

PMR MARKET
EXPERTS

TELECOMMUNICATIONS MARKET IN POLAND 2025

MARKET ANALYSIS AND DEVELOPMENT
FORECASTS FOR 2025-2030





Main objective

To provide businesses and investors with comprehensive knowledge about the telecommunications market in Poland including its size, structure, and development directions in order to support strategic decision-making based on market development forecasts until 2030.

Additional objectives

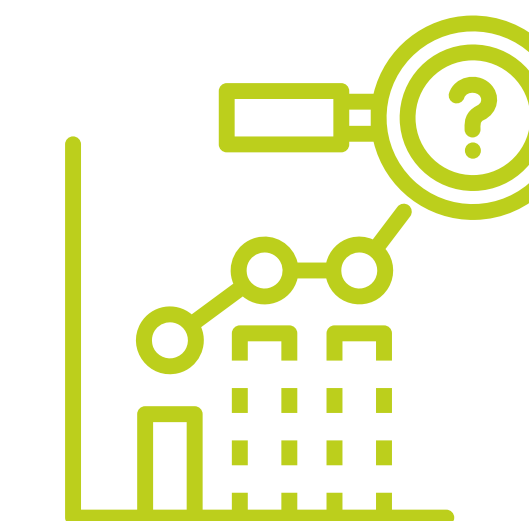
The specific objectives of the research and analysis conducted for the report were to identify the following:

- value of the telecommunications market,
- structure of individual telecommunications market segments: mobile telephony, fixed-line telephony, DLISP (Data Line Internet Service Provider, commonly referring to fixed broadband), and the capital expenditures (CAPEX) of telecom operators on services related to the installation and construction of telecommunications networks,
- key factors and trends (macroeconomic, regulatory, demand, supply, and technological) influencing the telecommunications market in Poland and its dynamics in 2025-2030,
- mapping of competition within individual telecommunications market segments in Poland.



Time span

2015-2024



Forecast horizon

2025-2030



Geographic coverage

Poland

What is included in the report?

- **market value and dynamics** - detailed numerical data on market size, analysis of historical trends, and the growth rate of the entire telecommunications sector in Poland
- **market structure by segment** - analysis of individual segments of the Polish telecommunications market, including mobile telephony, fixed-line telephony, and DLISP (Data Line Internet Service Provider/ Fixed Broadband)
- **number of subscribers (RGU)** - a breakdown of the number of active services (Revenue Generating Units) in individual segments of the telecommunications market in Poland
- **operator capital expenditures (CAPEX)** - data concerning investment expenditures, including investments in mobile and fixed-line telecommunications infrastructure
- **operator and competition profiling** - detailed characteristics of the largest market participants, including operational and financial data, as well as market shares in the analyzed segments
- **market indicators** - analysis of key indicators such as service penetration level, Average Revenue Per User (ARPU), and customer churn rate
- **key events and trends** - an overview of consolidation processes, regulatory changes, changes in operator offers, and models for the distribution of telecommunications services
- **factors influencing the market** - analysis of macroeconomic, regulatory, supply, and demand factors affecting the telecommunications market in Poland
- **market development forecasts 2025-2030** - forecasts for the entire telecommunications sector in Poland and its individual segments, taking into account factors influencing the market



Scope

Mobile telephony

- value structure
 - ↳ retail market
 - ↳ wholesale market
 - ↳ telecommunications hardware sales
- volume structure
 - ↳ pre-paid
 - ↳ post-paid
 - ↳ M2M
 - ↳ mobile internet

Fixed-line telephony

- value structure
 - ↳ call charges
 - ↳ subscription fees
 - ↳ wholesale services
- volume structure
 - ↳ number of fixed telephone lines
 - ↳ WLR
 - ↳ VoIP
 - ↳ WLL

DLISP

- value structure
 - ↳ ISP
 - ↳ data transmission
 - ↳ line rental
- volume structure
 - ↳ number of subscribers to fixed-line internet services



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:

- key macroeconomic indicators,
- value and dynamics of the telecommunications market in Poland, segmented by individual sectors,
- number of subscribers (RGU) in the telecommunications market in Poland, segmented by individual sectors,
- capital expenditures (CAPEX) of telecommunications operators on services related to the installation and construction of telecommunications networks.

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 „Telecommunications market in Poland 2025“

1 **View of the market value and dynamics extending to 2030**
Data on the value of the telecommunications market in Poland for the years 2015-2024 and 5-year forecasts based on PMR models.

2 **Fixed-Line internet and FTTH in figures and forecasts**
NGA and FTTH coverage, operator market shares, comparisons with the EU, and subscriber number forecasts for the coming years.

