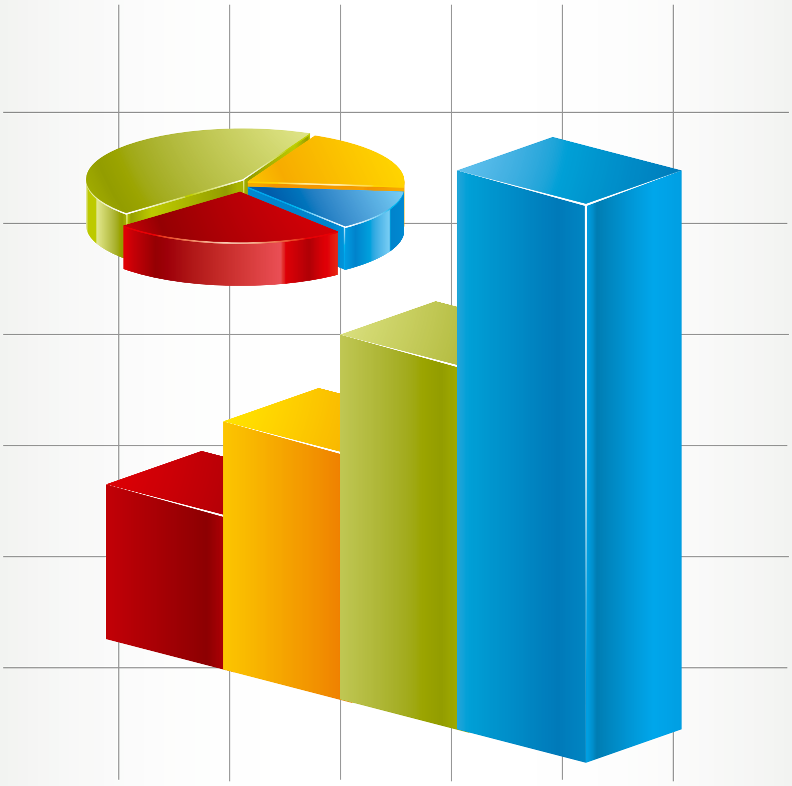
ANRCETI

NATIONAL REGULATORY AGENCY
FOR ELECTRONIC COMMUNICATIONS
AND INFORMATION TECHNOLOGY
OF THE REPUBLIC OF MOLDOVA

Electronic Communications Market in the Republic of Moldova

ANNUAL REPORT 2012



CONTENTS

KEY INDICATORS OF ELECTRONIC COMMUNICATIONS SECTOR

Value	2011	2012	Change
Mobile communications:			
Total users	3.714.965	4.262.044	14,73%
Active users	3.217.261	3.584.283	11,41%
- individual users	3.041.421	3.353.475	10,26%
- business users	211.093	230.808	9,34%
Penetration	104,34%	119,74%	15,40 p.p.
Revenues (million lei)	3610,59	3732,95	3,39%
ARPU (monthly)	89,6	79,3	-11,50%
Mobile telephony			
Users	3.587.431	4.080.143	13,73%
Traffic (million minutes)	4.743,6	5.093,0	7,37%
MoU (monthly minutes per user)	132	121	-8,33%
SMS messages (million lei)	1019,51	676,21	-33,67%
MMS Messages (million lei)	3,92	2,70	-31,12%
Penetration	100,76%	114,63%	13,87 p.p.
Revenues (million lei)	3434,92	3503,14	1,99%
ARPU (monthly)	89,1	77,6	-12,91%
Mobile Internet Traffic of voice users (TB)	389,56	575,82	47,81%
Dedicated mobile Internet			
Users	124.813	178.459	42,98%
Penetration	3,51%	5,01%	1,51 p.p.
Revenues (million lei)	175,66	229,80	30,82%
ARPU (monthly)	118,8	126,3	6,31%
Mobile Internet Traffic of dedicated mobile broadband users, dedicated (TB)	6.168,87	15.943,97	158,46%
Fixed telephony			
Users (subscriber lines) total	1.179.865	1.205.768	2,20%
- individual users	1.040.305	1.066.440	2,51%
- business users	139.560	139.328	-0,17%
Penetration	33,15%	33,87%	0,73 p.p.
Traffic (million minutes)	3.321,7	3.029,5	-8,80%
MoU (monthly minutes per user)	236	211	-10,59%
Revenues (million lei)	1.647,02	1.546,10	-6,13%
ARPU (monthly)	117,27	108,01	-7,90%
Fixed broadband and data transmission			
Subscribers	355.099	417.177	17,48%
- individual users	-	388.736	-
- business users	-	20.630	-
Penetration	9,97%	11,72%	1,75 p.p.
Revenues (million lei)	678,19	808,11	19,16%
ARPU Internet fix (monthly)	144,23	145,94	1,19%
International Internet bandwidth (Gbps)	122,74	143,54	16,95%
Audiovisual			
Multichannel TV subscribers	256.118	284.827	11,21%
Multichannel TV penetration	7,2%	8,00%	0,8 p.p.
Audiovisual revenues (million lei)	283,95	328,95	15,85%
ARPU multichannel (monthly)	58,78	51,39	-12,57%
Total revenues from electronic communications (million lei)	**6.219,7**	**6.416,1**	**3,16%**

1 GENERAL CHARACTERISTIC

1.1 Main events of 2012

In 2012, a number of major events took place on the electronic communications market, which influenced the development of this important national economy sector. The main event of 2012 was the launch (November 2012), of electronic communications broadband wireless access networks/services 4G/LTE, by companies JSC "Moldcell" and JSC "Orange", under licenses for the use of 2500-2690 MHz radio frequencies/channels, issued to these companies at the beginning of November by ANRCETI.

Another important event took place on March 31, 2012, when Moldova switched to the "closed" format of dialing numbers from range "2" of the National Numbering Plan (NNP), which of telephone numbers in Moldova have a uniform format and created prerequisites for more efficient use of numbering resources in the provision of electronic communications services.

In October 2012, JSC "Orange Moldova" and JSC "Moldcell" launched, as part of a public-private project, the electronic signature service, an instrument which will enhance the access of citizens to the available electronic services. The launch of this service placed Moldova among the first seven countries in the world that are implementing such innovational technologies.

In February, JSC "Moldtelecom" opened a Data Center for hosting IT equipment and offering other IT services, whereas "Starnet" LLC , throughout the year, extended the area of its service provision (Internet, TV and fixed telephony) up to 15 administrative centers of Moldova.

During the year, several providers launched new tariff plans and offers, including several types of services in a subscription . As per the situation on 31.03.2013, a provider (JSC "Moldtelecom") offers 5-play services (fixed telephony, mobile telephony, dedicated mobile broadband 3G, fixed broadband and IPTV), another provider (JSC "Orange Moldova") - 4-play services (mobile telephony, fixed telephony, dedicated mobvile broadband 3G/4G, fixed broadband), four providers (JSC "Moldcell", „Starnet" LLC, „Sun Communications" LLC , and „Arax-Impex" LLC) offer triple-play services, and 20 providers - 2-play services. So, of the total of 192 electronic communications providers (who reported revenues in 2012), 26 – provide several types of services within one subscription.

1.2 Dynamics of revenues

According to the statistical data reported to ANRCETI by providers of electronic communications networks and services, in 2012, the total value of the four electronic communications markets (mobile communications, fixed telephony, fixed broadband and data transmission, broadcasting services increased over 2011, by 3,16% and made a total of 6 billion 416,1 million lei. The most significant sales were registered on the market for mobile communications and the one for fixed telephony – 3 billion 732,9 million lei (increasing by 3,39%), and, accordingly, 1 billion 546,1 million lei (decreasing by 6,13%). The value of the market for fixed broadband and data transmission increased by 19,16% and made a total of 808,1 million lei, the market for broadcasting services – by 15,85% and made a total of 329 million lei (Figure 1).

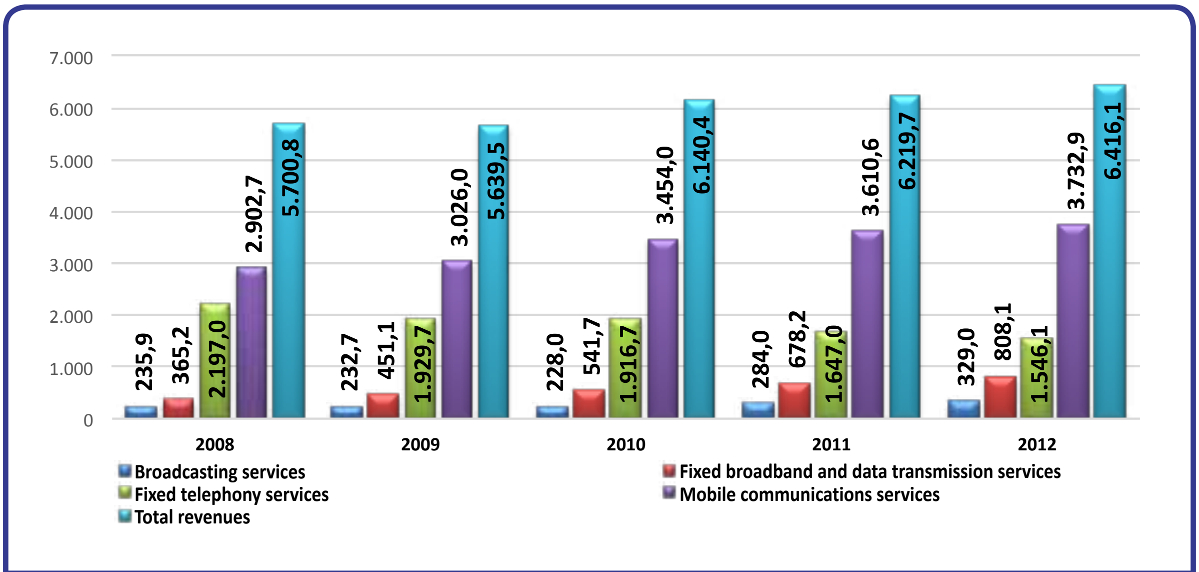


Figure 1 Evolution of revenues in electronic communications sector (million lei)

As a result of this evolution, the share of Fixed broadband and data transmission services in the structure of electronic communications services increased by 1,69 percent points (p.p.) and made up 12,6%, the share of Broadcasting services - by 0,5 p.p. and made up 5,1%, mobile communications services by 0,2 p.p. and became 58,2%. But, the share of fixed telephony decreased by 2,38 p.p. and made up 24,1% (Figure 2).

