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

STATISTICAL RAPORT

EVOLUTION OF ELECTRONIC COMMUNICATIONS MARKET IN 2018

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CUPRINS

This Report was developed on basis of statistical data, submitted to the National Regulatory Agency for Electronic Communications and Information Technology (hereinafter ANRCETI) by providers of public networks and publicly available electronic communications and services, for 2018.

Pursuant to the Law on Electronic Communications and Information Technology no. 241 of 15.11.2007, with subsequent amendments (*hereinafter – Law 241/2007),* 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 perform 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.

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

Main Electronic Communications Market Indicators

Indicators	2017	2018	Change
Mobile voice services			
Users, total:	4 459 999	4 375 856	-1,9%
Users, active	3 662 968	3 566 276	-2,6%
Penetration rate per 100 inhabitants	125,6%	123,2%	-2,4 p.p.
Total traffic in mobile networks (mill. minutes)	6 219,70	6 176,20	-0,7%
Average number of minutes consumed monthly by a user - MoU (minutes)	263	273	3,8%
Messages SMS (mill.)	827,7	1 088,40	31,5%
Messages MMS (mill.)	1,71	1,66	-2,9%
Revenues (mill. lei)	3 337,6	3150,43	-5,6%
Average ARPU – active subscribers* (lei)	74,4	72,7	-2,2%
Mobile broadband services			
Mobile broadband users (3G, 4G, dedicated access) , total:	2 430 078	2 948 155	21,3%
- via smartphones	2 115 878	2 636 061	24,6%
- by dedicated access (modems/cards/USB)	314 200	312 094	-0,7%
Mobile broadband penetration rate per 100 inhabitants	68,4%	83,0%	14,6 p.p.
Dedicated mobile broadband traffic (TB),	8,8%	8,8%	-0,1 p.p.
Mobile broadband traffic via smartphones (TB),	43 726	49 050	12,2%
Revenues mobile broadband** (mill. lei)	22 377	35 631	59,2%
- Revenues dedicated mobile broadband (mill. lei)	908,5	1 058,5	16,5%
ARPU dedicated mobile broadband (lei)	290,4	298,3	2,7%
ARPU mobile broadband via smartphones (lei)	78,3	78,4	0,1%
Dedicated mobile broadband traffic (TB),	29,5	34,0	15,2%
Subscribers M2M	34 856	39 328	12,83%
Revenues M2M*** (mill. lei)	9,9	10,7	0,1
Fixed voice services			
Subscribers (telephone lines)	1 143 852	1 108 200	-3,1%
Service penetration rate per 100 inhabitants	32,2%	31,2%	-1,0 p.p.
Total traffic in fixed networks (mill. minutes)	1 587,9	1 339,0	-15,7%
Average number of minutes monthly consumed by a user - MoU (minutes)	178	156	-12,4%
Revenues (mill. lei)	695,5	556,85	-19,9%
ARPU (lei)	50,1	41,2	-17,7%
Fixed broadband services			
Subscribers	584 330	623 135	6,6%
Service penetration rate per 100 inhabitants	16,5%	17,5%	1,09 p.p.
Revenues (mil. lei)	1 209,5	1 289,54	6,6%
Average ARPU (lei)	176,96	179,06	1,2%
Total external internet capacity (Gbps)	356,40	541,70	52,0%
Data transmission revenues ***(mill. lei)	61,9	65,4	5,6%
Audiovisual broadcasting			
Pay TV subscribers	323 695	329 674	1,8%
Service penetration rate per 100 inhabitants	9,1%	9,3%	0,2 p.p.
Service penetration rate per 100 households	27,35%	27,95%	0,6 p.p.
Revenues from transmission and re-transmission services (mil. lei)	262,0	248,69	-5,1%
- including revenues from pay TV services	159,5	162,1	1,6%
ARPU pay TV (lei)	43,8	41,8	-4,5%
Revenues from other electronic communications activities (mill. lei)	829,7	895,9	8,0%
Total revenues in electronic communications sector (mill. lei)	**6624,8**	**6439,8**	**-2,8%**
Total investments in electronic communications sector (mill. lei)	**1096,4**	**1194,3**	**8,9%**

*This indicator was calculated taking into account only active subscribers.

** This indicator also includes revenues from the sale of mobile broadband accessed from smartphones and is presented, as information, to show the development of total revenues on the mobile broadband 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 voice.

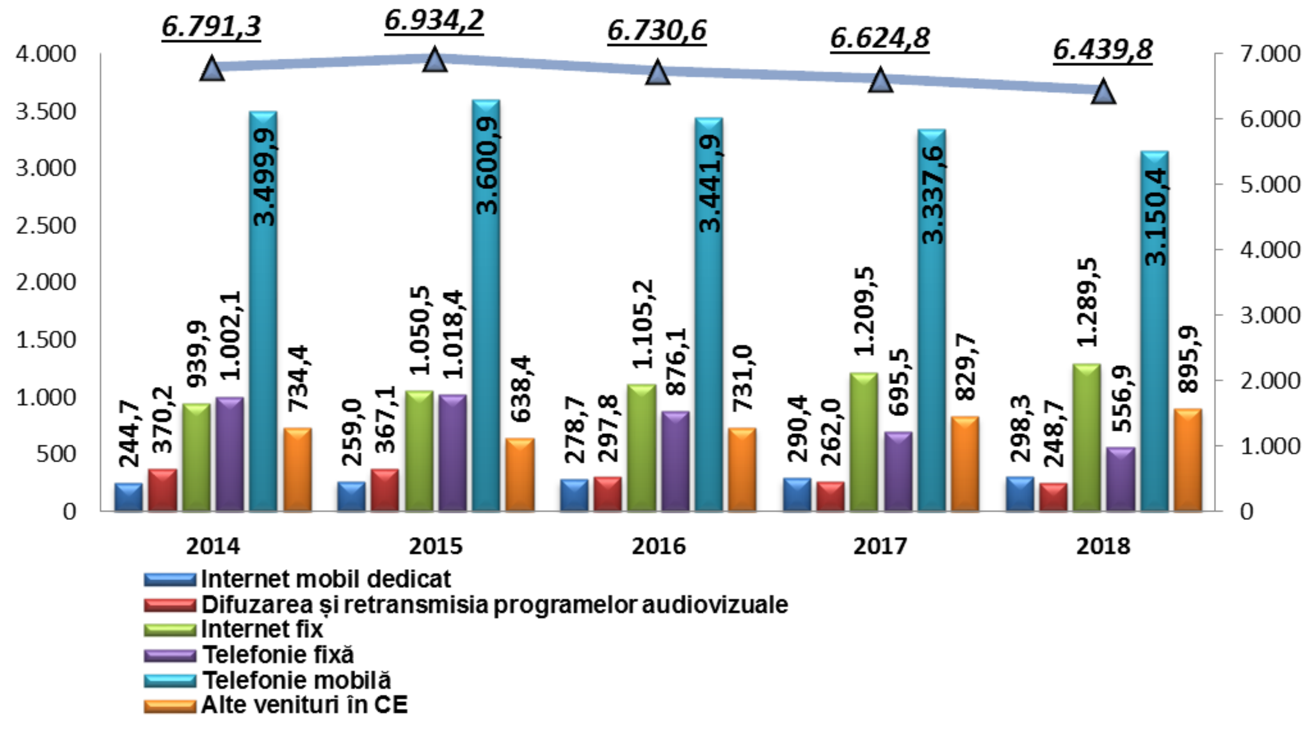
*** These indicators are presented as information to show the revenue development on the corresponding market segments. The amounts of such revenues are included in revenues from other electronic communications activities.

1. Market development. General description

1.1 Development of revenues

According to the statistical data presented to ANRCETI by the 258 active providers of public electronic communications networks and/or publicly available electronic communications services show that in 2018 the total revenues in electronic communications services (mobile voice, mobile broadband, fixed voice, fixed broadband, audiovisual broadcasting, other electronic communications activities), in comparison with 2017, slightly decreased, by 185 mill. lei (- 2.8%) and was estimated at 6 billion 439.8 mill. lei.

The decrease was caused by lower revenues from three market segments: fixed voice, audiovisual broadcasting, and mobile voice. The revenues of the fixed voice market decreased by 19,9% to a total of 556,9 mil. lei, revenues on the mobile voice market slightly dropped by 5,6% to 3150,4 mil. lei, revenues of audiovisual broadcasting market dropped by 5,1% to 248,7 mil. Lei. Meanwhile the revenues from other electronic communications activities[1] increased by 8% up to 895,9 mill. lei, those from fixed broadband services - by 6.6%, the total 1289,5 mil. lei, revenues from dedicated mobile broadband services (by modems/cards/USBs) increased by 2,7% to a total of 298,3 mil. lei. (Chart 1).



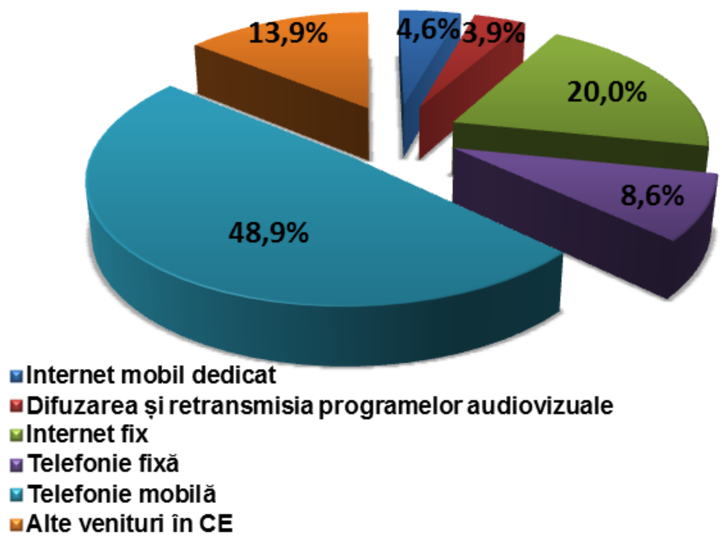
Dedicated mobile broadband, Audiovisual broadcasting, Fixed broadband, Fixed voice, Mobile voice, Other EC revenues Total EC revenues,

Chart 1. Development of revenues in electronic communications sector (mil. 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.

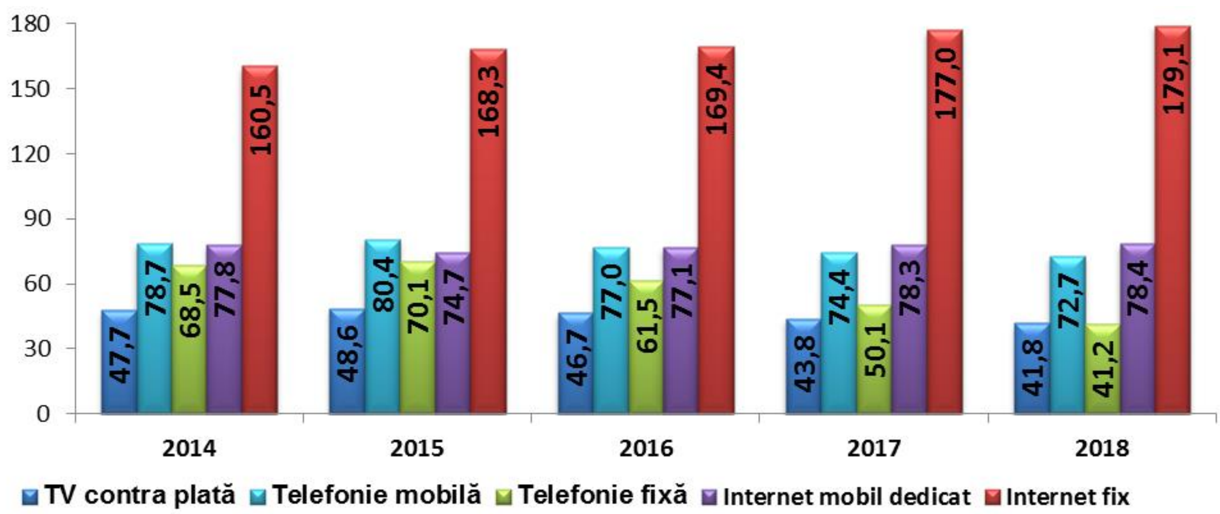
Compared to 2017, the structure of the electronic communications market, by revenues, has undergone minor changes. The share of revenues from fixed broadband services increased from 18,3% to 20%, the revenues from other electronic communications activities - from 12,5% to 13,9% and the revenues from dedicated mobile broadband services - from 4,4% to 4,6%. The share of revenues from fixed voice services reduced from 10,5% to 8,6%, mobile voice services - from 50,4% to 48,9%, and the revenues from audiovisual broadcasting services – from 4% to 3,9%(Chart 2).



Dedicated mobile broadband, Audiovisual broadcasting, Fixed broadband, Fixed voice, Mobile voice, 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) – 179,1 lei. On the dedicated mobile Internet market this indicator was 78,4 lei, on the mobile voice market – 72,7 lei, on the fixed voice market – 41,2 lei and on the pay TV market - 41,8 lei (Chart 3).

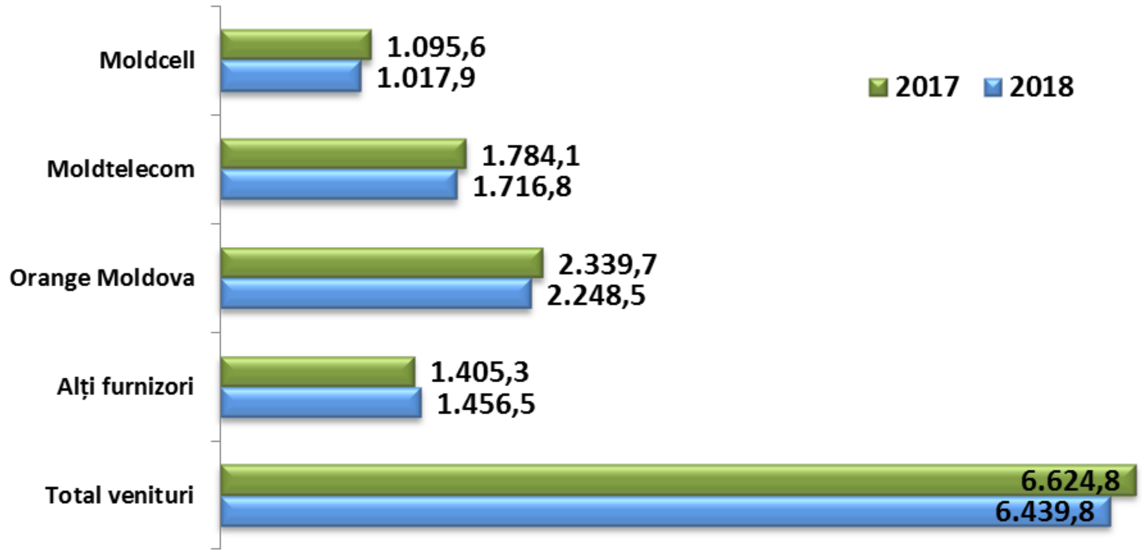


Pay TV, Mobile voice, Fixed voice, Dedicated mobile broadband, Fixed broadband

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

In 2018, JSC Orange Moldova had the highest revenues - 2248,5 mil. lei or 34,9% of the total revenues in the electronic communications sector. The revenues of JSC Moldtelecom were

1716,8 mil. lei or 26,7% of the total, the revenues of JSC Moldcell - 1017,9 mil. lei sau 15,8 % of the total. The revenues of other providers jointly were 1456,5 mil. lei or 22,6% of the total (Chart 4).



Other providers, Total revenues

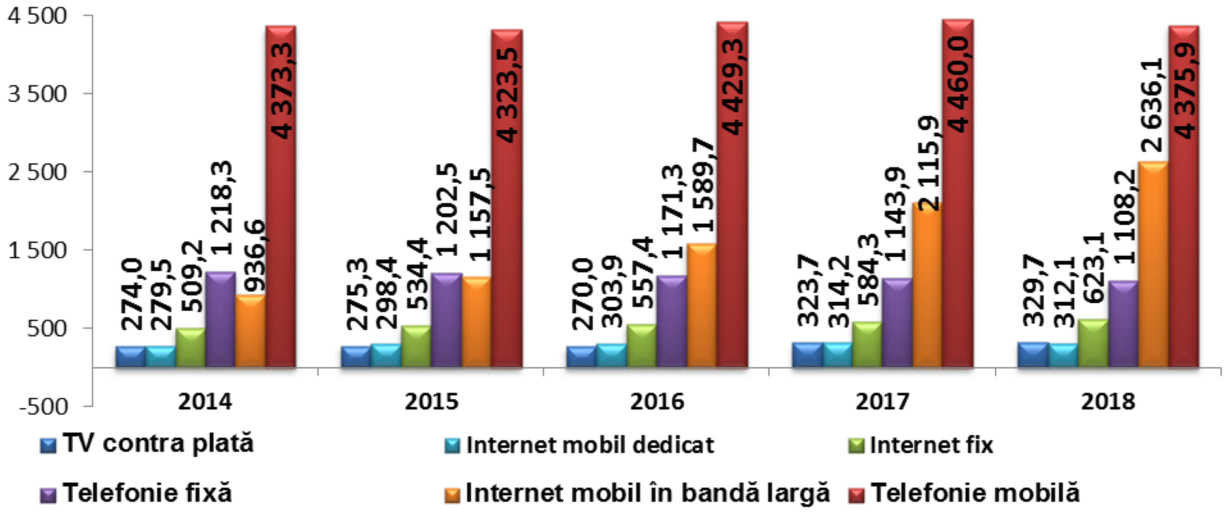
Chart 4. Volume of revenues by electronic communications network/service providers in 2017 - 2018 (mil. lei)

Source: ANRCETI

1.2 Development of the number of end users

In 2018, the most dynamic increase in the number of end users was attested, like in 2017, on the mobile broadband market (based on 3G, 4G and modems/cards/USBs - dedicated access). The number of those users increased, compared to 2017, by 21,3%, was estimated at over 2948,2 thousand. From that number, 2 mil. 636,1 thousand are users of mobile broadband via smartphones, which is 24,6% increase, while the number of dedicated mobile Internet users dropped by 0,7%, to an estimate of 312,1 thousand.

At the same time, the number of fixed broadband subscribers increased by 6,6%, up to a total of 623,1 thousand, and the number of pay TV subscribers (cable TV and IP TV) increased by 1,8% and amounted to 329,7 thousand. At the same time, the total number of fixed voice users dropped by 3,1% to 1108,2 thousand and the number of mobile voice subscribers dropped by 1,9% to 4375,9 thousand (Diagram 5).

