National Regulatory Agency for Electronic Communications and Information Technology of the Republic of Moldova

Evolution of Electronic Communications Market in 2017

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This Report was developed on basis of statistical data for 2017, submitted to the National Regulatory Agency for Electronic Communications and Information Technology (hereinafter ANRCETI) by authorized providers of publicly available electronic communications networks and services

Pursuant to the Law on Electronic Communications and Information Technology no.241 of 15.11.2007, with subsequent amendments, ANRCETI collects and processes statistical data as regards the quarterly situation on electronic communications market segments. Based on the reported data, ANRCETI specialists evaluate the electronic communications market trends and make market analysis. On quarterly basis, ANRCETI publishes on its official Web site reports that cover the situation on electronic communications market segments, while every year, before April 30, publishes the report on market evolution for the previous year.

Where readers wish to provide comments, suggestions or questions with reference to the contents of this Report, they are welcome to send them to the e-mail address: raport.statistic@anrceti.md.

Main Electronic Communications Market Indicators

Indicators	2016	2017	Change
Mobile telephony services			
Users, total:	4.429.277	4.459.999	0,7%
Users, active	3.788.490	3.662.968	-3,3%
- individuals	3.535.663	3.393.698	-4,0%
- businesses	252.827	269.270,0	6,5%
Penetration rate per 100 inhabitants	124,66%	125,60%	0,94 p.p.
Total traffic in mobile networks (million minutes)	6.208,3	6.212,6	0,1%
Average number of minutes consumed monthly by a user - MoU (minutes)	225	221	-1,8%
Messages SMS (million)	888,5	827,7	-6,8%
Messages MMS (million)	1,9	1,7	-9,9%
Revenues (million lei)	3.441,9	3.337,6	-3,0%
ARPU (lei)	66,2	62,3	-5,9%
Mobile Internet access services			
Mobile broadband users (3G, 4G, dedicated access) , total:	1.893.562	2.430.078	28,3%
- via smartphones	1.589.691	2.115.878	33,1%
- by dedicated access (modems/cards/USB)	303.871	314.200	3,4%
Mobile Internet penetration rate per 100 inhabitants	53,29%	68,44%	15,14 p.p.
Dedicated mobile Internet penetration rate per 100 inhabitants	8,55%	8,85%	0,30 p.p.
Dedicated mobile Internet traffic (TB),	38.981	43.726	12,2%
Mobile Internet traffic via smartphones (TB),	12.615	22.377	77,4%
Revenues mobile broadband* (million lei)	713,2	908,5	27,4%
- Revenues dedicated mobile Internet access (million lei)	278,7	290,4	4,2%
ARPU dedicated mobile Internet access (lei)	77,1	78,3	1,5%
ARPU mobile Internet access via smartphones (lei)	24,0	29,5	22,9%
M2M subscribers	30.606	34.856	13,9%
M2M revenues ** (million lei)	8,71	9,92	13,9%
Fixed telephony services			
Subscribers (telephone lines)	1.171.287	1.143.852	-2,3%
- individuals	1.032.332	1.007.474	-2,4%
- businesses	138.955	136.378	-1,9%
Service penetration rate per 100 inhabitants	32,97%	32,21%	-0,75 p.p.
Total traffic in fixed networks (million minutes)	1.823,9	1.587,9	-12,9%
Average number of minutes monthly consumed by a user - MoU (minutes)	198	178	-10,1%
Revenues (million lei)	876,1	695,5	-20,6%
ARPU (lei)	61,5	50,1	-18,6%
Fixed broadband services			
Subscribers	557.403	584.330	4,8%
- individuals	526.993	551.731	4,7%
- businesses	30.410	32.599	7,2%
Service penetration rate per 100 inhabitants	15,7%	16,5%	0,77 p.p.
Revenues (million lei)	1.105,2	1.209,5	9,4%
Average monthly revenue per user - ARPU (in lei)	169,4	177,0	4,4%
Total external internet capacity (Gbps)	349,20	356,40	2,1%
Data transmission revenues (million lei)	62,2	61,9	-0,4%
Audiovisual broadcasting and re-transmission			
Pay TV subscribers	269.971	323.695	19,9%
Service penetration rate per 100 inhabitants	7,60%	9,12%	1,52 p.p.
Revenues (million lei)	297,8	262,0	-12,0%
Average monthly revenue per user - ARPU (in lei)	46,4	44,8	-3,5%
Revenues from other electronic communications activities (million lei)	731,0	829,7	13,5%
Total revenues in electronic communications sector (million lei)	**6.730,64**	**6.624,76**	**-1,6%**
Total investments in electronic communications sector (million lei)	**1.454,46**	**1.096,41**	**-24,6%**

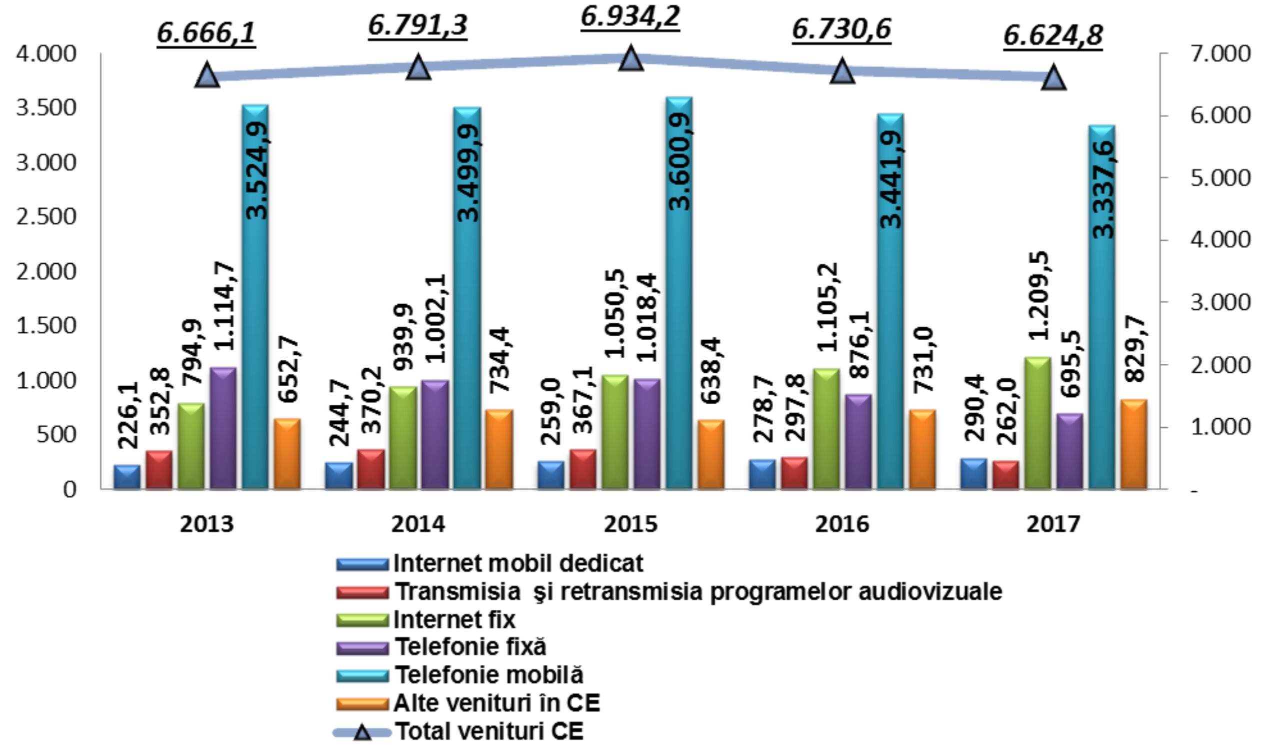
* This indicator also includes revenues from the sale of mobile Internet access services accessed from smartphones and is presented, as information, to show the development of total revenues on the mobile Internet access market. These revenues are part of the total revenues on the mobile market, on the grounds that they are revenues from services additional to the basic service - mobile telephony. ** These indicators are presented as information to show the revenue development on the corresponding market segments. The amounts of such revenues are included in revenues from other electronic communications activities.

1. Market development. General description

1.1 Development of revenues

According to the statistical data presented to ANRCETI by the 276 active providers of publicly available electronic communications networks and services show that in 2017 the total revenues from electronic communications services (mobile telephony, mobile Internet, fixed telephony, fixed broadband, audiovisual broadcasting and re-transmission, other electronic communications activities), in comparison with 2016, a slight decrease estimated at 105,9 million lei (- 1,6%) and came to a total of 6 bn. 624 million lei.

The decrease was caused by lower revenues from three market segments: fixed telephony, audiovisual broadcasting and re-transmission, mobile telephony. The revenues of the fixed telephony market decreased by 20,6% to a total of 695,5 million lei, revenues of audiovisual broadcasting and re-transmission market - by 12%, estimated at 262 million lei, revenues on the telephony market slightly dropped by 3% to 3 bn. 337,6 million lei. Meanwhile the revenues from other electronic communications activities[1] increased by 13,5% up to 829,7 million lei, those from fixed broadband services - by 9,4% and comprised 1 bn. 209,5 million lei, revenues from dedicated mobile Internet access services (by modems/cards/USBs) increased by 4,2% to a total of 290,4 million lei (Chart 1).

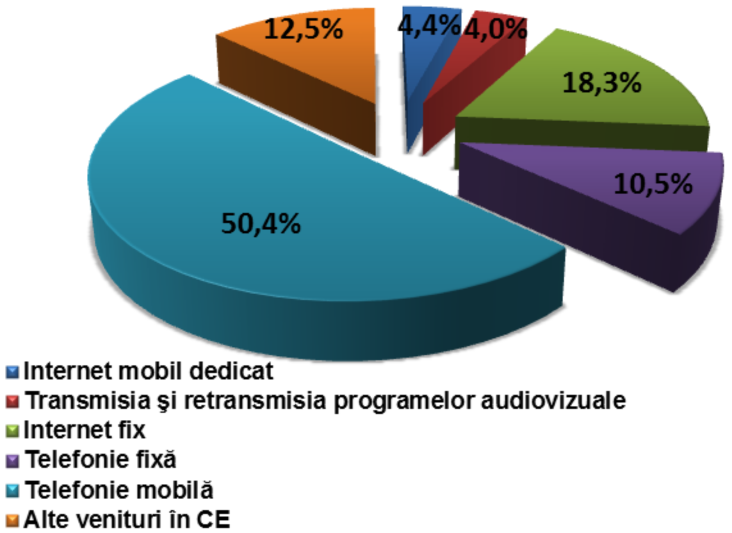


Dedicated mobile Internet, Audiovisual broadcasting and re-transmission Fixed broadband, Fixed telephony Mobile telephony, Other EC revenues Total EC revenues,

Chart 1. Development of revenues in electronic communications sector (million lei)
Source: ANRCETI

[1] **Revenues from other CE activities** represent revenues of electronic communications network providers generated from installation, operation, management or making available, to an authorized third party, of electronic communications networks or associated infrastructure (Art.2 of *Law 241/2007*), data transmission, etc.

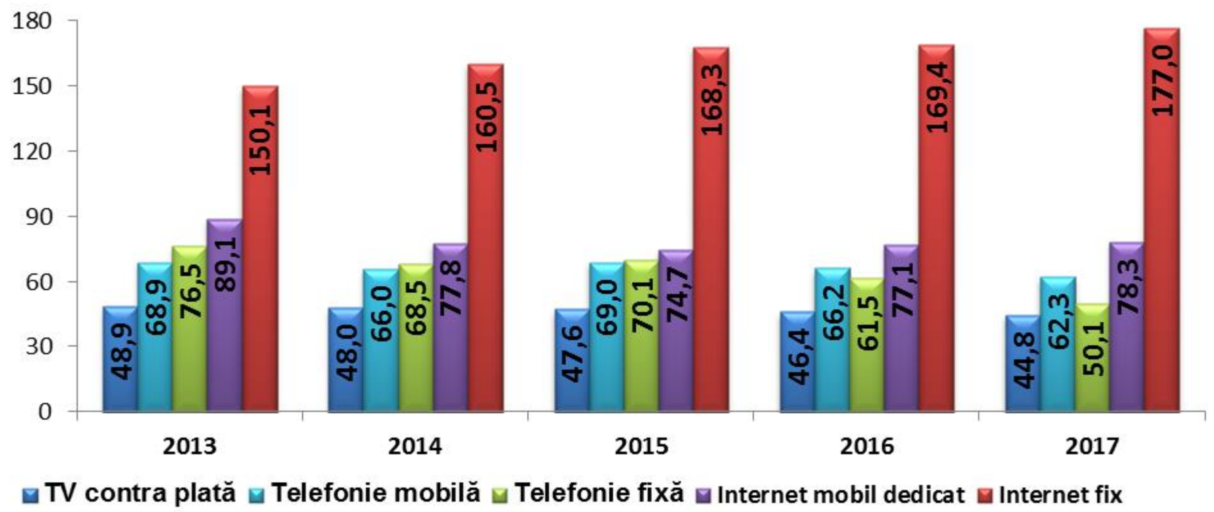
Compared to 2016, the structure of the electronic communications market, by revenues, has undergone minor changes. The share of revenues from fixed broadband services increased from 16,4% to 18,3%, the revenues from other electronic communications activities - from 10,9% to 12,5% and the revenues from dedicated access to mobile Internet services - from 4,1% to 4,4%. The share of revenues from fixed telephony services reduced from 13% to 10,5%, mobile telephony services - from 51,1% to 50,4% and the revenues from audiovisual broadcasting and re-transmission services – from 4,4% to 4%.(Chart 2).



Dedicated mobile Internet, audiovisual broadcasting and re-transmission Fixed broadband, Fixed telephony, Mobile telephony, Other EC revenues

Chart 2. Structure of electronic communications market, by revenues
Source: ANRCETI

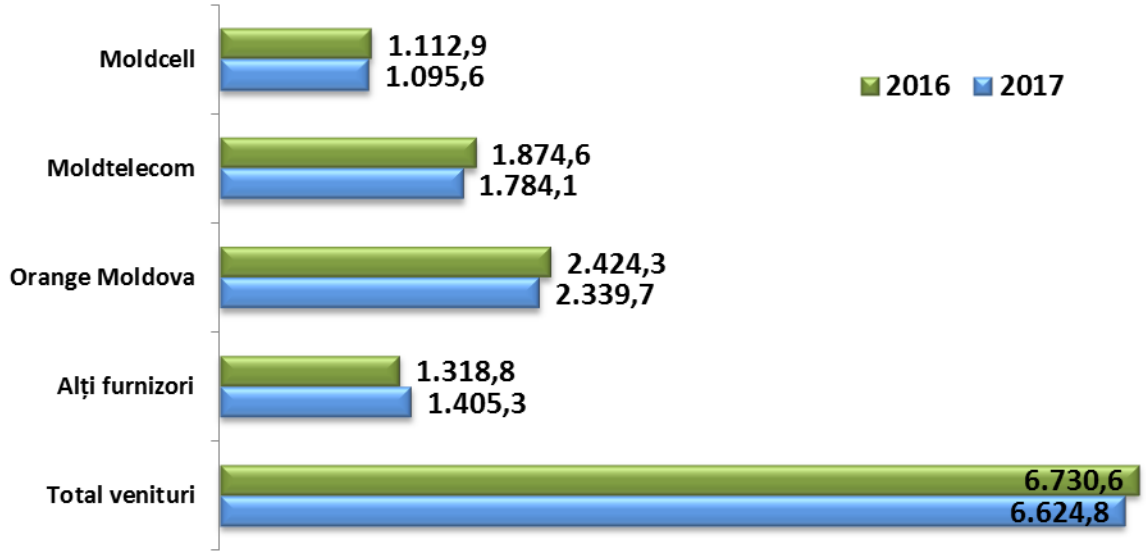
Statistical data show that similarly to the previous years, the fixed broadband market attested the most significant average monthly revenue per user (ARPU) – 177 lei. On the dedicated mobile Internet market this indicator was 78,3 lei, on the mobile telephony market – 62,3 lei, on the fixed telephony market – 50,1 lei and on the pay TV market - 44,8 lei (Chart 3).



Pay TV, Mobile telephony, Fixed telephony, Dedicated mobile Internet, Fixed broadband

Chart 3. Development of monthly revenue per user - ARPU (lei)
Source: ANRCETI

In 2017, JSC „Orange Moldova” had the highest revenues - 2 bn. 339,78 million lei or 35,3% of the total revenues in the electronic communications sector. The revenues of JSC „Moldtelecom” were 1 bn. 784,1 million lei or 26,9% of the total, the revenues of JSC „Moldcell” - 1 bn. 095,6 million lei or 16,5% of the total. The revenues of other providers jointly were 1 bn. 405,3 million lei or 21,2 % of the total (Chart 4).



Other providers, Total revenues

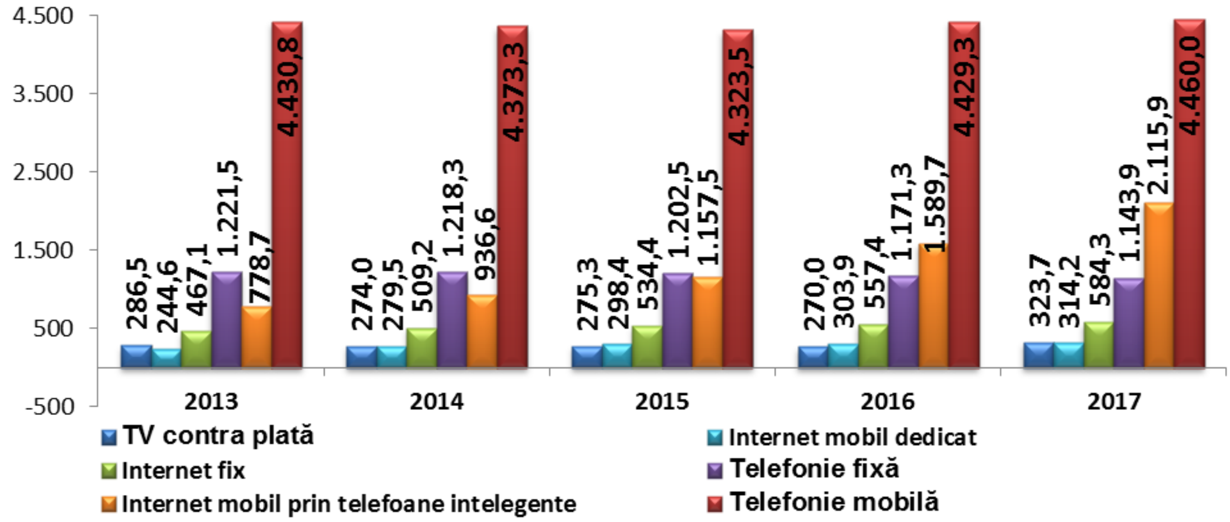
Chart 4. Volume of revenues by electronic communications network/service providers in 2016 - 2017 (million lei)

Source: ANRCETI

1.2 Development of the number of end users

In 2017, the most dynamic increase in the number of end users was recorded, like in 2016, on the mobile broadband market (based on 3G, 4G and modems/cards/USBs and dedicated access). The number of those users increased, compared to 2016, by 28,3% up to 2 million 430 thousand. The number of users of mobile Internet via smartphones increased by 33,1%, to more than 2 million 115,8 thousand, and the number of dedicated mobile Internet users - by 3,4% and summed up 314,2 thousand.