It should be mentioned that in 2012, for the fourth year in a row, the most significant average monthly revenue per user (ARPU) –141,12 lei – was registered on the market for fixed broadband. On the fixed telephony this indicator was 108,01 lei, on the market for mobile communications –79,34 lei and on the market for multichannel TV services – 51,39 lei (Figure 3).

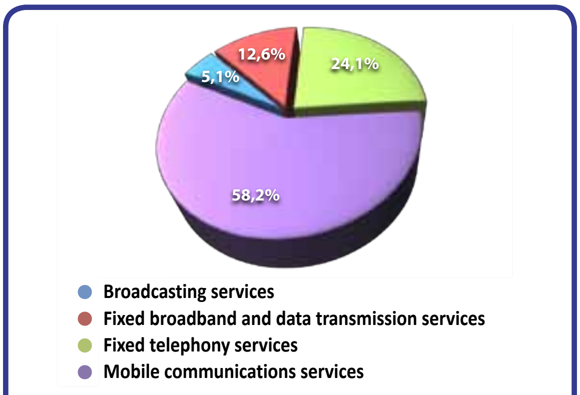


Figure 2 Structure of the electronic communications market according to revenues

In 2012, the highest revenue was earned by: JSC ”Orange Moldova” (2 billion 629 million lei or 41% of the total), followed by JSC ”Moldtelecom” (2 billion 293 million lei or 35,7% din total), JSC ”Moldcell” (956 million lei or 14,9% of the total) and “Starnet” LLC (123 million lei or 1,9% of the total). The other providers had a cumulative revenue of 416 million lei or 6,5% of the total revenues in the sector (Figure 4). It is notable that the cumulative revenue of the first three providers (Orange Moldova, Moldtelecom and Moldcell) makes 91,6% of the total revenues earned in the electronic communications sector.

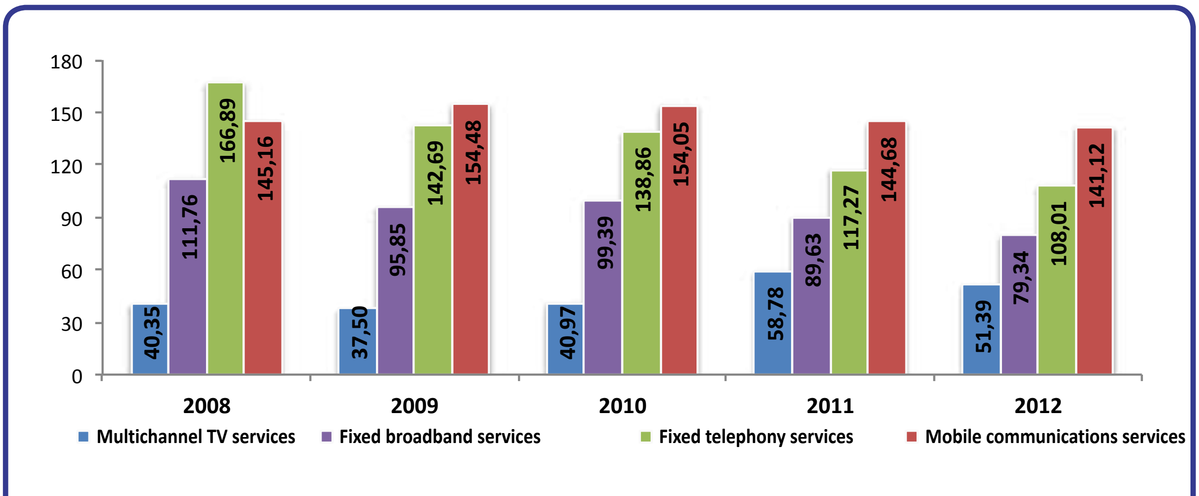


Figure 3 Evolution of average monthly revenue per user - ARPU (lei)

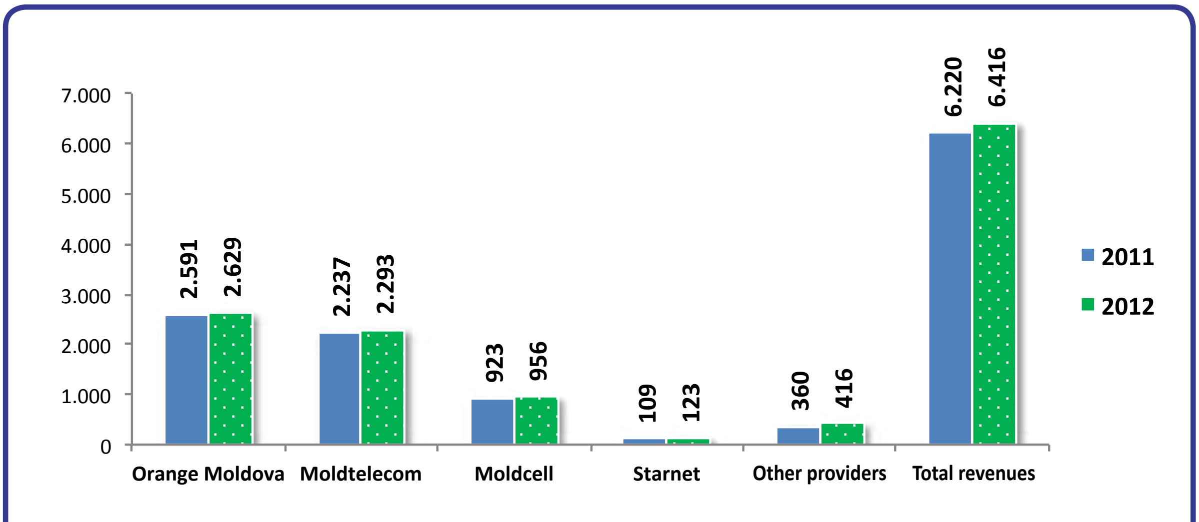


Figure 4 Dynamics of revenues earned by providers in 2011-2012 (million lei)

1.3 Evolution of the number of users

Though the volumes of sales on the four electronic communications markets were subject to different trends, the number of users was ascending, the total number increasing over 2011 by 12,1% and reaching 6 million 169,8 thousand. The number of users of fixed broadband increased by 17,48%, of mobile communications by 14,73%, of multichannel TV fixed telephony services increased by 11,21% and, accordingly, by 2,2% (Figure 5).

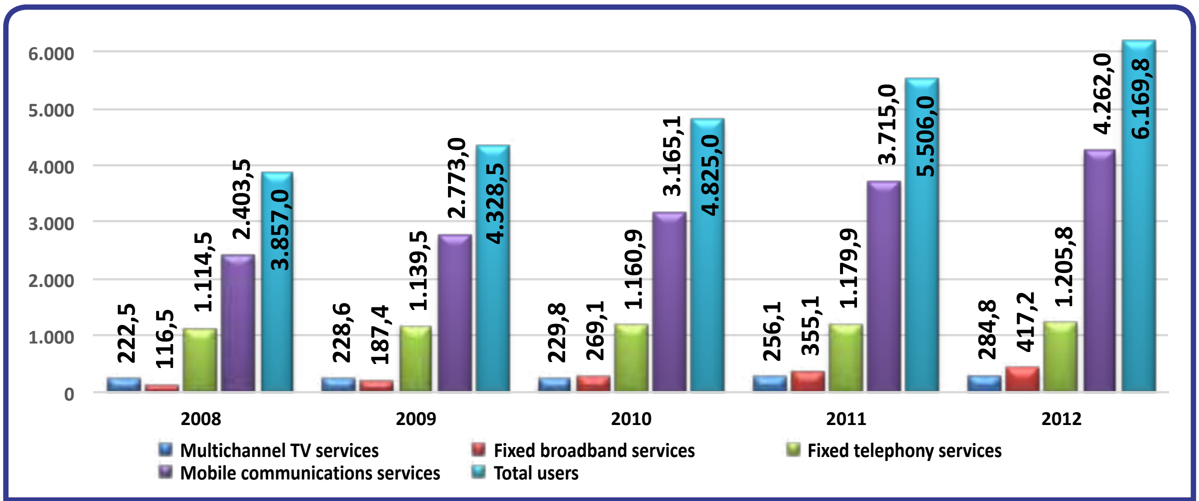


Figure 5 Evolution of the number of electronic communications users (thousand)

Of the total number of electronic communications users 69,08% are mobile, 19,54% - fixed telephony, 6,76% - fixed broadband and 4,62% - multichannel TV users (Figure 6).

The increase in the number of electronic communications users led to the higher penetration rates per 100 inhabitants. This indicator reached 119,74% on the mobile communications market, 33,87 % on the fixed telephony market, 11,72% on the market for Fixed broadband and 8,00% - on multichannel TV market. (Figure7). The increase on the mobile communications segment is caused by the fact that end users have several SIM cards, which implies that the tariffs for communications between end users of different communications networks are rather high.

