POLISH TELECOMMUNICATION MARKET- OVERVIEW AND CHALLENGES

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POLISH REGULATOR – HISTORY

- **2000** – Office of Telecommunications Regulation (URT)
- **2002** – Office of Telecommunications and Post Regulation (URTiP)
- **2004** – Telecommunications Act
- **2006** – Office of Electronic Communications (UKE)
- **2010** – Mega – Law (Megaustawa)
- **2012** – Amendment to the Telecommunications Act adjusting the Polish law to EU regulations

PRESIDENT OF UKE AS A REGULATOR

- performance of tasks provided for in the Telecommunications Act and regulations issued within the scope of telecommunications services markets' regulation and control;
- analysis and assessment of the functioning of telecommunications and postal services markets;
- management of frequency and numbering resources;
- exercising controls of operators of public telecommunications networks and providers of publicly available telecommunications services;
- ensuring consumer protection in relations with undertakings;
- resolving disputes between telecommunications undertakings;
- facilitating development of infrastructure – so called „mega-law";
- cooperation with the European Commission, BEREC and regulatory authorities of other EU/ITU Member States.

MARKET VALUE (2013)

- Total market value – **EUR 9,6 billion**

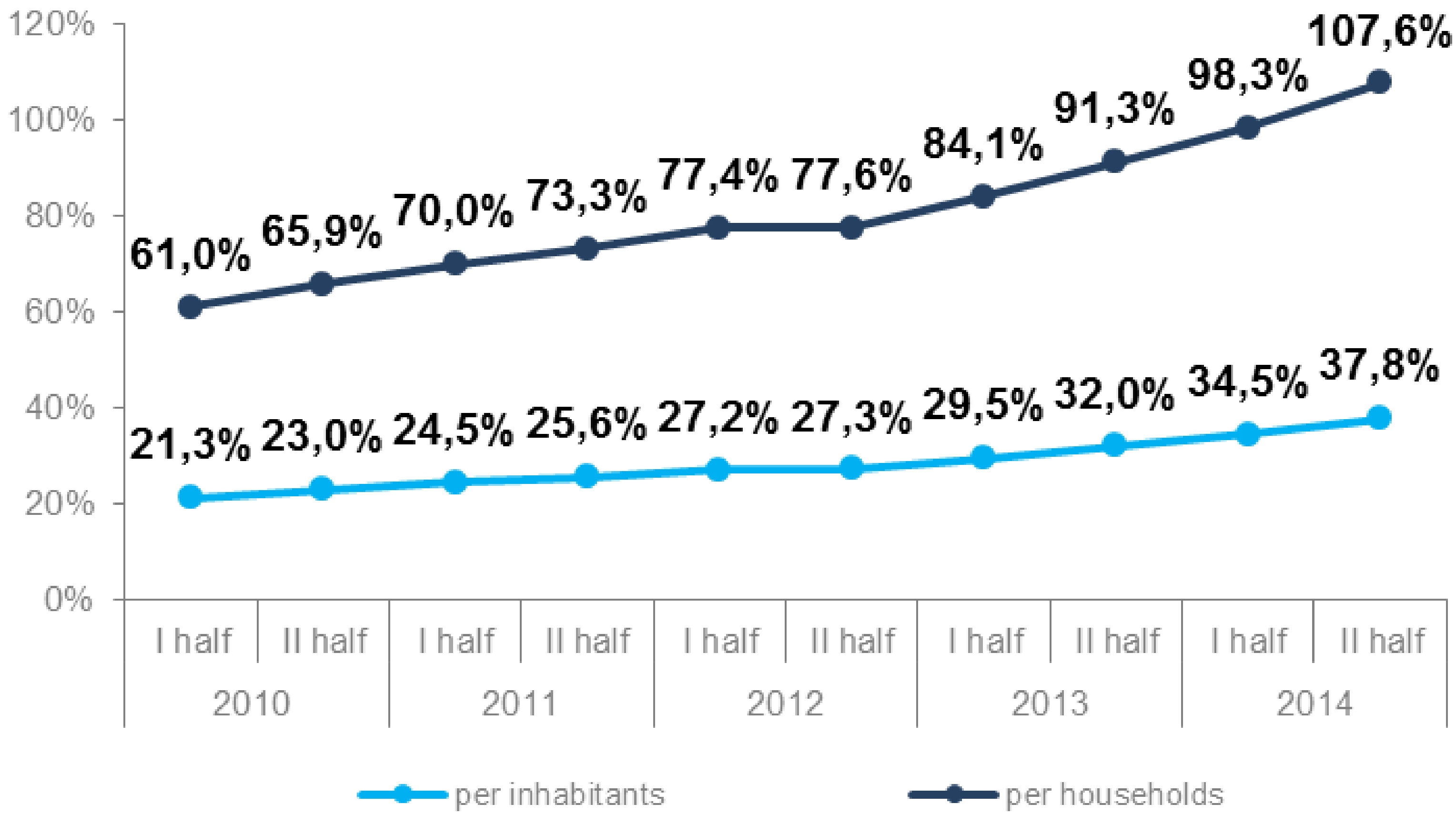
Internet access

Mobile telephony

Fixed telephony

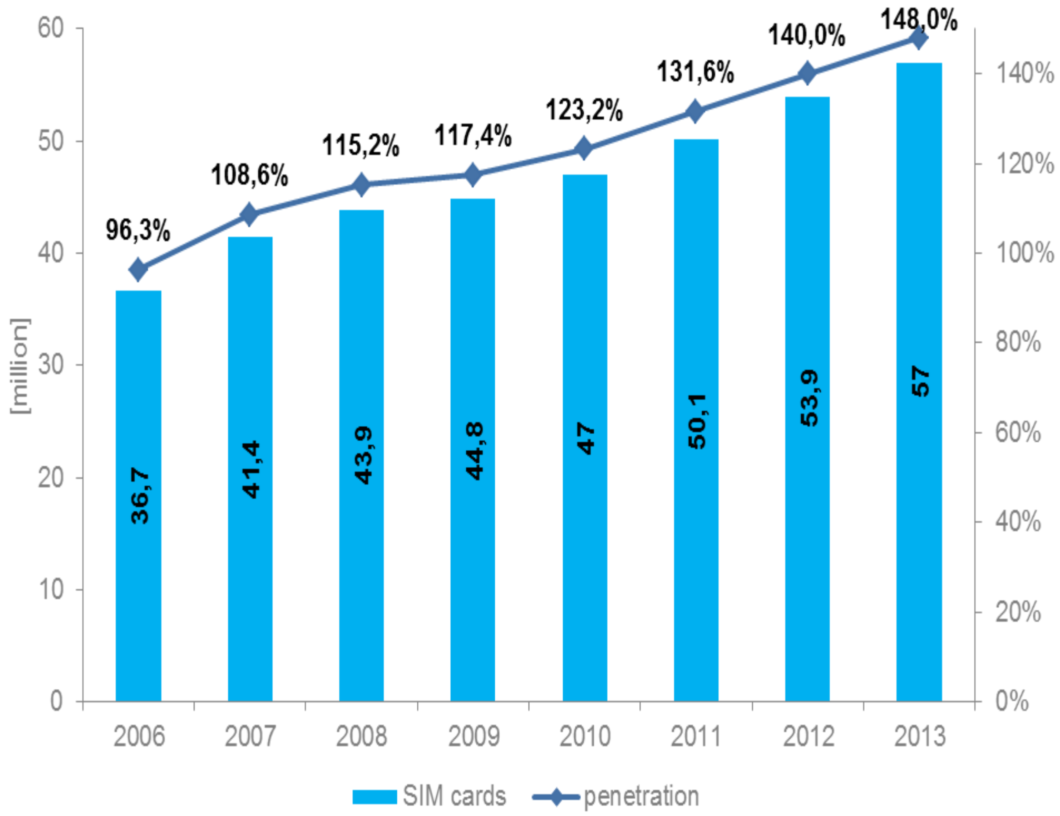
Internet access		Mobile telephony		Fixed telephony	
1 BN EUR revenue	11,6 MM subscribers	4,4 BN EUR revenue	53,9 MM subscribers	1 BN EUR revenue	7,4 MM subscribers

