

Digital Landscape in Eastern Europe

July 2021

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Scope

Key findings

REGIONAL OVERVIEW

Internet use continues to climb in Eastern Europe

Mobile dominates subscriber numbers in Eastern Europe

Poland doing much better in mobile than home connectivity

Massive leap in Polish mobile internet penetration rate

Mobile gains further ground as the preferred mode for internet access

Strong growth in high-speed connections across the region

Polish operators withdrawing 3G service to free up space for 5G

COUNTRY SNAPSHOT

Czech Republic: Market Context (1)

Czech Republic: Market Context (2)

Hungary: Market Context (1)

Hungary: Market Context (2)

Poland: Market Context (1)

Poland: Market Context (2)

Romania: Market Context (1)

Romania: Market Context (2)

Russia: Market Context (1)

Russia: Market Context (2)

Ukraine: Market Context (1)

Ukraine: Market Context (2)

FORECAST PROJECTIONS

Internet penetration will continue to grow in Western Europe

Mobile internet penetration and subscribers to continue growing

Mobile penetration will continue to leave fixed broadband behind

EU countries can tap into its Digital Europe programme

Broadband infrastructure will continue to develop in 2020-2025

Russia and Ukraine to continue improving LTE coverage

Key takeaways

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