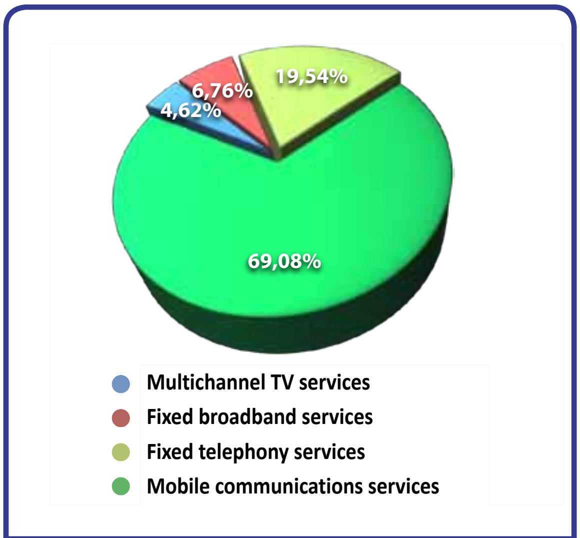


Figure 6 Structure of the market, according to number of users

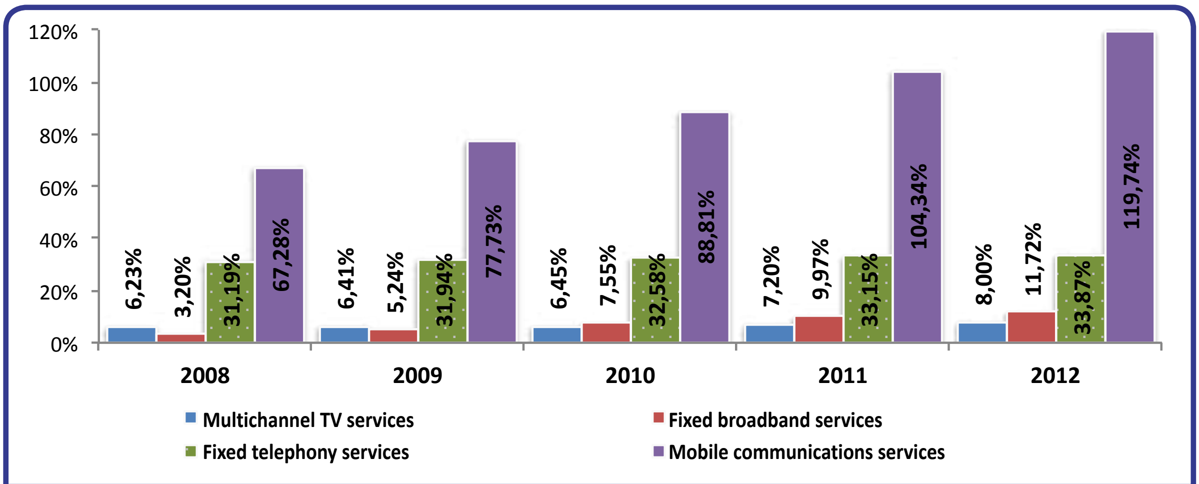


Figure 7 Evolution of electronic communications services penetration rates

1.4 Evolution of voice traffic

In 2012, the users of mobile and fixed telephony generated 8,12 billion minutes total traffic volume, an increase by 0,71% over 2011. This trend was caused by the decrease of traffic in fixed networks by 8,8%, down to 3,03 billion minutes. At the same time, the traffic in mobile telephony networks increased over 2011 by 7,37% and constituted 5,09 billion minutes (Figure 8).

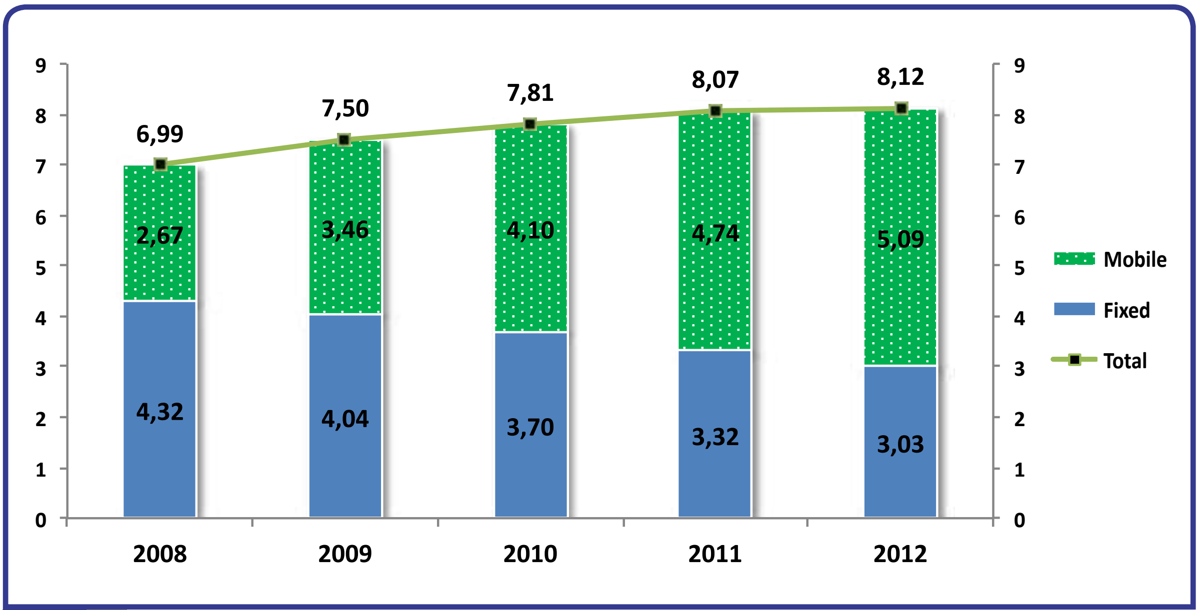


Figure 8 Evolution of traffic in mobile and fixed telephony networks (billion minutes)

The biggest share in the structure of the total voice traffic in fixed and mobile telephone networks – 50,8% - belongs to the traffic generated in mobile networks (this traffic also includes the traffic in the provider's individual networks and mobile-mobile traffic). The data in Figure 9 show that the share of voice traffic in the fixed networks decreased during the last five years by 20,1 p.p. and made up 28,5% in 2012,

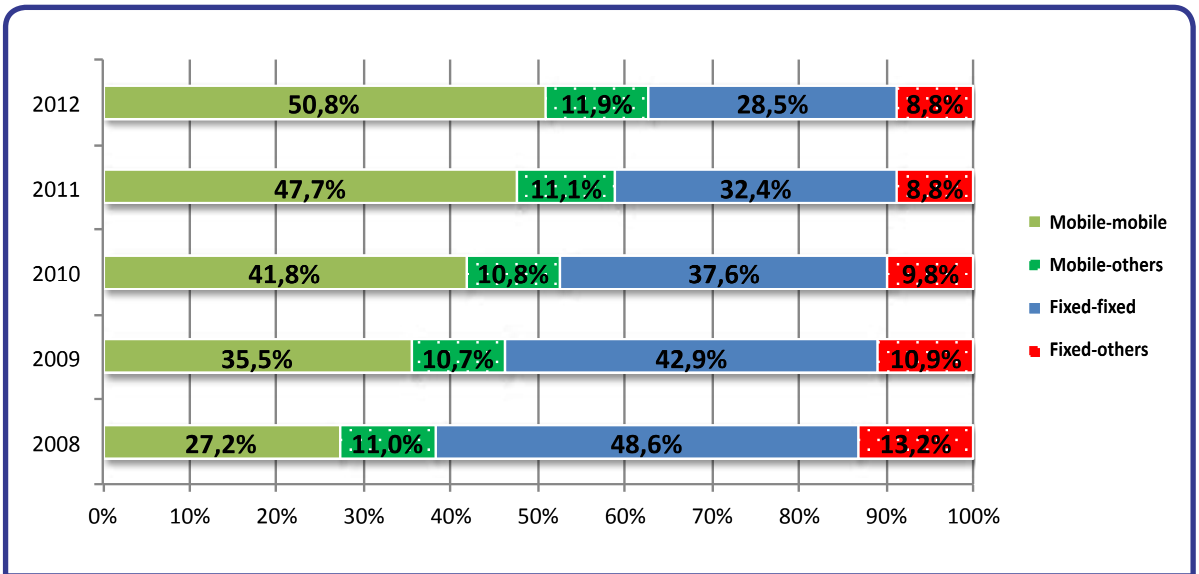


Figure 9 Share of traffic types in the structure of total fixed and mobile traffic

1.5 Dynamics of investments

In the timeframe under report, the total volume of investments in electronic communications, as compared to 2011, decreased by 3,75% and equaled 1 billion 743 million lei (Figure 10).

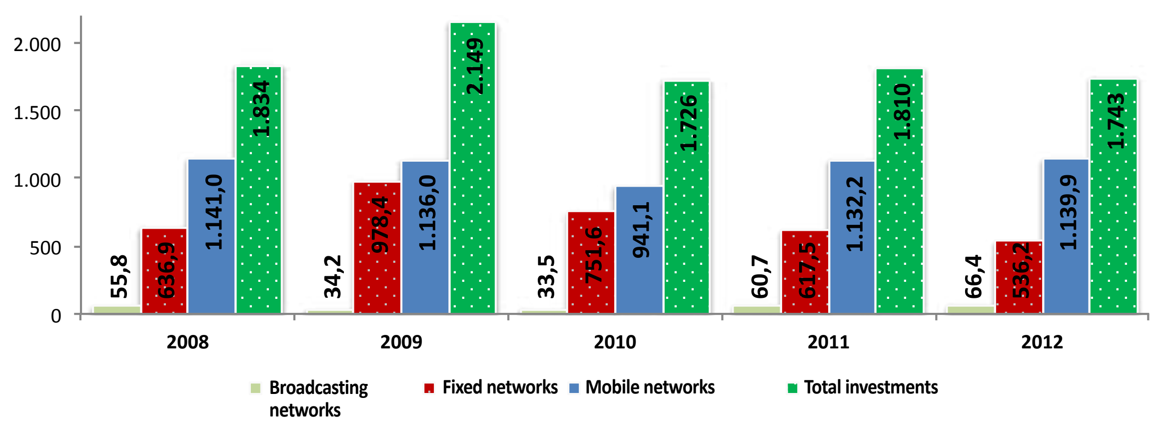


Figure 10 Evolution of investments in electronic communications sector (million lei)

The investments in broadcasting networks increased by 9,34% and totaled 66,4 million lei, those in mobile networks – by cu 0,68% and totaled 1 billion 139,9 million lei. But the investments in fixed networks dropped by 13,16% and constituted 536,2 million lei.

Of the total volume of investments 65,4% were allocated to the development of mobile communications networks, 30,8% - fixed networks and 3,8% - to broadcasting services. (Figure 11).

In 2012, like in the previous years, the biggest investors in electronic communications sector were the companies JSC ”Moldtelecom”, JSC ”Orange Moldova” and JSC ”Moldcell”, that jointly made 95,6% of the total investments in the sector. JSC ”Moldtelecom” invested 680 million lei or 39,0%, JSC ”Moldcell” – 503,2 million lei or 28,9 % and JSC ”Orange Moldova” – 483,2 million lei or 27,7% of the total.

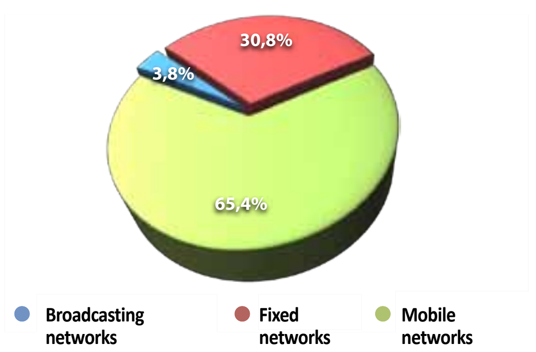


Figure 11 Destination of investments made in electronic communications sector

2 MOBILE COMMUNICATIONS

2.1 General data. Dynamics of the market

In 2012, the three mobile communications providers (mobile telephony and dedicated mobile broadband) – JSC ”Orange Moldova”, JSC ”Moldcell” and JSC Moldtelecom”, under the brand ”Unite”, – used the technologies given in the Table no. 1.