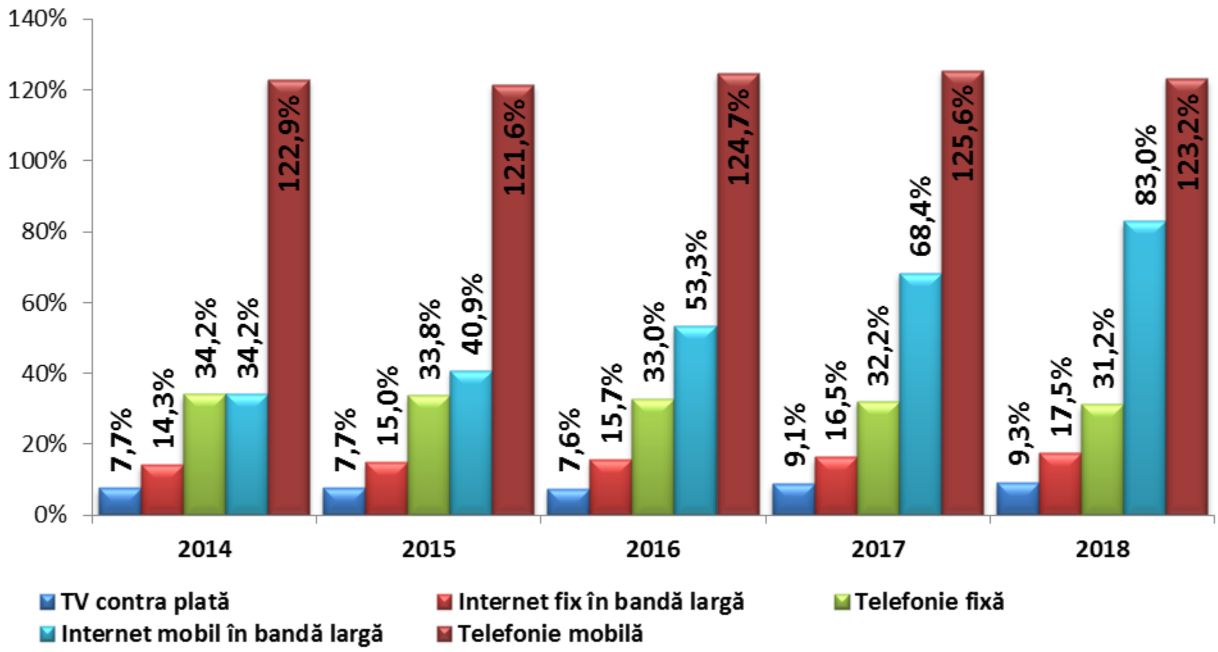


Pay TV, Fixed voice, Dedicated mobile broadband, Mobile broadband, Fixed broadband, Mobile voice

Chart 5. Development of the number of electronic communications service users (thousand)

Source:ANRCETI

As a result of the aforementioned evolutions, the development of penetration rates of most types of services per 100 inhabitants had a positive trend. The fastest growth rate for this indicator was attested on the mobile broadband market, it increased compared to 2016 by 14,6 percentage points (p.p.) and reached 83%. At the same time, the penetration rate of fixed broadband access increased by 1 p.p. and made up 17,5%, whereas the pay-TV penetration rate increased by 0,2 p.p. and reached 9,3%. At the same time, penetration rates for mobile and fixed voice services decreased by 2.4 p.p. and 1 pp respectively, accounting for 123.2% and 31.2%, respectively. (Chart6).



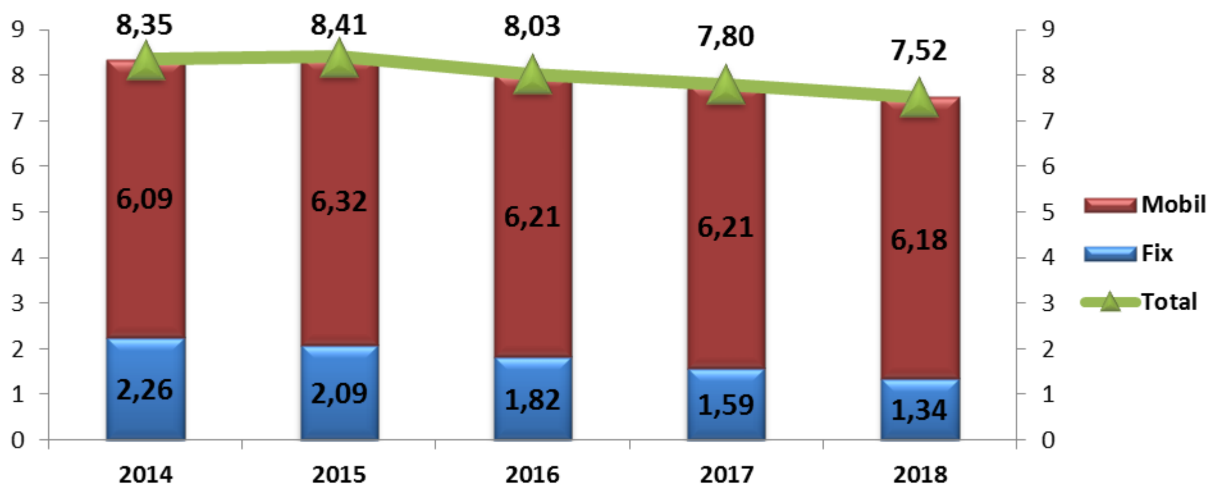
Pay TV, Mobile broadband, Fixed broadband, Mobile voice, Fixed voice

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 2018, the cumulative volume of voice traffic in mobile and fixed networks was subject to a decrease, for the third consecutive year. The total of this traffic reduced compared to 2017, by 3,7% and was estimated at 7,5 bn. minutes. Like in the previous year, this reduction was caused by a well-marked decrease of fixed voice traffic, which reduced by 15,7% and was estimated at 1,3 bn. minutes, whereas the traffic in mobile networks dropped by 0,7% compared to the previous year, and was estimated at 6,18 bn. minutes. (Chart 7).

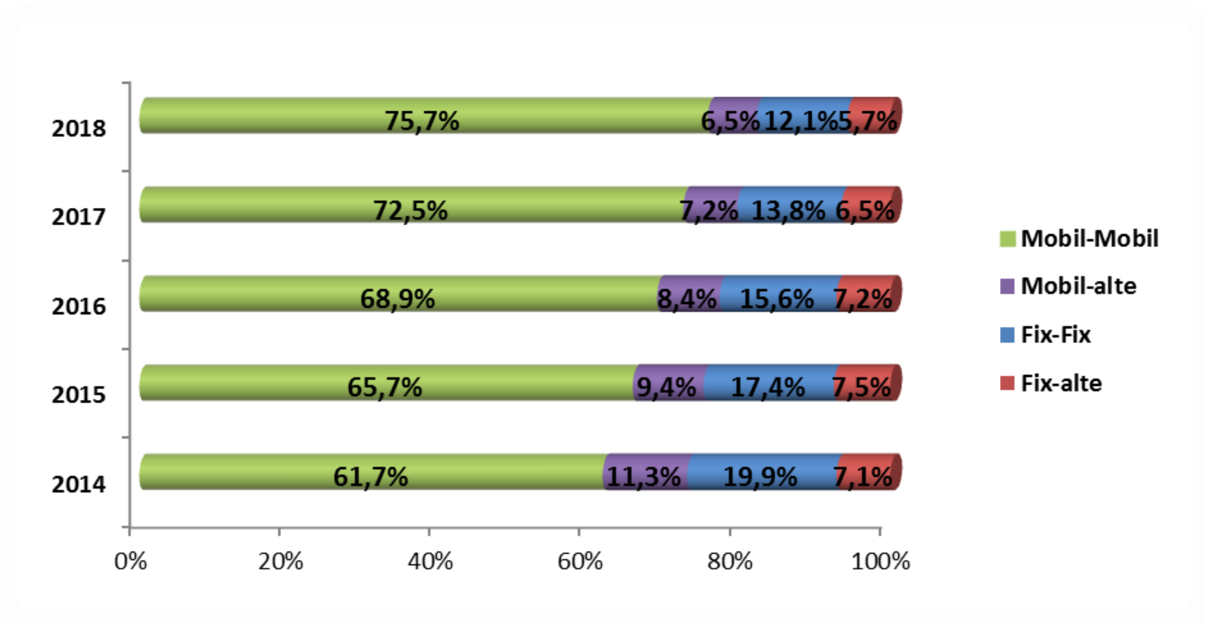


Mobile, Fixed, Total

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

Source: ANRCETI

As a result of the decrease of voice traffic in fixed and mobile voice networks, 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 2,5 p.p. compared to 2017 and reached 82,2%, and the share of fixed networks traffic dropped proportionately down to 17,8% (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

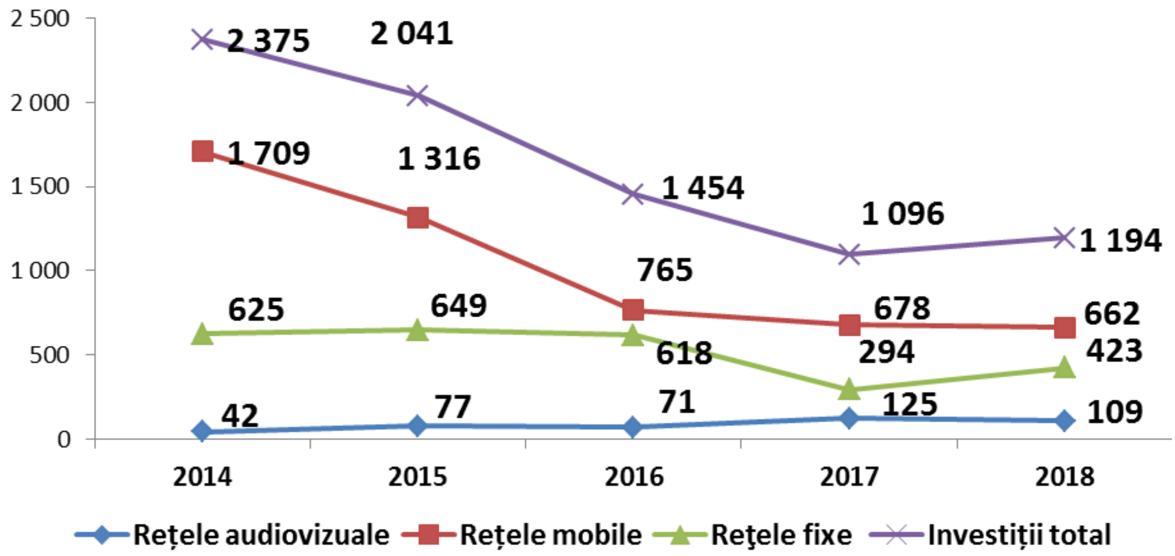
Source: ANRCETI

More detailed data on the evolution of voice traffic in mobile and fixed networks are presented in sections 2.3 and 3.3 of this Report.

1.4 Development of investments

According to the statistical data aggregated by ANRCETI in 2018, the total volume of investments in the electronic communications sector of grew by 8,9% compared to 2017 and reached 1 billion 194 mill. lei. This increase was driven by the 44% increase of investments in fixed networks, which amounted to 423 mill. lei.

At the same time, the value of investments in mobile networks decreased by 2,3% and was estimated at 662 mill. lei, while investments in audiovisual broadcasting networks decreased by 12,8% and amounted to 109 mill. lei (Chart 9).



Broadcasting networks
Mobile networks
Fixed networks
Total investment

Chart 9. Evolution of investments in electronic communications sector (mill. lei)

Source: ANRCETI

In terms of the investments shares, the highest value of this indicator of 55,4% was attested with networks. The value of this indicator for fixed was 35,5%, and for networks for audiovisual broadcasting - about 9,1%.

2. Mobile voice services

2.1 Market development

In 2018, for the third consecutive year, the total volume of sales on the mobile voice market decreased, by 5,6%, compared to 2017, and reached 3150.4 mill. lei. This decrease was mainly caused by the decrease of sales by JSC Orange Moldova and JSC Moldcell. The sales of the first provider decreased by 5.5% and showed 2041.2 mill. lei, and the second provider - by 8,1% and represented 936 mill. lei. At the same time, revenues earned by JSC Moldtelecom (Unite) from mobile voice services grew by 8,5% and were estimated at 174 mill. lei (Chart 10).

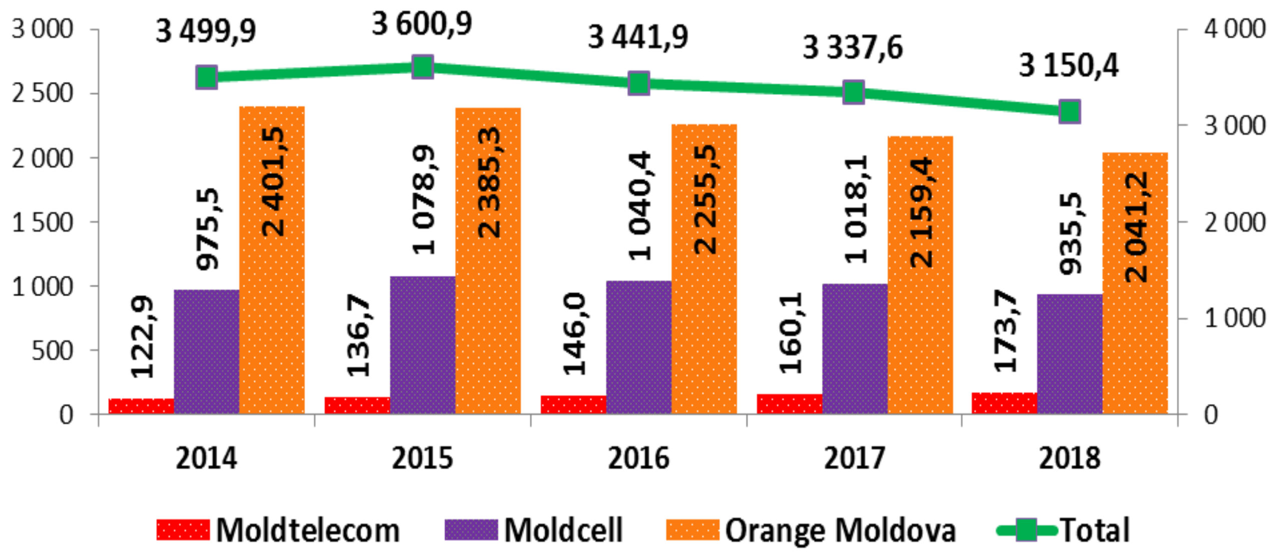


Chart 10. Development of mobile providers' revenues (mill. lei)
Source: ANRCETI

The statistical data submitted by the providers show that in 2018, the revenues from subscription-based mobile voice services continued to go up while the revenues from prepay card services were decreasing. Thus, the total volume of revenues from subscription-based services increased by 12,4%, compared to 2017 and exceeded 1 billion 920,5 mill. lei, and the revenues from prepay card services decreased by 10,6% and totaled 692.9 mill. lei.
(Table no.1).

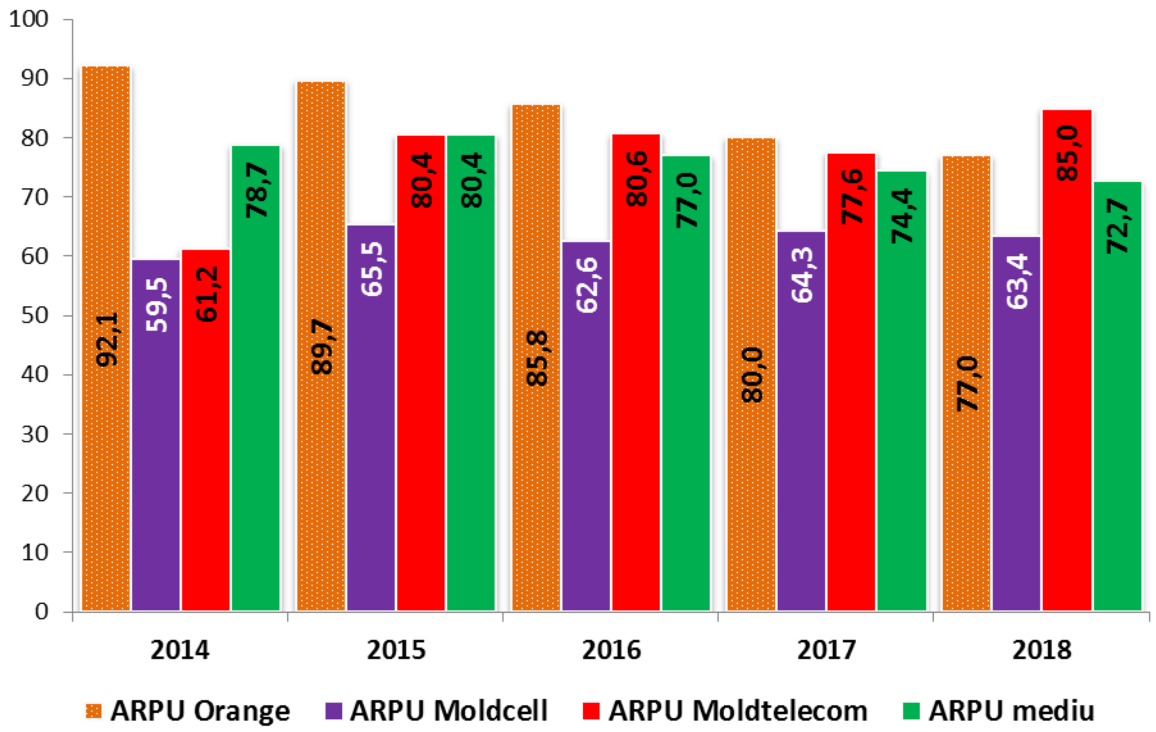
Table no.1 Revenues on retail market: subscription-based and prepay cards

Indicators	2014	2015	2016	2017	2018	Change 2017-2018
Revenues subscriptions (mill.. lei)	1186,4	1290,2	1499,8	1708,1	1920,5	12,4%
Revenues from prepay cards (mill.. lei)	958,3	882,6	818,1	774,7	692,9	-10,6%

Source: ANRCETI

As a result of the decrease in the total volume of sales on the mobile voice market, the average monthly revenue per active user (ARPU) of these services decreased by 2,2% compared to 2017 and was equal to 72,7 lei. The average monthly revenue per user - residential[2] - was 56 lei, and per business user[3] – 113,2 lei. The highest was the ARPU of JSC Moldtelecom - 85 lei, followed by JSC Orange Moldova - 77 lei and JSC Moldcell – 63,4 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 voice user - ARPU (lei)
Source: ANRCETI

During the reporting period, the market shares of the three mobile voice providers, according to turnover, remained practically unchanged. Compared to 2017, the market share of JSC Moldcell decreased by 0,8 p.p. and accounted for 29,7%, and JSC Orange Moldova and JSC Moldtelecom grew by 0,1 p.p. and respectively 0,7 p.p. and totaled 64,8% and 5,5%.