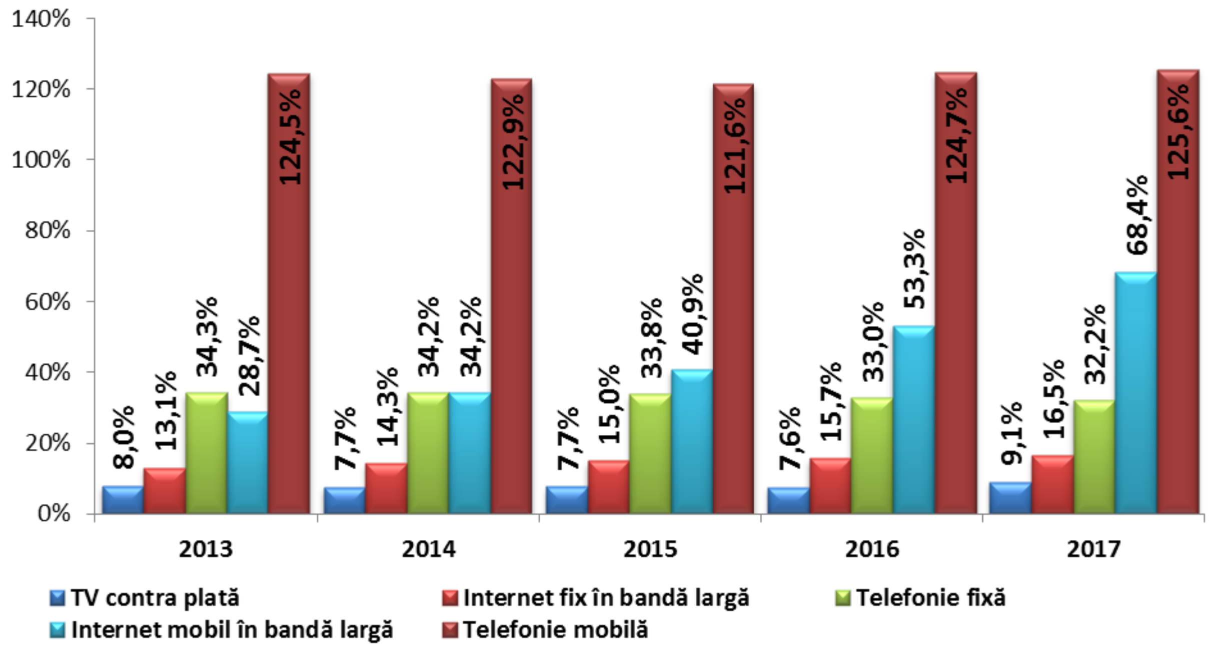
At the same time, the number of pay TV subscribers (cable TV and IP TV) increased by 19,9% and amounted to 323,7 thousand, that of fixed broadband subscribers - by 4,8% and totaled 584.3 thousand and the number of mobile telephony users increased by 0,7% and reached 4 mil 460 thousand. At the same time, the number of fixed telephony subscribers decreased by 2,3% and amounted to 1 million 143,9 thousand. (Chart 5).



Pay TV, Dedicated mobile Internet, Fixed broadband, Fixed telephony, Mobile telephony, mobile Internet via smartphones

Chart **5. Development of the number of electronic communications service users (thousand)**
Source: ANRCETI

As a result of the aforementioned evolutions, the penetration rates of most types of services per 100 inhabitants registered positive evolution. The fastest growth rate for this indicator was attested on the mobile broadband market, it increased compared to 2016 by 15,1 percentage points (p.p.) and reached 68,4%. Penetration rates of mobile telephony and fixed broadband reached 125,6% and 16,5% accordingly, that of pay TV services - 9,1%. At the same time, the penetration rate of fixed telephony services decreased by 0,8 p.p. and made 32,2% (Chart 6).



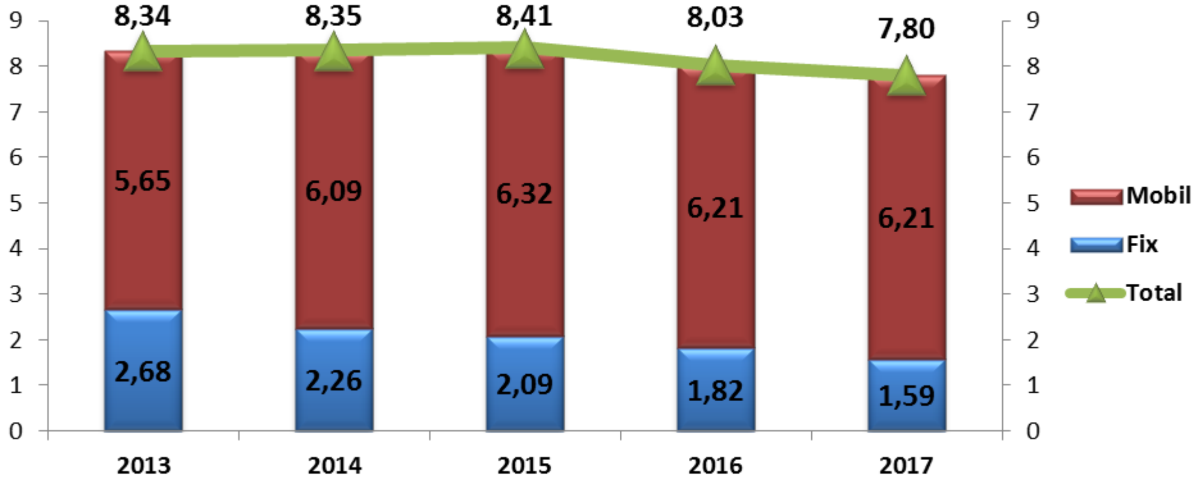
Pay TV, Mobile broadband, Fixed broadband, Mobile telephony, Fixed telephony,

Chart 6. Development of electronic communications service penetration rates
Source: ANRCETI

1.3 Development of voice traffic in mobile and fixed networks

According to the statistical data aggregated by ANRCETI, in 2017, the cumulative volume of voice traffic in mobile and fixed networks was subject to a decrease, for the second year in a row.

The total of this traffic reduced compared to 2016, by 2,9% and was estimated at 7,8 bn. minutes. This reduction was caused by a well-marked decrease of fixed voice traffic. Thus, the voice traffic in fixed networks reduced by 12,9% and was estimated at 1,59 bn. minutes, whereas the traffic in mobile networks practically kept to the level as 2016 - 6,21 bn. minutes. (Chart 7).

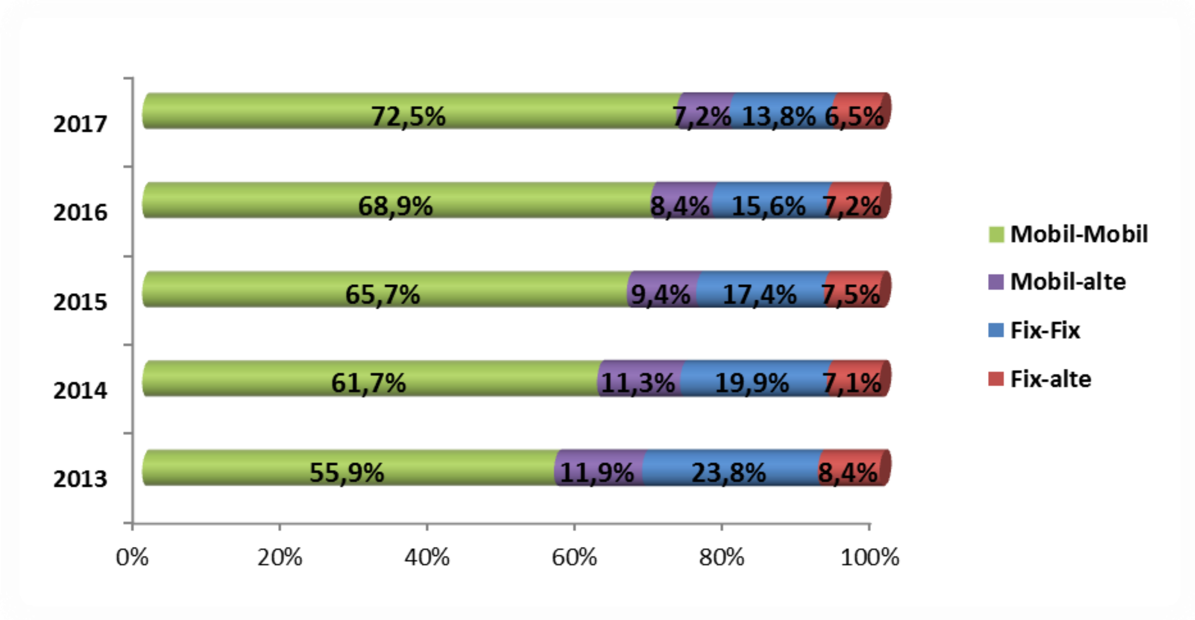


Mobile, Fixed, Total

Chart 7. Development of voice traffic in mobile and fixed networks (bn. minutes)

Source: ANRCETI

As the voice traffic in fixed telephony networks decreased, the share of mobile traffic (which includes traffic in individual networks and traffic to same type of network) in the total traffic structure increased by 2,4 percentage points (p.p.) compared to 2016 and reached 79,7% and the share of fixed traffic dropped proportionately down to 20,3% (Chart 8).



Mobile-mobile, Mobile-other, Fixed-fixed, Fixed-other

Chart 8. Share of traffic types in the total voice traffic structure in mobile and fixed networks

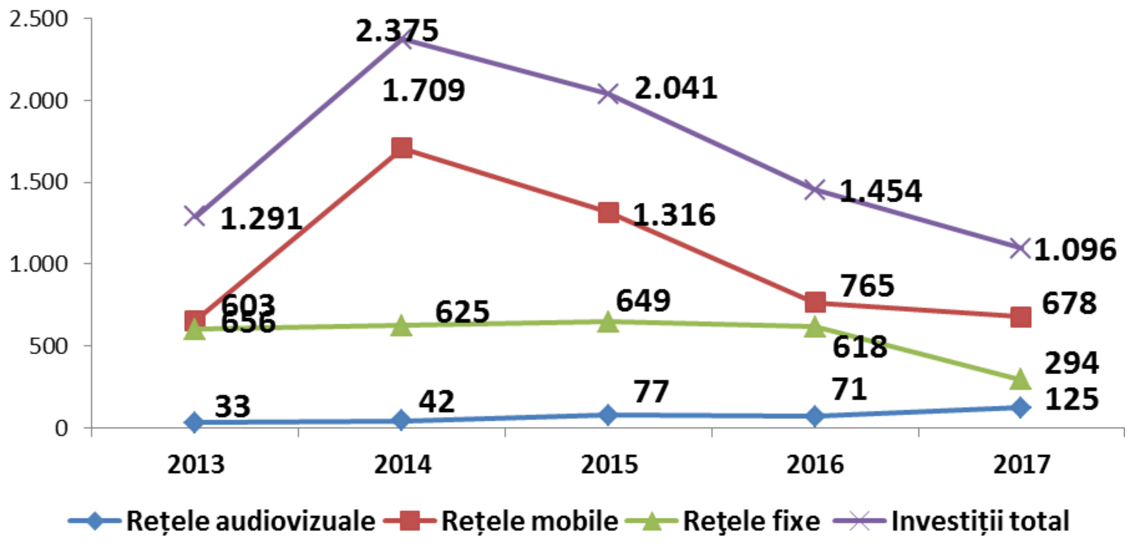
Source: ANRCETI

More detailed data on the evolution of voice traffic in mobile telephone networks and in fixed telephony networks are presented in Sections 2.3 and 3.3 of this report.

1.4 Development of investments

According to statistical data aggregated by ANRCETI, in 2017, the total investments in the electronic communications sector was 1bn. 96 million lei, decreased by 24,6% compared to 2016. This decrease was determined by lower investments in fixed and in mobile networks.

The investments in fixed networks were 294 million. lei, decreased compared to 2016 by 52,4%, while the investments in mobile networks were 678 million. lei, decreased by 11,4%. At the same time, investments in electronic communications networks for broadcasting and retransmission of audiovisual programs increased by 75,4% and reached 125 million. lei (Chart 9).



Broadcasting networks
Mobile networks
Fixed networks
Total investment

Chart 9. Evolution of investments in electronic communications sector (million lei)
Source: ANRCETI

In terms of investment - turnover ratio, the highest value of this indicator - 62% - was attested in mobile electronic communications networks. This indicator for audiovisual broadcasting and re-transmission networks was about 11%, and for the fixed electronic communications networks - 27%.

2. Mobile telephony

2.1 Market development

In 2017, for the second consecutive year, the total revenues on mobile telephony market was 3bn. 337,6 million lei, a slight reduced by 3% compared to 2016. This reduction was caused, basically, by the decrease of revenues by JSC "Orange Moldova" (by 4,3% to the total of 2 bn. 159,7 million lei) and JSC "Moldcell" (by 2,2%, to the total of 1 bn. 18,1 million lei). At the same time, the revenues earned by S.A. "Moldtelecom" (Unite) from mobile telephony services increased by 9,6% up to 160,1 million lei (Chart 10).

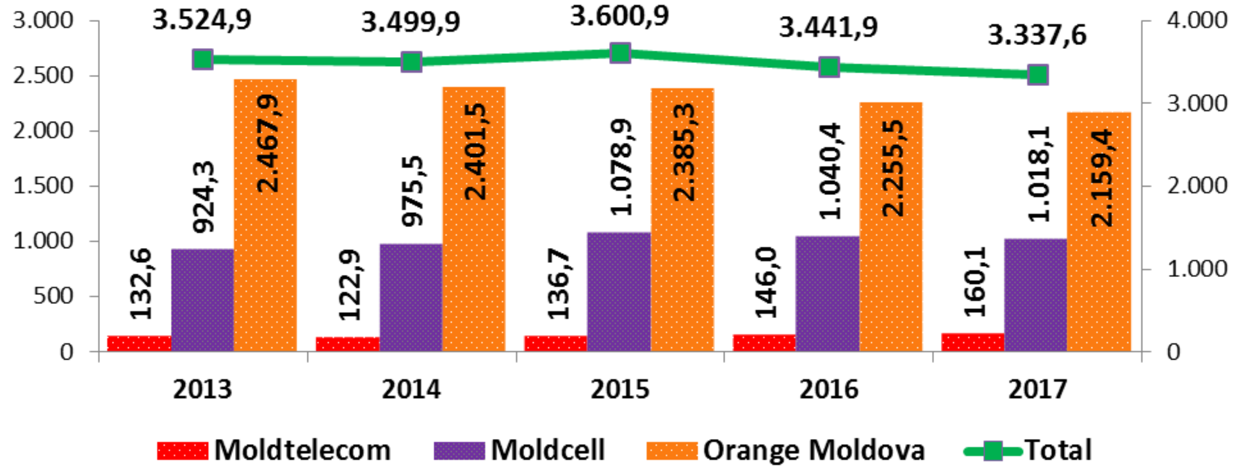


Chart 10. . Development of mobile providers' revenues (million lei)
Source: ANRCETI

The statistical data submitted by providers show that in 2017, for the third year in a row, the revenues from subscription-based mobile services continued to grow, while revenues from prepay cards services have been decreasing. Thus, the total revenues from subscription-based services increased, compared to 2016, by 13,9% and exceeded 1 bn. 708,1 million lei, and the revenues from prepay cards services decreased by 5,3% and totaled 774,7 million lei.
(Table no.1).