Table 1 Technologies used by providers of mobile communications services

Furnizor	GSM	CDMA 1x/EV-DO	UMTS/HSPA	LTE
JSC „Orange Moldova”	+	-	+	+
JSC „Moldcell”	+	-	+	+
JSC „Moldtelecom”	-	+	+	-

In the timeframe under report, the total volume of revenues from sales of electronic communications services increased over 2011, by 3,39% and reached 3 billion 732,9 million lei. The revenues generated by mobile communications of JSC "Moldtelecom" increased by 42,83% and constituted 184,9 million lei. The sales of JSC "Moldcell" increased by 3,37% and made up 954,4 million lei, whereas the revenues of JSC "Orange Moldova", - by 1,4% and made 2 billion 593,6 million lei (Figure 12).

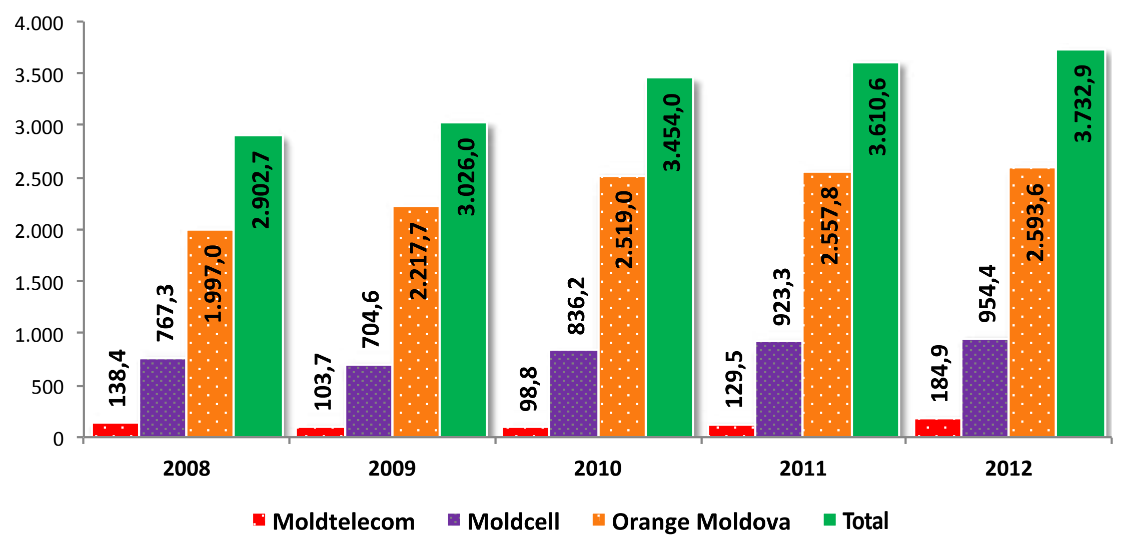


Figure 12 Evolution of revenues by mobile communications providers (million lei)

As per the situation on 31.12.2012, according to turnover, JSC "Orange Moldova" had 69,48% of the market, JSC "Moldcell" – 25,57% and JSC "Moldtelecom" – 4,95% (Figure 13).

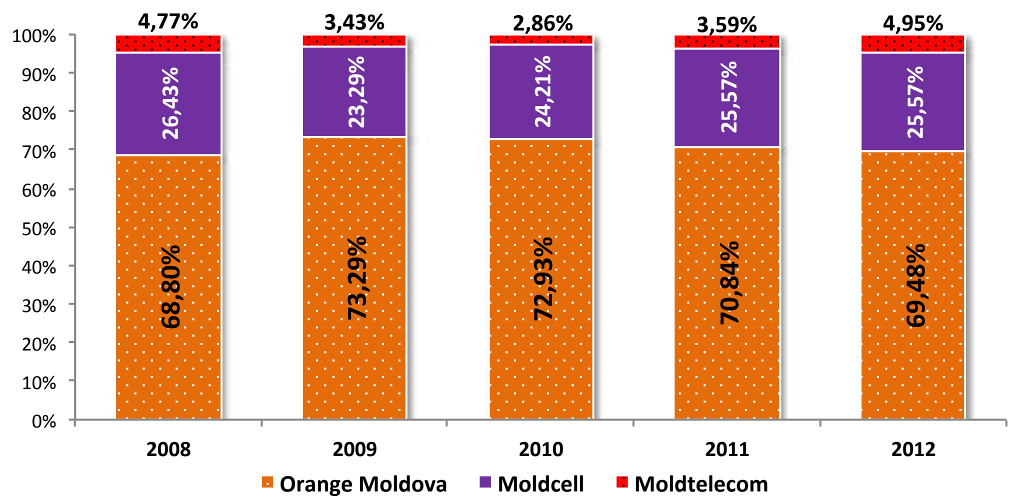


Figure 13 Structure of mobile communications market, according to turnover

In 2012, the average monthly revenue per user (ARPU) was lower than in 2011 with all the three mobile communications providers. The value of ARPU dropped by 11,5% and equaled 79,3 lei (Figure 14). The drop of this indicator was caused by the reduction of revenues from new subscribers, decrease of retail tariffs, as well as wholesale tariffs for call termination in mobile networks, a remedy imposed by ANRCETI on SMP providers on this market.

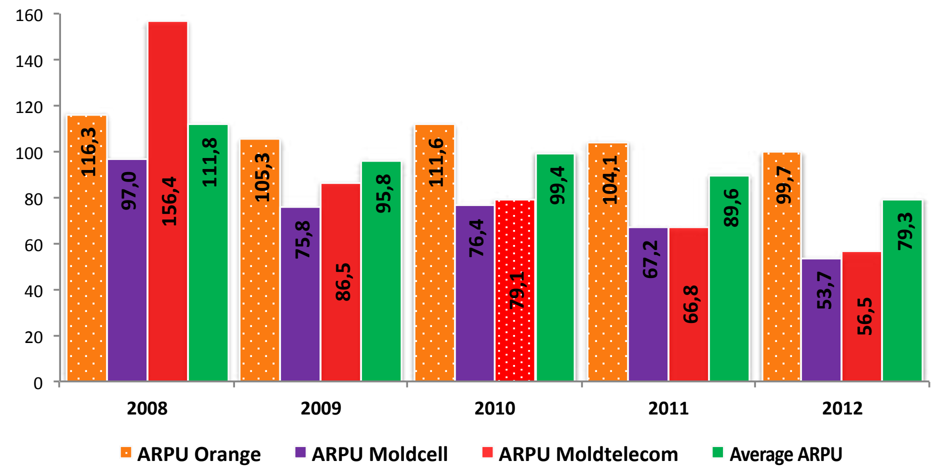


Figure 14 Evolution of monthly average revenue per user - ARPU (lei)

According to the data presented by the three mobile communications providers, as per 31.12.2012, JSC "Orange Moldova" ensured 99,00 % territory coverage with 2G radio signal, JSC "Moldcell"– 97,35% and JSC "Moldtelecom" (CDMA2000 1x in 450 MHz band) – 98,07% (Figure 15).

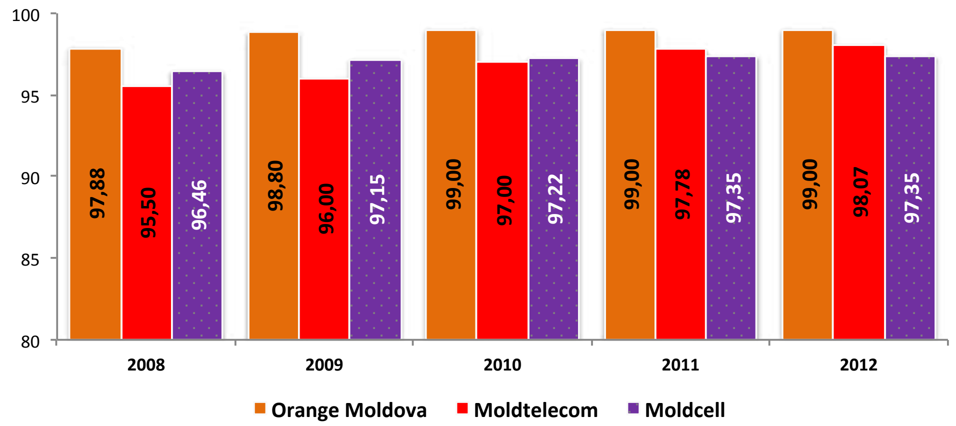


Figure 15 The rate of territory coverage with 2G networks (%)

As for the population coverage with 2G signal, JSC "Orange Moldova" ensured, at the end of 2012, 99%, JSC "Moldtelecom"– 98,79% and JSC "Moldcell" – 96,82% (Figure 16).

As for 3G territory coverage, JSC "Orange Moldova" had 99,00%, JSC "Moldtelecom"– 80,40% and JSC "Moldcell" – 75,89% (Figure 17).

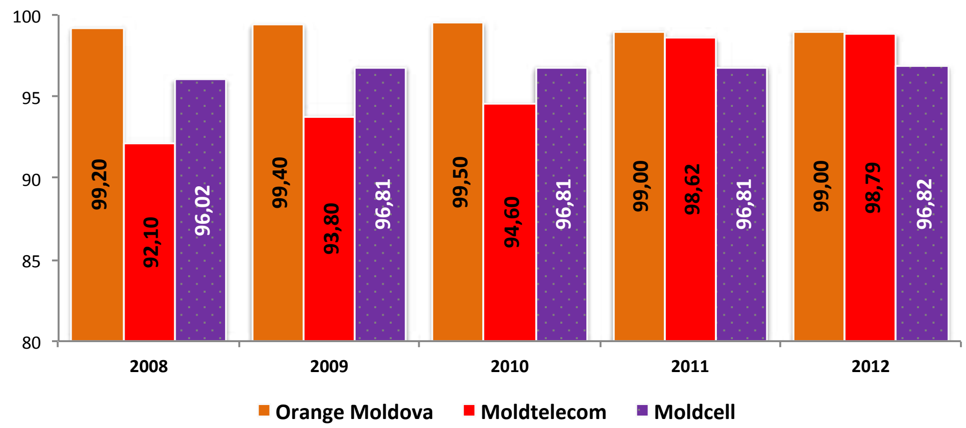


Figure 16 Rate of population coverage with 2G networks(%)

The data regarding population coverage with 3G networks show that the highest coverage rate – 99% - was attained by JSC ”Orange Moldova”, followed by JSC ”Moldtelecom” - 81,2% and JSC ”Moldcell” – 57,57% (Figure 18).