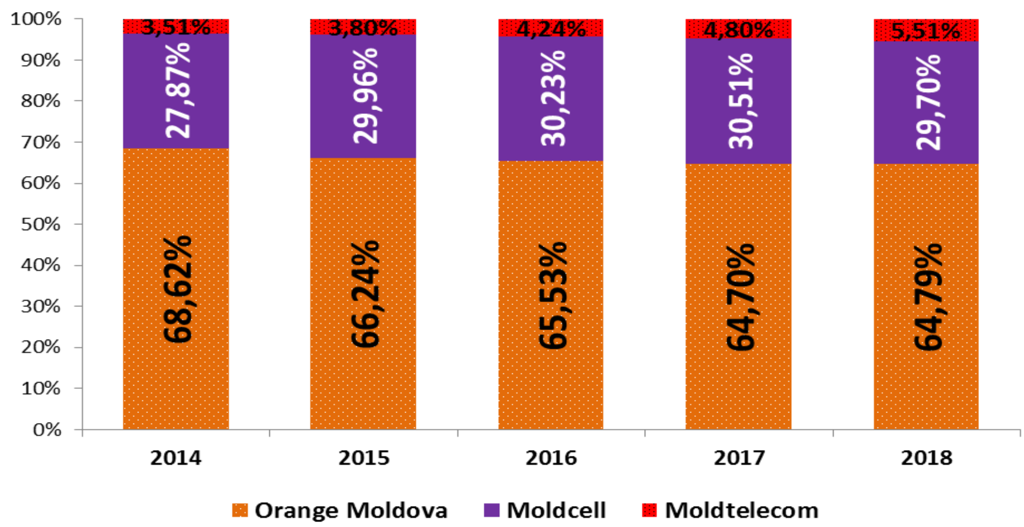
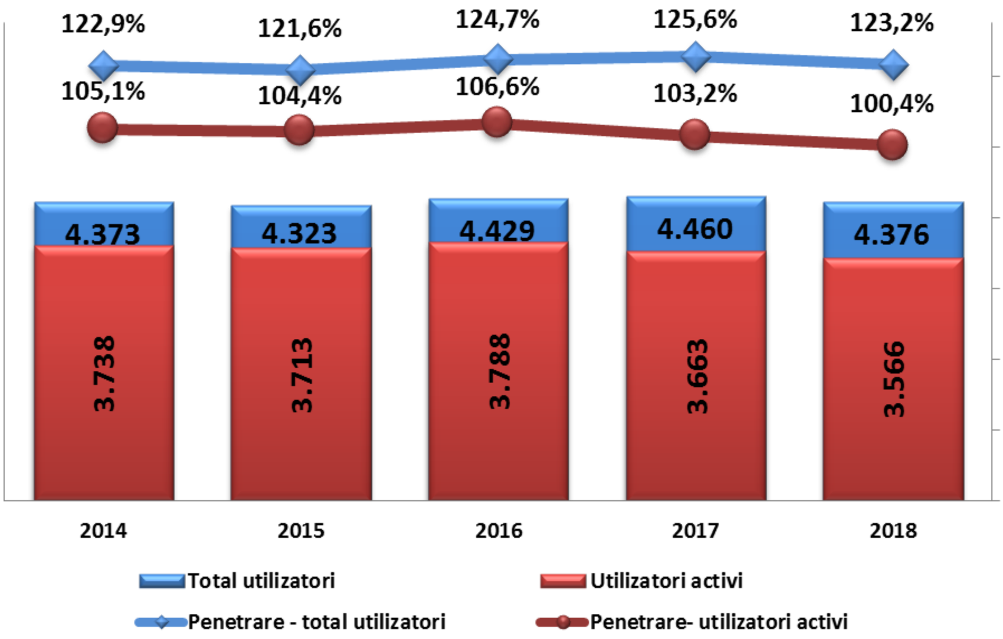


Chart 12. Development of mobile voice providers' market shares, by turnover
Source: ANRCETI

2.2 End users and service penetration rates

In 2018, the number of users of mobile voice users decreased by 1,9%, compared to 2017, and was estimated at 4376 thousand (SIM cards), of which 3566,3 thousand active subscribers. Of the total number of active subscribers, 3287,4 thousand residential and the remaining 278,8 thousand – businesses. The decrease was due to the reduction of customer base of JSC Moldcell and JSC Orange Moldova, while customer base of JSC Moldtelecom increased. As a result, the penetration rate of mobile voice services per 100 inhabitants dropped by 2,4 p.p. and was equal to 123,2% (Chart 13).

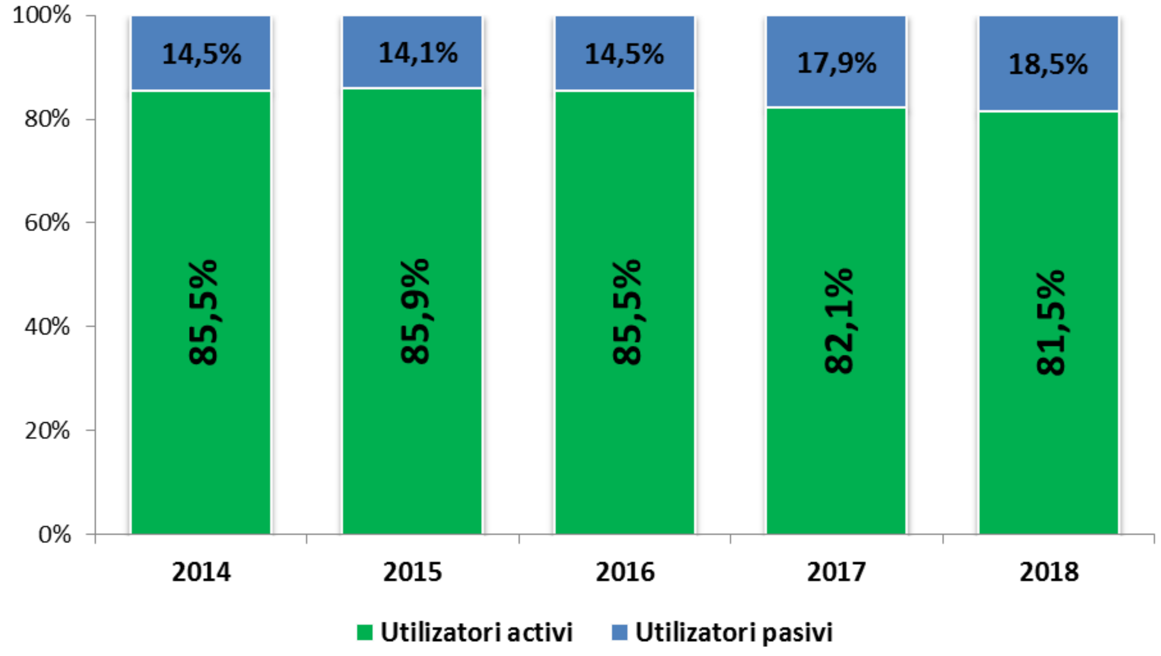


Total users
Penetration – total users
Active users
Penetration – active users

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

During 2018, the share of active users[4] of mobile voice services in the structure of the total number of users dropped compared to 2017, by 0,6 p.p. and made up 81,5%, while the share of passive users grew the same rate and made up 18,5%. (Chart 14).

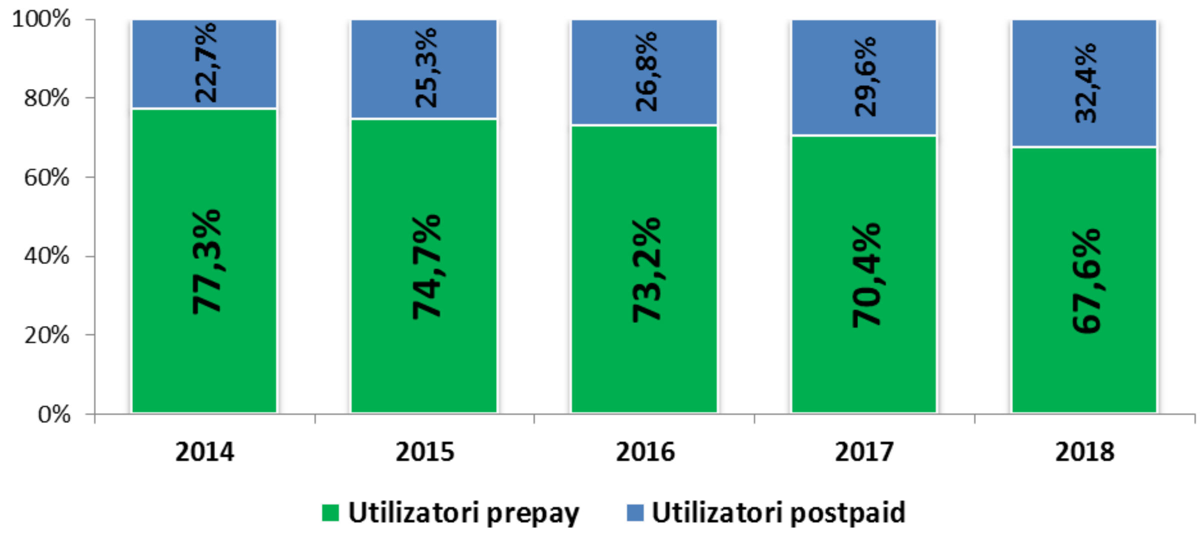
[4] According to ANRCETI methodology, active users are considered users who have used and paid for at least one service in the last three months before the statistical data have been reported, while passive users - those who during the mentioned timeframe have not used nor paid for any services.



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

The share of mobile subscription-based mobile users increased by 2,9 p.p. compared to 2017 and became 32.4%, while the share of prepay card users decreased in the same rate and was 67.6% (Chart 15).

Prepay users

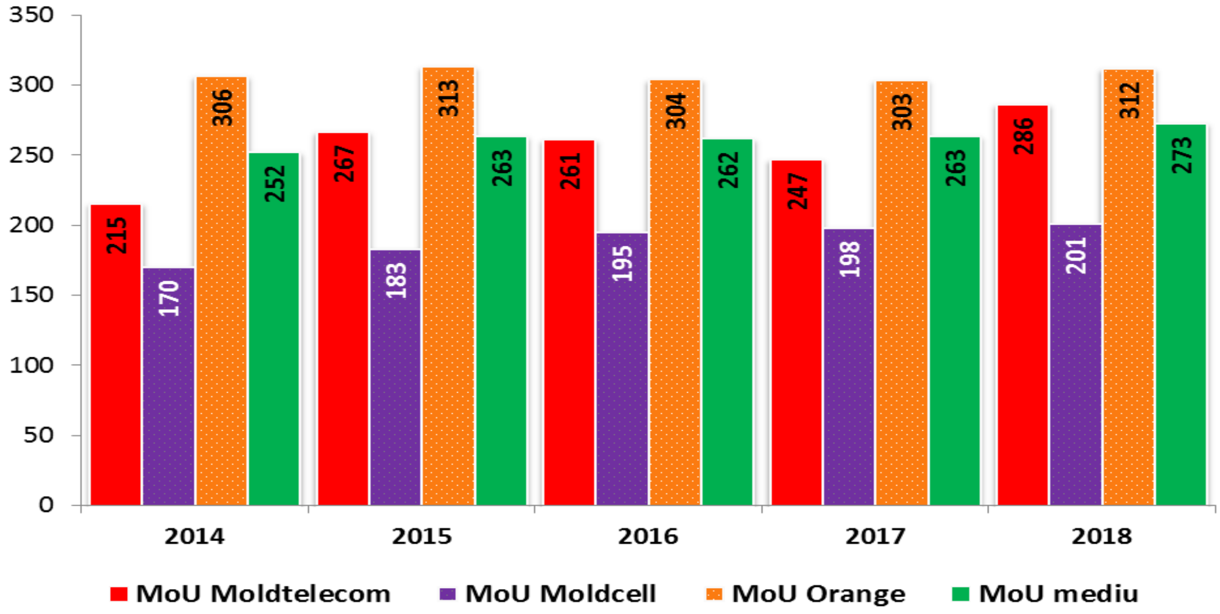


Prepay users
Post-paid users
Chart 15. Structure of mobile voice market, by method of payment for services (prepay/postpaid)
Source:ANRCETI

2.3 Development of voice traffic

According to the data presented to ANRCETI by the three mobile voice service providers, the total volume of voice traffic on mobile networks was 6176.2 mill. minutes, which is a decrease of about 43.5 mill. minutes (-0.7%) compared to 2017. The analysis of the voice traffic generated by users shows that they traditionally prefer calls made to the same networks and to other mobile networks. However, compared to last year, the traffic on mobile networks decreased by 0.5% to 4618 mill. minutes, in favor of the traffic to other networks of the same type, which increased by 5,4% and reached over 1069 mill. minutes. At the same time, international outgoing mobile voice traffic dropped by 24,7% to 62,4 mill. minutes and the traffic to fixed telephony networks declined by 2,3% to 257,5 mill. minutes.

However, taking into account the decrease of the total number of subscribers, the average monthly traffic generated by an active mobile user increased by 3,8% - making up 273 minutes (4 hours 33 minutes), the average duration a call stayed the same – 1,7 minutes. The average monthly traffic per user of JSC Moldtelecom increased by 16%, JSC Orange Moldova - by 2,7% and JSC Moldcell - by 1,6%, compared to 2017 (Chart 16).



Average MoU

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

Source: ANRCETI

During the reporting period, the negative trend of the evolution of MMS traffic, which had been attested in the previous years, continued. The number of SMS sent by users increased by 31,5% compared to 2017 and reached 1088,4 mill., while the number of MMS messages decreased by 2,9% and reached 1,7 mill.. According to ANRCETI estimates, in 2018 a mobile phone user sent on average 25 SMS per month.

2.4. Territory and population coverage rates

The statistical data on territory and population coverage with radio signals from 3G mobile networks show that in 2018 JSC Orange Moldova maintained the coverage rates of 2017, while JSC Moldcell and JSC Moldtelecom reported increase of this indicator by 4 p.p and 1 p.p accordingly, estimated at 96% and 99% (Chart 17).

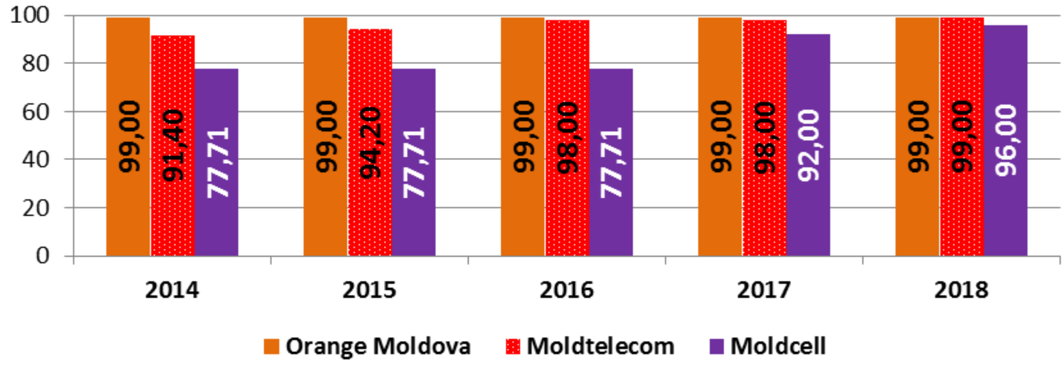


Chart 17. Rates of territory coverage by 3G networks (%)
Source: ANRCETI

The coverage of the population with radio signals from 3G networks shows coverage stability, as in the previous year, of about 100% (Chart 18).

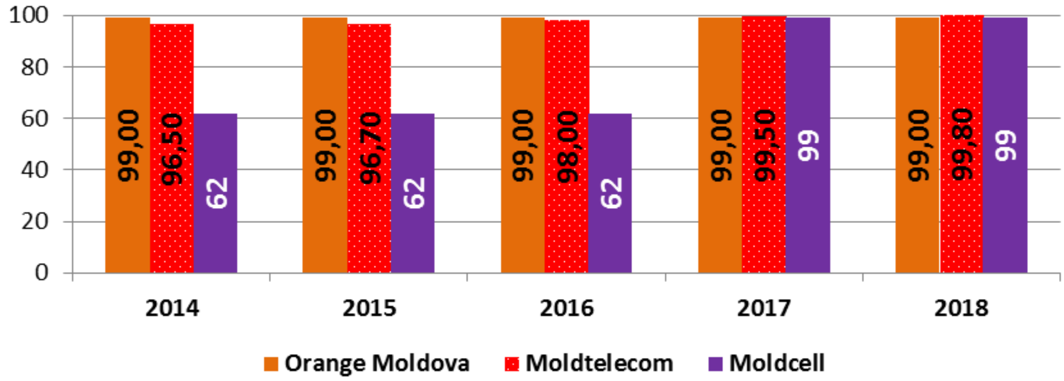


Chart 18. Rates of population coverage by 3G mobile networks (%)
Source: ANRCETI

In terms of territory coverage by 4G mobile networks, we note that in 2018 - similarly to 2017, the highest increase of this indicator - of 21 p.p. – was reported by JSC Moldcell - from 46% to 67%. JSC Moldtelecom and JSC Orange Moldova maintained the rate of 2017 - 7% and 94%, accordingly (Chart 19).

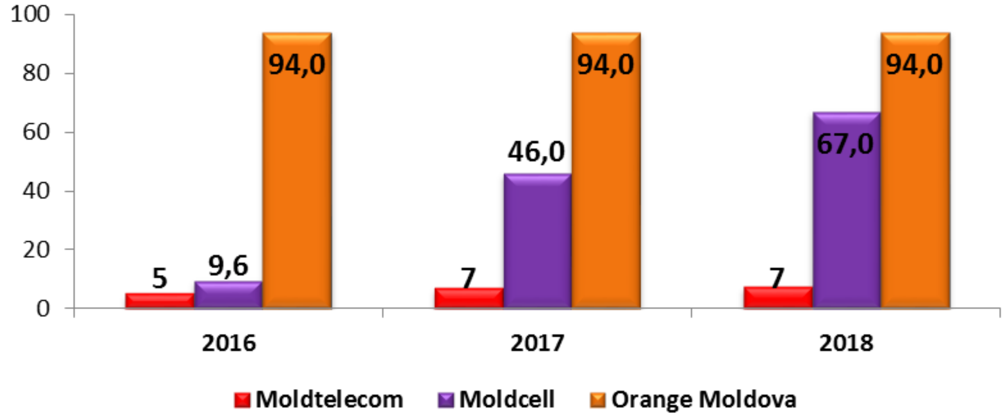


Chart 19. Rates of territory coverage by 4G mobile networks (%)
Source:ANRCETI

The population coverage with radio signal from 4G networks kept the same level as in 2017. (Chart 20).

