction

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



Krolewska 57
30-081 Krakow
Poland