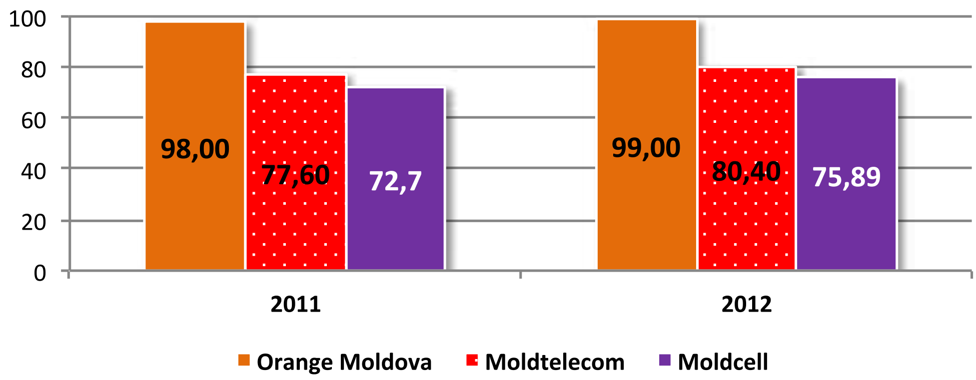


Figure 17 Rate of territory coverage with 3G networks (%)

The data in Figures 17 and 18 show that in 2012 all the three mobile communications providers ensured the increase of the rates of territory and population coverage with 3G networks.

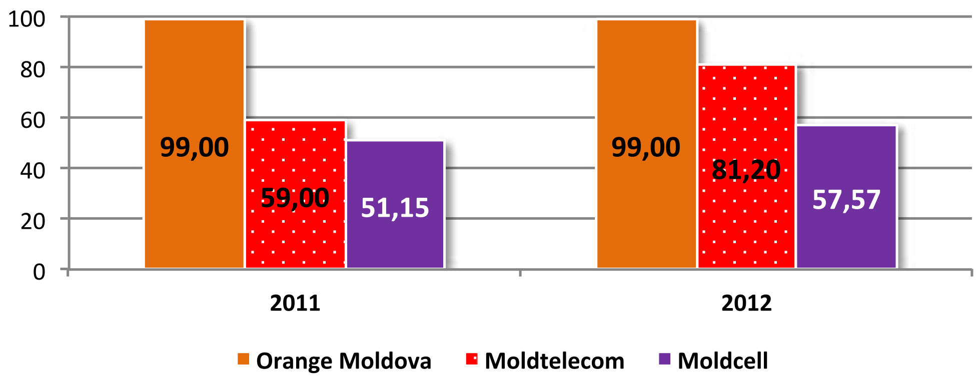


Figure 18 Rate of population coverage with 3G networks 3G (%)

Datele expuse în figurile 17 şi 18 arată că în anul 2012 toţi cei trei furnizori de comunicaţii mobile au asigurat creşterea ratelor de acoperire a teritoriului şi a populaţiei cu semnal radio provenit din reţelele 3G.

2.2 Users and penetration

In 2012, the ascending evolution of the mobile communications services user base continued. Their number grew over 2011, by 14,73% and exceeded 4 million 262,0 thousand, whereas the penetration rate of these services increased by 15,5 p.p. and reached 119,7%. (Figure 19). Of the total number of users, 4 million 080,1 thousand were mobile telephony users, 178,5 thousand – users of dedicated mobile Internet broadband, and 3,9 thousand - users of other services (M2M, etc.).

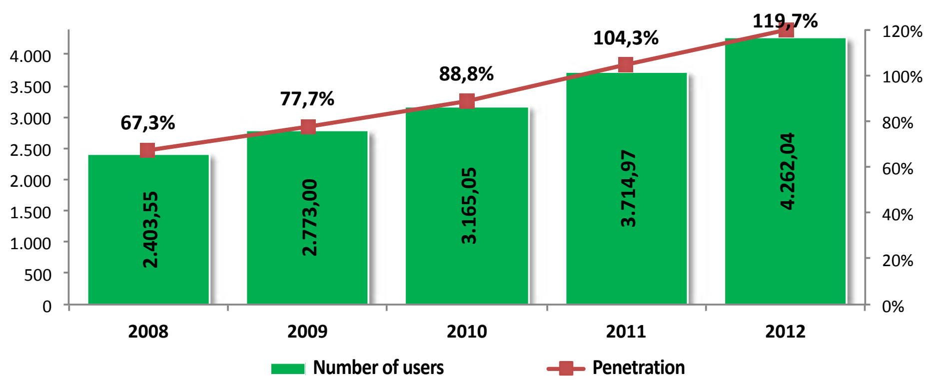


Figure 19 Number of users (thousand) and penetration rate of mobile communications services

According to the situation on 31.12.2012, 93,6% of the total number of mobile communications users were individual users and 6,4% - business users. the user base of JSC "Moldcell" grew most significantly - 242,4 thousand. The client base of this provider increased over 2011 by 17,8% and reached 1 million 603 thousand. The number of users of JSC "Orange Moldova" increased by 214,0 thousand and reached 2 million 343,5 thousand, the one of JSC "Moldtelecom" – by 90,7 thousand and made 316,0 thousand.

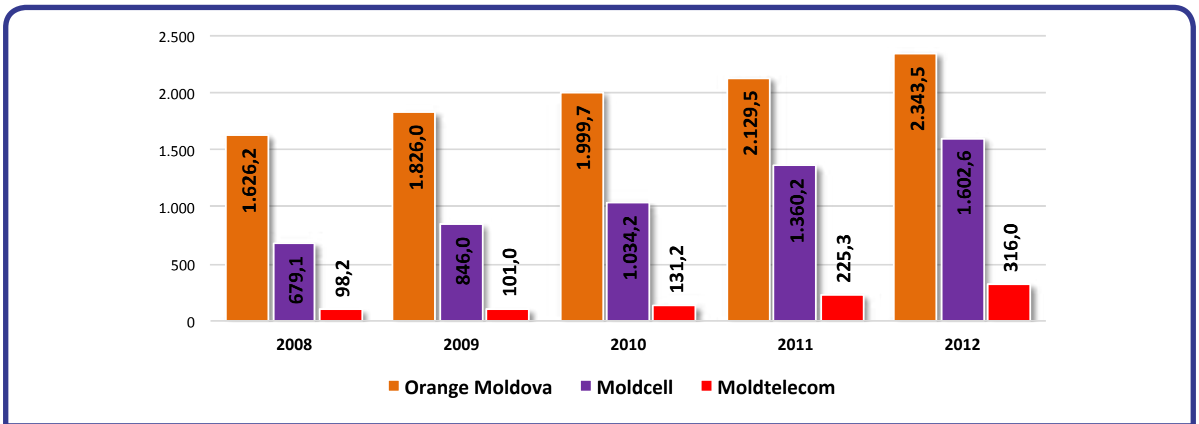


Figure 20 Evolution of number of mobile communications users per provider (thousand)

The most significant mobile market share, according to the number of users - 54,99% - was the one of JSC "Orange Moldova", followed by JSC "Moldcell" - 37,6% and JSC "Moldtelecom" - 7,41% (Figure 21). However, statistical data show that the market share of JSC "Orange Moldova" has decreased by almost 10 p.p. over the recent three years.

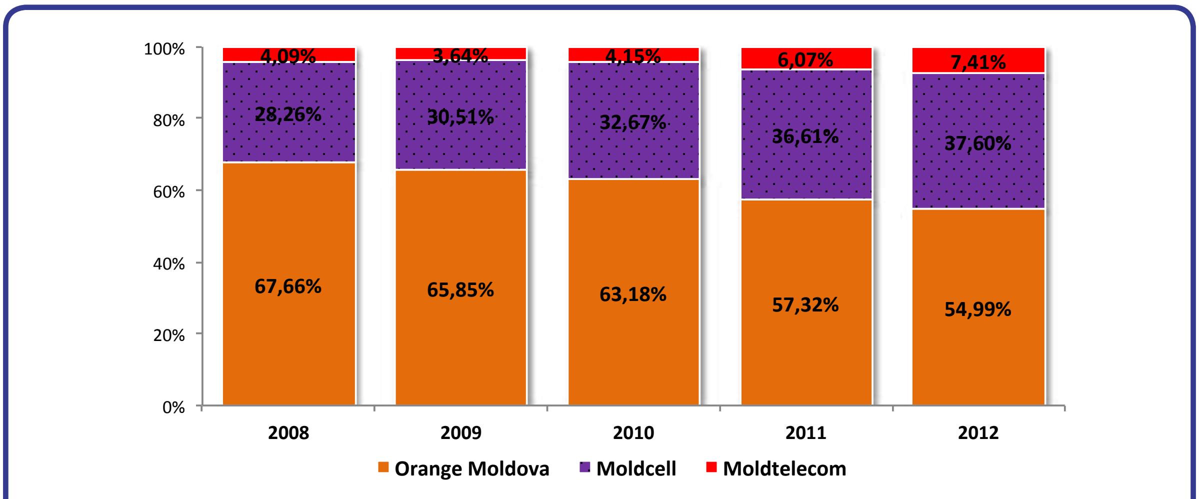


Figure 21 Structure of the market, according to number of mobile communications users

2.3 Mobile telephony

In 2012, the number of mobile telephony users increased over 2011, by reached 4 million 080,1 thousand. The penetration rate of these services increased by 13,87 p.p. and showed 114,6%. (Figure 22).

