

# Poland Telecommunications Report Q2 2016

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## Abstracts

**BMI View:** The Polish telecoms market is one of the fastest-changing in the Central and Emerging Europe region. Its large and competitive retail and wholesale services markets as well as extensive deployments of high-capacity next-generation infrastructure are driving usage of premium non-voice services as well as complex, multi-screen converged services. The 2015/16 auction of 4G 800MHz and 2600MHz spectrum ended unsatisfactorily as the costs turned out to be much higher than operators had anticipated.

### Latest Updates & Industry Developments

The mobile market contracted sharply in Q415 as T-Mobile shed more than 3mn inactive subscriptions. By contrast, Orange and P4 (Play) performed well, signalling good underlying growth prospects despite saturation. We forecast 53.423mn mobile subscriptions by 2020.

Mobile expansion is being driven by 3G/4G migration. We forecast 48.364mn subscriptions by 2020, or 90.5% of the overall market, but the rate of growth will depend on the final outcome of the spectrum auction of 2015/16 as outlays on spectrum will weigh on operators' capacity to invest in networks.

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