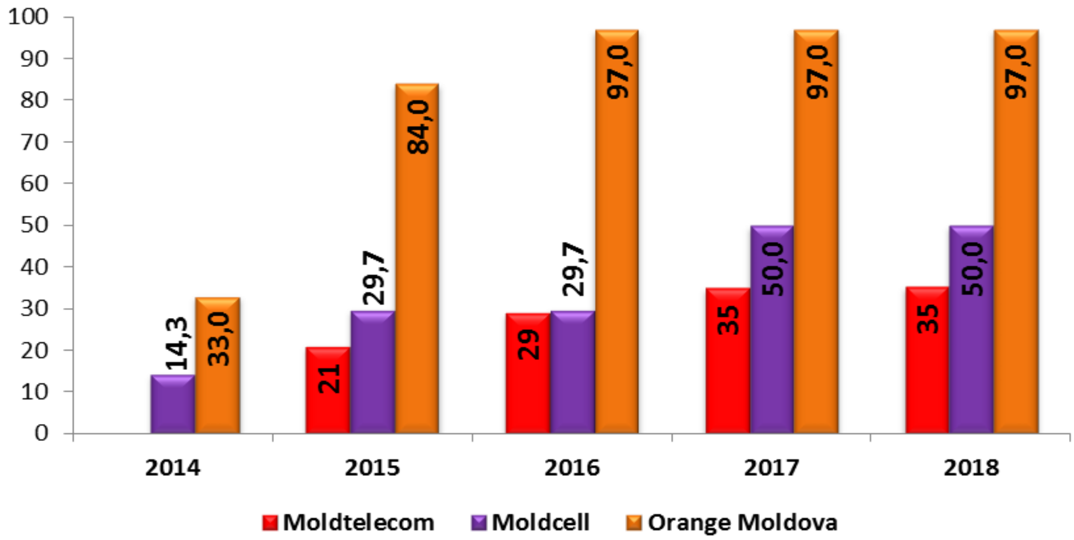


Chart 20. Rates of population coverage by 4G networks (%)
Source: ANRCETI

3. Fixed voice

3.1 Market development

In 2018, the total volume of revenues from fixed voice services kept to the downward trend, which made up 19,9% and reached 556,9 mill. lei. All fixed voice providers reported decrease of this indicator. JSC Moldtelecom's revenues from fixed voice services decreased by 20,3% and totaled 532 mill. lei, while those of alternative fixed voice providers - by 10,6% and amounted to 24,8 mill. lei (Chart 21).

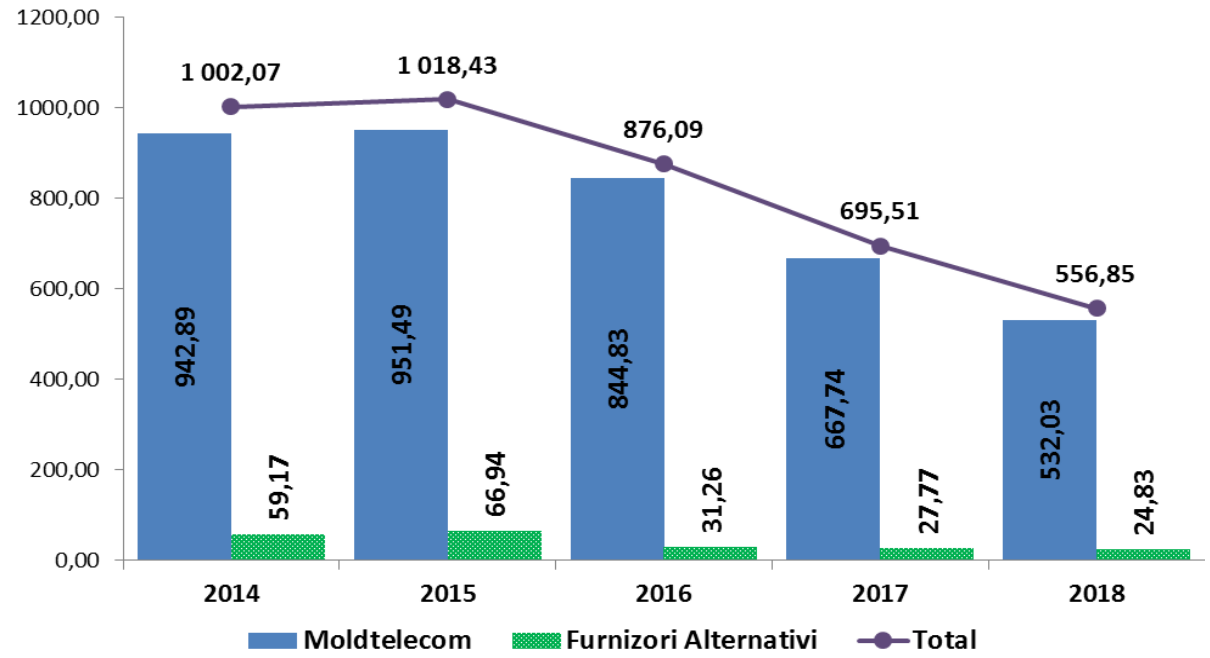
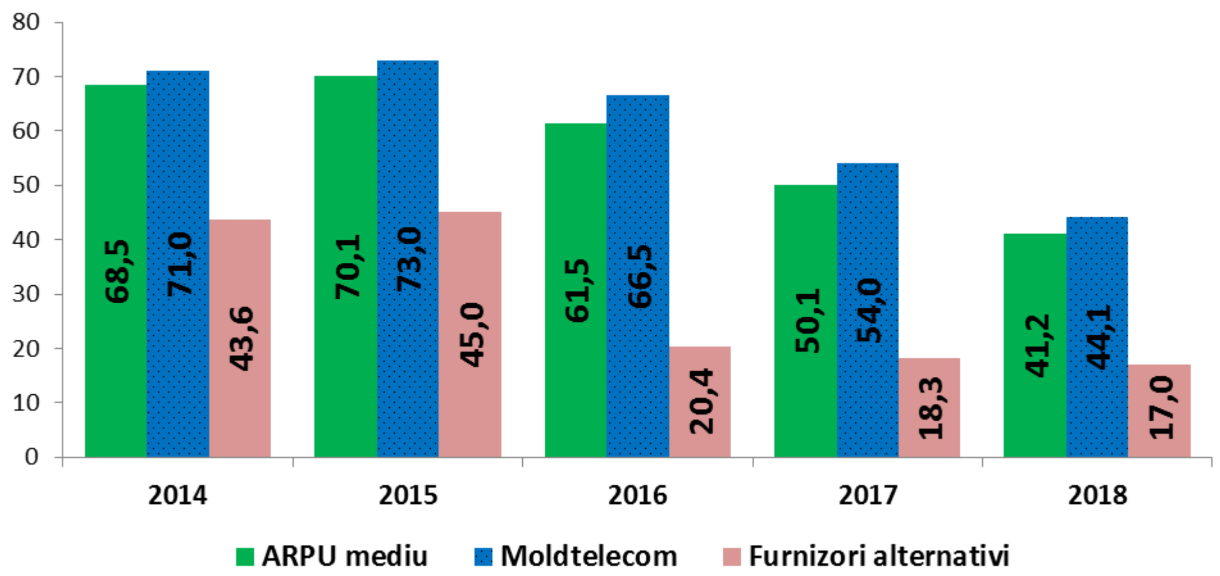


Chart 21. Development of revenues on the fixed voice market (mill. lei)
Source: ANRCETI

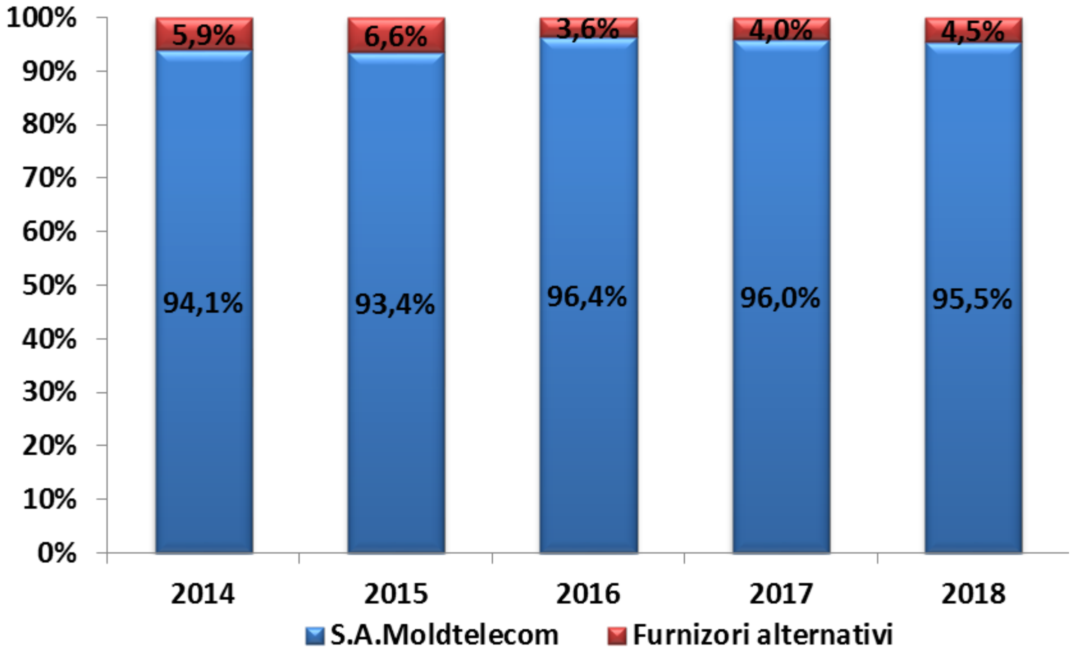
Following the reduction of total revenues from fixed voice services, the average monthly revenue per users (ARPU) for fixed telephony services was 41,2 lei, down by 17,7%. The average monthly revenue per individual users was 20,4 lei (down by 12%) and per business - 54,1 lei (down by 18,8%). This indicator for JSC Moldtelecom was 44,1 lei (down by 18,2%), for alternative providers - 17 lei (down by 7%) (Chart 22).



Alternative providers
Average ARPU

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

In 2018, the market shares of fixed voice providers, by revenues, practically remained unchanged. The market share of JSC Moldtelecom decreased by 0,5 p.p. and was estimated at 95,5% at the end of 2018, while the cumulative market share of alternative providers reduced the same amount and was reported as 4,5%, (Chart 23).



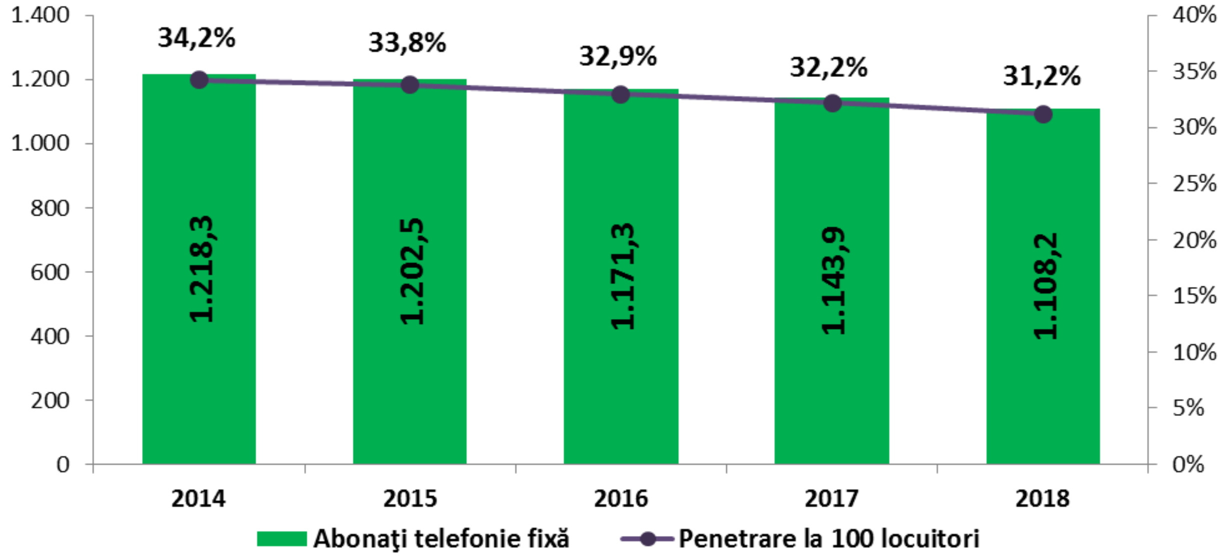
Alternative providers

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

3.2 Subscribers and penetration rate

In 2018, the number of subscribers to fixed[5] voice services decreased, compared to 2017, by 3,1% and was estimated at 1108,2 thousand. The reduction of the number of subscribers was determined by the decrease of the subscriber base of JSC Moldtelecom by 2, 7%, to a total of 990,5 thousand by the end of the year. The cumulative subscriber base of the other 19 alternative fixed voice providers decreased by 6.4% and was estimated at over 117,7 thousand. As a result, the fixed voice penetration rate per 100 inhabitants was estimated at 31,2% , down by 1 p.p. (Chart 24).

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



Fixed voice subscribers
Penetration per 100 inhabitants

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

At the end of 2018, the data reported 89,4% or 973,8 thousand residential subscribers and 10,6% or 134,4 thousand - businesses. More than half of the total number of subscribers - 53,5% – resided in urban areas, whereas 46,5% – in rural areas.

3.3 Development of voice traffic

In 2018, the total voice traffic in fixed networks decreased by 15,7% and was estimated at 1 bn. 1339 mil. minutes. This decrease was caused by the reduction of all traffic types. The traffic to international networks dropped by 31,2%, the traffic originated abroad and terminated in the fixed networks in the R. Moldova decreased by 20%, the traffic in the same networks - 15,9% , to other networks of the same type – by 15,8%, the traffic to mobile networks – by 11,8%, and the interconnection traffic – by 9,8%.

As a result of the significant reduction of voice traffic in fixed networks, the average monthly traffic via one access line (MoU indicator) dropped by 22 minutes (12,3%), compared to 2017, and equaled was 156 minutes (2 hours 36 minutes), whereas the average call duration was 2,3 minutes (Chart 25).

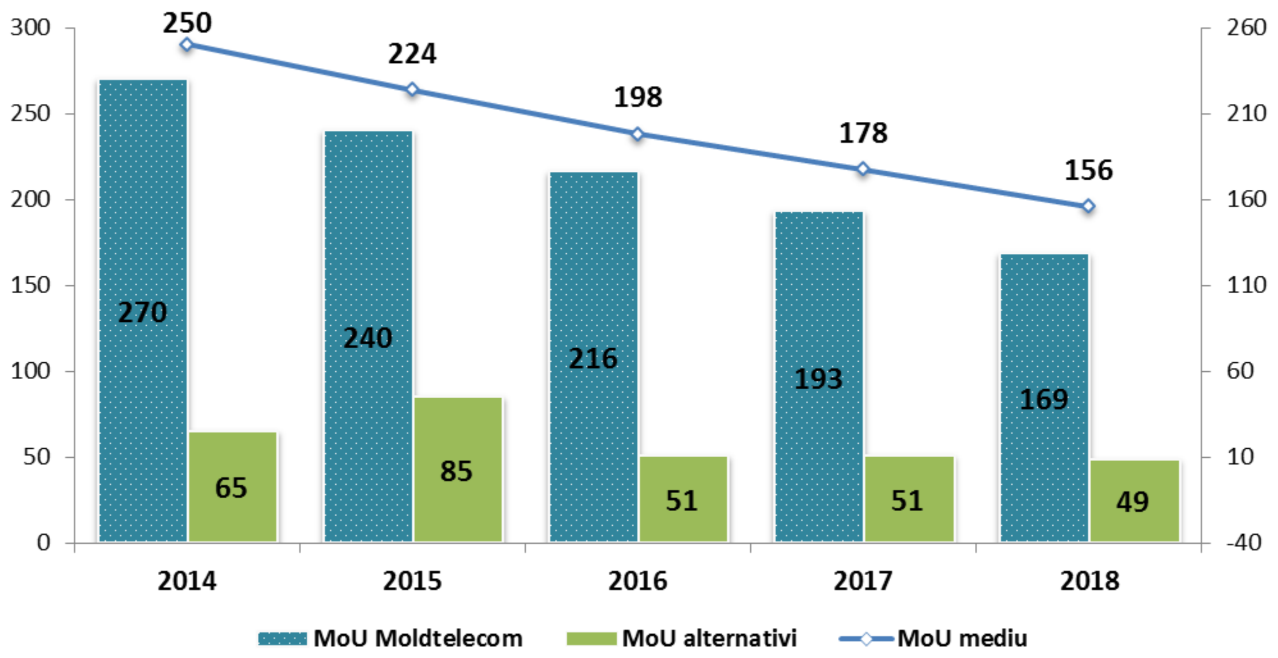


Chart 25. Development of the MoU indicator (minutes)
Source: ANRCETI

4. Fixed and mobile broadband services

In 2018, the fixed and mobile broadband 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 and mobile broadband market

The data reported by active providers of fixed and mobile broadband show that the total revenues on the two market segments increased by 10,9% and exceeded 2,3 bn. lei, which makes 37% of the total value of the electronic communications market.

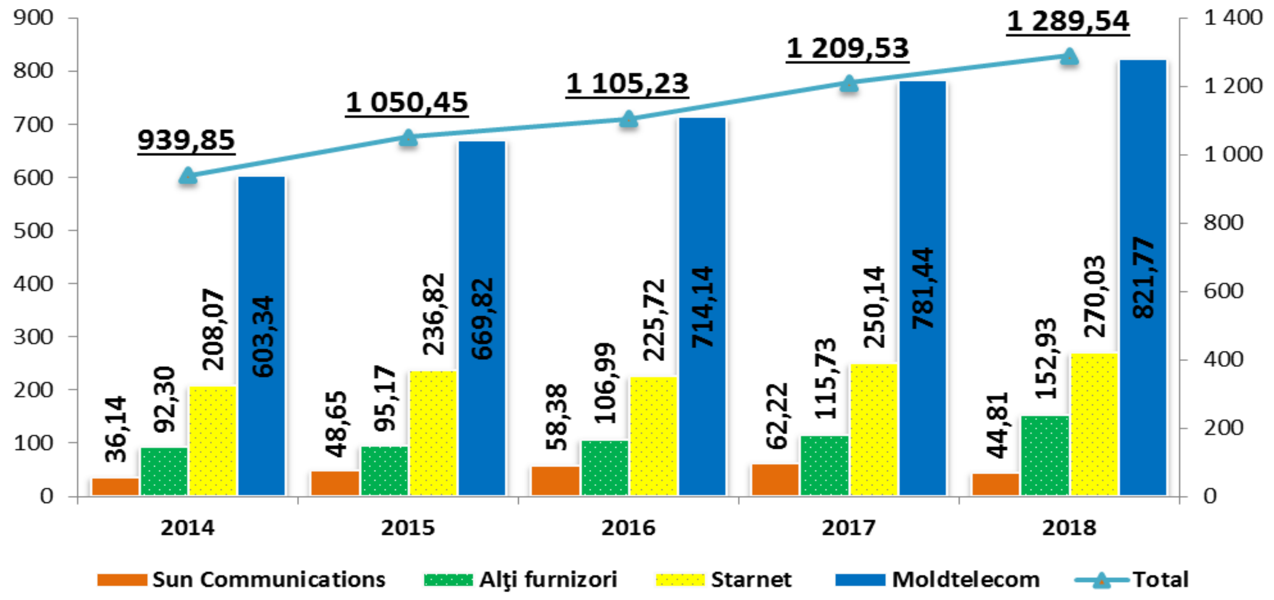
Table no. 2 Revenues from fixed and mobile broadband services (mill. lei)

	2014	2015	2016	2017	2018
Fixed broadband access	939,9	1 050,5	1 105,2	1 209,5	1 289,5
Mobile broadband access	482,2	579,1	713,2	908,5	1 058,5
of which Internet access voice users	224,5	304,4	412,9	597,2	737,8
of which revenues dedicated Internet access	244,7	259,0	278,7	290,4	298,3
Total revenues fixed and mobile broadband access	**1 422,0**	**1 629,6**	**1 818,4**	**2 118,1**	**2 348,0**
The share of revenues fixed broadband	66,1%	64,5%	60,8%	57,1%	54,9%
The share of revenues mobile broadband	33,9%	35,5%	39,2%	42,9%	45,1%

Source: ANRCETI

4.1.1 Development of revenues on the fixed broadband market

According to the data reported by the 88 active providers of fixed broadband services, the total revenues on this market grew, compared to 2017, by 6,6% up to 1 bn. 289,5 mill. lei. Practically all providers reported increased revenues from fixed broadband services. The highest revenues from these services were reported by Starnet Solutii LLC – total 270 mill. lei, increased by 8%, JSC Moldtelecom - total 821,8 mill. lei, increased by 5,2%, while the revenues of Sun Communications LLC – total 44,8 mill. lei, decreased by 28%. The cumulative revenues of the other 85 fixed broadband providers increased by 32% and reached 152,9 mill. lei. (Chart 26).