BROADBAND ACCESS

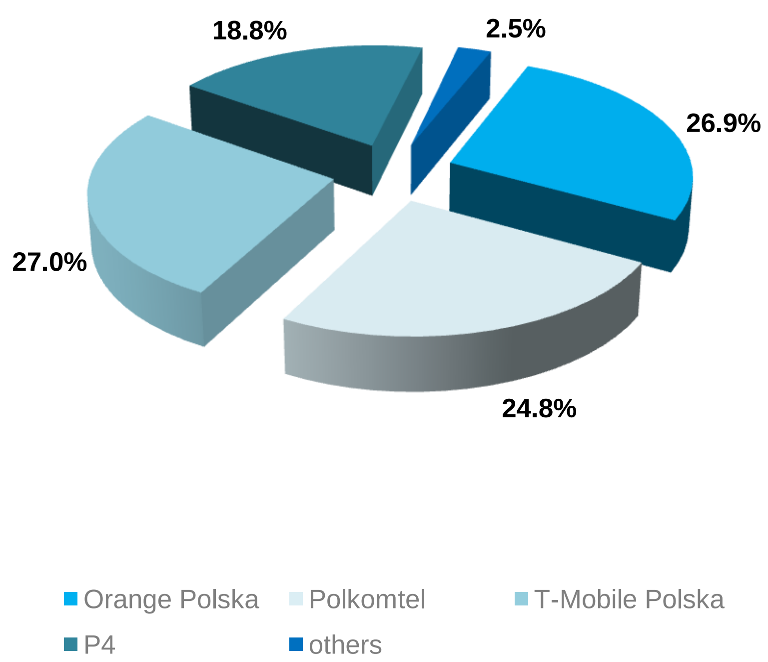


MOBILE TELEPHONY

Number of users and penetration



Shares of the operators in terms of the number of users

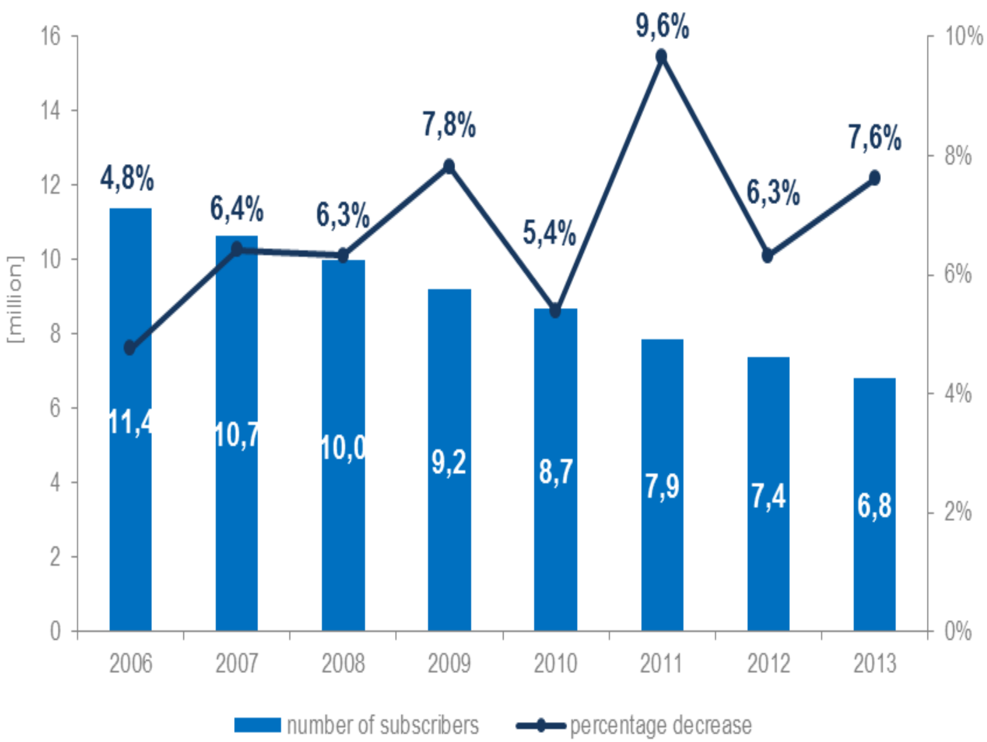


Republic of Poland

Office of Electronic Communications

FIXED-LINE TELEPHONY

Number of users and the dynamics of change



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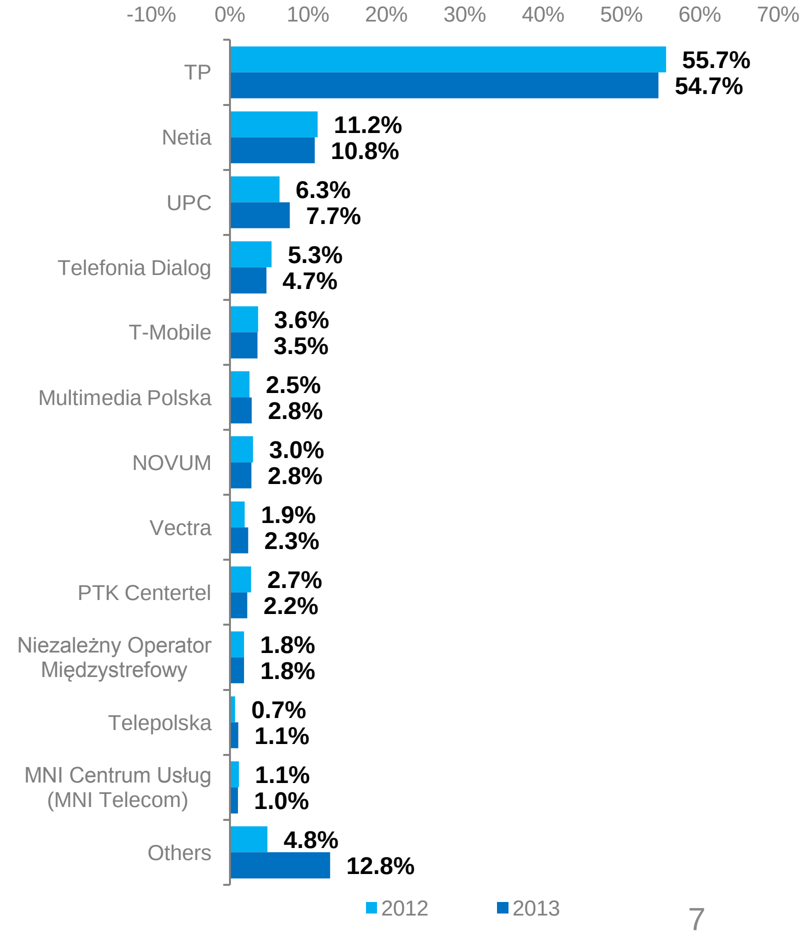