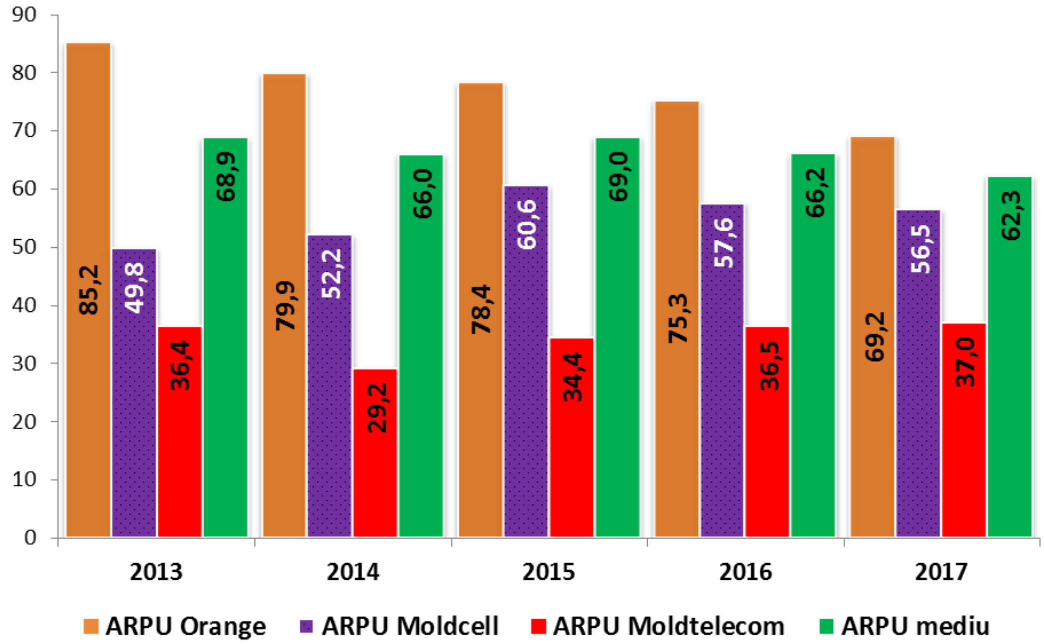
Table no.1 Revenues on retail market: subscription-based and prepay cards

Indicators	2013	2014	2015	2016	2017	Change 2016-2017
Revenues subscriptions (million. lei)	1.251,0	1.186,4	1.290,2	1.499,8	1.708,1	13,9%
Revenues from prepay cards (million. lei)	1.044,4	958,3	882,6	818,1	774,7	-5,3%

Source: ANRCETI

As a result of the decrease in the total revenues on the mobile market, the average monthly revenue per user (ARPU) decreased, compared to 2016, by 5,8% and equaled 62,3 lei. The average monthly revenue per individual[2] user – was 50,9 lei, and per business[3] user – 115,1 lei. JSC "Orange Moldova" had the largest ARPU – 69,2 lei. JSC Moldcell had 56,5 lei ARPU and JSC "Moldtelecom" - 37 lei (Chart 11).

[2] Average value of the bill paid by an individual user, VAT-free
[3] Average value of the bill paid by a business user, VAT-free



Average ARPU

Chart 11. Development of average monthly revenue per mobile user - ARPU (lei)
Source: ANRCETI

During the reporting period, the market shares of the three mobile service providers, by turnover, practically remained unchanged. Compared to 2016, the market share of JSC "Orange Moldova" was 64,7%, down by 0,8 p.p., while the market shares of JSC "Moldcell" and JSC "Moldtelecom" were 30,5% and 4,8%, up by 0,3 p.p. and 0,6 p.p., accordingly.

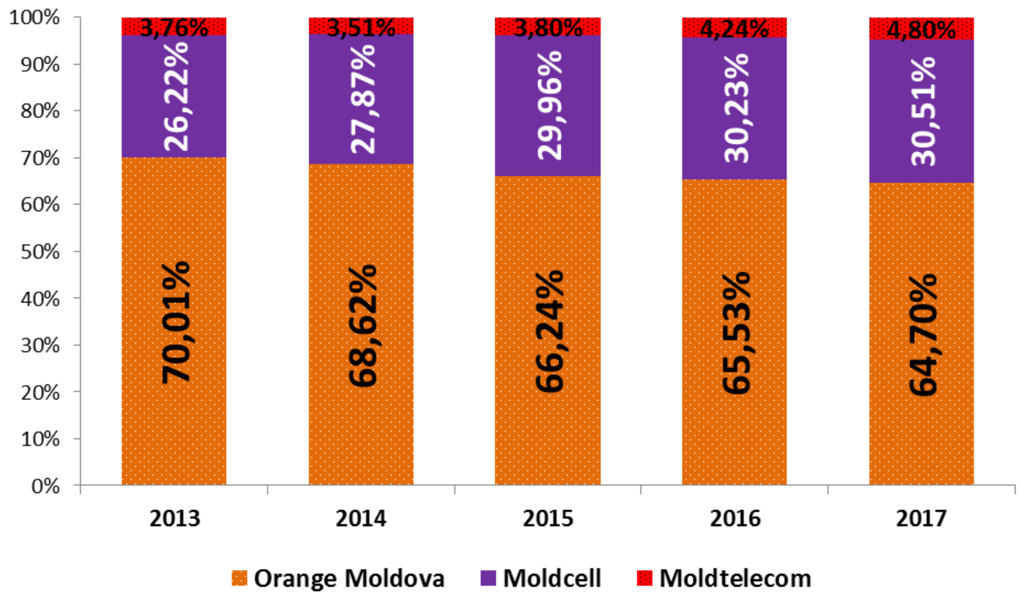
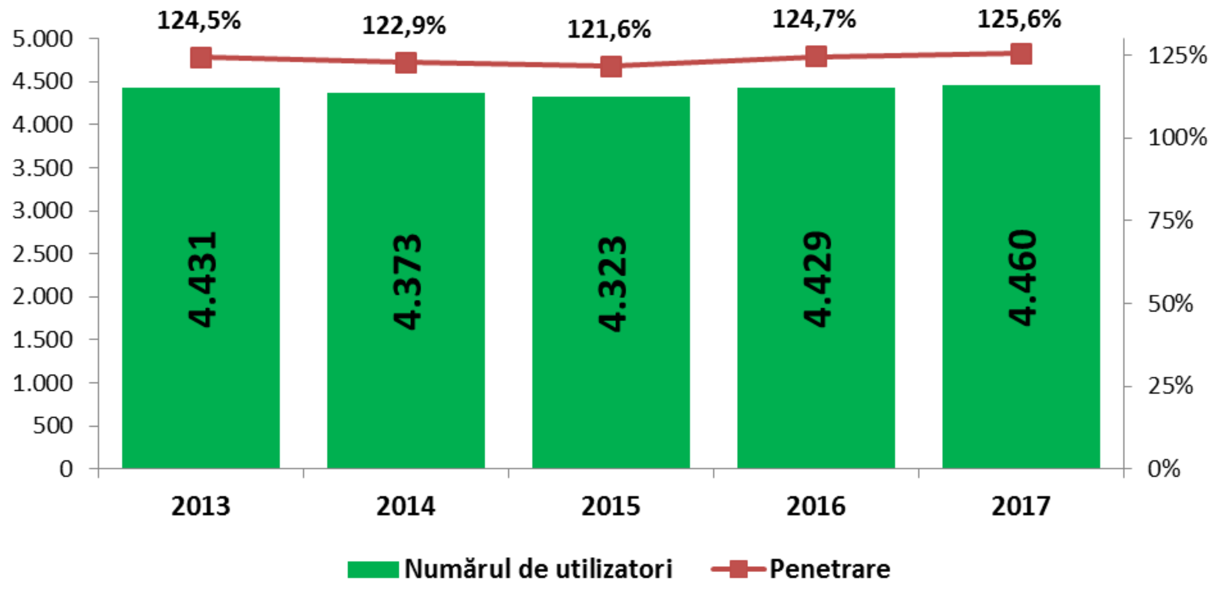


Chart 12. Development of mobile providers' market shares, by turnover
Source: ANRCETI

2.2 End users and service penetration

In 2017, the number of mobile users increased insignificantly, by 0,7% compared to 2016, up to 4 million 460 thousand (SIM cards). This increase was due to the expansion of the subscriber base of JSC "Moldtelecom" and JSC "Orange Moldova", while at the same time the subscriber base of

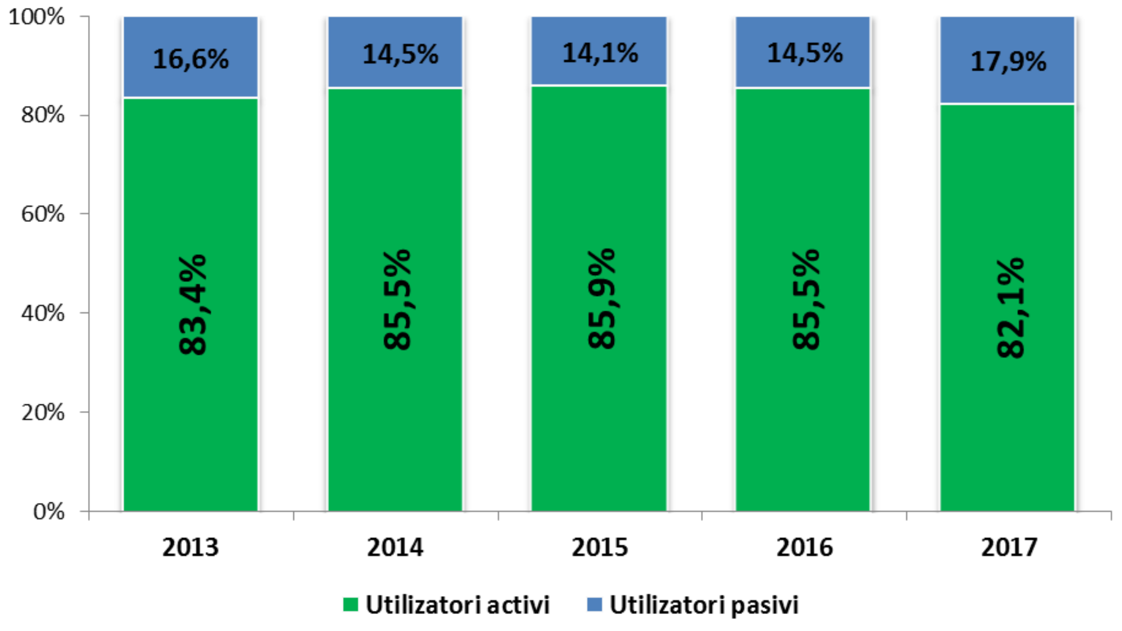
JSC “Moldcell” decreased. As a result, the mobile penetration rate per 100 inhabitants increased by 0,9 p.p. up to 125,6% (Chart 13).



Number of users
Penetration

Chart 13. Development of the number of users (thousand) and mobile penetration rate (%)
Source: ANRCETI

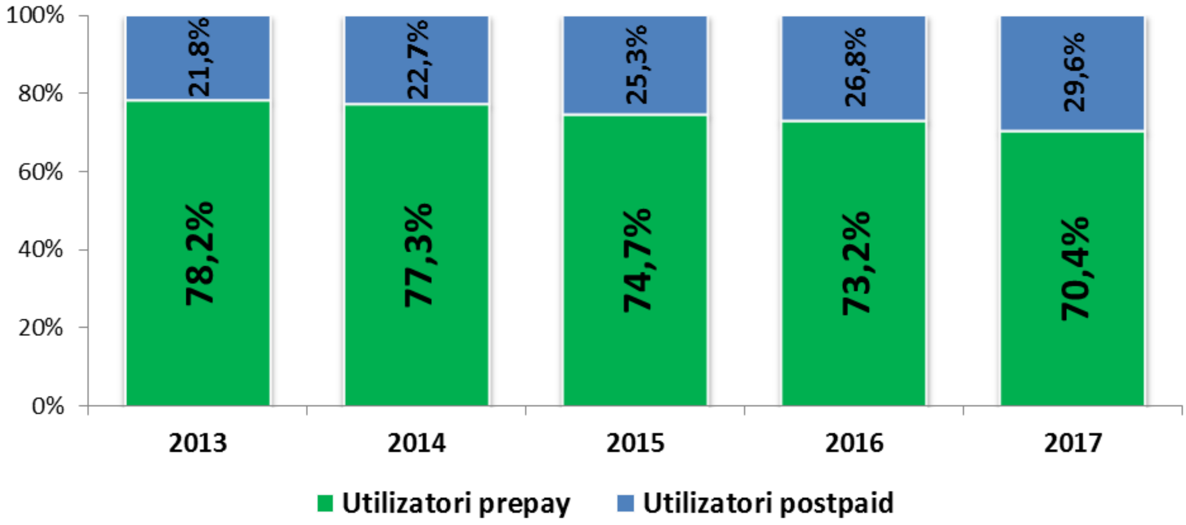
During 2017, the share of active mobile users in the total number of users dropped by 3,4 p.p., by 82,1% compared to 2016 and the share of passive users increased the same proportion up to 17,9% (Chart 14).



Active users
Passive users

Chart 14. Structure of mobile market, by category of users (active/passive)
Source: ANRCETI

In the same year, the share of mobile subscription-based users increased by 2,8 p.p. compared to 2016 and reached 29,6%, while the share of prepay users dropped to the same extent to 70,4% (Chart 15).

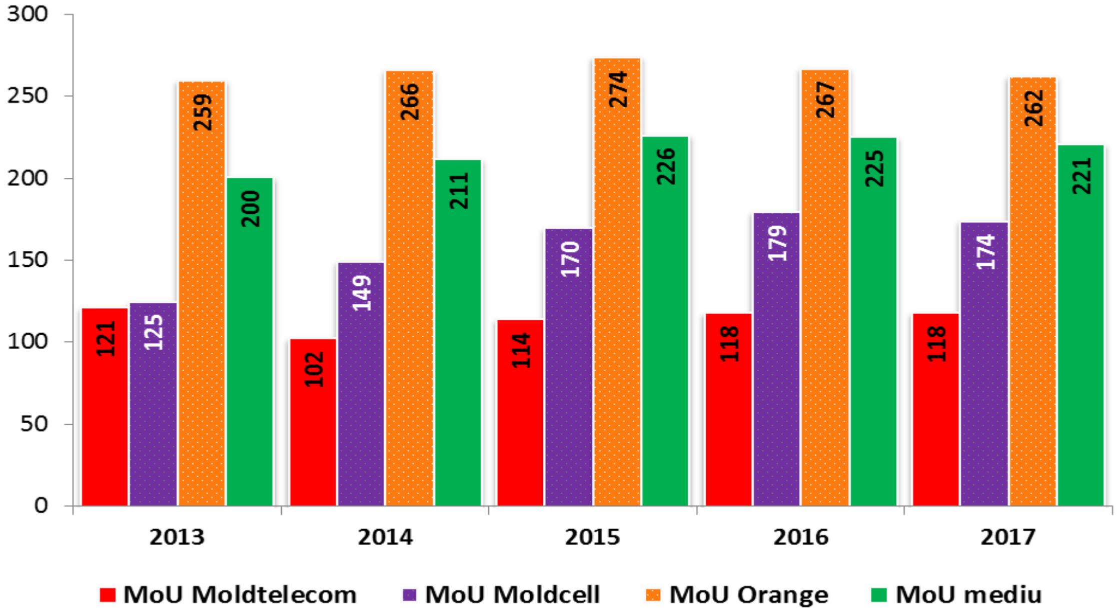


Prepay users
Postpaid users
Chart 15. Structure of mobile market, by method of payment (prepay/postpaid)
Source:ANRCETI

2.3 Development of voice traffic

According to the data presented to ANRCETI by the three mobile providers, the total voice traffic on mobile networks slightly increased compared to 2016 - by 4,3 million minutes (+ 0,1%) and reached 6 bn. 212,6 million minutes. The analysis of voice traffic shows that users prefer calls in the same network and to other mobile networks. Thus, the traffic in the same mobile networks increased by 2,5% to a total of 4,6 bn. minutes, while the traffic to other mobile networks - by 0,3% , to over 1 bn, minutes. At the same time, the international outgoing traffic in mobile networks decreased by 30,4% to 82,9 mil minutes, while the traffic to fixed networks decreased by 2,4% to 263,5 million minutes.

The negative trend of the mentioned traffic types led to a slight 1,8% decrease of average monthly traffic generated by a mobile phone user - 221 minutes (three hours and 41 minutes), by 1,7 minutes average call duration. The average monthly traffic per user with JSC "Orange Moldova" and JSC "Moldcell" decreased slightly and the average monthly traffic generated by a user of JSC “Moldtelecom” remained at the level of 2016. (Chart 16).



Average MoU

Chart 16. Evolution of monthly average traffic generated by a user - MoU indicator (minutes)
Source: ANRCETI

The negative trend of the SMS and MMS traffic, evident in recent years, continued in 2017. The number of SMS messages sent by users dropped by 6,8% compared to 2016 and showed 827,7 million, and the number of MMS messages decreased by 10,3% and amounted to 1,7 million According to ANRCETI estimates, in 2017 a mobile user sent a monthly average of 19 SMS.

2.4. Territory and population coverage rates

The statistical data on 3G territory and population coverage show that in 2017 JSC „Orange Moldova" and JSC „Moldtelecom" maintained the same level as in 2016, while JSC "Moldcell" increased this indicator by 14,3 p.p. (Chart 17).

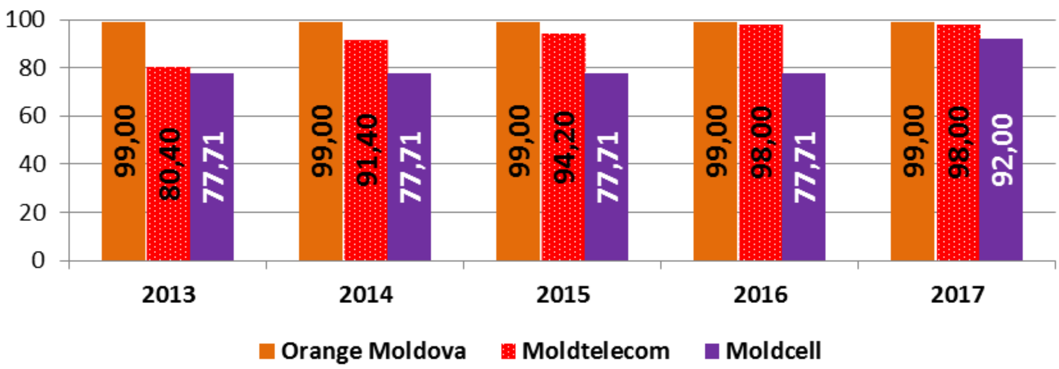


Chart 17. Rates of territory coverage by 3G networks (%)
Source: ANRCETI

A similar situation was attested in terms of population coverage by 3G mobile networks. JSC „Orange Moldova" maintained the coverage rates of 2016, while JSC "Moldcell" and JSC „Moldtelecom" increased that level by 37 p.p. – up to 99% and by 1,5 p.p. up to 99,5%, accordingly, (Chart 18).