Other providers

Chart 26. Development of revenues from fixed broadband services (mill. lei)
Source: ANRCETI

The market shares of the biggest fixed broadband providers by revenues practically remained unchanged. Compared to 2017, the market share of Starnet Solutions LLC increased 0,2 p.p. and was estimated at 20,9%, the share of JSC Moldtelecom decreased 0,9 p.p. - 63,7%. The market shares of Sun Communications LLC dropped by 1,6 p.p. and was estimated 3,5%, and the cumulative share of the other providers increased by 2,3 p.p., to 11,9% (Chart 27).

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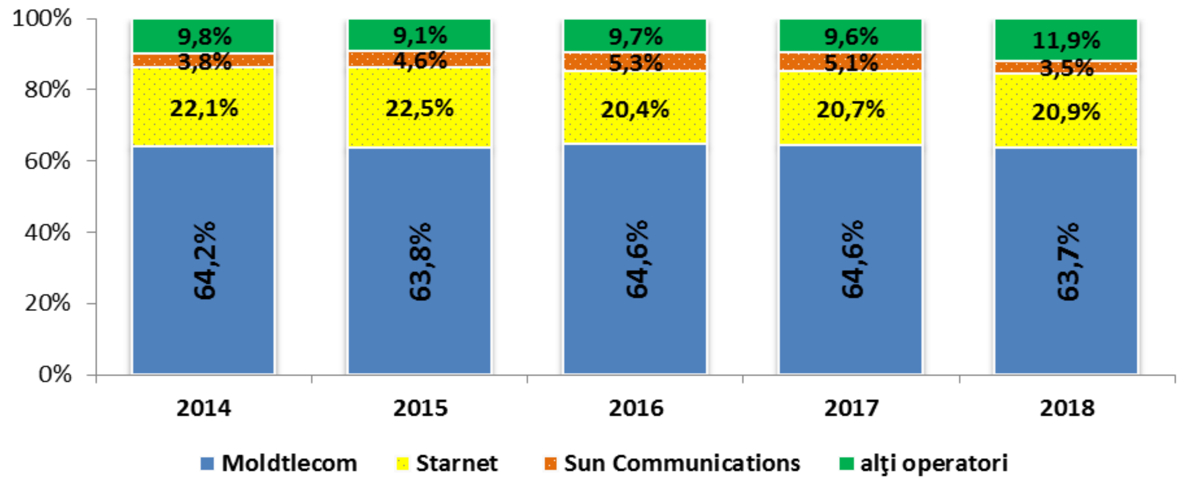


Other providers

Chart 27. Development of 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 1,2% and was estimated at 179 lei (Chart 28). The average monthly revenue per individual user was 160 lei, per business users – 564 lei.

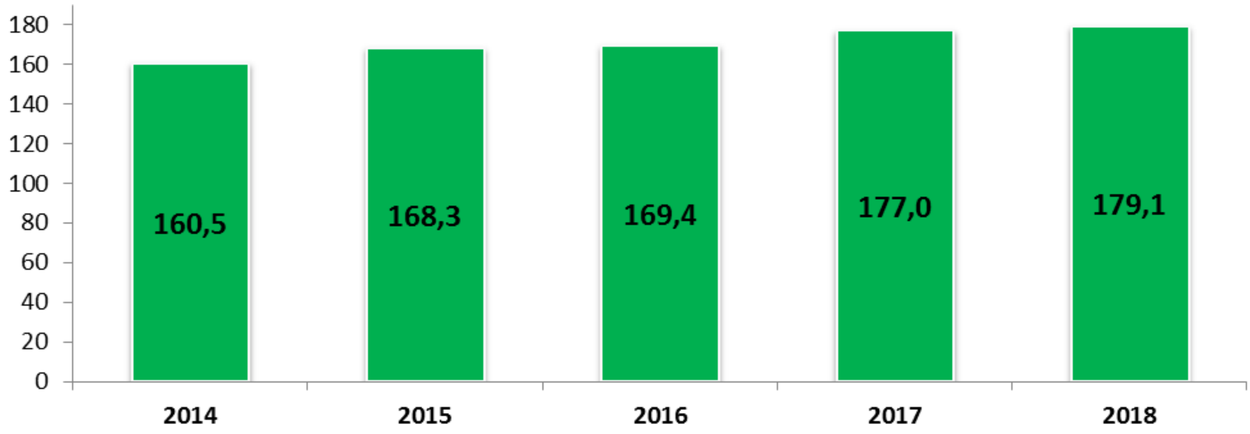


Chart 28. Development of average monthly revenue per user for fixed broadband services - ARPU (lei)
Source: ANRCETI

4.1.2 Development of revenues on mobile broadband market

In 2018, the total revenues by three mobile providers (JSC Orange Moldova, JSC Moldcell and JSC Moldtelecom (Unite) from mobile broadband services (3G, 4G, via modems/cards/USB – dedicated access) increased over 2017, by 16,5%, reaching 1058,5 mill. lei. This evolution was driven by the increase of revenues registered by all mobile broadband providers. JSC Orange Moldova and JSC Moldcell. The revenues of JSC Orange Moldova made up 663,2 mill. lei, an increase by 19%, the revenues of JSC Moldcell were 293,3 mill. Lei, an increase by 15,5% and the revenues of JSC Moldtelecom increased by 4,6% to a total of 102,1 mill. lei. (Chart 29).

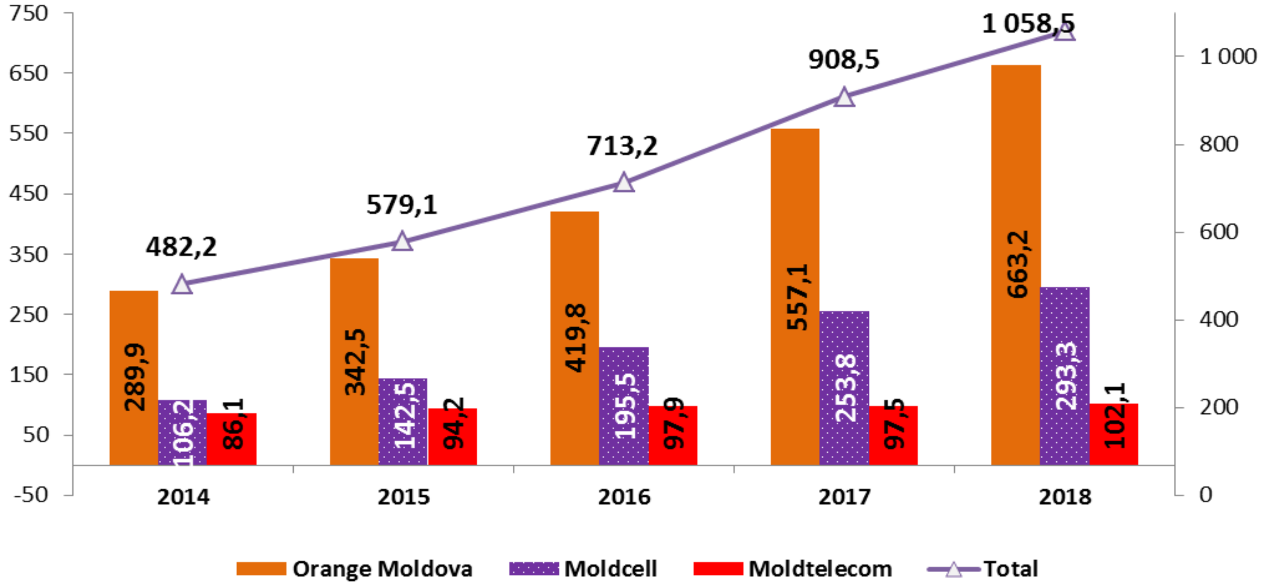


Chart 29. Development of revenues on mobile broadband market (mill. lei)
(mill. lei)
Source: ANRCETI

In 2018, the market shares of the three mobile broadband providers, by turnover, changed insignificantly. The market share of JSC Orange Moldova increased, compared to 2017, by 1,3 p.p. and reached 62,6% and that of JSC Moldcell and JSC Moldtelecom decreased by 0,2 p.p. and 1,1 p.p. accordingly and were equal to 27,7% and 9,6%, accordingly (Chart 30).

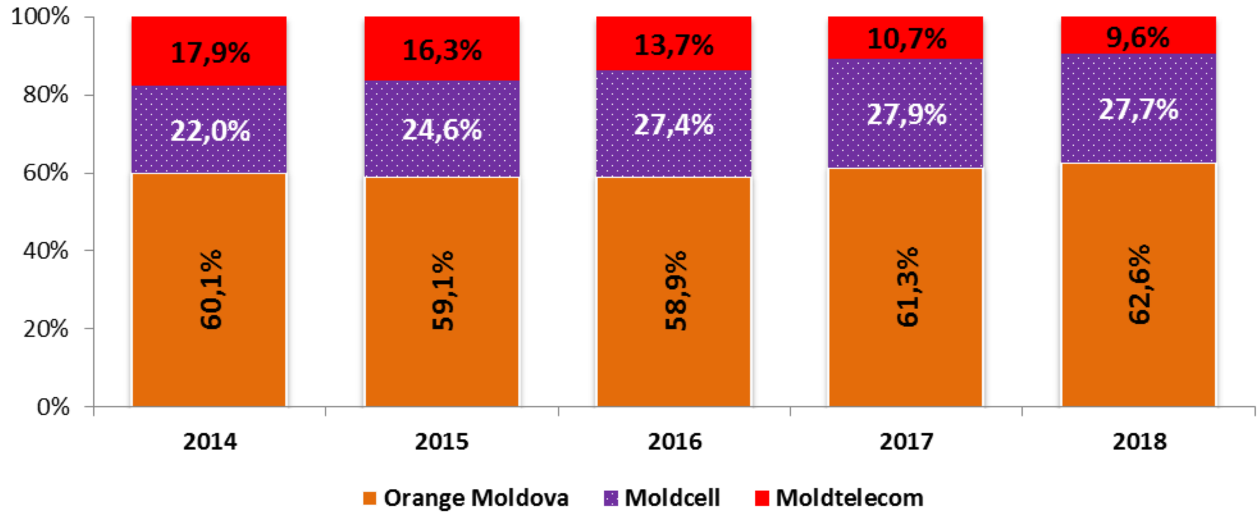


Chart 30. Market shares of mobile Internet providers by revenues
Source: ANRCETI

The statistical data on the revenues of the the three mobile providers from the sale of dedicated mobile broadband services show that their total volume grew by 2,7% compared to 2017 and reached 298.3 mill. lei . This increase was due to the higher revenues of JSC Moldcell - by 7,9% and JSC Moldtelecom - by 4,8%. At the same time, the revenues of JSC Orange Moldova decreased by 1,3%. Thus JSC Orange Moldova had 131.8 mill. lei revenues, JSC Moldtelecom - 92,1 mill. lei and JSC Moldcell - 74,4 mill. lei from dedicated mobile broadband services (Chart 31).

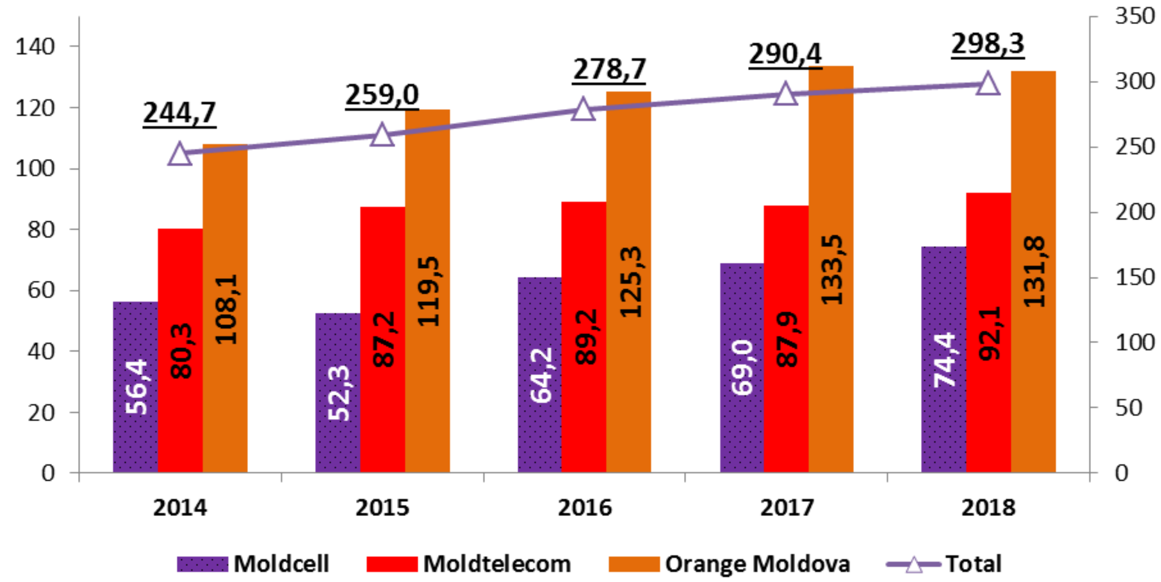


Chart 31. Development of revenues from dedicated mobile broadband services (mill. lei)
Source: ANRCETI

Compared to 2017, the market shares of the three dedicated mobile broadband providers to not change significantly. The share of JSC Orange Moldova decreased by 1,8 p.p., to 44.2%, JSC Moldcell's share increased by 1,1 p.p. and reached 24.9% and JSC Moldtelecom's share increased by 0,6 p.p. and made 30.9% (Chart 32).

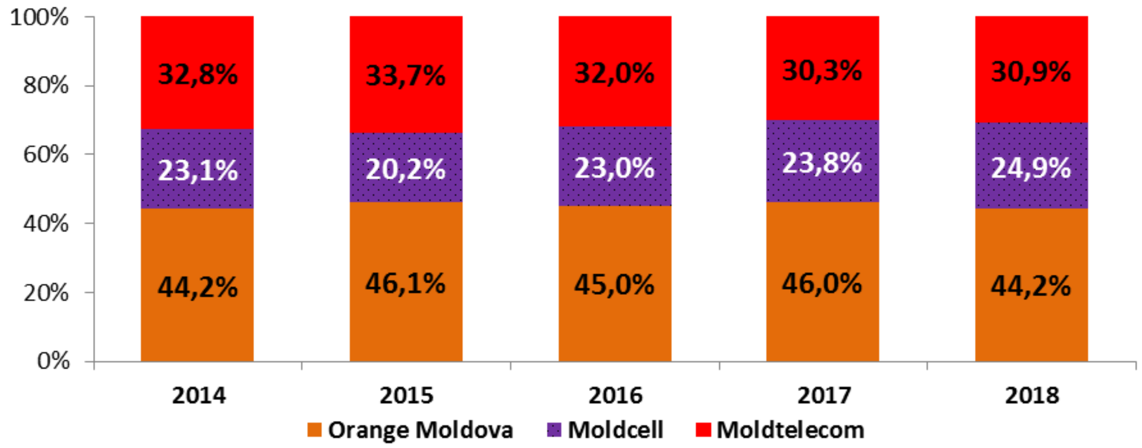
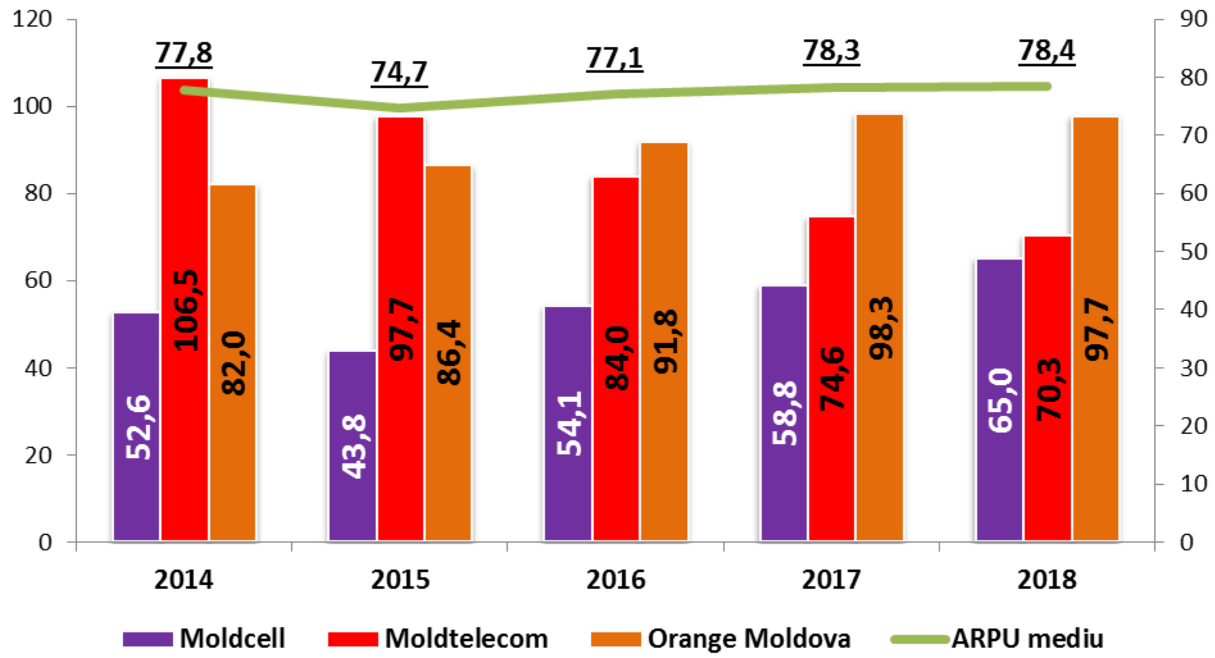


Chart 32. Evolution of market shares of providers of dedicated broadband services, by revenues
Source: ANRCETI

