

# Poland Telecommunications Report Q3 2016

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## Abstracts

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**BMI View:** The Polish telecoms market is rapidly evolving and is one of the fastest-changing markets in the Central and Eastern European region. The deployment of next-generation infrastructure is driving usage of premium non-voice services as well as complex, multi-screen converged services. We believe that the market will post only modest gains in terms of new subscriber growth. However, our outlook on the uptake of 3G/4G services is optimistic, despite the 2015/16 auction of 4G 800MHz and 2600MHz spectrum ending thus-far unsatisfactorily as the costs turned out to be much higher than operators had anticipated.

### Latest Updates And 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.

T-Mobile claims to have installed more than 200 new LTE base stations across the country and now claims to offer 4G LTE services to over 90% of the population. We believe that competitors will continue to invest heavily into advanced data services as a means of propelling the market forward and generating revenue streams.



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