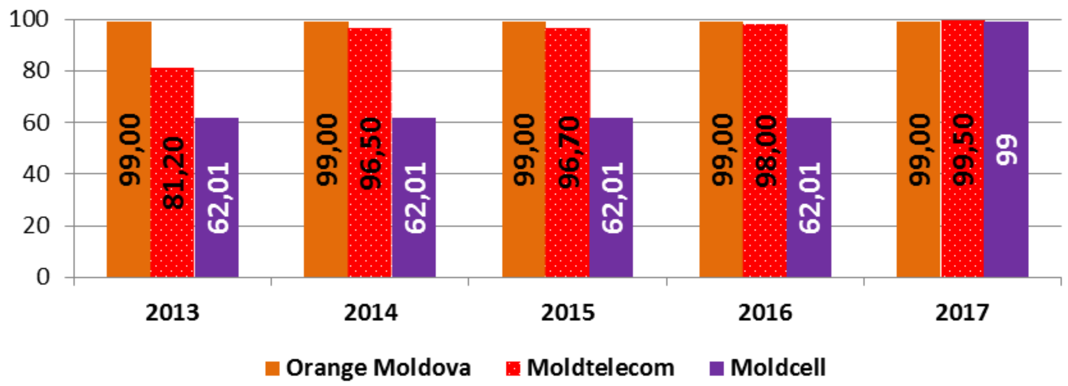


Chart 18. Rates of population coverage by 3G mobile networks (%)
Source: ANRCETI

As for the territory coverage by 4G mobile networks, it is notable that in 2017 JSC „Moldcell" had the biggest increase of this indicator – 36,4 p.p.: from 9,6% to 46%. JSC „Moldtelecom" increased this rate by 2 p.p. – up to 7%, while JSC „Orange Moldova" maintained the rate at the level of 2016 - 94% (Chart 19).

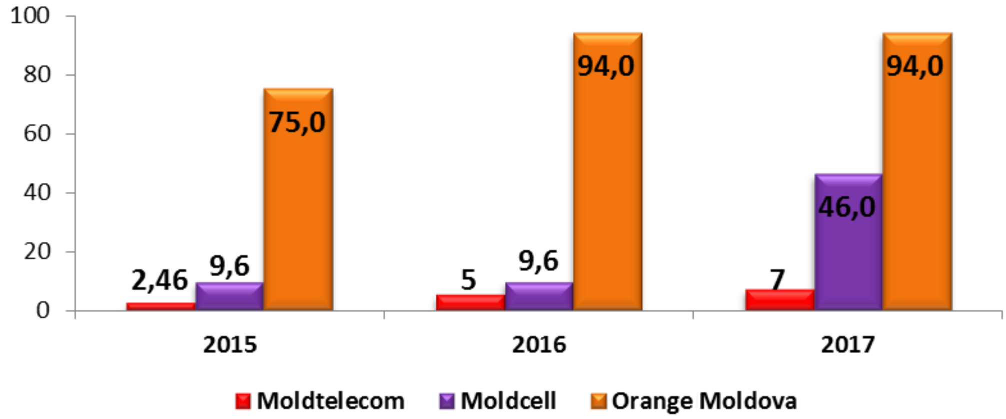


Chart 19. Rates of territory coverage by 4G mobile networks (%)
Source: ANRCETI

A similar evolution was reported for the rates of population coverage by 4G networks. JSC „Moldcell" increased this indicator from 29,7% to 50%, JSC „Moldtelecom" – from 29% to 35%, while JSC „ Orange Moldova" maintained the rate at the level of 2016– 97%. (Chart 20).

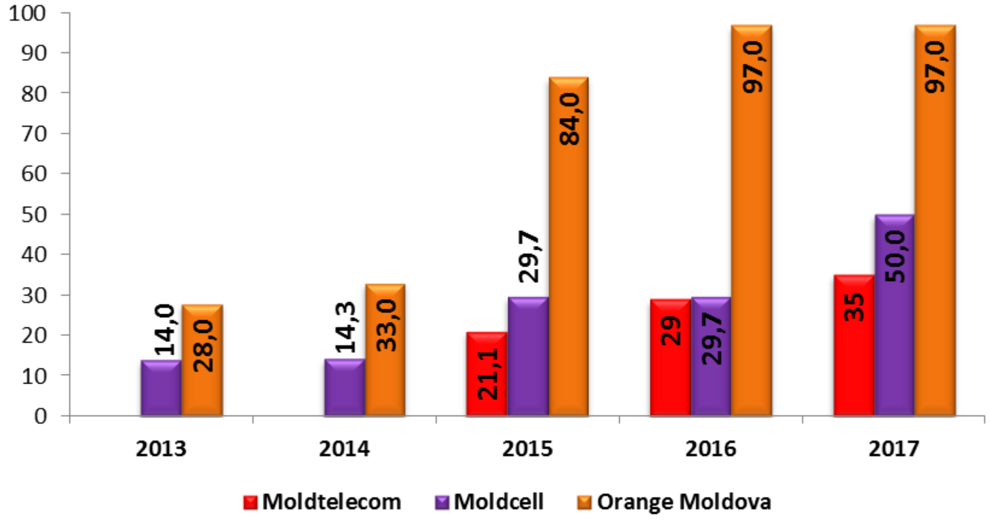
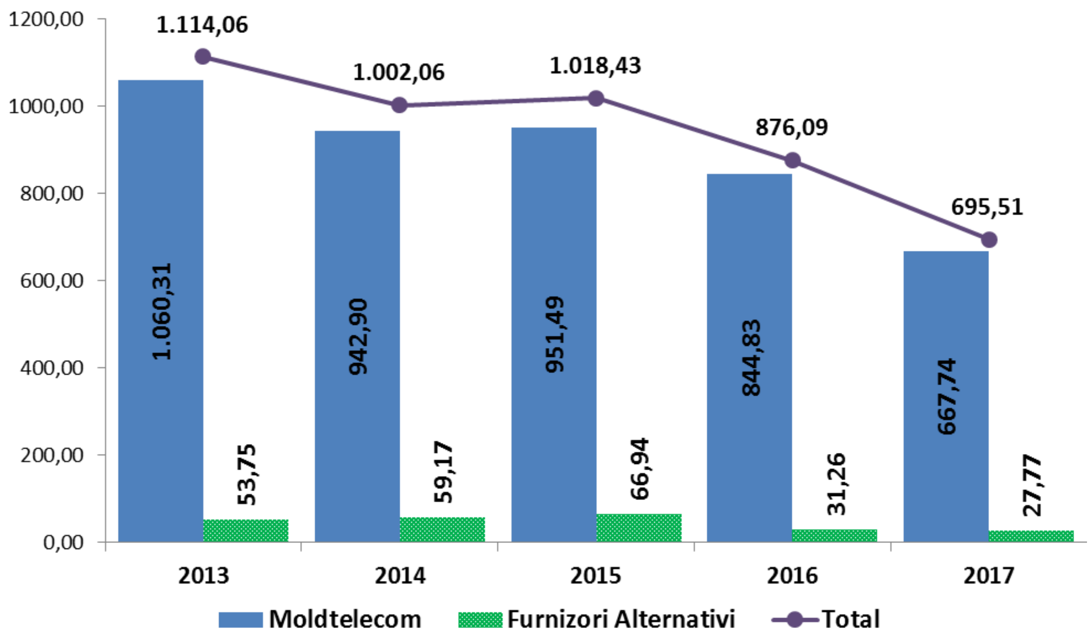


Chart 20. Rates of population coverage by 4G networks (%)
Source: ANRCETI

3. Fixed telephony
3.1 Market development

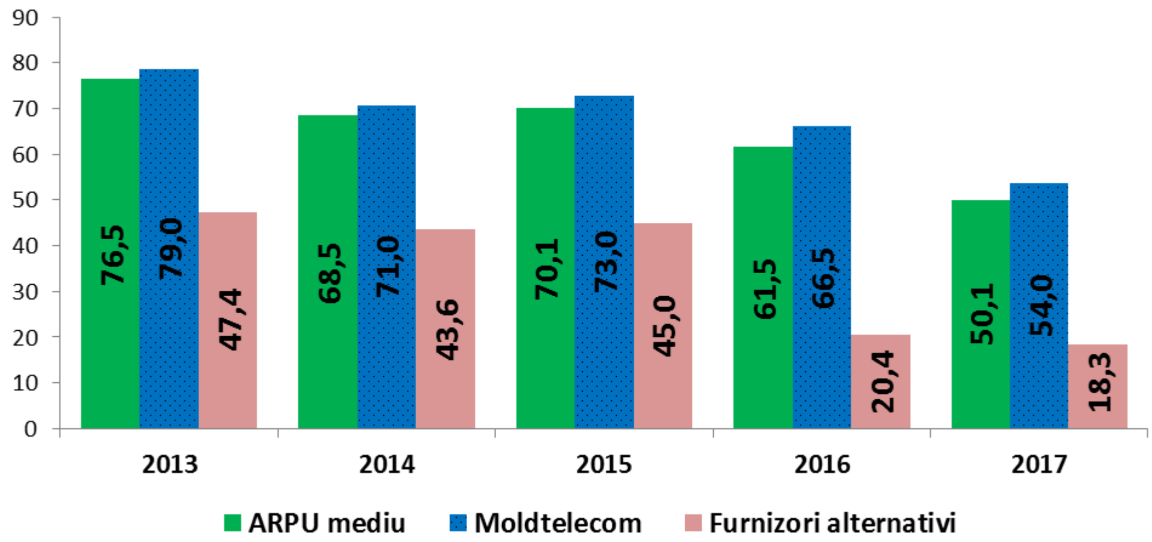
In 2017, the total revenues on the fixed telephony market was 695,5 million lei, a decrease by 20%, most significant decrease in the recent five years. This happened because of the reduction in the number of subscribers and voice traffic in fixed networks. Practically all the fixed telephony providers reported drop of revenues: JSC „Moldtelecom" - by 21%, estimated at 667,7 million lei, alternative operators – by 11,2%, estimated at 27,8 million lei (Chart 21).



Alternative providers

Chart 21. Development of revenues on the fixed telephony market (million lei)
Source: ANRCETI

Following the total revenues reduction, the average monthly revenue per users (ARPU) for fixed telephony services was 50,1 lei, down by 18,6%. The average monthly revenue per individual users was 23,2 lei (down by 4,7%) and per business - 66,6 lei (down by 9%). This indicator for JSC „Moldtelecom" was 54 lei (down by 18,8%), for alternative providers - 18,3 lei (down by 10,4%) (Chart 22).



Alternative providers

Chart 22. Development of the average monthly revenue per fixed subscriber - ARPU (lei)
Source: ANRCETI

In 2017, the market shares of fixed telephony providers, by revenues, practically remained unchanged. The market share of JSC „Moldtelecom" grew by 0,4 p.p. and was estimated at 96%, at the end of 2017, while the cumulative market share of alternative providers reduced the same amount and was reported as 4%, (Chart 23).

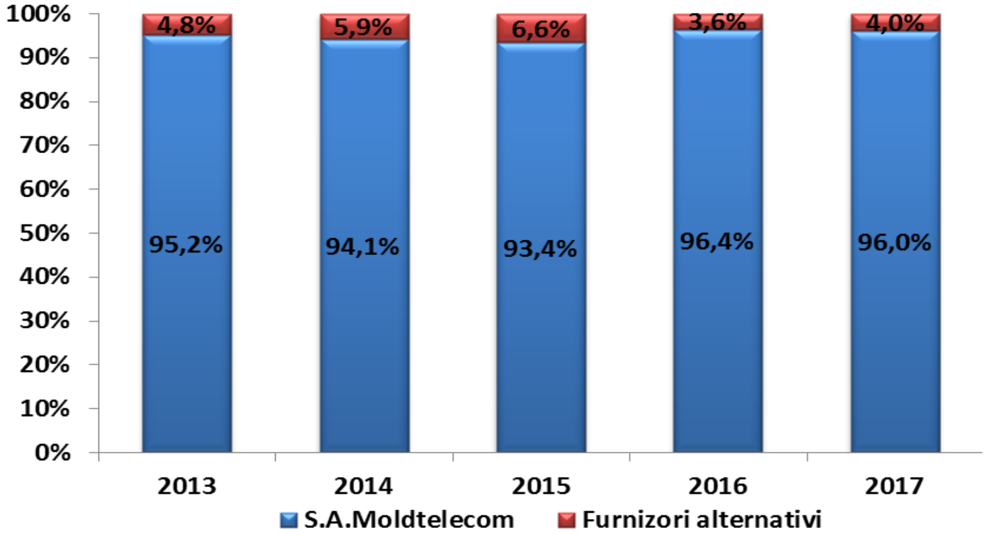
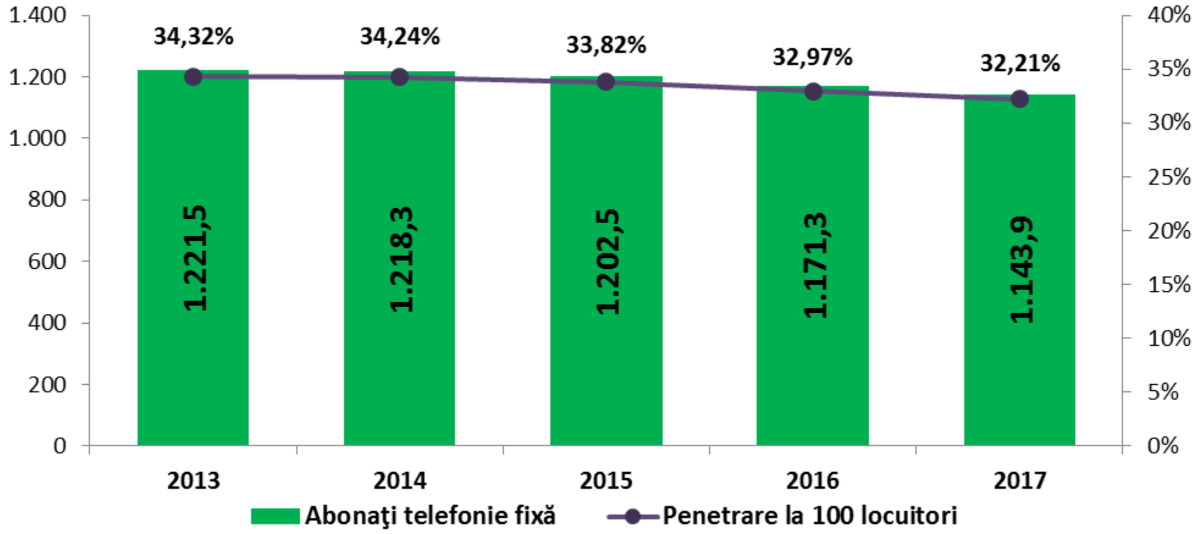


Chart 23. Development of market shares of fixed telephony providers, by revenues
Source: ANRCETI

3.2 Subscribers and penetration rate

In 2017, the number of subscribers to fixed telephony services[4] decreased, compared to 2016, by 2,3% and was estimated at 1 million 143,9 thousand. The reduction of the number of subscribers was determined by the decrease of the subscriber base of JSC „Moldtelecom" by 2,4%, to a total of 1 million 18,2 thousand by the end of the year. The subscriber base of the other 19 alternative fixed telephony providers decreased by 1,5% and was estimated at 125,7 thousand. As a result, the fixed penetration rate per 100 inhabitants was estimated at 32,21%, down by 0,76 p.p. (Chart 24).



Fixed telephony subscribers
Penetration per 100 inhabitants

Chart 24. Number of fixed telephony subscribers (thousand) and fixed penetration rate (%)
Source: ANRCETI

At the end of 2017, 88% of fixed telephony subscribers were individuals and 12% - businesses. More than half of the total number of subscribers - 54,4% – resided in urban areas, 45,6% thousand (45,2%) – in rural areas.

3.3 Development of voice traffic

In 2017, the total voice traffic in fixed networks decreased by 12,9% and was estimated at 1 bn. 587 million minutes. This decrease was caused by the reduction of all traffic types. The traffic to international networks dropped by 28,6%, the traffic originated abroad and terminated in the fixed networks in the R. Moldova decreased by 24,9%, the traffic to other fixed networks – by 12,7%, the traffic to mobile networks – by 13,3% and the interconnection traffic – by 7,9%. From the total of outbound traffic, 55,3% was directed to mobile networks, 32,3% - to other fixed networks and 12,3% - to international destinations.

As a result of the significant reduction of voice traffic in fixed telephony networks, the average monthly traffic via one access line (MoU indicator) was 178 minutes (2 hours 58 minutes), a 20-minute (10,3%) decrease compared to 2016, whereas the average call duration was 2,3 minutes (Chart 25).

[4] Calculations included fixed subscriber telephone lines, whereas for VoIP services – telephone numbers allocated to end users.