As a result of the increase in the total volume of revenues from mobile dedicated broadband services, the average monthly revenue per subscriber (ARPU) increased by 0,1% compared to 2017 and was equal to 78,4 lei. The highest ARPU - of 97,7 lei - was reported by JSC Orange Moldova, JSC Moldtelecom reported 70.3 lei ARPU and JSC Moldcell - 65 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 and mobile broadband

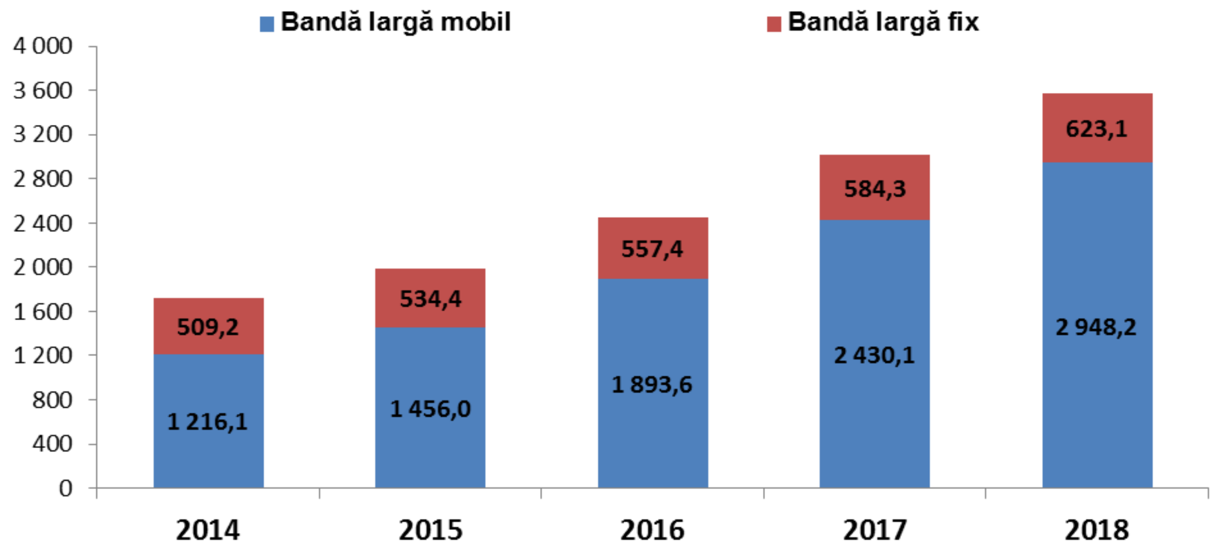
In 2018, the number of subscribers to fixed broadband services grew by 6,6% compared to 2017 and was estimated at 623.1 thousand, and the number of mobile broadband users (based on technologies 3G, 4G and modems / cards / USB - dedicated access) increased by 21,3% and exceeded 2 mill. 948 thousand. On the mobile broadband market, the highest growth was reported on the 3G and 4G Internet access segment. The number of users of these services increased by more than 24,6% and exceeded 2 mill. 636,1 thousand, while the number of dedicated mobile broadband users decreased by 0,7% and reached 312,1 thousand (Table no.3)

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

	2014	2015	2016	2017	2018	Change 2018-2017
1. Fixed broadband	**509 195**	**534 393**	**557 403**	**584 330**	**623 135**	**6,6%**
2. Mobile broadband:	**1 216 105**	**1 455 975**	**1 893 562**	**2 430 078**	**2 948 155**	**21,3%**
2.1. including subscribers to dedicated mobile broadband	279 504	298 429	303 871	314 200	312 094	**-0,7%**
2.2. including users of Internet via smartphones, voice users	936 601	1 157 546	1 589 691	2 115 878	2 636 061	**24,6%**
1. Fixed broadband penetration rate	14,3%	15,0%	15,7%	16,5%	17,5%	+1,09 p.p
2. Mobile broadband penetration rate	34,2%	40,9%	53,3%	68,4%	83,0%	+14,59 p.p
2.1. including dedicated mobile Internet penetration rate	7,9%	8,4%	8,6%	8,8%	8,8%	-0,06 p.p

Source: ANRCETI

The same statistical data show that the share of mobile broadband users in the structure of the total number of broadband users raised to 82,5% and the share of fixed broadband subscribers went down to 17,5% (Chart 34).



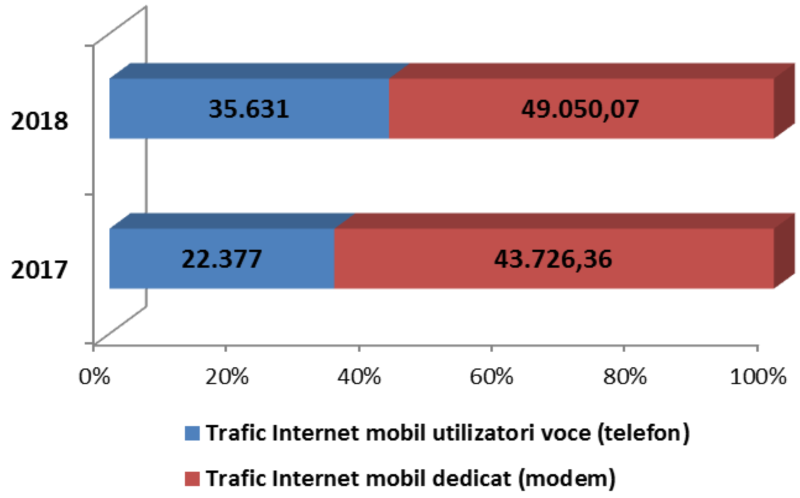
Mobile broadband
Fixed broadband

Chart 34. Development of the number of fixed and mobile broadband users (thousand)

Source: ANRCETI

In terms of residential location of fixed broadband subscribers, the data presented by the providers show that 60,6% of their total number were urban residents and 39,4% - rural residents.

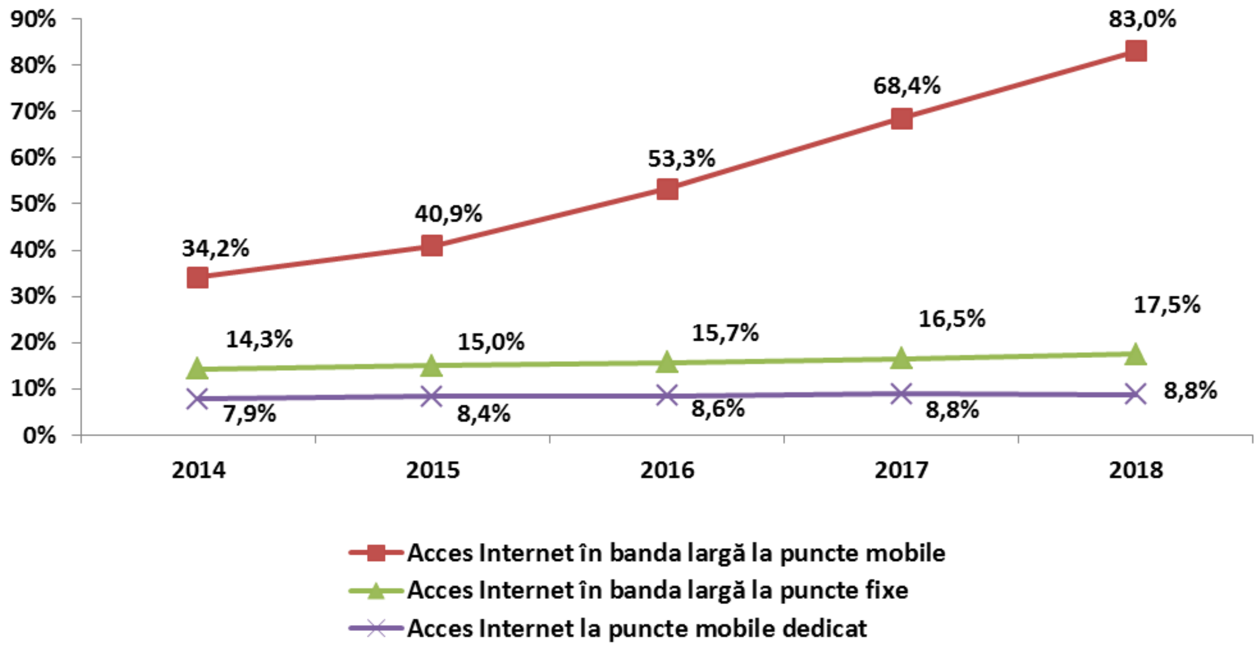
According to statistical data on mobile broadband services, the total traffic of these services increased by 28,1% compared to 2017, to more than 84,7 thousand TB. Of this traffic volume, about 35,6 thousand TB (up by 59,2%) was generated by smartphones users and 49,1 thousand TB (up by 12.2%) - by dedicated broadband users. (Chart 35). A user of mobile broadband via smartphone generated an average monthly traffic of about 1,5 GB, by 51,1% higher than in 2017, and a dedicated mobile Internet user - a monthly traffic of 13 GB, up by 10,7% compared to 2017.



Mobile broadband traffic voice users (phone)
Dedicated mobile broadband traffic (modem)

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

As a result of the increase in the number of fixed and mobile broadband users, the penetration rates of these services per 100 inhabitants increased as well. The mobile broadband penetration rate recorded highest increase – by 14,6 p.p., reaching 83%. The penetration rate of dedicated mobile broadband services compared to 2017 remained at 8,8%, and the penetration rate of fixed broadband services increased by 1 p.p. reached 17,5% (Chart 36).



Mobile broadband
Fixed broadband
Dedicated broadband

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

According to ANRCETI estimates, at the end of 2018, the fixed broadband penetration rate per 100 households was 49,5%. In most of the administrative-territorial units of the republic this indicator ranged between 28% and 62%, while in Chisinau this indicator was 77%. Additional information on the development of fixed broadband services in administrative - territorial units of Moldova are 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 2018 the access infrastructure required by the end-users of fixed broadband services was dominated by connections through fiber technologies (FTTx - *Fiber to the premises*) and xDSL (*Digital Subscriber Line*). During one year, the number of users connected by fiber networks increased by 13,4%, to a total of 394,2 thousand, and those connected by coaxial cable increased by 6,4% and reached over 44,3 thousand. At the same time, the number of subscribers connected to the network via xDSL technologies decreased by 5,5% and was 182.2 thousand (Chart 37).

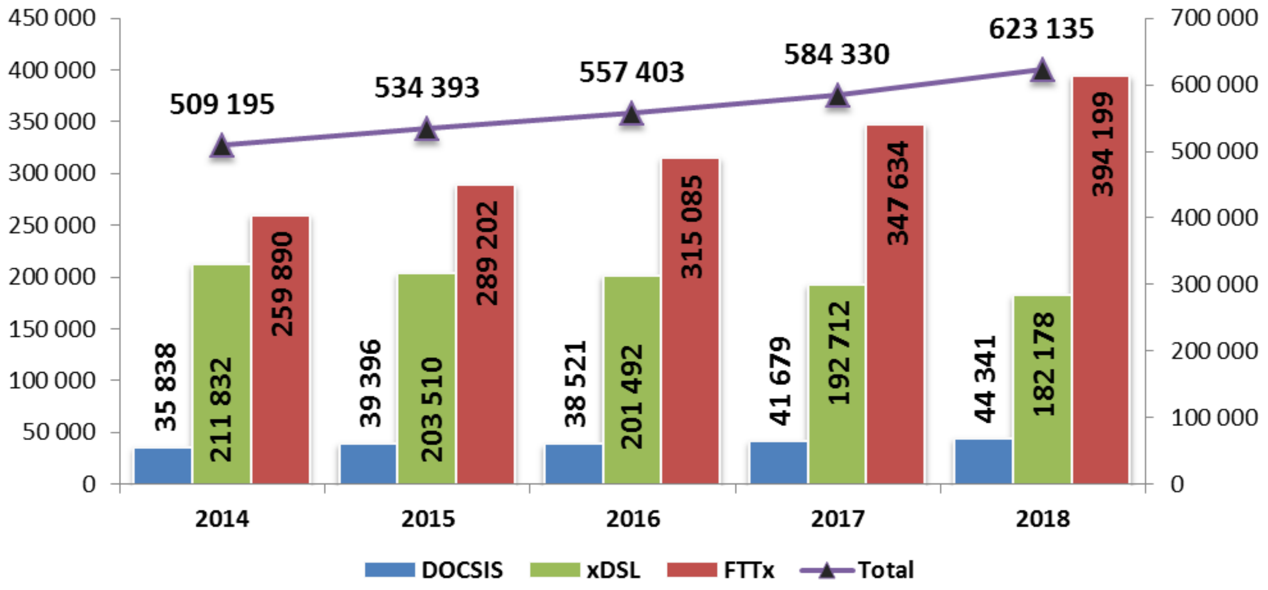
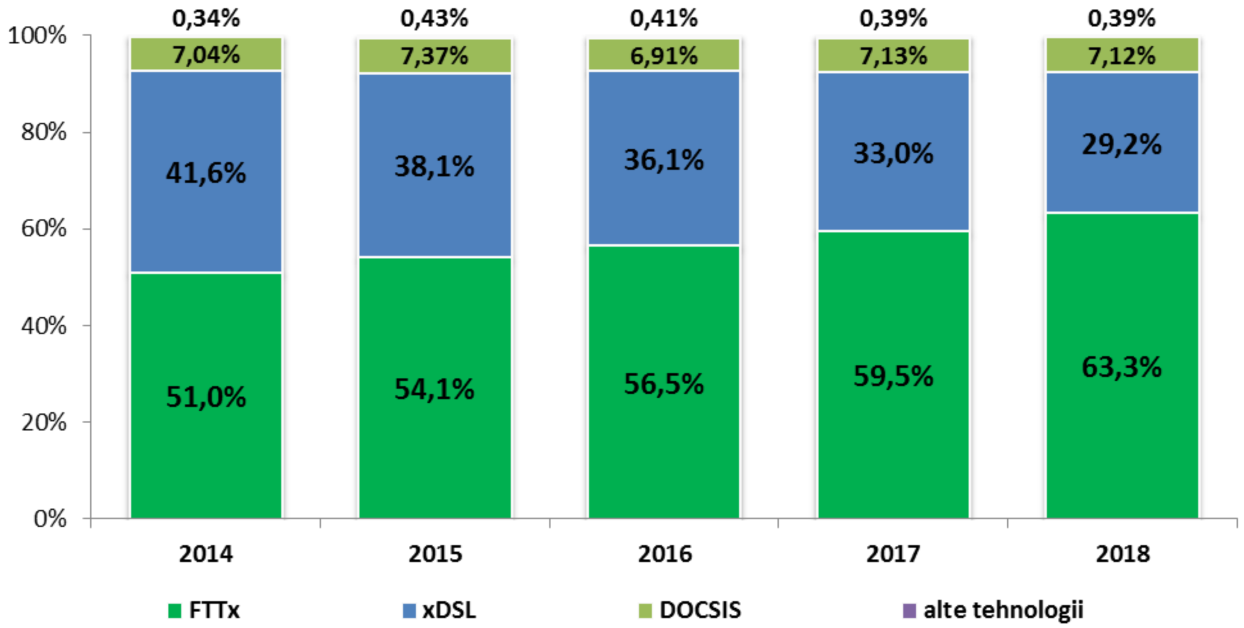


Chart 37. Development of the number of fixed broadband subscribers, by technology
Source: ANRCETI

In the reporting year, share of FTTx-based fixed broadband connections increased, compared to 2017, by 3,8 p.p. and reached 63.3%, and the share of coaxial cable connections declined insignificantly, showing the same 7,1% compared to the previous year. The share of xDSL-based connections kept its downward trend of the recent years, declining by 3,8 p.p. down to 29,2% (Chart 38).

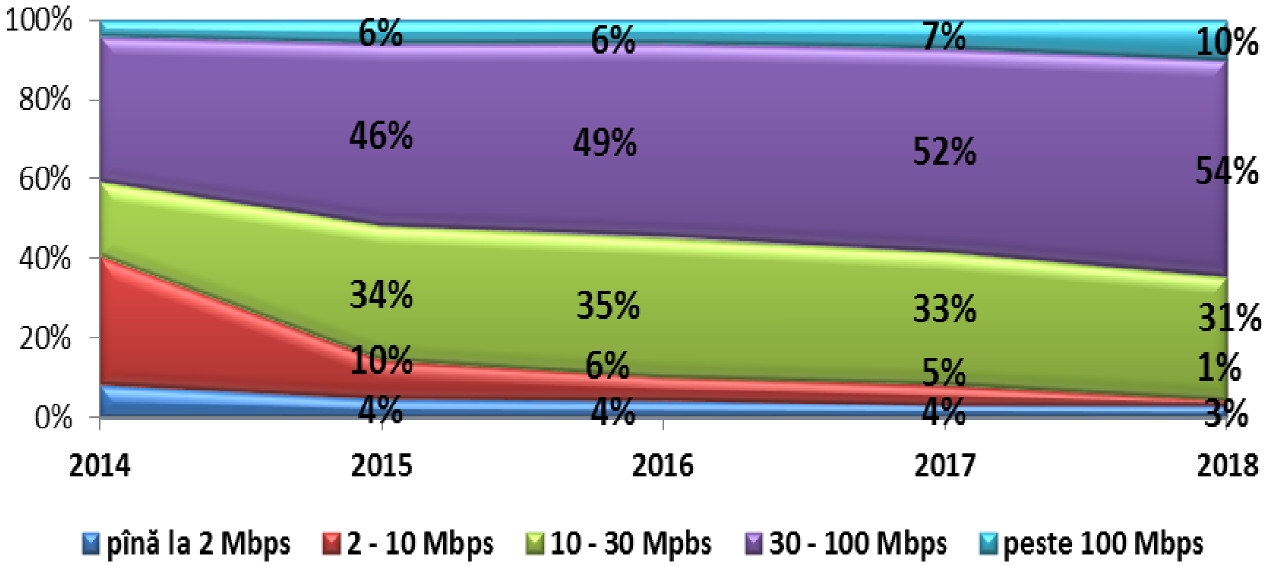


Other technologies

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

The analysis of fixed broadband connections by data transfer speeds contracted by subscribers shows that in 2018 the most significant growth was attested on the segment of connections above 100 Mbps, The number of these subscribers increased by 56,8% compared to 2017 and reached 62,6 thousand. The number of subscribers to connections with data transfer rates between 30 Mbps and 100 Mbps increased by 14,8% to over 338,9 thousand, those ranging between 10 Mbps and 30 Mbps increased by 2,3% to a total of 194,4 thousand, while connections between 2 Mbps and 10 Mbps – decreased by 68,1% to a total of 8,4 thousand subscribers, those with up to 2 Mbps decreased by 11,6% and reached 18,9 thousand subscribers.

At the end of 2018, the share of subscribers to connections exceeding 100 Mbps rate reached about 10% and connections at speeds between 30 Mbps and 100 Mbps reached 54,4%. At the same time, the share of subscribers to connections between 10 Mbps and 30 Mbps dropped down to 31,2%, for connections with speeds between 2 Mbps and 10 Mbps - up to 1,3%, and for connections with speeds up at 2 Mbps decreased to 3% (Chart 39).

