Poland Telecommunications Report Q1 2016

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Abstracts

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BMI View: The Polish telecommunications market is one of the fastest-changing in the Central and Emerging Europe region.

This is linked to its large and competitive retail and wholesale services markets as well as extensive deployments of high-capacity next-generation active and passive infrastructure.

Mobile and wireline operators report rising usage of premium non-voice services as well as growing demand for complex, multi-screen converged services.

However, operators face a lack of 4G spectrum.

The auction of 4G 800MHz and 2600MHz spectrum took place recently but it was an event shrouded in a lot of controversy and the costs turned out to be much higher than operators had anticipated.

Latest Updates & Industry Developments

> We have made positive revisions to our Polish forecast in our Q116 report update. The market performed well in 9M15 with operators posting a total subscriber base of 55.6mn, a q-o-q growth of 0.8% and an annual increase from 54.0mn in Q314.
>
> We believe that 4G and LTE technology will drive the market forward in the future as operators look to boost their data services and look to lure competitors' customers given the ease of number portability. High competition will play a

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significant role in the development of the market. We are now forecasting the 3G/4G segment of the market to exceed over one-third of the total market by the end of our forecast period, 2019.

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