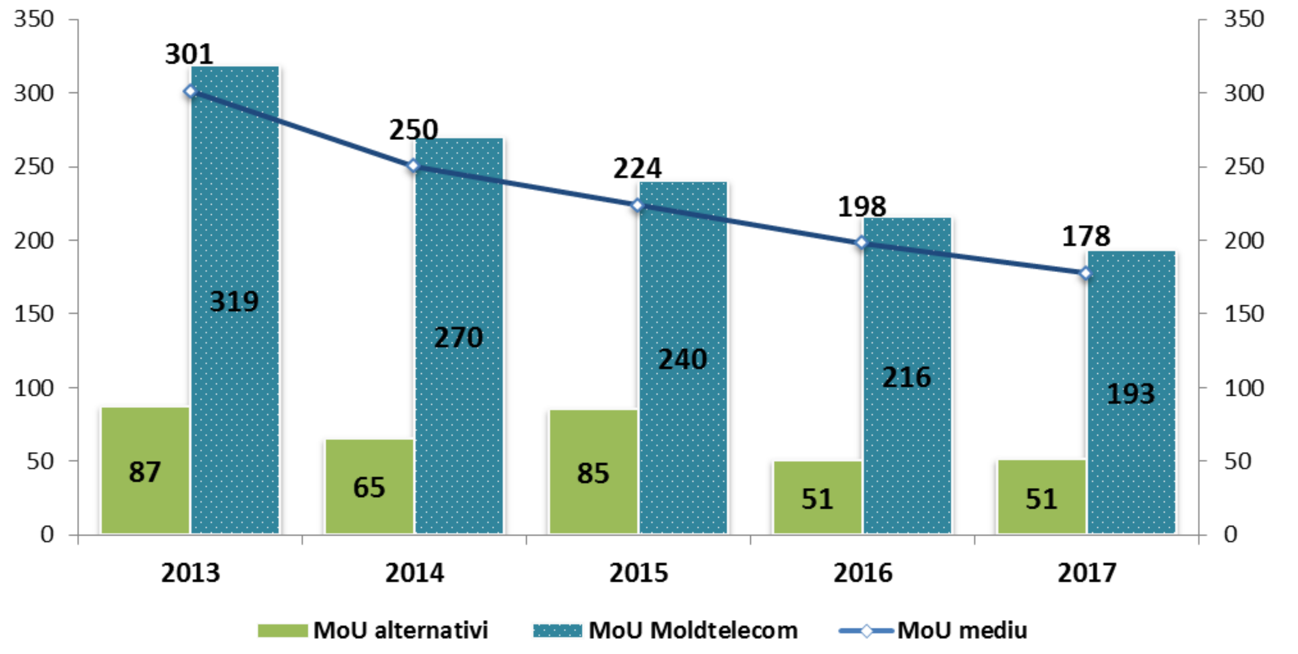


Chart 25. Development of the MoU indicator (minutes)
Source: ANRCETI

4. Fixed broadband and mobile Internet access services

In 2017, the fixed broadband and mobile Internet services, similarly to the previous years, continued to be the most dynamic markets in the electronic communications sector. The main indicators of these markets (number of users, data traffic, revenues) increased significantly. The ascending trend was enhanced by the growing demand for Internet services, development of the Internet access infrastructure based on 3G, 4G technologies and fiber, wider use of alternative communications services such as OTT services: Skype, Viber, WhatsApp etc, more intense competition among providers.

4.1 Development of revenues on the fixed broadband and mobile Internet access market

The data reported by active providers of fixed broadband and mobile Internet access service show that the total revenues on the two market segments increased over 2016 by 16,5% and exceeded 2,1 bn. lei, which makes 32% of the total value of the electronic communications market. The most advanced growing rate of revenues - by 44,6 % - was reported on the market for mobile Internet access via smartphones (Revenues mobile Internet access voice users).

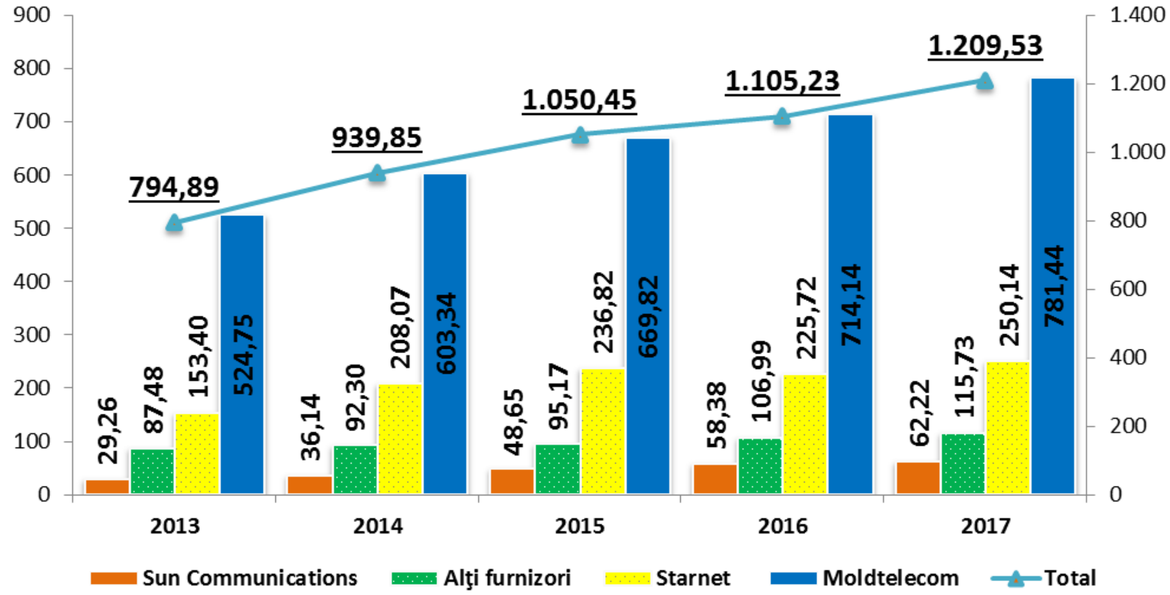
Table no. 2 Revenues from fixed broadband and mobile Internet access services (million lei)

	2013	2014	2015	2016	2017
Revenues from fixed broadband	794,9	939,8	1.050,4	1.105,2	1.209,5
Revenues from mobile Internet access, of which:	407,9	482,1	579,1	713,2	908,5
Internet access voice users	*173,1*	*224,5*	*304,4*	*412,9*	*597,2*
revenues dedicated Internet access	*226,1*	*244,7*	*258,9*	*278,7*	*290,4*
Total revenues fixed broadband and mobile Internet access	**1.202,8**	**1.422,0**	**1.629,6**	**1.818,4**	**2.118,1**
The share of revenues fixed broadband (%)	66,1%	66,1%	64,5%	60,8%	57,1%
The share of revenues mobile Internet access (%)	33,9%	33,9%	35,5%	39,2%	42,9%

Source: ANRCETI

4.1.1 Development of revenues on the fixed broadband market

According to the data reported by the 80 active providers of fixed broadband services, the total revenues on this market grew, compared to 2016, by 9,4% up to 1 bn. 209,5 million lei. Practically all providers increased revenues from fixed broadband services. The highest revenues from these services were reported by LLC „Starnet Soluții" – 250,1 million lei, increased by 10,8%, JSC „Moldtelecom" - 781,4 million lei, increased by 9,4%, and „Sun Communications" LLC - 62,2 million lei, increased by 6,6%. The cumulative revenues of the other 77 fixed broadband providers increased by 8,2% and reached 115,7 million lei. (Chart 26).

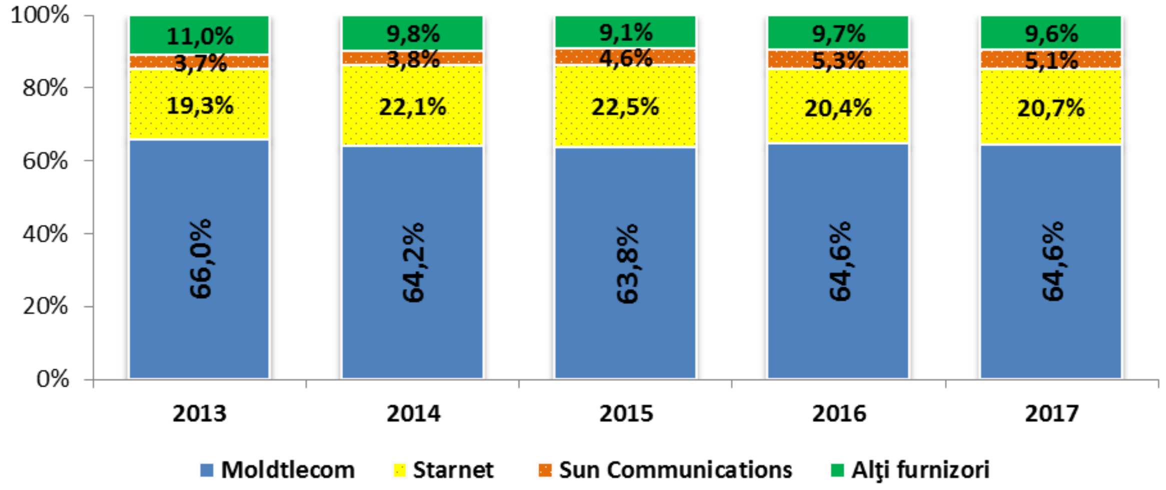


Other providers

Chart 26. Development of revenues from fixed broadband services (million lei)

Source: ANRCETI

The market shares of the biggest fixed broadband providers by revenues did not change significantly. Compared to 2016, the market share of „Starnet Solutions" LLC increased 0,3 p.p. and was estimated at 20,7%, the share of JSC „Moldtelecom" kept to the level of 2016 - 64,6%. The market shares of „Sun Communications" LLC dropped by 0,2 p.p. and was estimated 5,1%, and the cumulative share of the other providers decreased by 0,1 p.p., to 9,6% (Chart 27).



Other providers

Chart 27. Market shares of fixed broadband providers, by revenues
Source: ANRCETI

As a result of the increased revenues from fixed broadband services, the average monthly revenue per user (ARPU) increased by 4,4% and was estimated at 177 lei (Chart 28). The average monthly revenue per individual user was 159,6 lei, per business users - 539,7 lei.

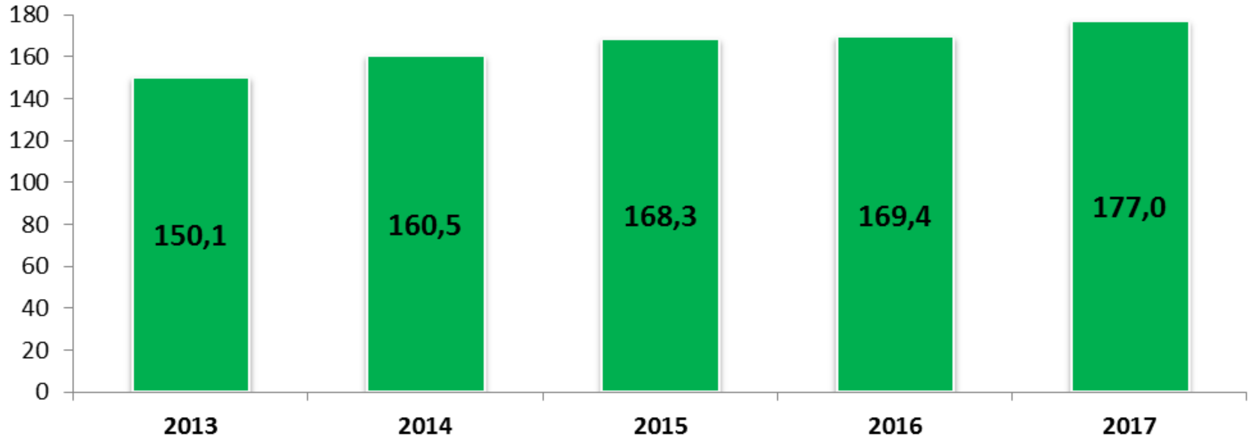


Chart 28. Development of average monthly revenue per user for fixed broadband services - ARPU (lei)
Source: ANRCETI

4.1.2 Development of revenues on mobile Internet access market

In 2017, the total revenues by three mobile providers (JSC „Orange Moldova", JSC „Moldcell" and JSC „Moldtelecom" (Unite) from broadband Internet access services (3G, 4G, via modems/cards/USB – dedicated access) increased over 2016, by 27,4%, reaching 908,5 million lei. This evolution was driven by the increase of revenues registered by JSC "Orange Moldova" and JSC "Moldcell". The revenues of JSC „Orange Moldova" came to 557,1 million Lei, an increase by 32,7%, the revenues of JSC „Moldcell" were 253,8 million Lei, an increase 29,8% up, while revenues of JSC „Moldtelecom" dropped slightly - by 0,4 p.p. to a total of 97,5 million lei. (Chart 29).

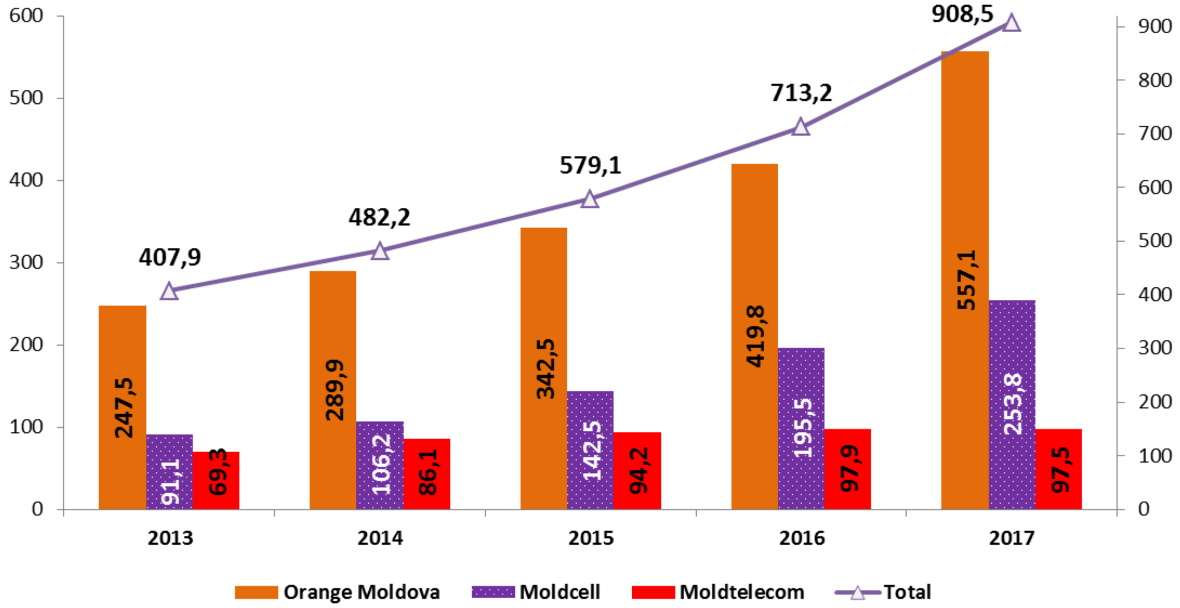


Chart 29 . Development of revenues on mobile broadband market (million lei)
Source: ANRCETI

In 2017, the market shares of the three mobile broadband providers by turnover did not change significantly. The market shares of JSC „Orange Moldova" increased compared to 2016, by 2,4 p.p., showing 61,3%, the share of JSC „Moldcell" increased 0,5 p.p. up to 27,9%. The share of JSC „Moldtelecom" decreased by 3 p.p. up to 10,7%. (Chart 30).

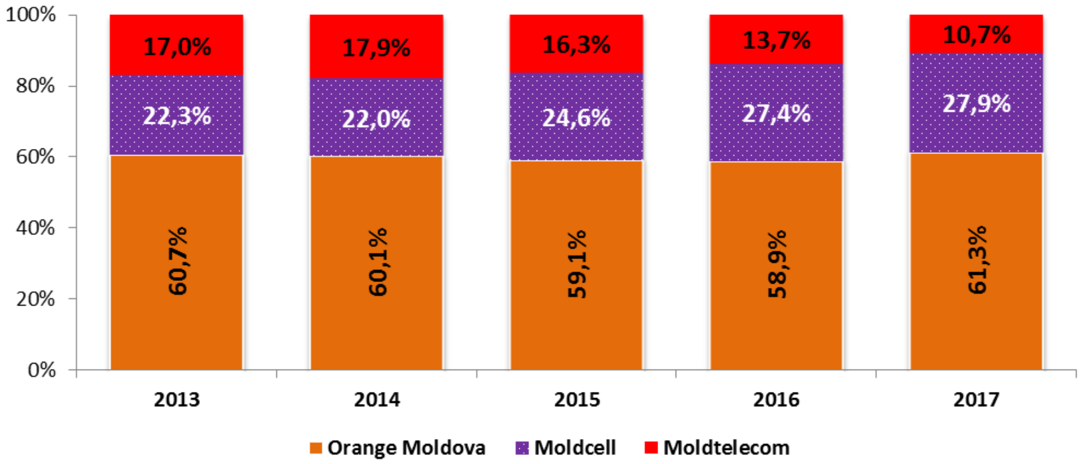


Chart 30. Market shares of mobile Internet providers by revenues
Source: ANRCETI

The statistical data on revenues obtained by the three mobile providers from dedicated mobile Internet services show that the total volume of these revenues increased by 4,2% compared to 2016 and were estimated at 290,4 million lei. This occurred following the increase in the volume of revenues by JSC "Orange Moldova" - by 6,6%, exceeding 133,5 million lei and JSC "Moldcell" - by 7,4% reaching 69 million lei. The revenues of JSC "Moldtelecom" from these services decreased by 1,5%, to 87,9 million lei (Chart 31).

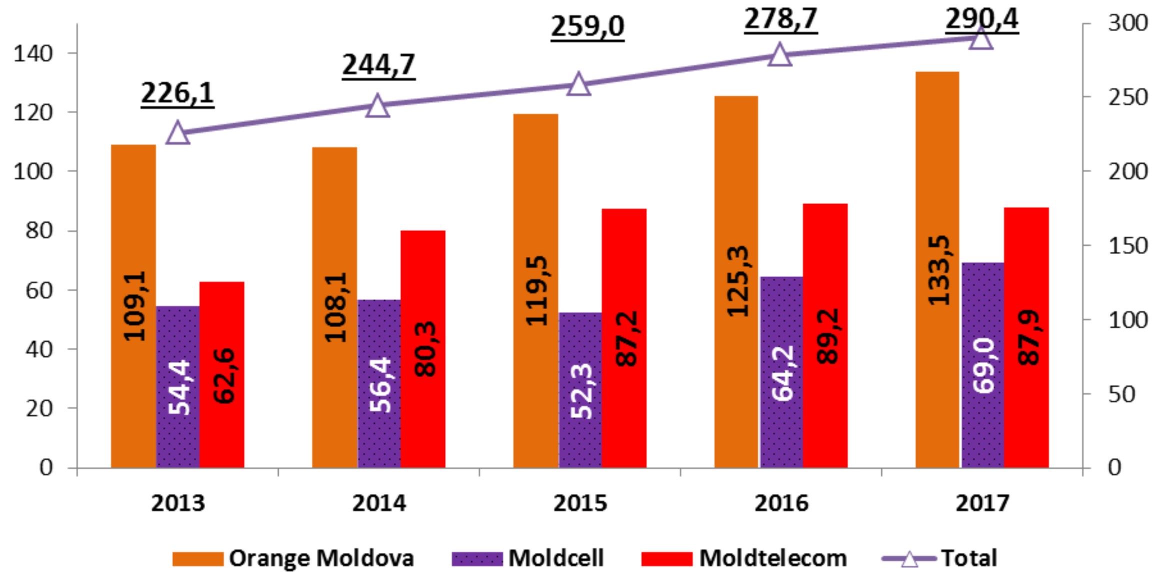


Chart 31. Development of revenues from dedicated mobile Internet services (million lei)
Source: ANRCETI

Compared to 2016, the market shares of the three providers of dedicated mobile Internet services, by revenues, did not change significantly. The market share of JSC „Orange Moldova" increased by 1 p.p. and was estimated at 46%, the market share of JSC „Moldcell" increased by 0,8% p.p. and came to 23,8%, while the market share of JSC „Moldtelecom" decreased by 1,7 p.p. to 30,3% (Chart 32).