3 **Horizontal trends and consolidation directions**
An in-depth analysis of market trends: the sale of passive infrastructure, consolidation and ownership changes, rising service prices, and models for wholesale infrastructure sharing.

4 **CAPEX of the largest operators**
Investments in telecommunications infrastructure expansion by major market players, segmented by sector, with comparative analysis.

5 **Regulations and 5G auctions as a change driver**
The impact of the Polish Telecommunications Law, auction commitments, and regulator decisions on future competition and operator strategies.

6 **SIM card penetration and base in Polish mobile market**
Data on users, mobile penetration, and the projected M2M card base, broken down by pre-paid and post-paid segments.

7 **Market structure with full segment breakdown**
Market value, number of services provided, and the share of mobile and fixed-line telephony, and DLISP in the telecommunications market.

8 **Operator benchmarking (ARPU, Churn, RGU)**
A detailed analysis of the financial and operational indicators of the largest operators, highlighting differences in their strategies, market position, and potential for further development.

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 do we answer in the report?

- What is the value of the telecommunications market in Poland?
- What is the value of the individual segments and what are the forecasts for their development over the next 5 years?
- How have the reductions in MTR and FTR rates affected the revenues of telecommunications operators?
- How do telecommunications service price increases affect operator revenues?
- How many services are provided in the Polish telecommunications market in each analyzed segment?
- What is the amount of capital expenditure (CAPEX) of operators in the Polish telecommunications market, and which operator allocates the most funds for it?
- How does the open broadband infrastructure model (BSA) affect the ISP market in Poland?
- How do EU funds (KPO, FERC) impact operator investments in the Polish telecommunications market?
- What are the most important events and trends in the telecommunications market in Poland?

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



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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.

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20+

years of experience

600+

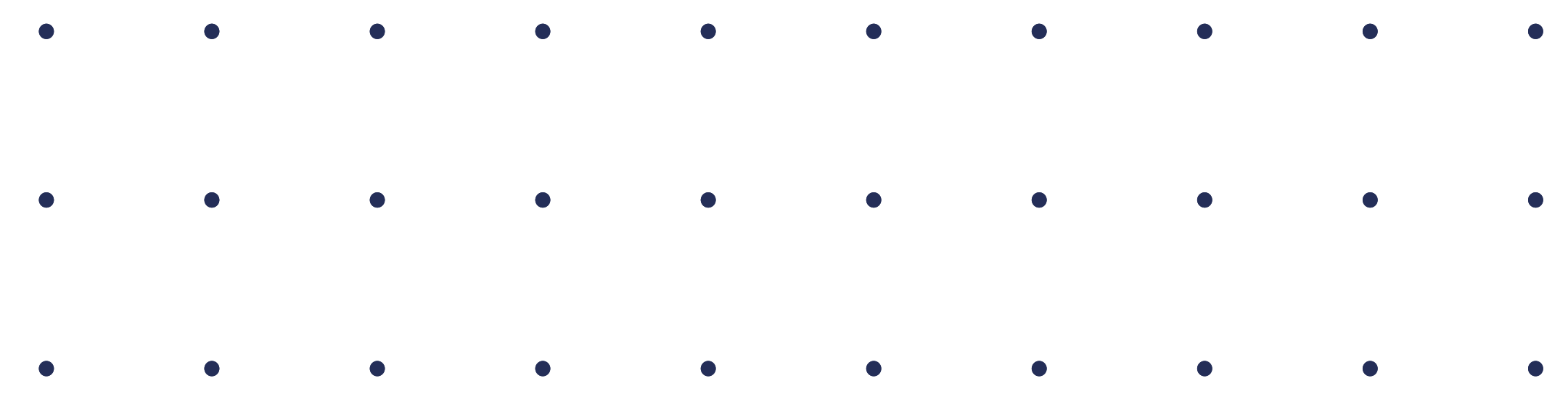
global clients

5,000+

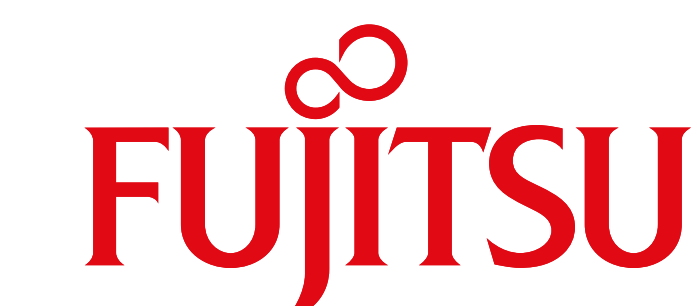
brands studied

50+

analysed countries



Over 600 companies have already trusted us, including:





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

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