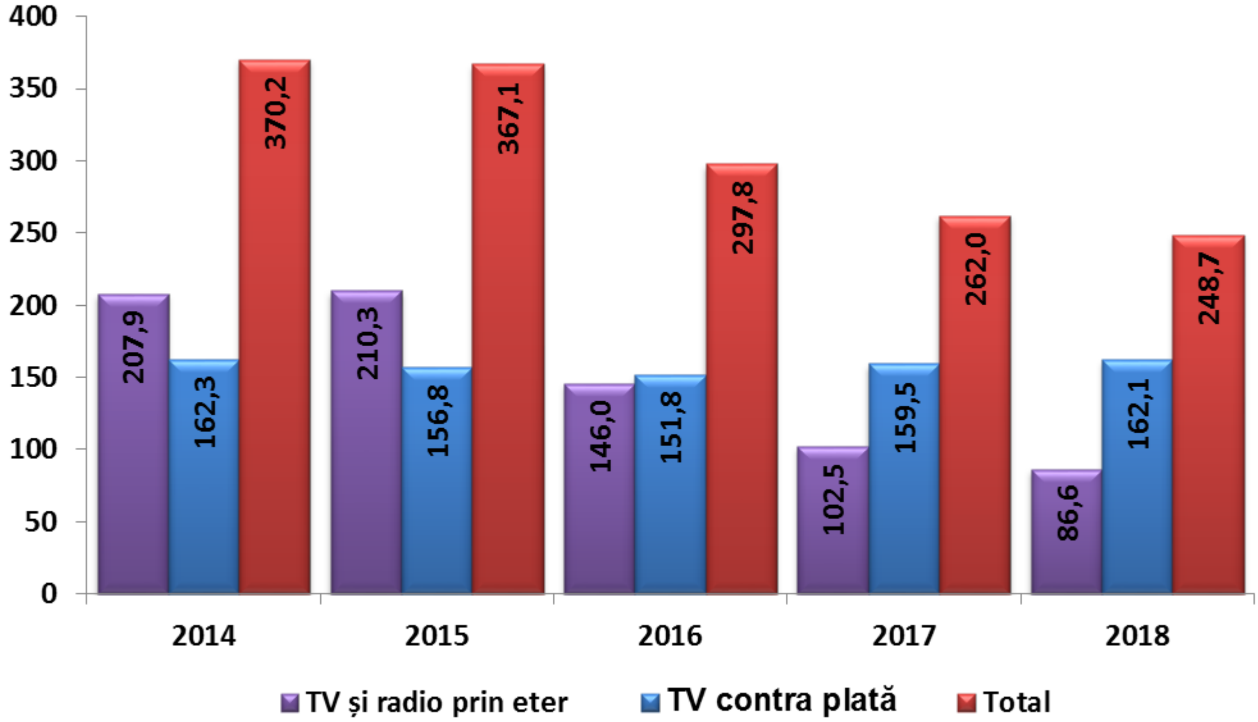


Up to 2 Mbps
Over 100 Mbps
Chart 39. The share of fixed broadband connections, by data transfer speeds
Source: ANRCETI

5. Audiovisual broadcasting
5.1 Market development

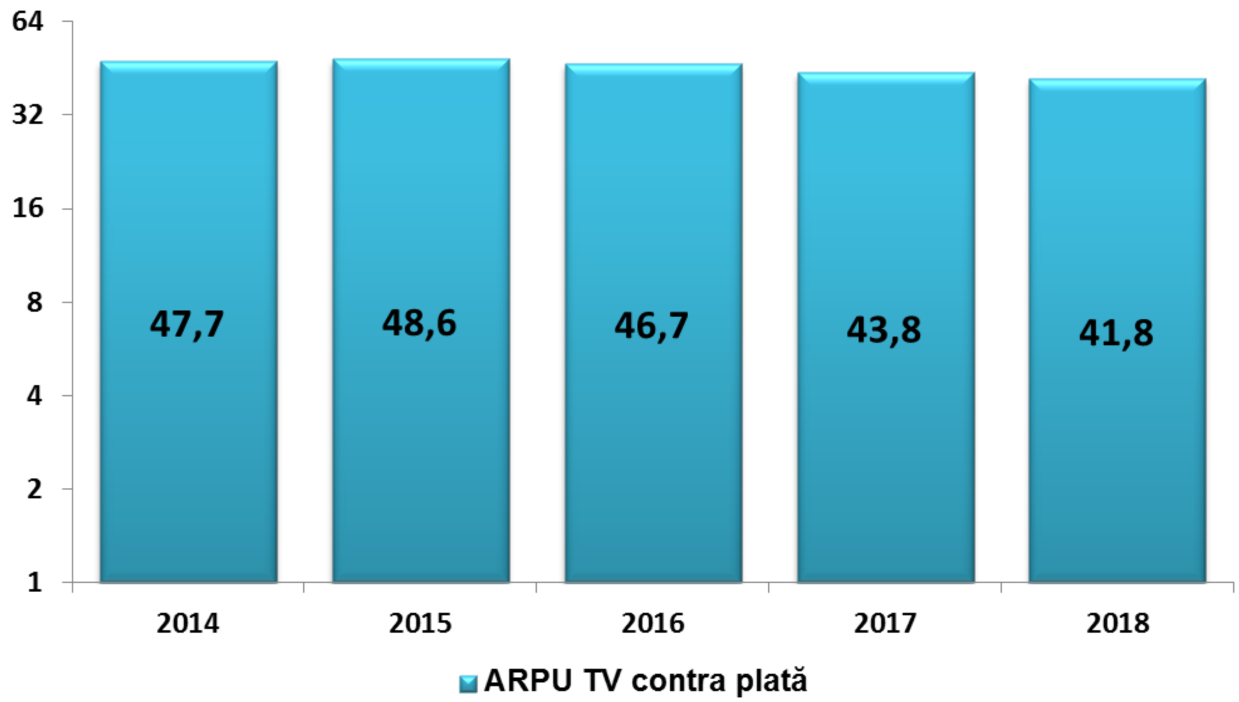
The statistical data presented to ANRCETI by 119 active providers of audiovisual broadcasting show in 2018 a significant decrease of revenues from the over-the-air television and radio services, while a slight increase in revenues from pay TV services.

The revenues from over-the-air television and radio services dropped by 15,5% compared to 2017, to a total of 86,6 mill. lei, whereas the revenues from pay TV increased by 1,6% to 162,1 mill. lei. As a result, the cumulative volume of revenues from over-the-air television and radio services and pay TV services decreased by 5,1% and was estimated at 248,7 mill. lei. According to the situation on 31.12.2018, the share of revenues from pay TV services in the structure of the audiovisual broadcasting market reached 65,2% and the share of revenues from over-the-air television and radio services reached 34,8% (Chart 40).



Over-the-air television and radio services
Pay TV services
Chart 40. Evolution of sales on the audiovisual broadcasting market (mil. lei)
Source: ANRCETI

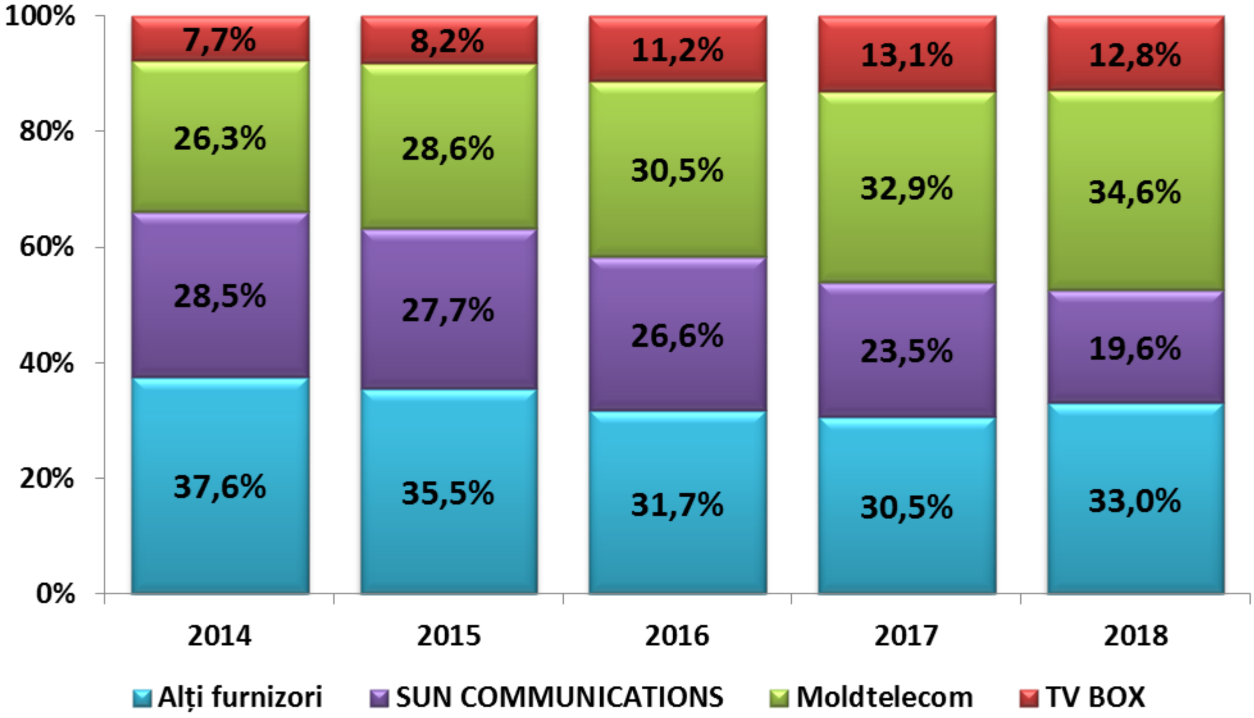
The increase in revenues from pay TV services was driven by the increase of revenues by IPTV providers. The turnover recorded by these providers increased by 6,8% compared to 2017 and amounted to 79,1 mill. lei. At the same time, the revenues of the cable TV providers decreased by 2,8% and amounted to 82,8 mill. lei. As a result, the average monthly revenue per subscriber (ARPU) of pay TV services decreased by 4,5% and amounted to 41,8 lei (Chart 41).



ARPU Pay TV
Chart 41. Evolution of average monthly revenue per subscriber to pay TV services - ARPU (lei)

Source: ANRCETI

In the reference year, the market shares of the main pay TV providers, based on revenue, changed insignificantly. The market share held by JSC Moldtelecom increased compared to 2017 by 1,7 p.p. and showed 34,6%. At the same time, the market share held by TV BOX LLC and Sun Communications LLC decreased by 0,3 p.p. and 3,9 accordingly and was estimated as 12,8% and 19,6%. At the same time, the cumulative share of other pay TV providers increased by 2,5 p.p. and amounted to 33% (Chart 42).



Other providers

Chart 42. Evolution of market shares held by the main providers of pay TV services, by revenues

Source: ANRCETI

5.2 Pay TV subscribers and penetration rate

According to data presented by 80 active pay TV service providers, the total number of subscribers to these services increased by 1,8% compared to 2017 and reached about 329,7 thousand.

The increase in the total number of pay TV subscribers was determined by the increase in the number of IPTV subscribers, by 14,1%, reaching 159,2 thousand. At the same time, the subscriber base of cable TV providers dropped by 7,7% to 170 thousand. As a result of this evolution, the penetration rate of pay TV services, per 100 inhabitants, increased from 9,1% to 9,3% in the timeframe 2017 - 2018, and the penetration rate of these services in relation to 100 households - from 27,3% to 27,8% (Table 4).

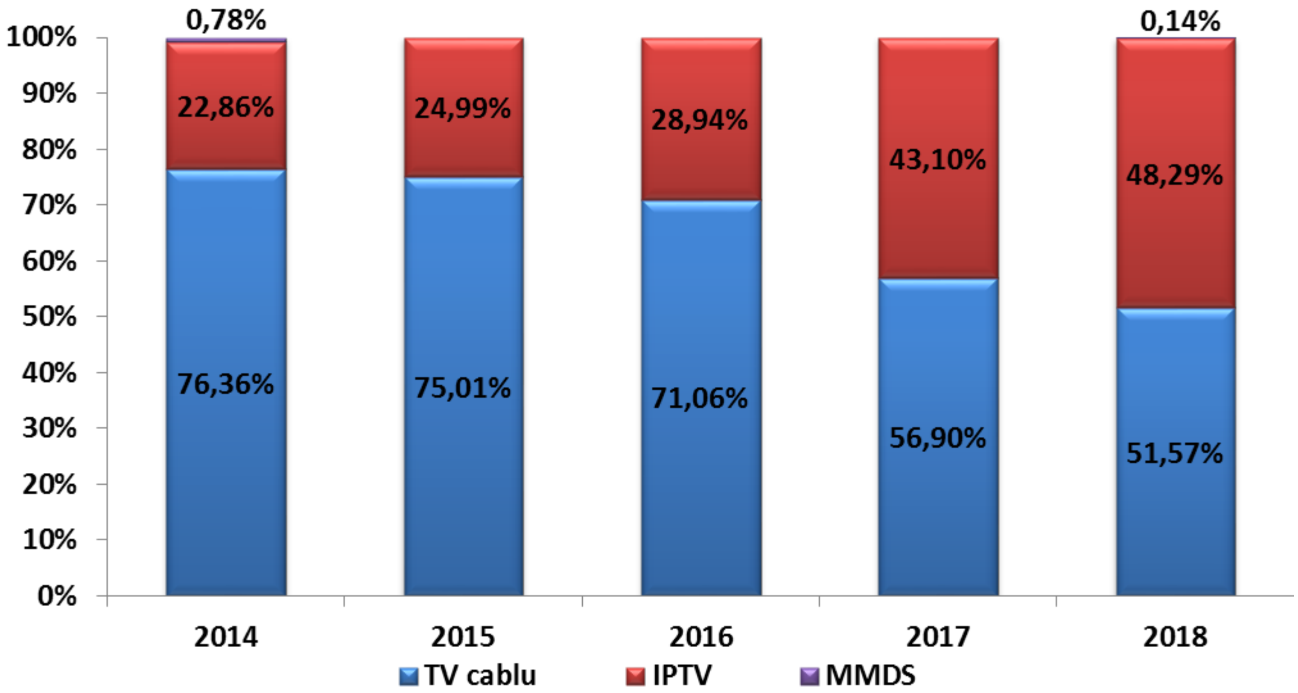
Table 4. Evolution of the number of subscribers to pay TV services and penetration rates (thousand)

Indicators	2014	2015	2016	2017	2018
Cable TV subscribers	209,2	206,5	191,8	184,2	170,0
IPTV subscribers	62,6	68,8	78,1	139,5	159,2
MMDS subscribers	2,1	-	-	-	0,46
Total subscribers	**274,0**	**275,3**	**269,9**	**323,7**	**329,7**
Penetration per 100 inhabitants	7,70%	7,74%	7,60%	9,12%	9,28%
Penetration per 100 households	**23,11%**	**23,23%**	**22,79%**	**27,33%**	**27,85%**

Source: ANRCETI

Statistical data on the place of residence of pay TV subscribers shows that during the reporting period, as in previous years, the absolute majority of subscribers (80,1%) were urban residents and the rest (19,9%) – rural residents.

According to the same data, at the end of 2018, the share of subscribers to IPTV services, in the structure of pay TV subscribers, increased by 5,2 p.p. compared to 2017 and reached 48,3%. The share of cable TV subscribers decreased by 5,3 p.p. and became 51,6% and 0,14% for MMDS (Chart 43).

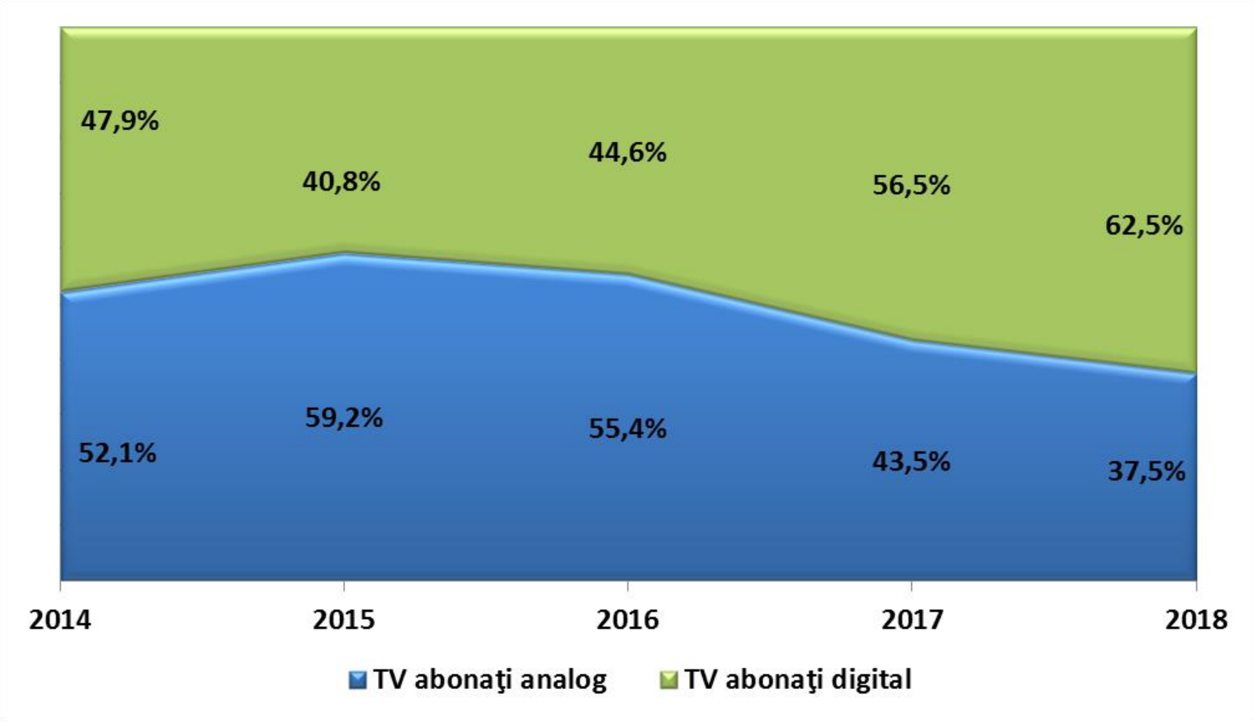


Cable TV

Chart 43. Share of pay TV subscribers, depending on technology on TV signal reception

Source: ANRCETI

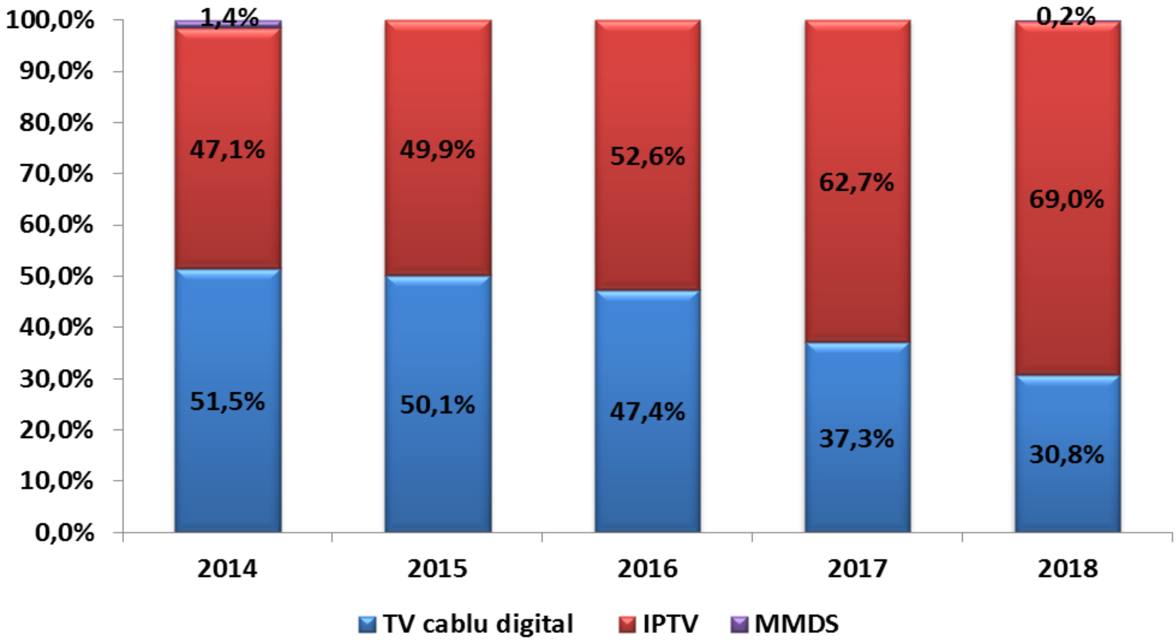
During the reporting period, the trend of increasing use of digital pay TV services continued. The number of subscribers to these services increased by 3,7% in one year and exceeded 230,6 thousand. According to the situation on December 31, 2018, the share of digital TV subscribers increased, compared to 2017, by 6 p.p. and accounted for 62,5%, the share of analogue TV subscribers dropped the same amount, to 37,5% (Chart 44).