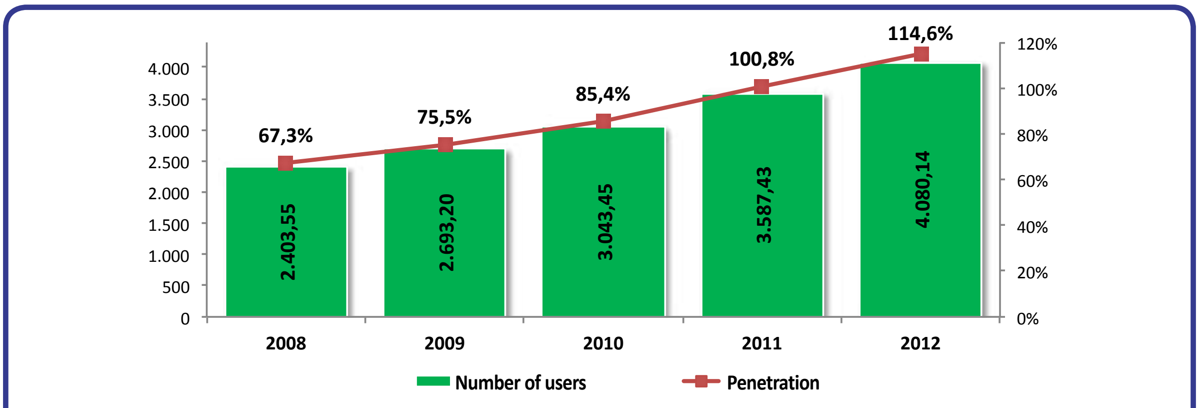


Figure 22 Number of users (thousand) and mobile telephony services penetration rates

As compared to other countries/regions, the penetration rate of mobile telephony services in R. Moldova (Figure 23), exceeds the global average (86%) by 29 p.p. Compared with the neighboring countries, this indicator is lower by 8 p.p. that the average in Ukraine and Romania (123%). This indicator is by 11 p.p. lower than the average in EU countries (126%) and by 31 p.p. – that the average in CIS countries (146%).

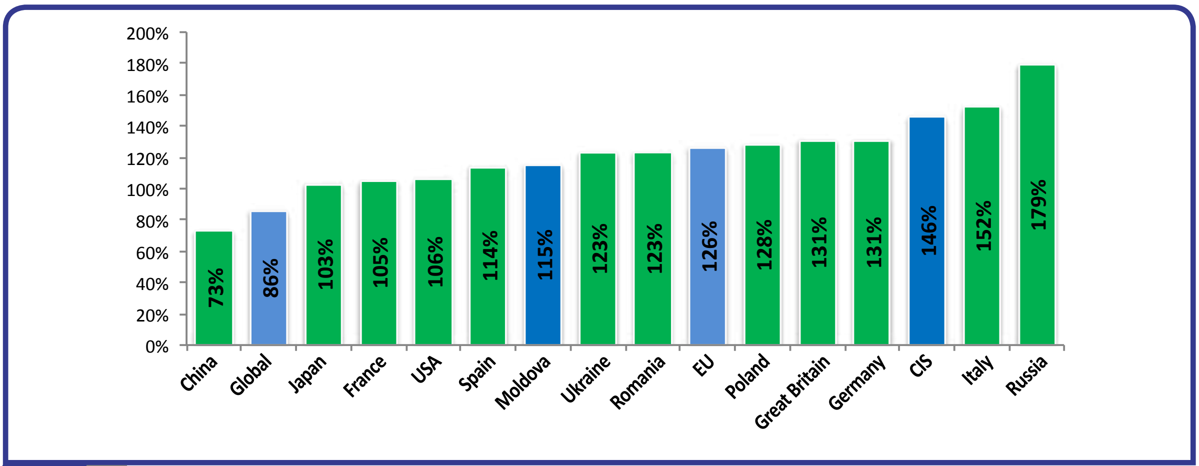


Figure 23 Mobile telephony services penetration rates[1] in Moldova and other countries/regions

According to the situation of 31.12.2012, of the total number of mobile telephony users, 87,85% were active[1], 12,15% - passive (Figure 24).

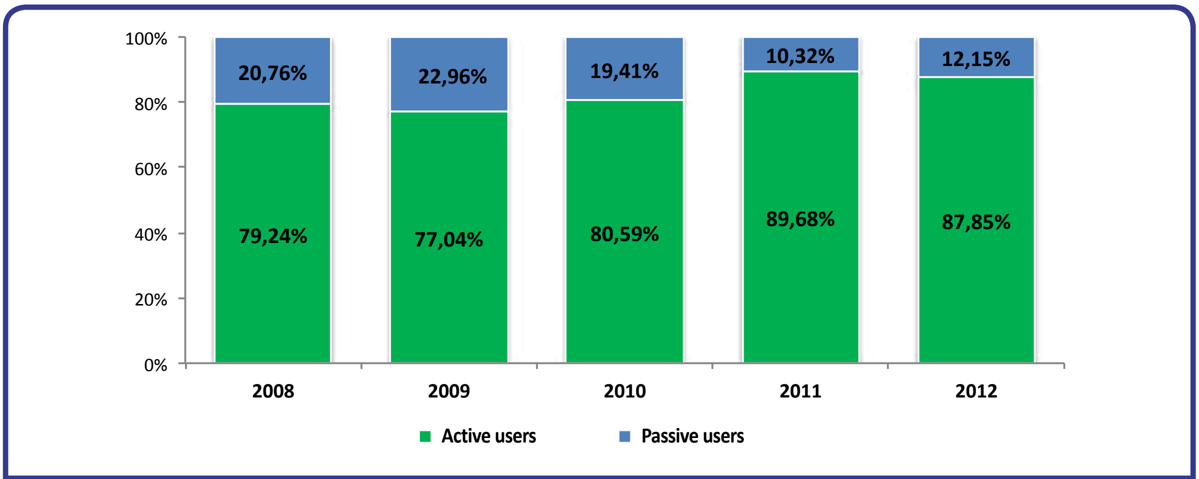


Figure 24 Market structure, according to type of users (active/passive)

In 2012, the share of mobile telephony users with subscriptions was 23,87%, pre-paid users - 76,13% (Figure 25).

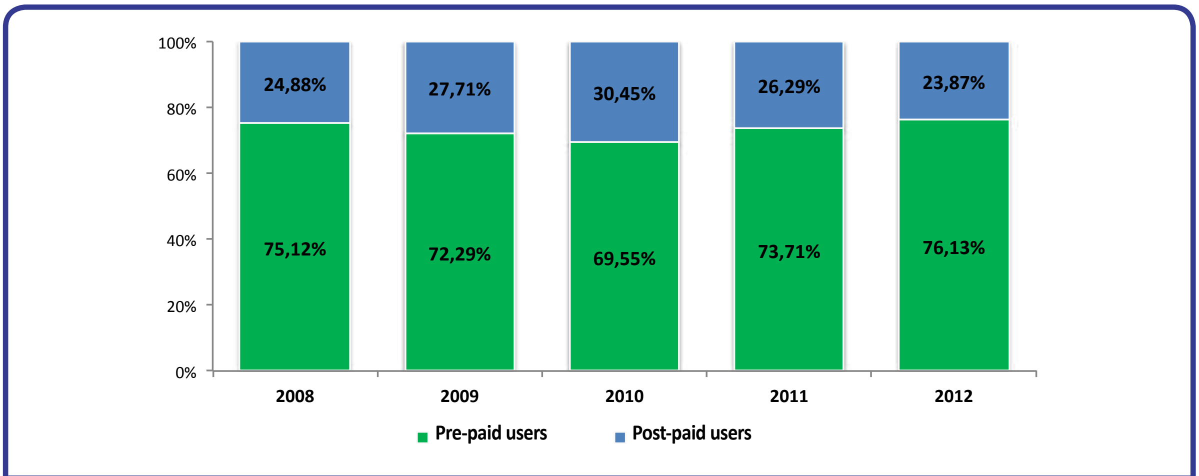


Figure 25 Market structure, according to type of users (pre-paid/post-paid)

[1] Statistical data from ITU report for 2011
[2] According to ANRCETI methodology, active users are thos users that during the last three months before reporting u consumed at least one paid service.

In the reporting year, the total volume of voice traffic in mobile networks increased over 2011, by 7,37% and exceeded 5,09 billion minutes. All traffic categories increased in these networks increased over 2011. (Figure 26).

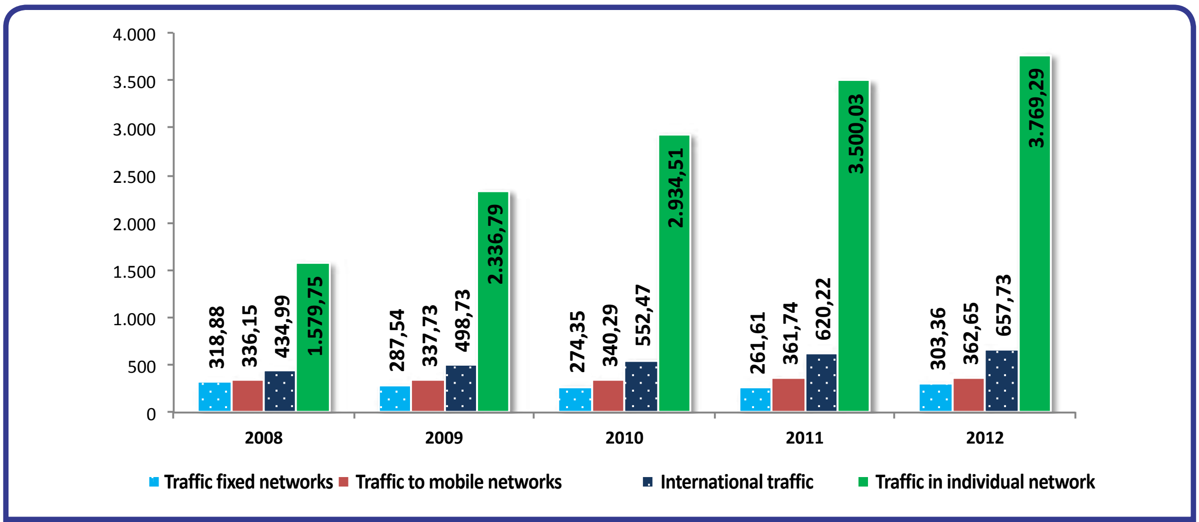


Figure 26 Evolution of traffic in mobile networks (million minutes)

The total volume of voice traffic generated in mobile networks was as follows: 3,14 billion minutes - JSC "Orange Moldova", 1,09 billion minutes - JSC "Moldcell" and 240,2 million minutes - JSC "Moldtelecom" (Figure 27).