(Chart 32).

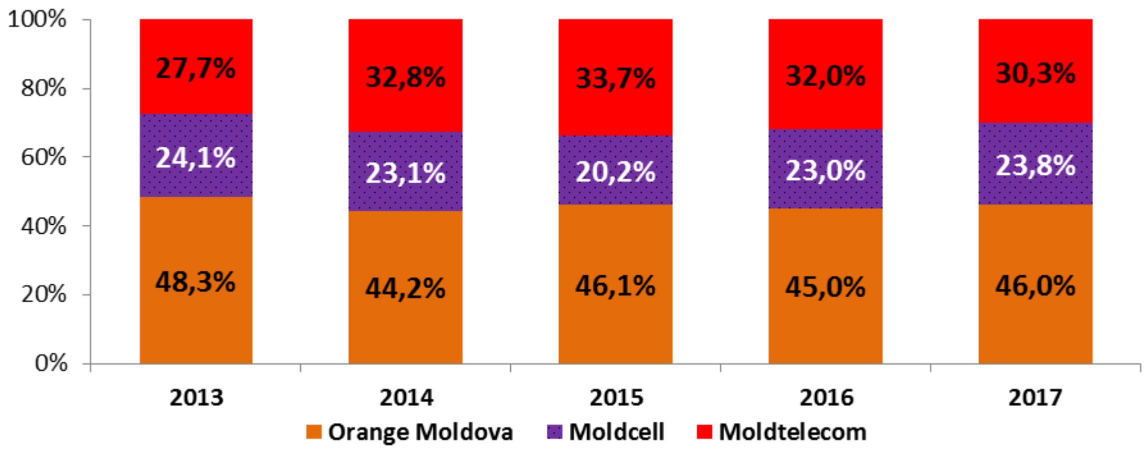
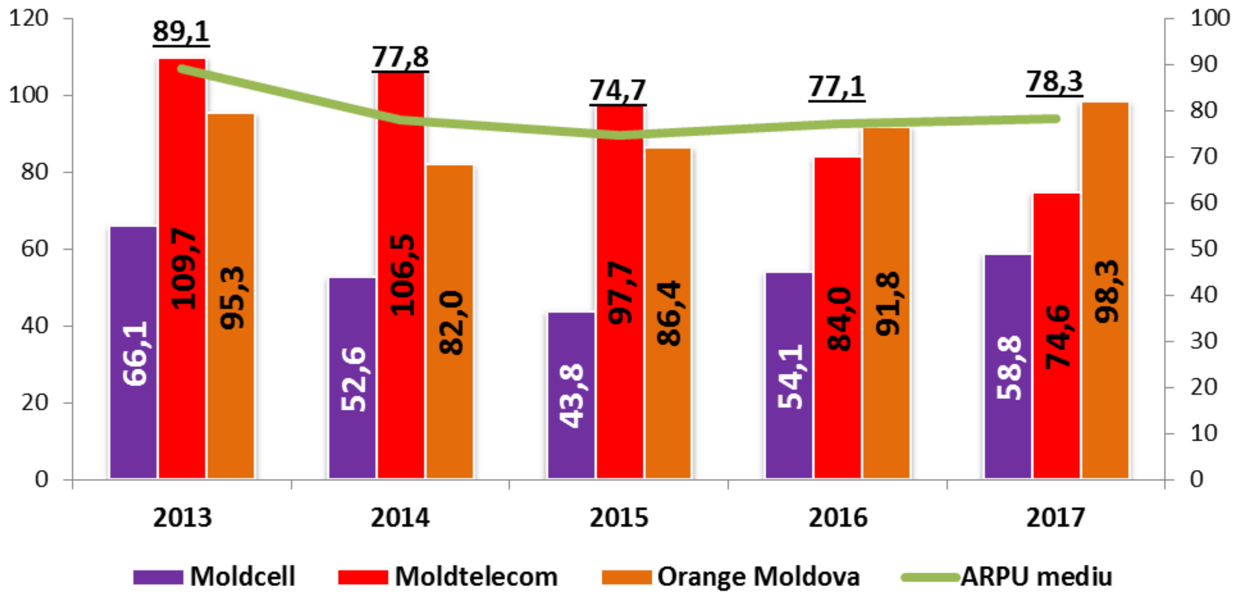


Chart 32. Market shares of providers of dedicated mobile Internet access services, by revenues
Source: ANRCETI

As a result of the increase of the total revenues from the dedicated mobile Internet services, the average monthly revenue per subscriber (ARPU) increased by 1,5% to 78,3 lei. The highest ARPU was reported by JSC „Orange Moldova" – 98,3 lei. The ARPU of JSC „Moldtelecom" was 74,6 lei, of JSC „Moldcell" - 58,8 lei (Chart 33).



Average ARPU

Chart 33. Average monthly revenue per subscriber (ARPU) to dedicated mobile broadband (lei)

Source: ANRCETI

4.2 Subscribers and penetration rate of fixed broadband and mobile Internet access services

In 2017, the number of fixed broadband subscribers grew, compared to 2016, by 4,8% up to 584,3 thousand, while the number of users of mobile broadband (via 3G, 4G and via modems/cards/USB – dedicated access) increased 28,3% and exceeded 2 million 430 thousand.

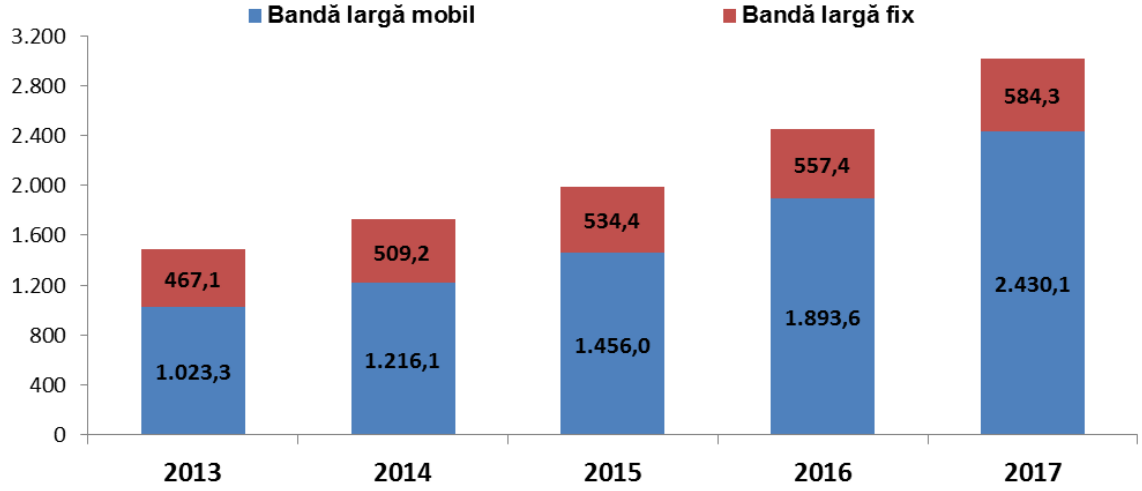
On the mobile broadband market, the fastest increase occurred on the segment of Internet access based on 3G and 4G technologies. The number of users of these services increased by more than 33% and exceeded 2 million 115,8 thousand and the number of users of dedicated access to mobile Internet services increased by 3,4% and reached 314 ,2 thousand. (Table no.3)

Table no.3 Development of the number of fixed and mobile Internet users

	2013	2014	2015	2016	2017	Change 2017-2016
1. Fixed broadband	**467.072**	**509.195**	**534.393**	**557.403**	**584.330**	**4,8%**
2. Mobile broadband	**1.023.343**	**1.216.105**	**1.455.975**	**1.893.562**	**2.430.078**	**28,3%**
2.1. including subscribers to dedicated mobile Internet access	244.602	279.504	298.429	303.871	314.200	3,4%
2.2. including users of Internet via smartphones, voice users	778.741	936.601	1.157.546	1.589.691	2.115.878	33,1%
1. Fixed broadband penetration rate	13,1%	14,3%	15,0%	15,7%	16,5%	+ 0,8 p.p.
2. Mobile broadband penetration rate	28,7%	34,2%	40,9%	53,3%	68,4%	+15,1 p.p.
2.1. including dedicated mobile Internet penetration rate	6,9%	7,9%	8,4%	8,6%	8,8%	+ 0,2 p.p.

Source: ANRCETI

The same statistical data show that share of mobile broadband users among the total broadband users raised 80,6%, while the share of fixed broadband subscribers dropped to 19,4% (Chart 34).



Mobile broadband
Fixed broadband

Chart 34. Development of the number of fixed and mobile broadband subscribers (thousand)
Source: ANRCETI

61% of the total number of fixed broadband subscribers are residents of urban areas, 39% - of rural areas. Most of these subscribers - 40% - are concentrated, like in previous years, in Chisinau.

According to the statistical data on mobile broadband, the total traffic generated by users increased by 28,1% compared to 2016 and reached over 66,1 thousand TB. Of this traffic volume, 22,4 thousand TB (up 77,4%) was generated by mobile Internet users via smartphones and 43,7 thousand TB (up 12,2%) - by those users of dedicated Internet access (Chart 35). A user who accessed the mobile Internet via a smartphone has on average generated a monthly traffic of about 1 GB (1049 MB), which is by 56,7% higher than in 2016, while a dedicated mobile Internet user - a monthly traffic of 11, 8 GB, up by 9,3% compared to 2016.

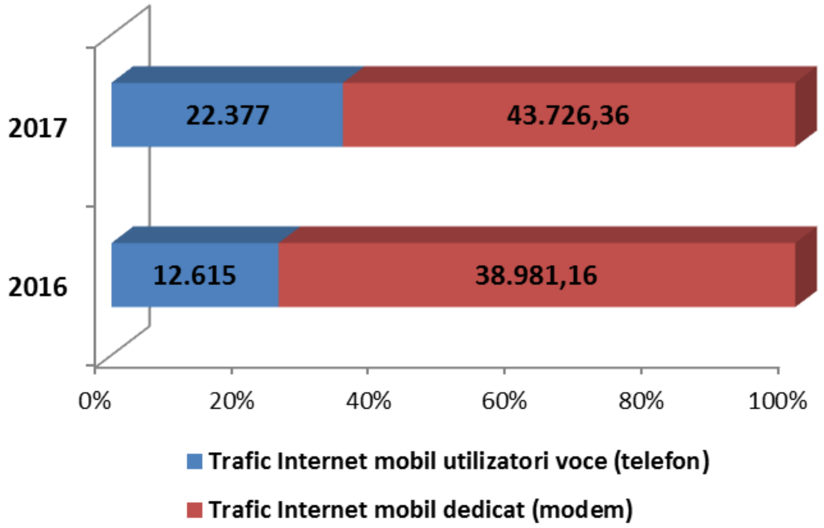
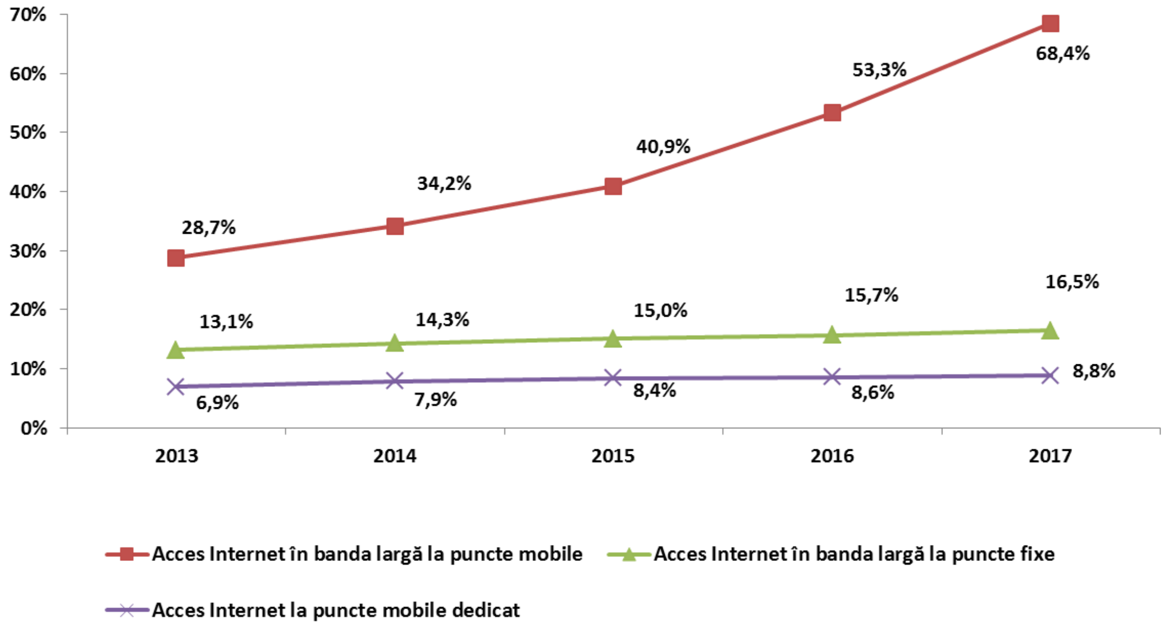


Chart 35. Development of traffic generated by mobile broadband users (TB)
Source: ANRCETI

As a result of the increase in the number of fixed broadband users and mobile broadband users, the penetration rates also increased: mobile broadband increased most significantly – by 15,1 p.p., and reached 68,4%. The penetration rate of dedicated mobile Internet services grew by 0,2 p.p. and reached 8.8%, compared to 2016, whereas fixed broadband services increased by 0,8 p.p. and reached 16,5%
(Chart 36).



Mobile broadband
Fixed broadband
Dedicated Internet access

Chart 36. Development of penetration rates of mobile Internet access and fixed broadband services
Source: ANRCETI

According to ANRCETI estimates, at the end of 2017, the penetration rate of fixed broadband services per 100 households was 48,7%. In most of the administrative-territorial units this indicator ranged between 24% and 54% and in Chisinau it was 83,9%. Further information on the development of fixed broadband services in the administrative - territorial units is available in the Annex to this Report.

4.2.1 Fixed broadband technologies and data transfer speeds

The statistical data processed by ANRCETI show that in 2017 fiber (FTTx - *Fiber to the premises*) and coaxial cable technologies prevailed among the connections to fixed broadband services. During one year, the number of users connected to fiber network increased by 10,3%, to a total of over 347,6 thousand, the number of users connected by coaxial cable grew by 8,2% and reached over 41,6 thousands. At the same time, the number of subscribers connected by xDSL (Digital Subscriber Line) technology decreased by 4,4% to 192,7 thousand (Chart 37).

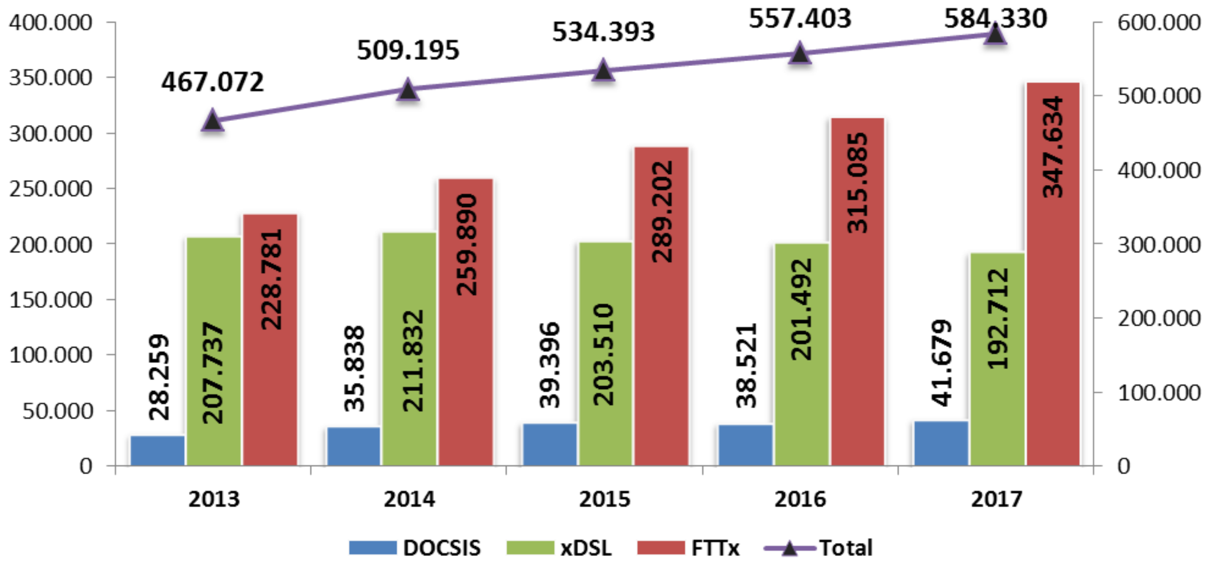
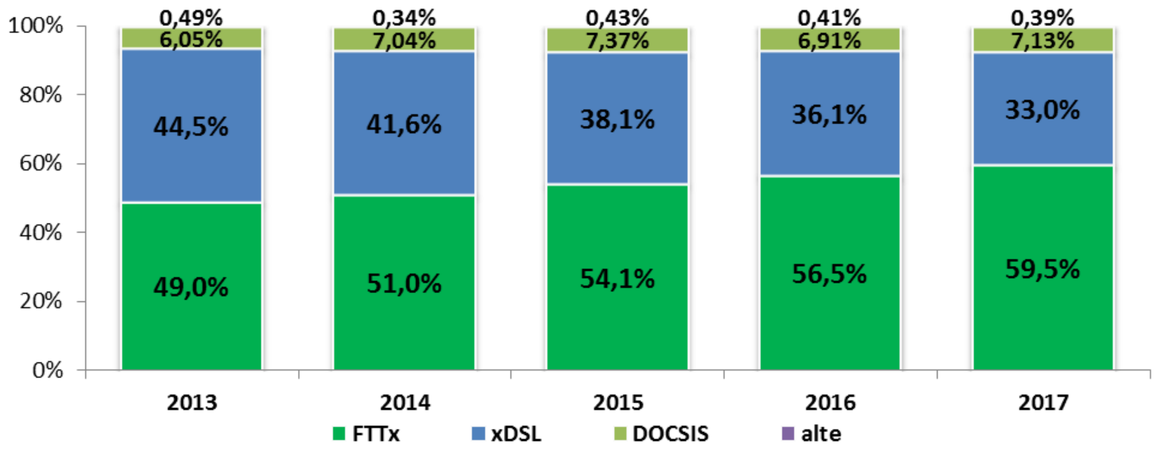


Chart 37. Development of the number of fixed broadband subscribers, by technology
Source: ANRCETI

In 2017, the share of FTTx fixed broadband connections increased, compared to 2016, by 3 p.p. to 59,5%, while the number of coaxial cable connections increased by 0,22 p.p. to 7,1%. At the same time, the share of xDSL-based connections decreased by 3,1 p.p. and was 33% (Chart 38).