Analog TV subscribers
Digital TV subscribers

Chart 44. Share of pay TV subscribers, by TV reception format
Source: ANRCETI

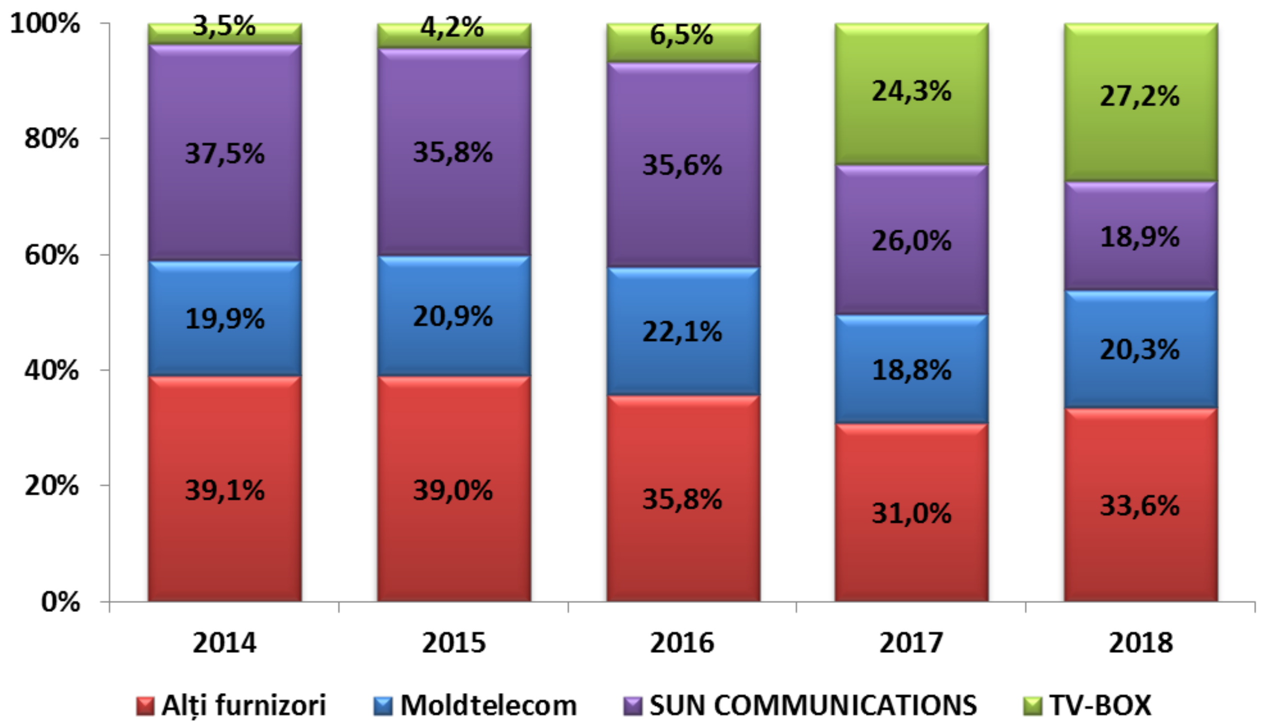
The statistical data over the past five years show a steady increase in the number of digital pay TV subscribers. During this period, the share of subscribers receiving digital TV signal on basis of IPTV technology increased by 6,3 p.p: from 62,7% to 69%, and those receiving TV signal in the same format via cable TV networks declined in the same proportion, from 37,3% to 30,8%. The share of subscribers receiving the signal through MMDS technology is insignificant - 0,2% (Chart 45).



Digital cable TV

Chart 45. Share of digital TV subscribers, by technology of receiving TV programs
Source: ANRCETI

In 2018, the market shares of the main pay TV providers, by the number of subscribers, did not change significantly. TV BOX LLC strengthened its market position by 2,9 p.p, the share of this provider reaching 27,2% at the end of 2018 and JSC Moldtelecom - by 1,5p.p. to 20,3%. The market share of Sun Communications LLC declined by 7,1 p.p. to 18,9% and the cumulative share of the other 77 providers increased by 2,6 p.p. and reached 33,6% (Chart 46).



Other providers

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

Conclusions

The analysis of the statistical data in this Report shows that in 2018 the electronic communications sector continued to be driven by the main trends as predicted in 2017: the recession of fixed voice, mobile voice, audiovisual broadcasting against rapid growth of mobile and fixed broadband. The decrease of revenues from fixed voice by 19,9%, mobile voice - by 5,6%, audiovisual broadcasting – by 5,1% entailed the decrease of the total volume of sales in the electronic communications sector by 2,8%, the value of this indicator reaching more than 6,4 billion lei.

It is noteworthy that the decrease in the total volume of sales in the electronic communications sector decreased by 1,2 p.p. compared to the rate recorded in 2017. This trend was determined by the higher growth rates, attested in 2018, in terms of revenues from mobile broadband - by 16,5%, from fixed broadband - by 6,6%, and from other electronic communications activities - by 8%. The significant influence of the mobile voice market on the revenues (including mobile broadband) in the electronic communications sector is explained by the fact that this market provides about half of the total volume of revenues generally made in the sector.

As mentioned before, the total volume of sales on the mobile market was subject to a slight decrease for the third consecutive year. The decline of this market is caused by the change of consumers' preferences for voice services from mobile to alternative internet communications services, which are cheaper or free of charge (OTT applications: Skype, Viber, WhatsApp, etc.). This trend is also witnessed on mobile markets in European countries and will be more well-marked in the coming years, when most mobile consumers will use electronic communications services via smartphones.

The more prominent decrease of revenues fixed voice services in 2018 occurred due to the continuation of users' migration from fixed to mobile voice and Internet communication services. The negative dynamics of this market is in line with the overall trend of fixed telephony stagnation.

Under the conditions of the recession of the fixed and mobile voice markets, the mobile (3G, 4G and dedicated access) and fixed broadband markets in 2018 reached the highest growth rates. As the number of fixed and mobile broadband users is rising steadily, in particular the number of those using 4G global network and data traffic, the total volume of sales on the two markets increased, as compared to the year 2017, by 10,9% and surpassed 2,3 billion lei, which represents about 37% of the total value of the electronic communications sector.

The upward trend of the mobile and fixed broadband is boosted by the steady increase in demand for these services, the development of Internet access infrastructure based on modern technologies (4G and fiber optics), increasing competition on these markets and launching of more attractive offers to users. In this respect, it is worth mentioning that at the end of 2017, the 4G coverage of population and territory of Moldova remains at the level of the previous year (97% and 94% accordingly), which means that virtually all the population of the country continue to have access to high-speed mobile broadband.

According to ANRCETI estimates, mobile and fixed broadband markets will continue to grow in the coming years, being the main engines of sector development.

Annex

Number of subscribers and use of fixed broadband technologies in administrative – territorial units of the R. Moldova, as per 31.12.2018

No	Territorial-administrative Unit	Total BB subscribers	BB penetration per 100 households	Subscribers				Share of BB access technology				Penetr. Per 100 inhabitants 2018	Dynamics of penetration (p.p)		Dynamics of technology share (p.p.)				Increase of the number of subscribers (un.)				
				xDSL	FTTx	Coaxial cable	Other tehnologies	xDSL	FTTx	Coaxial cable	Other technologies		per 100 households p.p.	Per 100 inhabitants, p.p.	xDSL	FTTx	Coaxial cable	alte tehn.	xDSL	FTTx	Coaxial cable	Other technologies	BB subscribers
1	CHISINAU Mun.	245 821	77,0%	6 059	200 137	38 174	1 451	2,5%	81,4%	15,5%	0,6%	29,8%	3,8	1,5	-0,7	1,1	-0,3	-0,1	-1 279	13 726	1 353	-181	13 619
2	BALTI Mun.	31 442	52,2%	2 858	26 331	2 247	6	9,1%	83,7%	7,1%	0,0%	20,8%	2,8	1,1	-1,8	1,8	0	0	-376	2 014	135	-1	1 772
3	CAHUL Mun.	8 183	53,9%	1 295	6 346	521	21	15,8%	77,6%	6,4%	0,3%	20,7%	0,9	0,3	-2,9	1,9	1	-0,1	-214	261	93	-4	136
4	EDINET Mun.	3 624	51,2%	341	3 280	0	3	9,4%	90,5%	0,0%	0,1%	19,7%	2,8	1,1	-1	0,9	0	0,1	-14	211	0	2	199
5	HINCESTI Mun.	3 850	62,3%	282	3 566	0	2	7,3%	92,6%	0,0%	0,1%	22,3%	3,8	1,4	-1	1	0	0	-20	255	0	0	235
6	ORHEI Mun.	7 316	58,1%	464	6 221	615	16	6,3%	85,0%	8,4%	0,2%	21,5%	0,7	0,3	-0,8	0,9	-0,3	0,1	-51	165	-10	10	114
7	SOROCA Mun.	6 150	43,8%	661	5 489	0	0	10,7%	89,3%	0,0%	0,0%	16,2%	4,9	1,8	-2,3	2,3	0	0	-45	771	0	0	726
8	STRASENI Mun.	3 255	48,5%	398	2 854	0	3	12,2%	87,7%	0,0%	0,1%	15,6%	12,5	4	-6,2	6,2	0	0	-46	885	0	0	839
9	UNGHENI Mun.	7 892	59,8%	409	7 483	0	0	5,2%	94,8%	0,0%	0,0%	20,6%	3,1	1,1	-1,3	1,4	0	0	-79	492	0	-1	412
10	r. ANENII NOI	13 198	49,1%	5 608	7 313	250	27	42,5%	55,4%	1,9%	0,2%	16,0%	5,6	1,8	-11,2	11,2	1,9	-1,9	-732	2 095	250	-221	1 392
11	r. BASARABEASCA	4 093	41,5%	1 588	2 276	0	229	38,8%	55,6%	0,0%	5,6%	14,6%	2,8	1	-7,1	1,6	0	5,6	-171	207	0	228	264
12	r. BRICENI	11 207	40,1%	5 297	5 907	0	3	47,3%	52,7%	0,0%	0,0%	15,6%	2,3	0,9	-9,6	9,6	0	0	-763	1 320	0	1	558
13	r. CAHUL	9 900	39,6%	7 836	2 062	0	2	79,2%	20,8%	0,0%	0,0%	11,7%	3,5	1	-13,4	13,3	0	0	-529	1 385	0	1	857
14	r. CANTEMIR	7 686	41,9%	6 252	1 433	0	1	81,3%	18,6%	0,0%	0,0%	12,5%	3,3	1	-4,2	4,2	0	0	178	408	0	0	586
15	r. CALARASI	9 210	34,8%	4 865	4 336	0	9	52,8%	47,1%	0,0%	0,1%	12,0%	2	0,7	-3,2	3,2	0	0	-14	519	0	0	505
16	r. CAUSENI	11 442	39,9%	6 804	4 631	3	4	59,5%	40,5%	0,0%	0,0%	12,7%	2,4	0,8	-3,7	3,6	0	0	-5	657	3	-1	654
17	r. CIMISLIA	8 002	40,8%	4 294	3 706	0	2	53,7%	46,3%	0,0%	0,0%	13,5%	2,8	0,9	-5,6	5,6	0	0	-157	648	0	0	491
18	r. CRIULENI	11 047	46,0%	5 592	5 447	0	8	50,6%	49,3%	0,0%	0,1%	15,0%	2,4	0,8	-5,2	5,2	0	0	-268	817	0	4	553
19	r. DONDUSENI	5 126	28,9%	3 165	1 959	0	2	61,7%	38,2%	0,0%	0,0%	12,2%	2,4	1	-9	9	0	0	-191	573	0	1	383
20	r. DROCHIA	10 930	34,9%	4 200	6 728	0	2	38,4%	61,6%	0,0%	0,0%	12,7%	-0,5	-0,2	-4,4	12,8	-8,4	0	-579	1 281	-935	0	-233
21	r. DUBASARI	4 134	36,3%	2 552	1 581	0	1	61,7%	38,2%	0,0%	0,0%	11,7%	1,4	0,5	-0,4	0,4	0	0	85	78	0	0	163
22	r. EDINET	8 529	36,0%	5 140	3 388	0	1	60,3%	39,7%	0,0%	0,0%	13,9%	2,4	0,9	-5,2	5,2	0	0	-129	612	0	0	483
23	r. FALESTI	10 471	32,0%	5 325	5 146	0	0	50,9%	49,1%	0,0%	0,0%	11,5%	2,1	0,8	-9,2	9,2	0	0	-566	1 232	0	-3	663
24	r. FLORESTI	11 691	34,9%	6 977	4 335	0	379	59,7%	37,1%	0,0%	3,2%	13,5%	4	1,5	-8,1	4,6	0	-0,4	-98	947	0	1	1 254
25	r. GLODENI	7 299	35,1%	5 282	2 016	0	1	72,4%	27,6%	0,0%	0,0%	12,4%	1,8	0,6	-0,1	0,1	0	0	235	98	0	0	333
26	r. HINCESTI	11 252	34,2%	7 873	3 378	0	1	70,0%	30,0%	0,0%	0,0%	11,0%	2,6	0,9	-6,8	6,8	0	0	-142	960	0	0	818
27	r. IALOVENI	16 251	53,2%	5 252	9 243	1 751	5	32,3%	56,9%	10,8%	0,0%	16,0%	4,7	1,4	-6,5	5,1	1,4	0	-493	1 580	358	0	1 445
28	r. LEOVA	6 740	39,1%	4 158	2 582	0	0	61,7%	38,3%	0,0%	0,0%	12,9%	2,8	0,9	-8,4	8,4	0	0	-249	698	0	0	449
29	r. NISPORENI	6 842	31,8%	4 287	2 411	143	1	62,7%	35,2%	2,1%	0,0%	10,5%	2,7	0,9	-6,6	4,5	2,1	0	-57	485	143	0	571
30	r. OCNITA	6 549	31,1%	4 019	2 525	0	5	61,4%	38,6%	0,0%	0,1%	12,3%	3,2	0,9	-17,1	17,1	0	0	-780	1 213	0	0	433
31	r. ORHEI	11 130	38,2%	6 574	4 267	283	6	59,1%	38,3%	2,5%	0,1%	12,3%	6,8	2,2	-13,8	14,3	-0,5	0	-134	2 052	0	1	1 919
32	r. REZINA	6 359	37,4%	3 361	2 995	0	3	52,9%	47,1%	0,0%	0,0%	12,7%	3,6	1,2	-7,1	7,1	0	0	-97	684	0	0	587
33	r. RISCANI	9 538	36,2%	4 532	5 004	0	2	47,5%	52,5%	0,0%	0,0%	14,2%	1,4	1,3	-6,4	6,4	0	0	-166	998	0	0	832
34	r. SINGEREI	12 450	39,2%	6 417	6 033	0	0	51,5%	48,5%	0,0%	0,0%	13,6%	2,2	0,8	-2,8	2,9	0	0	9	660	0	-2	667
35	r. SOROCA	6 668	27,9%	6 363	303	0	2	95,4%	4,5%	0,0%	0,0%	10,7%	2	0,8	-1,9	1,9	0	0	315	140	0	1	456
36	r. STRASENI	8 845	39,5%	5 774	2 792	77	202	65,3%	31,6%	0,9%	2,3%	12,4%	3,1	1	-9,5	8,5	0,9	0,1	-324	914	77	22	689
37	r. SOLDANESTI	4 544	30,7%	3 002	1 542	0	0	66,1%	33,9%	0,0%	0,0%	11,0%	3,7	1,3	-12,6	12,6	0	0	-167	681	0	-1	513
38	r. STEFAN VODA	8 392	35,2%	4 955	3 158	277	2	59,0%	37,6%	3,3%	0,0%	12,0%	2,9	1	-2,7	-0,6	3,3	0	180	204	277	-1	660
39	r. TARACLIA	5 318	39,9%	2 760	2 556	0	2	51,9%	48,1%	0,0%	0,0%	12,3%	0,5	0,2	-4,6	5,9	-1,3	0	-212	338	-70	0	56
40	r. TELENESTI	8 733	37,4%	5 443	3 285	0	5	62,3%	37,6%	0,0%	0,1%	12,2%	2,7	0,9	-7,3	7,2	0	0	-228	807	0	4	583
41	r. UNGHENI	8 433	32,1%	4 986	3 447	0	0	59,1%	40,9%	0,0%	0,0%	10,7%	2,6	0,9	-10,1	10,1	0	0	-388	1 059	0	0	671
42	UTA Gagauzia	23 593	47,1%	8 878	14 707	0	8	37,6%	62,3%	0,0%	0,0%	14,6%	1,9	0,6	-9,3	9,6	-0,3	0	-1 746	2 757	-77	-1	933
	Total	623 135	49,5%	182 178	394 199	44 341	2 417	29,2%	63,3%	7,1%	0,4%	17,6%	3,1	1,1	-3,8	3,9	-0,2	-0,1	-10 507	47 887	1 597	-141	39 240

Remark: The statistical data compared to the year 2017 were modified according to the updated information presented by the National Bureau of Statistics.