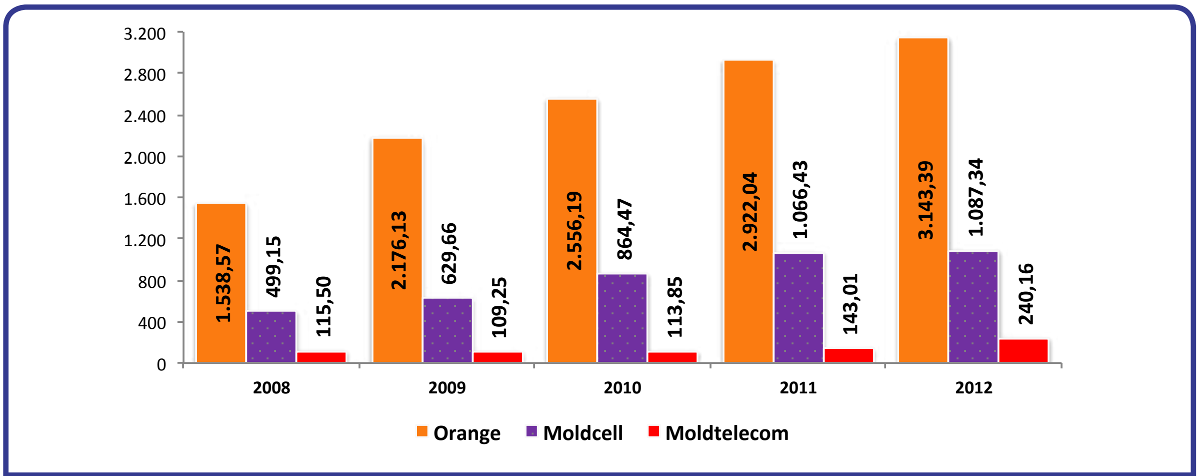


Figure 27 Traffic originated by mobile telephony providers (million minutes)

In 2012, the MoU indicator (average number of minutes monthly consumed by a user) was 121 minutes (2 hours and 1 minute). Per provider, the MoU indicator MoU did not change only with JSC "Orange Moldova", remaining 151 minutes. MoU indicator of JSC "Moldtelecom" decreased from 101 minutes to 95 minutes, the one of JSC "Moldcell" – from 104 minutes to 81 minutes. (Figure 28).

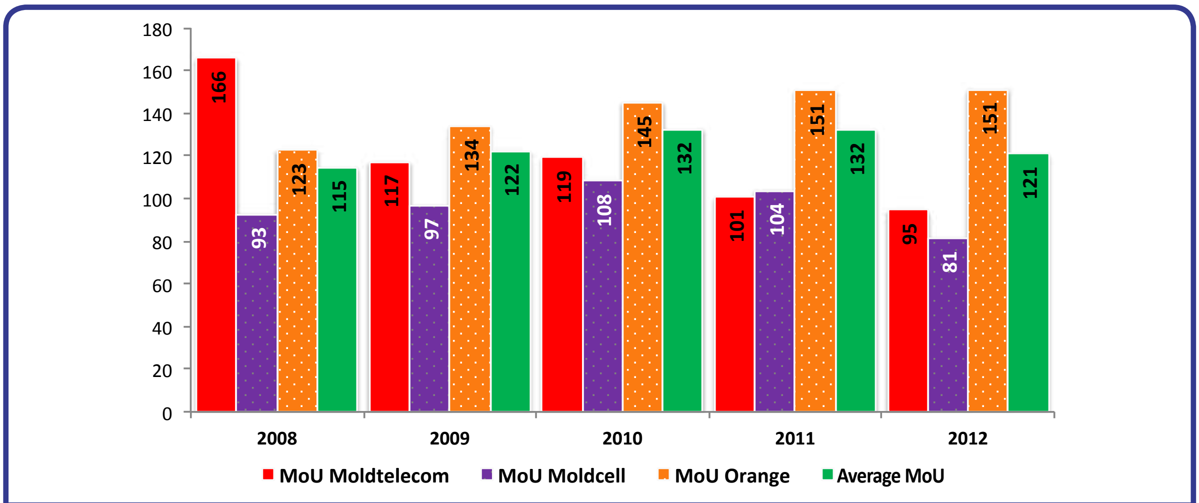


Figure 28 Evolution of MoU indicator (minutes)

As compared to the recorded average, in 2011, in EU countries (189 minutes), the MoU indicator MoU in Moldova is by 68 minutes less. (Figure 29).

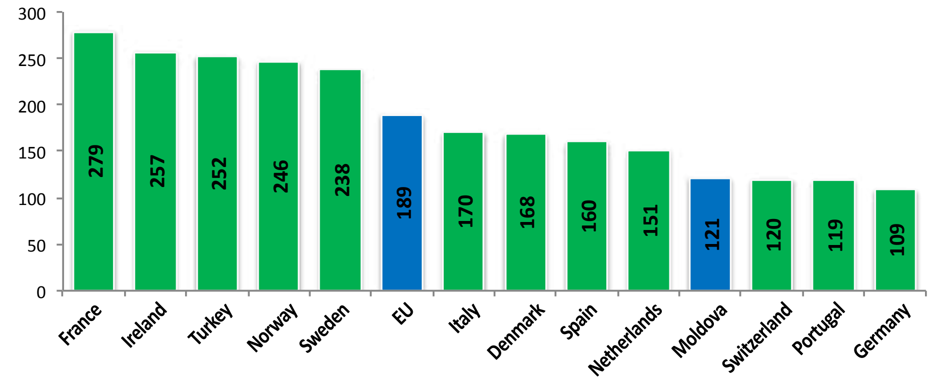


Figure 29 Values of MoU indicator in Moldova in some European countries (minutes)

Following the increase in the number of users and traffic in mobile networks the revenues yielded in 2012 from mobile telephony services grew over 2011 by 1,99% and reached 3 billion 503,1 million lei. The revenues of JSC "Moldtelecom" grew by 31,29% and totaled 140,3 million lei, the ones of JSC "Orange Moldova" - by 1,54% and reached 2 billion 481,5 million lei. But the sales of JSC "Moldcell" decreased by 0,32% and made up 881,3 million lei (Figure 30).

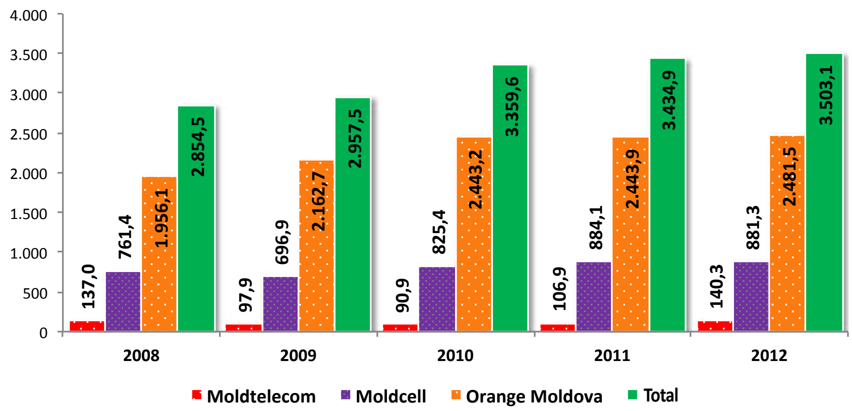


Figure 30 Evolution of revenues of mobile telephony service providers (million lei)

At the same time, the average monthly revenue per user (ARPU) decreased by 12,9% and constituted 77,6 lei. It is notable that all the three mobile telephony providers had the ARPU indicator lower than in 2011(Figure 31). The average monthly revenue per individual user[1] was 50,1 lei, per business user[2] - 170,6 lei.

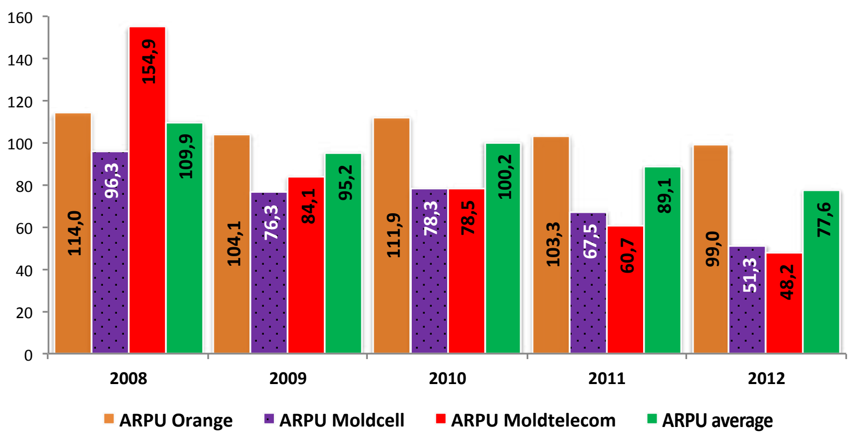


Figure 31 Evolution of average monthly revenue per mobile telephony user - ARPU (lei)

[1] Bill paid by a individual user, without VAT
[2] Bill paid by a business user, without VAT

2.5 Dedicated mobile broadband

In 2012, the total volume of revenues of the three mobile communications providers from sales of dedicated mobile broadband increased over 2011 by 30,8% and equaled 229,8 million lei. Per companies: JSC "Orange Moldova" 112,1 million lei revenues, JSC "Moldcell"– 73,1 million lei, JSC "Moldtelecom" – 44,6 million lei (Figure 32). In the last two years, only JSC "Moldtelecom" of the three providers succeeded in doubling its revenues.

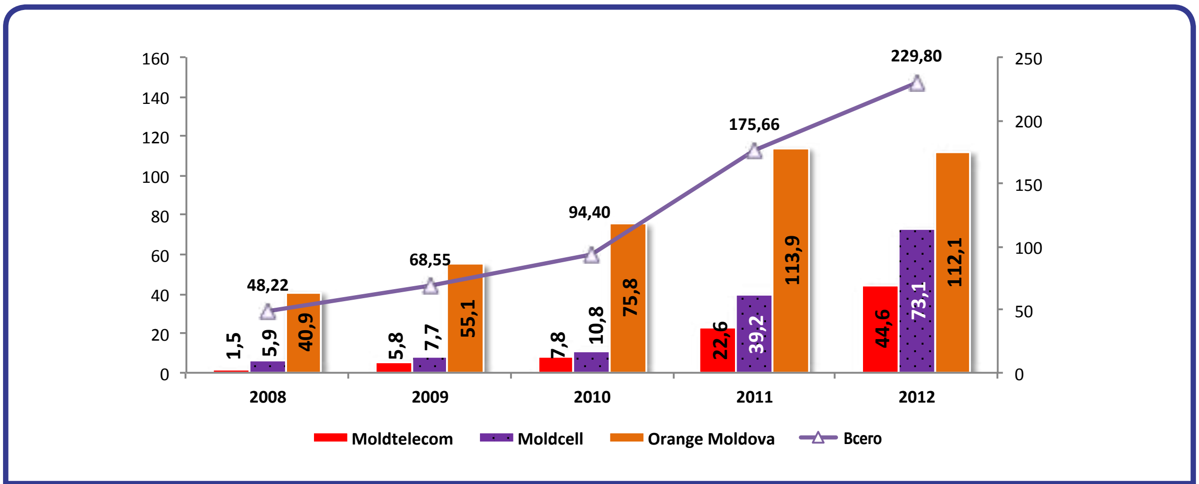


Figure 32 Revenues of providers of dedicated mobile broadband (million)

The average monthly revenue per user (ARPU) on this market increased over 2011 by 7,48 p.p. and to totaled 126,29 lei, the highest ARPU recorded by JSC "Moldcell"– 154,53 lei. The ARPU of JSC "Moldtelecom" was 126,82 lei, JSC "Orange Moldova" –112,68 lei (Figure 33).