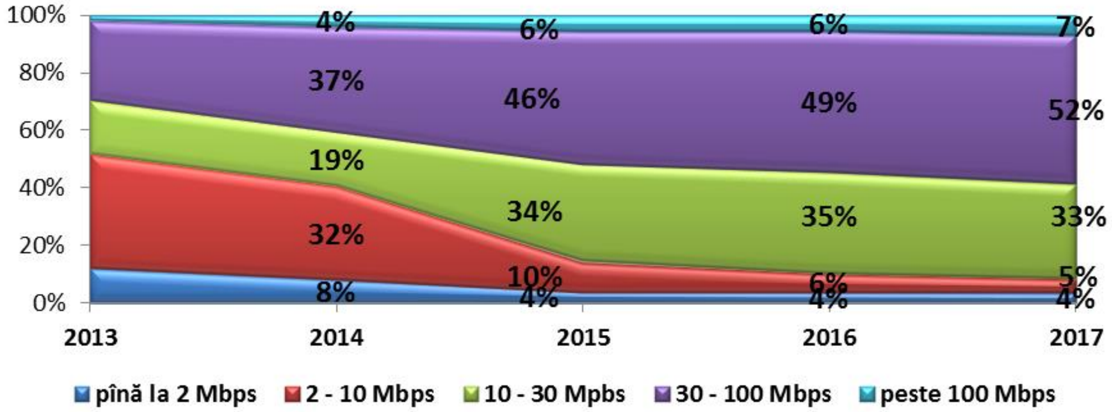


Other

Chart 38. The share fixed broadband connections, by technologies of access
Source: ANRCETI

The analysis of fixed broadband connections in terms of data transfer rates shows that in 2017 the number of subscribers to connections above 100 Mbps increased most significantly, by 23% compared to 2016 and was estimated at about 40 thousand. The number of subscribers to 30 - 100 Mbps connections increased by 10% to over 295,2 thousand. At the same time, the number of low-speed connections decreased ranging from 1 to 22%.

At the end of 2017, the share of subscribers to connections above 100 Mbps reached about 7%, and to connections from 30 Mbps to 100 Mbps reached 52%. At the same time, the share of subscribers to connections between 10 Mbps and 30 Mbps decreased to 33%, for connections between 2 Mbps and 10 Mbps - to 5% and for connections up to 2 Mbps remained at the level of 2016 - 4% (Chart 39).



Up to 2 Mbps
Over 100 Mbps

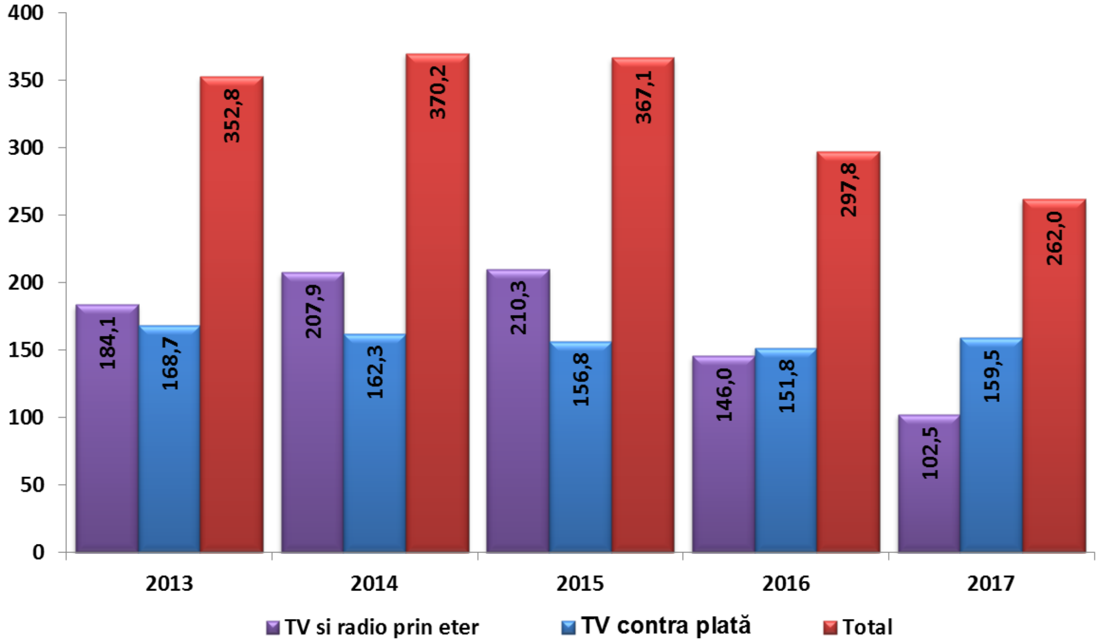
Chart 39. The share of fixed broadband connections, by data transfer speeds
Source: ANRCETI

5. Audiovisual broadcasting and retransmission

5.1 Market development

The statistical data presented by ANRCETI by 119 active providers of audiovisual broadcasting and re-transmission services show that in 2017 the revenues from over-the-air TV and radio services decreased significantly, while the volumes of pay TV services (cable and IP TV) slightly increased.

The revenues from over-the-air TV and radio services dropped compared to 2016 by 29,% to a total of 102,5 million lei, while the revenues from pay TV services increased by 5,1% up to 159,5 million lei. As a result of this development, the cumulative volume of revenues from over-the-air TV and radio services and pay TV services was 262 million lei, which is a 12% decrease. By 31.12.2017, the share of revenues from pay TV on the audiovisual broadcasting and re-transmission market was 60,9%, while the share of over-the-air TV and radio services reached 39,1% (Chart 40).



Over-the-air TV and radio, Pay TV

Chart 40. Development of revenues on broadcasting and re-transmission market (million lei)
Source: ANRCETI

The increase of revenues from pay TV services was driven by raising revenues of IPTV network providers. Their turnover increased by 16%, compared to 2016, and reached 73,9 million lei. At the same time, the revenues of the cable TV providers decreased by 2,8% and reached 85,6 million lei. As a result of these trends, the average monthly revenue per pay TV subscriber (ARPU) decreased by 3,5% to 44,78 lei. (Chart 41).

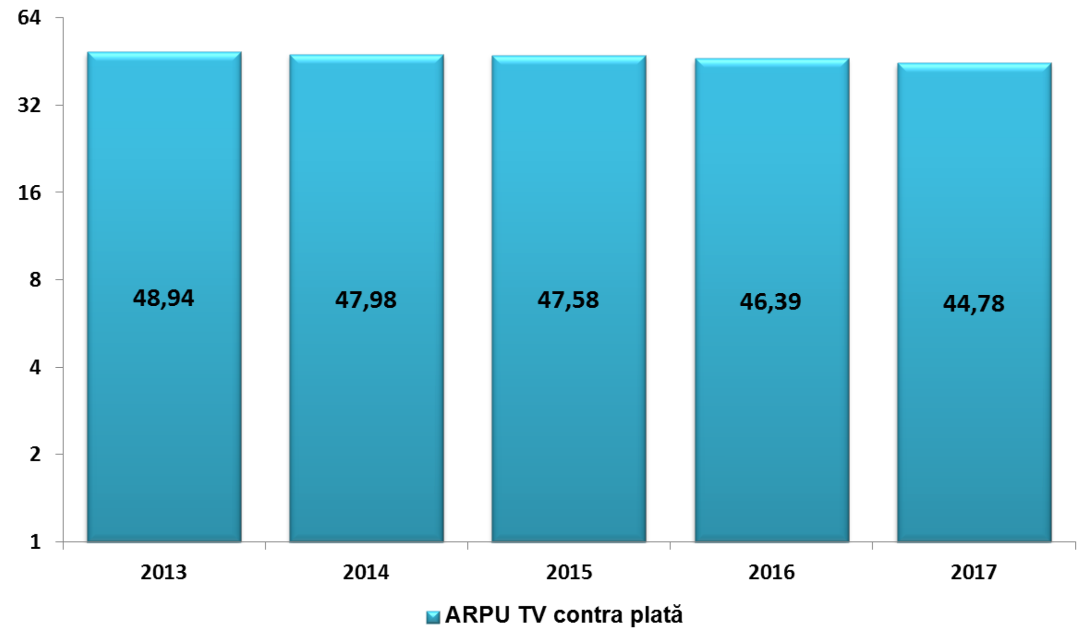
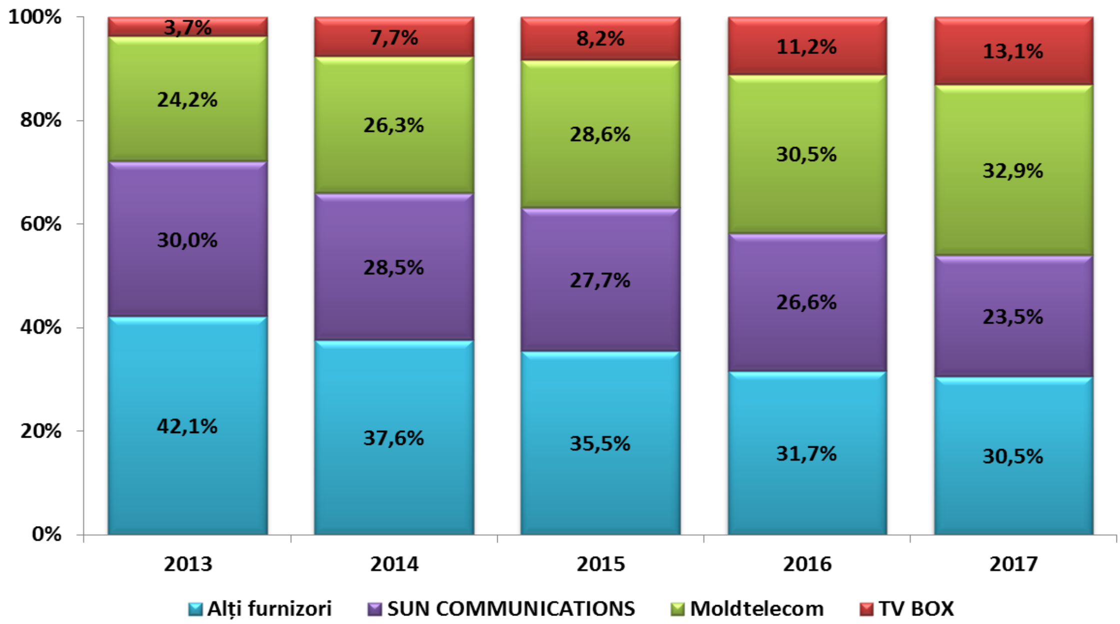


Chart 41. Development of the average monthly revenue per pay TV subscriber - ARPU (lei)
Source: ANRCETI

In 2017, the market shares of the main pay TV service providers, by revenues, changed insignificantly. The market shares of JSC "Moldtelecom" and "TV BOX" LLC increased by 2,4 p.p. and 1,9 p.p. accordingly, compared to 2016, and at the end of 2017 showed 32,9% and 13,1%, At the same time, the market share of Sun Communications LLC decreased by 3,1 p.p. and was estimated at 23,5% and the cumulative share of the other 72 pay TV service providers decreased by 1,2 p.p. and was estimated as 30,5% (Chart 42).



Other providers

Chart 42. Development of market shares of pay TV providers, by revenues
Source: ANRCETI

5.2 Pay TV subscribers and penetration rate

According to the data presented by 75 active pay TV service providers, the total number of subscribers to these services increased by 19,9% compared to 2016 and reached 323,7 thousand.

The increase in the total number of subscribers to pay TV services was driven by the increase by 78,5% of the number of IPTV subscribers, which was estimated as 139,5 thousand at the end of 2017. At the same time, the subscriber base of cable TV network providers was 184,2 thousand, down by 4%. As a result of this development, the penetration rate of pay TV services, per 100 inhabitants, increased in 2016-2017 from 7,6% to 9,1% and the penetration rate per 100 of households - from 22,79% to 27,35% (Table 4).

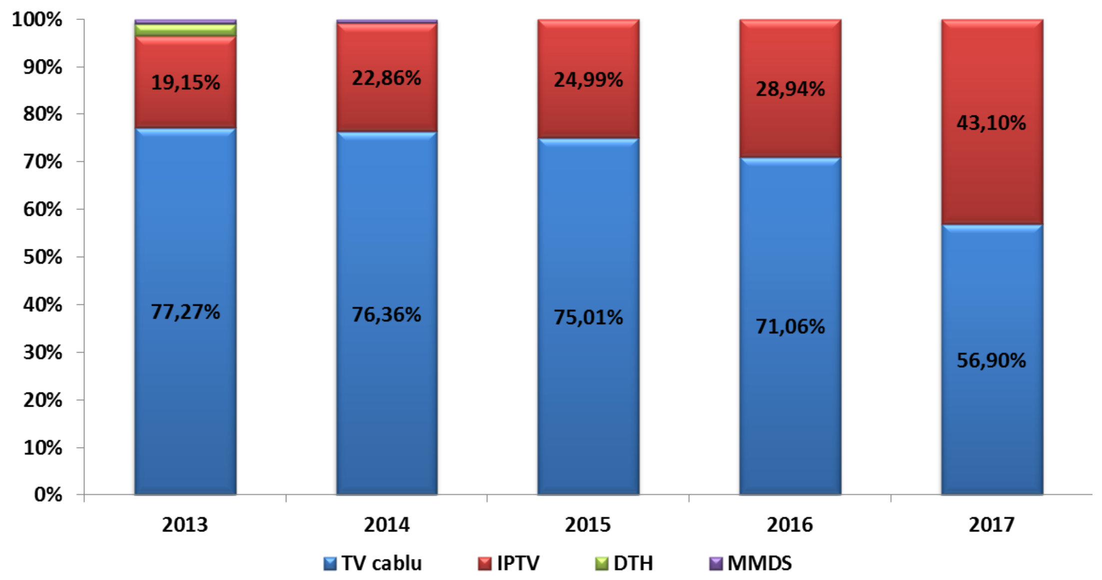
Table no. 4. Development of the number of pay TV subscribers and penetration rate (thousand)

Indicators	2013	2014	2015	2016	2017
Cable TV subscribers	224,0	209,2	206,5	191,8	184,2
IPTV subscribers	55,5	62,6	68,8	78,1	139,5
DTH subscribers	7,4	-	-	-	-
MMDS subscribers	2,9	2,1	-	-	-
Total subscribers	**289,9**	**274,0**	**275,3**	**269,9**	**323,7**
Penetration per 100 inhabitants	8,14%	7,70%	7,74%	7,60%	9,12%
Penetration per 100 households	**24,43%**	**23,11%**	**23,23%**	**22,79%**	**27,35%**

Source: ANRCETI

Statistical data on the pay TV subscribers' places of residence shows that like in previous years, the absolute majority of subscribers (83,7%) resided in urban areas and the other (16,3%) - in rural areas.

According to the same data, by the end of 2017, the share of IPTV subscribers in the structure of pay TV subscribers was 43,1%, up by 14,15 p.p. compared to 2016. The share of subscribers to cable TV services decreased the same proportion and was estimated at 56,9% (Chart 43).



Cable TV

Chart 43. The share of pay TV services, by TV signal reception technology
Source: ANRCETI

The trend of increasing use of digital pay TV services continued in 2017. The number of subscribers to these services went up by 49,7% in one year and exceeded 222 thousand by the end of 2017. By 31.12.2017, the share of digital TV subscribers increased compared to 2016 by 11,9 p.p. and reached 56,5%, while the share of analog TV subscribers decreased the same proportion and made up 43,5% (Chart 44).

