



ITU Polish ICT Market Overview

- Fixed broadband subscriptions in Poland reached 11.6 million by end 2012, for a penetration of 29 subscriptions per 100 inhabitants – much higher than the global average penetration of 9%. Poland’s fixed broadband penetration rate is now significantly above that of other Central and Eastern European countries (16.4% average).
- Poland’s mobile broadband market is also growing fast, with around 19 million active mobile broadband subscriptions by end 2012, for a penetration of 49% – well above the world average of 22%, but below the European region average of 67.5%. Poland’s mobile broadband penetration is however considerably higher than the average for Central and Eastern Europe (37%).
- Household Internet penetration reached 83% in Poland at end 2012 – above the developed country average (74%) and well above the global average of 37%.
- Mobile cellular subscriptions reached almost 54 million at end 2012, with a penetration of 140 subscriptions per 100 inhabitants (for a penetration rate of 140%) - well above both the average penetration in developed countries and the average global penetration, which were 124% and 91% respectively.
- In general, ICT services in Poland are very affordable, with an ICT price basket (IPB) value of 1.7 in 2011, just slightly above the developed country average of 1.6 and much lower than the world average of 10.3. Prices for all the three services included in the IPB are classed ‘affordable’, with mobile cellular being the cheapest of all, with a value of 1.2% of GNI per capita, followed by fixed-broadband prices at 1.9% of GNI per capita and fixed telephone prices at 2%.
- The cost of ICT services in Poland is going down. Prices of all ICT services included in the IPB have dropped between 2008 and 2011. Poland is the mobile cellular market with the highest decrease in prices in Europe, with costs falling by 18%.
- The Polish ICT market is currently valued at around EUR 9.5 billion.



ITU Regulatory Snapshot: Poland

- The National Regulatory Authority in the Republic of Poland was established in 2000 as a first step in aligning Polish telecommunication law with the European telecommunication framework, fostering competition and liberalization of the telecommunication sector.
- Poland joined the European Union in 2004 and embarked on reforming further its telecommunications regulatory environment.
- In 2006, the Office of Electronic Communications (UKE) was established as part of the national reform of state bodies.
- *A Strategy for the Development of the Information Society in Poland to 2013*, was issued in 2008 by the Ministry of Administration and Digitization of Poland.
- The Act on Supporting the Development of Telecommunication Services and Networks was adopted in 2010, providing for the development of broadband and new technologies. The Act encouraged investment in telecommunication infrastructure and aimed at achieving a higher level of competition in ICT markets.
- In February 2013, the Polish Council of Ministers adopted the *Long-term National Development Strategy* which includes, as part of its objectives, the creation of 'Digital Poland' and plans for the construction of a globally-connected broadband network. The strategy aims to develop digital competences of young people, teachers and the elderly.
- Recent regulations have been established to encourage Fibre-to-the-Home deployment to address current capacity limitations of wired and wireless technologies, as foreseen within the framework of the EU's Digital Agenda for Europe.
- In 2007, Poland received EUR 300 million (USD 432 million) in EU grants in order to close the digital divide in Eastern Poland between 2007 and 2013.



Joint ITU-UKE Activities

- The project on New Legislative of Broadband Infrastructure (NLP-BBI) was carried out jointly by ITU's Telecommunication Development Bureau (BDT) and the Ministry of Infrastructure, Republic of Poland. This project aims at delivering expertise on best practice and broadband regulation over the course of six months study period, focusing on the legislative development of four different regions (AFR/ASP/AMS/EUR).