Poland: Broadband markets

Poland has a very low take-up and availability of fixed broadband and should foster further the investment in infrastructure in order to increase the availability of fixed broadband. At the same time, Poland has also a relatively low availability of Next generation Access. In mobile broadband, take-up is higher than average and 4th generation (LTE) mobile broadband availability is relatively high.

In 2012, standard fixed broadband covered only 69.1% of homes in Poland (95.5% in the EU), which is the lowest in the EU. At the same time, Next Generation Access capable of providing at least 30 Mbps download was available to 44.5% of homes (53.8% in the EU).

In January 2013, the incumbent operator had a low market compared to the European average (28% compared to 42.3% in the EU). DSL was the most common technology to provide broadband access. At the same time, 28% of all subscriptions were cable broadband connections (17.4% in the EU).

The take-up (subscriptions as a percentage of population) of fixed broadband was 18.8% in January 2013, below the European average of 28.8% and only 0.1 p.p. higher than in 2012. The share of high speed connections (at least 30 Mbps) was lower than average (11.4% compared to 14.8% in the EU) and ultra-fast connections (at least 100 Mbps) accounted for only 1.3% of all subscriptions (3.4% in the EU).

On the mobile side, third generation mobile broadband (HSPA) was available to 96.5% of population in 2012 (96.3% in the EU). Meanwhile, 4th generation (LTE) availability stood already at 50% of population (26.2% in the EU). The take-up rate (subscriptions as a percentage of population) of mobile broadband was 74.1% in January 2013, above the average of 54.5% in the EU.