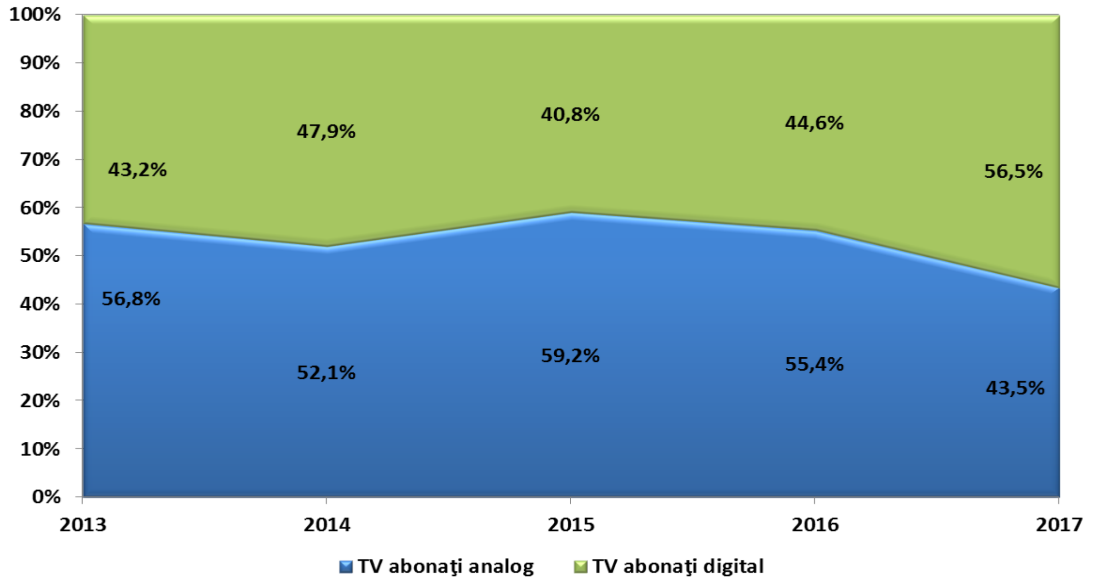


Chart 44. The share of pay TV services, by format of TV program reception
Source: ANRCETI

The statistical data of the past five years show a steady increase of the number of subscribers to digital pay TV services. During this period, the share of digital IPTV subscribers increased by 10,1 p.p.: from 52,6% to 62,7%, digital cable TV subscribers declined the same proportion from 47,4% to 37,3% (Chart 45).

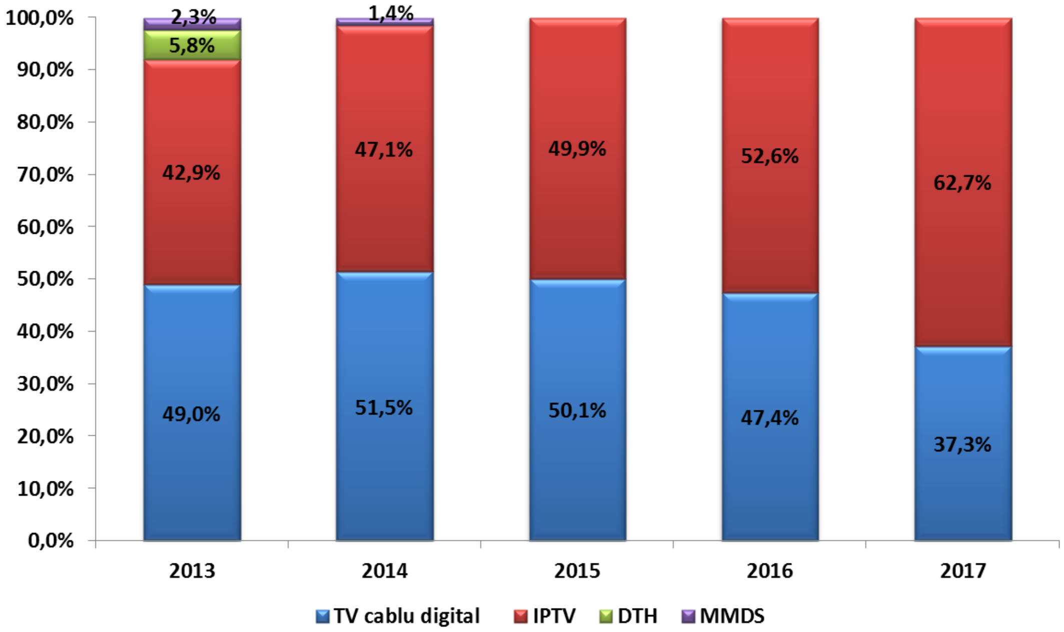


Chart 45. The share of subscribers to digital TV, by technology of TV program reception
Source: ANRCETI

In 2017, the market shares of the main pay TV providers, by number of subscribers, noticeably changed. “TV BOX LLC” strengthened its market position by 17,8 p.p., with share reaching 24,3% at the end of 2017. The market shares of other providers decreased by different values. Thus, the market share of "Sun Communications" LLC decreased by 9,6 p.p., to 26%. The share of JSC "Moldtelecom" decreased by 3,3 p.p. and was 18,8%. The cumulative shares of the other 72 providers decreased by 4,8 p.p. and was 31% (Chart 46).

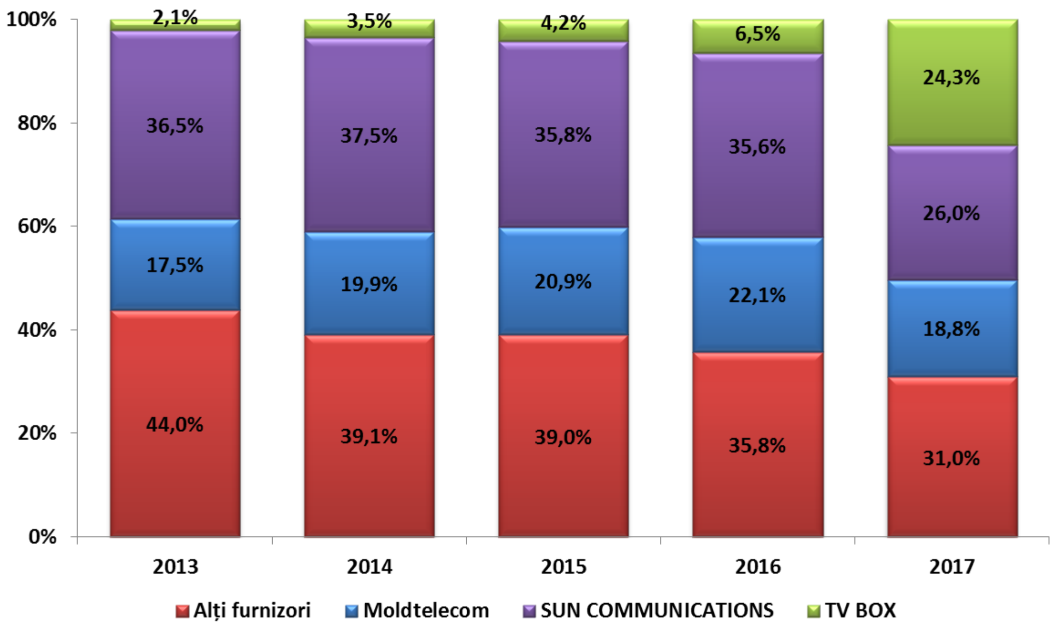


Chart 46. Evolution of market shares of pay TV service providers, by number of subscribers
Source: ANRCETI

Conclusions

The analysis of the statistical data in this Report show that the main tendencies, which shaped out in 2016, persisted in 2017: recession of fixed and mobile telephony markets and the market for audiovisual broadcasting and re-transmission, and on the other hand – the rapid growth of mobile Internet access and fixed broadband markets. The decrease in revenues from fixed telephony services (by 20,6%), mobile telephony (by 3%), audiovisual broadcasting and re-transmission (by 12%) led to a slight decrease of the total revenues in the electronic communications sector, by 1,6%, this indicator reaching more than 6 bn. 624.7 million lei.

It is noteworthy that the rate of total revenue decrease in the electronic communications sector dropped by 1,3 p.p. compared to the rate registered in 2016. This trend was driven by the higher growth rates, in 2017, of mobile broadband revenues - by 28,3% - and fixed broadband - by 9,4%, revenues from other electronic communications activities - by 13,5%, as well as slower decrease, compared to 2016, of revenues on mobile telephony market - by 1,4 p.p. The significant influence of the mobile telephony market on the revenues the electronic communications sector is explained by the fact that this market produces half of the total revenue generated in the sector.

Note that the total revenues on the mobile market slightly declined, for the second consecutive year. This decline was caused by the changing preferences of consumers in favor of alternative Internet communications services that are cheaper or free of charge (OTT applications: Skype, Viber, WhatsApp, etc.). ANRCETI believes that this trend, which is also attested on the European mobile markets, will become even more prominent in the upcoming years, when most mobile phone users will be accessing electronic communications services via smartphones.

The more significant decline of fixed voice revenues in 2017 occurred due to the more intense migration of users from fixed telephony services to mobile and Internet. The negative trend of this market fits into the overall trend of fixed telephony stagnation.

In the conditions of fixed and mobile decline, mobile broadband (3G, 4G and dedicated access technologies) and fixed broadband increased most significantly in 2017 compared to recent years. As the number of fixed and mobile broadband users, in particular of those using 4G, and also the data traffic, increased, the total volume of sales on the two markets grew compared to 2016, by 16,5% and exceeded 2,1 bn. lei, representing 32% of the total value of the electronic communications sector.

The upward trend in mobile broadband and fixed broadband market is boosted by the steadily increasing demand for these services, the development of Internet access infrastructure based on modern technologies (4G and fiber), enhanced competition on these markets, and launch of more attractive offers for users. In this respect, it is noteworthy that at the end of 2017, the 4G coverage of population and territory of the Republic of Moldova reached 97% and 94% accordingly, which means that practically all the population can use high-speed mobile Internet.

According to ANRCETI estimates, mobile and fixed broadband markets will continue to increase most, in the electronic communications sector in the coming years, being the main drivers of sector development.

Annex

Number of subscribers and use of fixed broadband technologies in administrative – territorial units of the R. Moldova, as per 31.12.2017

nr. de or.	Unitatea administrativ-teritorială	Total abonati BL	Penetrare servicii BL la 100 menaje	Abonaţi				Ponderea tehn. de acces în BL				Penetr. la 100 locuitori	Dinamica penetrării (p.p)		Dinamica ponderii tehnologiei (p.p.)				Cresterea numărului de abonaţi (un.)				
				xDSL	FTTx	cablu coaxial	alte tehn.	xDSL	FTTx	cablu coaxial	alte tehn.		la 100 de menaje	la 100 de locuitori	xDSL	FTTx	cablu coaxial	alte tehn.	xDSL	FTTx	cablu coaxial	alte tehn.	abonaţi banda largă
1	mun.Chişinău	234.008	83,94%	7.365	188.153	37.111	1.379	3,1%	80,4%	15,9%	0,6%	29,44%	3,20	1,12	-0,8	0,2	0,7	-0,1	-1.480	7.593	2.882	-62	8.933
2	mun. Bălţi	29.670	54,01%	3.234	24.317	2.112	7	10,9%	82,0%	7,1%	0,0%	19,89%	1,96	0,72	-1,2	1,0	0,3	0,0	-236	1.155	156	-1	1.074
3	R.Anenii Noi	11.806	43,56%	6.340	5.218	0	248	53,7%	44,2%	0,0%	2,1%	14,21%	4,18	1,36	-10,8	11,1	0,0	-0,2	-547	1.682	0	-1	1.134
4	R.Basarabeasca	3.829	39,79%	1.759	2.069	0	1	45,9%	54,0%	0,0%	0,0%	13,20%	4,92	1,63	-12,5	12,5	0,0	0,0	-201	674	0	0	473
5	R.Briceni	10.649	41,81%	6.060	4.587	0	2	56,9%	43,1%	0,0%	0,0%	14,26%	2,18	0,74	-7,9	7,9	0,0	0,0	-483	1.037	0	0	554
6	R.Cahul	17.090	43,55%	9.874	6.762	428	26	57,8%	39,6%	2,5%	0,2%	13,68%	1,82	0,57	-5,0	3,7	1,3	0,0	-402	881	237	-2	714
7	R.Cantemir	7.100	38,99%	6.074	1.025	0	1	85,5%	14,4%	0,0%	0,0%	11,36%	1,82	0,53	-1,4	1,4	0,0	0,0	187	144	0	0	331
8	R.Călăraşi	8.705	31,80%	4.879	3.817	0	9	56,0%	43,8%	0,0%	0,1%	11,05%	1,69	0,59	-4,6	4,6	0,0	0,0	-116	579	0	0	463
9	R.Căuşeni	10.788	36,03%	6.809	3.974	0	5	63,1%	36,8%	0,0%	0,0%	11,73%	2,20	0,72	-4,4	4,4	0,0	0,0	-35	693	0	0	658
10	R.Cimişlia	7.511	38,92%	4.451	3.058	0	2	59,3%	40,7%	0,0%	0,0%	12,25%	2,31	0,73	-3,1	3,1	0,0	0,0	42	404	0	0	446
11	R.Criuleni	10.494	45,28%	5.860	4.630	0	4	55,8%	44,1%	0,0%	0,0%	14,32%	3,25	1,03	-7,1	7,1	0,0	0,0	-270	1.023	0	0	753
12	R.Donduşeni	4.323	24,12%	3.356	966	0	1	77,6%	22,3%	0,0%	0,0%	9,65%	-2,38	-0,95	5,2	-5,2	0,0	0,0	-86	-341	0	0	-427
13	R.Drochia	10.716	32,59%	4.779	5.447	488	2	44,6%	50,8%	4,6%	0,0%	11,97%	0,66	0,24	-8,1	9,8	-1,7	0,0	-759	1.142	-167	0	216
14	R.Dubăsari	3.971	36,10%	2.467	1.503	0	1	62,1%	37,8%	0,0%	0,0%	11,28%	2,28	0,71	-9,1	9,1	0,0	0,0	-184	435	0	0	251
15	R.Edineţ	11.471	37,97%	5.624	5.845	0	2	49,0%	51,0%	0,0%	0,0%	13,90%	2,57	0,94	-7,1	7,1	0,0	0,0	-381	1.157	0	0	776
16	R.Făleşti	9.808	29,72%	5.891	3.914	0	3	60,1%	39,9%	0,0%	0,0%	10,61%	1,68	0,60	-6,7	6,7	0,0	0,0	-285	837	0	1	553
17	R.Floreşti	10.841	33,33%	7.075	3.388	0	378	65,3%	31,3%	0,0%	3,5%	12,23%	1,57	0,58	-1,4	0,9	0,0	0,4	190	258	0	64	512
18	R.Glodeni	6.966	32,45%	5.047	1.918	0	1	72,5%	27,5%	0,0%	0,0%	11,35%	0,86	0,30	-0,5	0,5	0,0	0,0	103	82	0	0	185
19	R.Hînceşti	14.049	37,60%	8.317	5.729	0	3	59,2%	40,8%	0,0%	0,0%	11,55%	2,06	0,63	-5,3	5,3	0,0	0,0	-253	1.021	0	2	770
20	R.Ialoveni	14.806	50,00%	5.745	7.663	1.393	5	38,8%	51,8%	9,4%	0,0%	14,85%	1,78	0,53	-6,9	6,9	-0,1	0,0	-778	1.265	39	2	528
21	R.Leova	6.291	37,24%	4.407	1.884	0	0	70,1%	29,9%	0,0%	0,0%	11,74%	1,86	0,59	-4,7	4,7	0,0	0,0	-60	374	0	0	314
22	R.Nisporeni	6.271	30,41%	4.344	1.926	0	1	69,3%	30,7%	0,0%	0,0%	9,42%	1,77	0,55	-3,3	3,3	0,0	0,0	58	306	0	0	364
23	R.Ocniţa	6.116	29,57%	4.799	1.312	0	5	78,5%	21,5%	0,0%	0,1%	10,96%	1,91	0,71	-12,1	12,1	0,0	0,0	-382	778	0	0	396
24	R.Orhei	15.505	37,52%	7.223	8.271	0	11	46,6%	53,3%	0,0%	0,1%	12,33%	1,69	0,55	-2,9	2,8	0,0	0,0	-98	792	0	3	697
25	R.Rezina	5.772	32,51%	3.458	2.311	0	3	59,9%	40,0%	0,0%	0,1%	11,04%	2,02	0,68	-8,9	8,9	0,0	0,0	-268	626	0	0	358
26	R.Rîşcani	8.706	33,11%	4.698	4.006	0	2	54,0%	46,0%	0,0%	0,0%	12,53%	2,29	0,87	-3,1	3,1	0,0	0,0	72	530	0	1	603
27	R.Sîngerei	11.783	37,93%	6.408	5.373	0	2	54,4%	45,6%	0,0%	0,0%	12,64%	2,26	0,75	-1,2	1,2	0,0	0,0	249	453	0	0	702
28	R.Soroca	11.636	31,81%	6.754	4.881	0	1	58,0%	41,9%	0,0%	0,0%	11,62%	2,29	0,84	-0,4	0,4	0,0	0,0	442	394	0	0	836
29	R.Străşeni	10.572	37,85%	6.542	3.847	0	183	61,9%	36,4%	0,0%	1,7%	11,55%	1,82	0,56	-8,9	9,1	0,0	-0,2	-581	1.097	0	-7	509
30	R.Şoldăneşti	4.031	26,56%	3.169	861	0	1	78,6%	21,4%	0,0%	0,0%	9,37%	2,91	1,03	-12,1	12,1	0,0	0,0	-87	528	0	0	441
31	R.Ştefan Vodă	7.732	33,25%	4.775	2.954	0	3	61,8%	38,2%	0,0%	0,0%	10,81%	1,44	0,47	-0,4	0,4	0,0	0,0	180	155	0	0	335
32	R.Taraclia	5.262	40,92%	2.972	2.218	70	2	56,5%	42,2%	1,3%	0,0%	11,93%	2,40	0,70	-20,6	22,0	-1,4	0,0	-847	1.221	-66	0	308
33	R.Teleneşti	8.150	33,79%	5.671	2.478	0	1	69,6%	30,4%	0,0%	0,0%	11,03%	2,68	0,88	-8,4	8,4	0,0	0,0	-181	828	0	0	647
34	R.Ungheni	15.242	39,37%	5.862	9.379	0	1	38,5%	61,5%	0,0%	0,0%	13,01%	2,49	0,82	-7,0	7,0	0,0	0,0	-625	1.588	0	0	963
35	UTA Gagauzia	22.660	48,96%	10.624	11.950	77	9	46,9%	52,7%	0,3%	0,0%	14,06%	1,20	0,35	-4,2	3,9	0,3	0,0	-678	1.158	77	0	557
	Total	584.330	48,75%	192.712	347.634	41.679	2.305	33,0%	59,5%	7,1%	0,4%	16,42%	2,25	0,76	-3,2	3,0	0,2	0,0	-8.780	32.549	3.158	0	26.927