INVESTMENT POTENTIAL

- The data submitted in 2013 to SIIS (Information System on Broadband Infrastructure) within the framework of annual data collection, reveal that 49 entities built the infrastructure (fibre-optic networks) with a total length of over 7100 km. The total value of these investments amounted to over PLN 350 million and more than 14,9% of it was provided from the state aid.
- In 2014, it was planned to construct nearly 7.5 thousand km of the infrastructure. The total cost of investment was expected to exceed PLN 760 million, with more than 58% funds obtained from public funds.

KEY PRIORITIES OF THE UKE STRATEGY FOR 2012-2015

- Introduction of tools to encourage telecommunications entrepreneurs to invest in infrastructure
- Stimulating growth of competition in the market
- Customer empowerment; providing the required Quality of Service
- Enhancing access to telecommunications services, i.a. through effective spectrum management
- Ensuring effective opening of postal market to competition
- Increasing the efficiency of UKE activities

MAJOR ACTIVITIES OF THE PRESIDENT OF UKE IMPLEMENTED DURING THE STRATEGY PERIOD

- 13 February 2013, the President of UKE resolved tender for frequency licences in the 1800 MHz band for the provision of high-speed mobile Internet services;
- 23 July 2013, the last nationwide analogue TV transmitter was switched off;
- 7 October 2014, the President of UKE signed a decision and a resolution deregulating the broadband access market in 76 communes;
- 10 October 2014, the President of UKE announced auction for 19 general exclusive frequency licences in the 800 MHz band and in the 2.6 GHz band, on the territory of the entire country, allocated for the provision of telecommunications services in the mobile or fixed radiocommunication service;
- 14 October 2014, the quality of service indicators referring to publicly available telecommunications services were published.

STRATEGY IMPLEMENTATION RESULTS

- increased accessibility and innovation of services;
- development of new technologies;
- leveling of access to broadband Internet in different country regions;
- higher service complexity and quality;
- adjustment of services to consumers' financial capabilities;
- increased customers' awareness and their better protection;
- reduced investment risk for operators.

OPERATIONAL PROGRAMME DIGITAL POLAND

PRIORITY AXIS I UNIVERSAL ACCES TO BROADBAND INTERNET

- **OBJECTIVES**

1. Limitation of the possibility of territorial differences in access to broadband Internet with high bandwidth

PRORITY AXIS II E-ADMINISTRATION

- **OBJECTIVES**

1. Improving the accessibility and quality of public e-services
2. Improving the digital efficiency of offices
3. Increasing the availability and the use of information in public sector

PRORITY AXIS III DIGITAL ACTIVISATION OF SOCIETY

- **OBJECTIVES**

1. E-inclusion and e-mobilization to increase the activity and quality of use of the Internet
2. Boosting the potential of talented developers to increase the use of digital solutions in the economy and administration

PRORITY AXIS IV TECHNICAL ASSISTANCE

- **OBJECTIVES**

1. Support the process of programme management and implementation
2. Information, Publicity and Consultancy

DIGITAL POLAND
GOALS

- access to broadband Internet with speeds of at least 30 Mb/s all over the country;
- citizen-oriented administration services provided by electronic means;
- interoperability of ICT systems of public administration;
- fully electronic public records;
- significant increase of digital literacy which will allow competing at the labour market and participation in creating a modern state (open government);
- balance between demand and supply of e-content (sharing public resources in education, science, cultural heritage), stimulating social creativity, economic growth, creating new and innovative business models.

THANK YOU FOR YOUR ATTENTION