

i2010 Annual Report 2007



Poland performs at the bottom end of the scale for most information society benchmarks and improvement seems slow. Enterprise use is slightly better than citizen use. Like in a few other countries, internet telephony and online media use is relatively higher than other indicators would normally imply.

Poland Today

Broadband take-up among citizens is among the lowest in Europe. Only about one third of citizens regularly use the internet, and more than half of all online households now use broadband. Digital Subscriber Line (DSL) connections make up about two thirds of the market. Use of basic and utility services is among the lowest in Europe, but downloading media is closer to average, and internet telephony actually above average. Digital television adoption is an area where Poland moves into the top ten figures. Poland's market for digital content currently suffers not only from low broadband penetration but also from a lack of necessary legislation in fields such as copyright, broadcasting and other media rights.

eGovernment supply is close to the lowest in Europe. Citizen use of eGovernment services is very low. However, enterprise use is close to average, even well above when it comes to returning filled-in forms online, indicating that the will to use services is somewhat higher than the available connectivity and service levels provide for. ICT availability and use in schools are very low.

Skill levels among employees are below the EU average, but not dramatically so. Investments in ICT-related R&D as well as the share of R&D going to ICT-related activities are the lowest among the measured countries. Polish enterprises now have the lowest take-up rate of broadband in Europe. Enterprise use is higher than citizen use, although generally well below average, with the exception of eSignatures. Growth in enterprise use is currently slow.

Polish ICT Policy

Measures in several key areas are taking place:

Legislation: Legislative work on the implementation of the EU directive on electronic commerce and on the amendment of the bill on electronic signatures. The compulsory acceptance of electronic signatures by public authorities has been postponed by two years.

eGovernment: Several long-term programmes have started: the 'teleinformatisation' of the Network for the Public Administration (STAP); an overhaul of Public registers (PESEL 2); an electronic platform of public administration services (ePUAP); a central portal for the ministry of justice (ePortal); an electronic system for tax declarations; an integrated system for medical information in health services; and, the modernisation of the electronic system for monitoring public aid (SHRIMP).

EU regional policy funds are used to finance projects focusing on ICT use in the administration and by businesses as well as on the development of broadband infrastructure.

Broadband	2003	2004	2005	2006	EU25	Rank
Total DSL coverage (as % of total population)		55.2	62.3		87.4	24
DSL coverage in rural areas (as % of total population)			51.9		65.9	18
Broadband penetration (as % of population)		0.6	1.7	4.5	15.7	23
DSL penetration (as % of population)		0.3	1.2	3.4	12.8	23
Predominant download speed			0.5-1Mbps			
Households having broadband (as % of those having access to the internet at home)		31.8	51.2	60.2	62.1	18
% of enterprises with broadband access		27.8	42.7	46.4	74.5	27
Number of 3G subscribers per 100 inhabitants			0.0		5.0	19
Digital Television in households			19.2		30.6	10
Music: number of single downloads per 100 inhabitants						
Internet Usage						
% population who are regular internet users		22.4	29.3	34.4	46.7	23
Take up of internet services (as % of population)						
Sending emails		19.3	24.1	27.2	43.8	25
Looking for information about goods and services		14.7	18.0	24.7	42.9	25
Internet telephoning or videoconferencing		3.5	4.5	8.0	7.1	13
Playing/downloading games and music		14.0	12.0	16.2	18.2	20
Listening to the web radio/watching web tv		5.6	5.7	9.8	11.8	20
Reading online newspapers/magazines		13.6	12.5	16.1	19.0	20
Internet banking		4.0	5.9	9.1	22.0	23
Places of access						
% at home		15.0	20.4	26.4	42.6	23
% at work		8.8	11.1	13.1	23.0	26
% at educational place		7.8	10.0	9.9	8.0	10
% at PIAP		11.4	6.0	5.5	6.8	14
eGovernment Indicators						
% basic public services for citizens fully available online		0.0		8.3	36.8	23
% basic public services for enterprises fully available online		25.0		37.5	67.8	24
% of population using e-Government services		12.6	12.5	5.8	23.8	25
of which for returning filled in forms		3.5	2.6	2.0	8.1	25
% of enterprises using e-Government services		73.8	64.1	60.9	63.7	18
of which for returning filled in forms		67.5	60.2	56.3	44.8	7
ICT in schools						
Number of computers connected per 100 pupils				5.6	9.9	24
% of schools with broadband access				28.0	67.0	26
% of teachers having used the computer in class during the last 12 months				61.4	74.3	22
e-Commerce						
E-commerce as % of total turnover of enterprises		2.8	4.4	5.9	11.7	17
% enterprises receiving internet orders		3.8	4.2	7.1	13.9	20
% enterprises purchasing on the internet		9.7	17.2	22.7	37.9	16
e-business. % enterprises:						
with integrated internal business processes		15.5	18.0	19.5	37.3	22
with integrated external business processes		10.4	5.6	4.7	13.5	24
Security: % enterprises using Secure servers		8.7	12.0	14.4	41.0	24
% using digital signatures for authentication		19.4	13.6	13.3	14.3	9
Employment and Skills						
% employees using computers connected to the Internet		21.5	27.1	27.8	36.1	21
% of persons employed with ICT user skills.	14.6	15.1	14.8	15.2	18.5	23
% of persons employed with ICT specialist skills	2.7	2.8	2.7	2.7	3.1	17
Indicators on growth of ICT sector and R&D						
ICT sector share of total GDP	5.5				5.5	11
ICT sector share of total employment	2.6				4.0	16
ICT sector growth (constant prices).	5.0				3.6	4
R&D expenditure in ICT by the business sector, as % of GDP	0.0				0.3	16
=== as % of total R&D expenditure	12.1				25.7	16