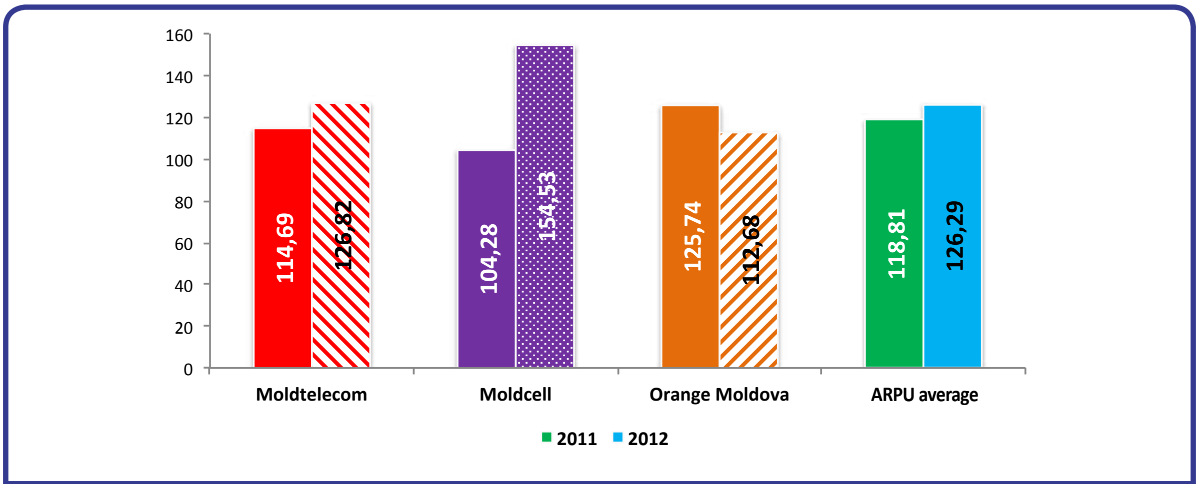


Figure 33 Average monthly revenue per user (ARPU) of providers of dedicated mobile broadband (lei)

In 2012, the biggest market share of dedicated mobile broadband services, according to turnover, – 48,8% - was held by JSC "Orange Moldova", followed by JSC "Moldcell" - 31,8%, and JSC "Moldtelecom" – 19,4% (Figure 34). The data below show that in the last two years the market share of JSC "Moldcell" increased by 20,4 p.p., whereas the share of JSC "Orange Moldova" decreased by 31,5 p.p.

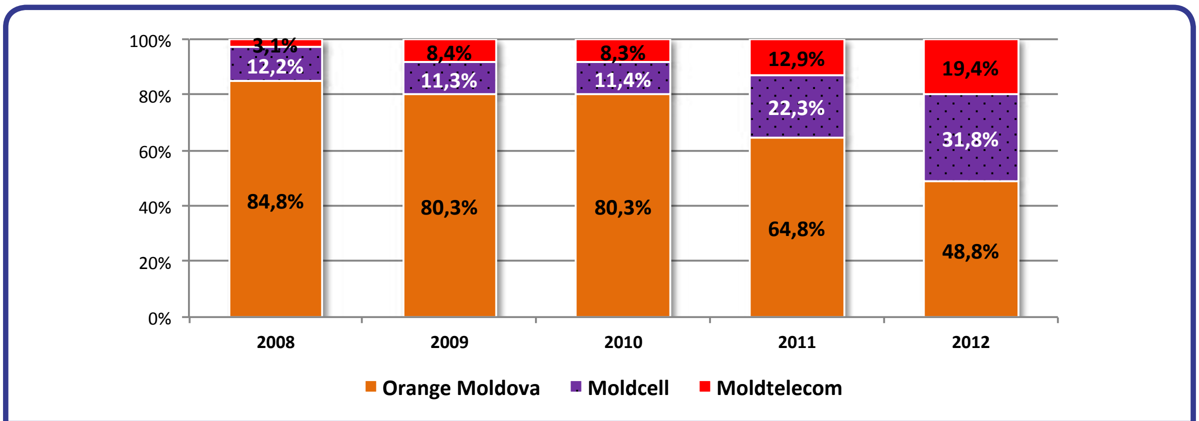


Figure 34 Market shares of providers of dedicated mobile broadband, according to turnover

In the timeframe under report, the number of users of dedicated mobile broadband grew by 42,98% and reached 178,4 thousand, whereas the penetration rate per 100 inhabitants grew by 1,51 p.p. and constituted 5,01%. As per the situation on 31.12.2012, JSC "Orange Moldova" had the biggest number of subscribers to dedicated mobile broadband – 86,6 thousand. JSC "Moldcell" subscriber base was 57,0 thousand, JSC "Moldtelecom" - 34,9 thousand (Figure 35).

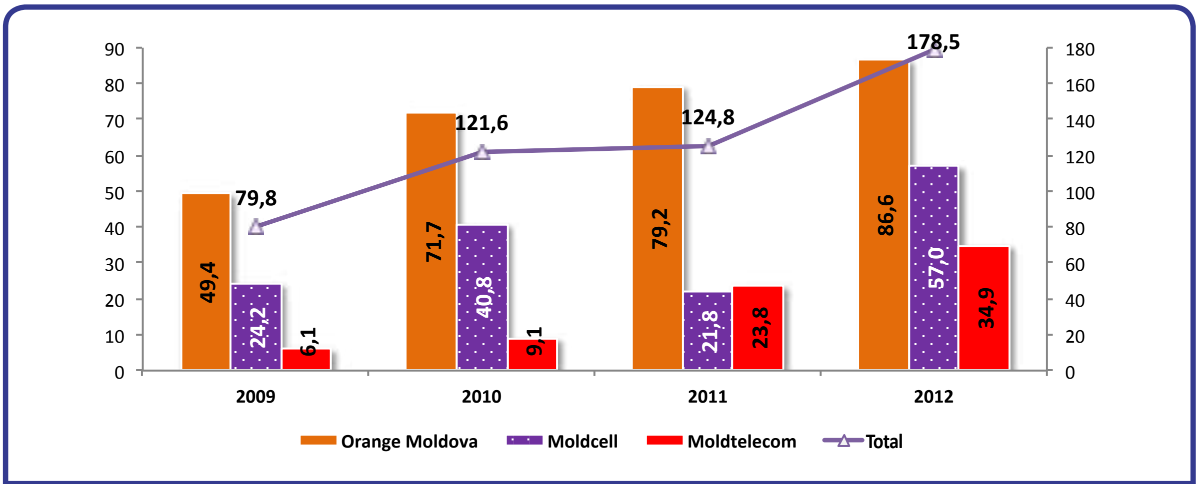


Figure 35 Evolution of the number of dedicated mobile broadband users (thousand)

In 2012, the total volume of mobile Internet traffic (AUPU) consumed by users of voice mobile communications was 575,8 thousand GB or about 36,8 MB monthly per user. At the same time, the total mobile Internet traffic (AUPU) consumed by the users of dedicated mobile broadband was 15 million 943,9 thousand GB or about 8,8 GB monthly per user.

3 FIXED TELEPHONY

3.1 General data. Market dynamics

In 2012, the fixed telephony market had 27 providers (the incumbent JSC "Moldtelecom" and 26 alternative providers). Compared to 2011, the total volume of sales on this market segment decreased by 6,1% and made 1 billion 546,1 million lei. JSC "Moldtelecom" sales decreased by 7,1% and constituted 1 billion 504,5 million lei, the sales of alternative providers increased by 50,9% and constituted 41,6 million lei (Figure 36). The data presented in the Figure show the decline of the incumbent on this market segment that has lasted for the fourth year in a row.
Figure 36.

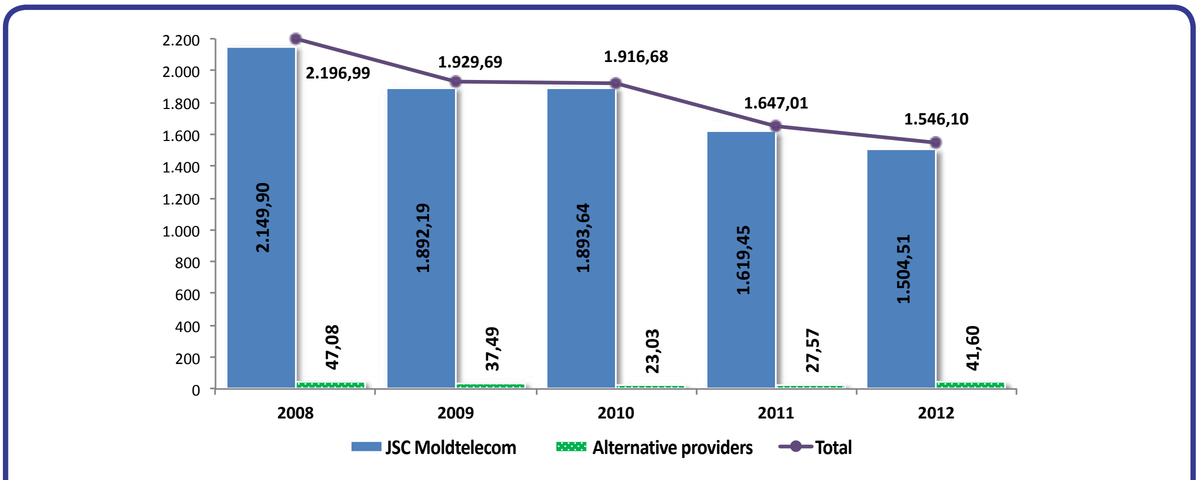


Figure 36 Evolution of revenues of fixed telephony service providers (million lei)

The revenues from fixed telephony services have the following structure: 53,3% - from international incoming and outgoing calls, 11,9% - from subscriptions, 11,7% - from calls to mobile networks, 11,9% - from local and long-distance calls, 11,2% - from other services (Figure 37). The data show the decrease of revenues from international calls, which have a significant share in the structure of the incumbent's turnover.

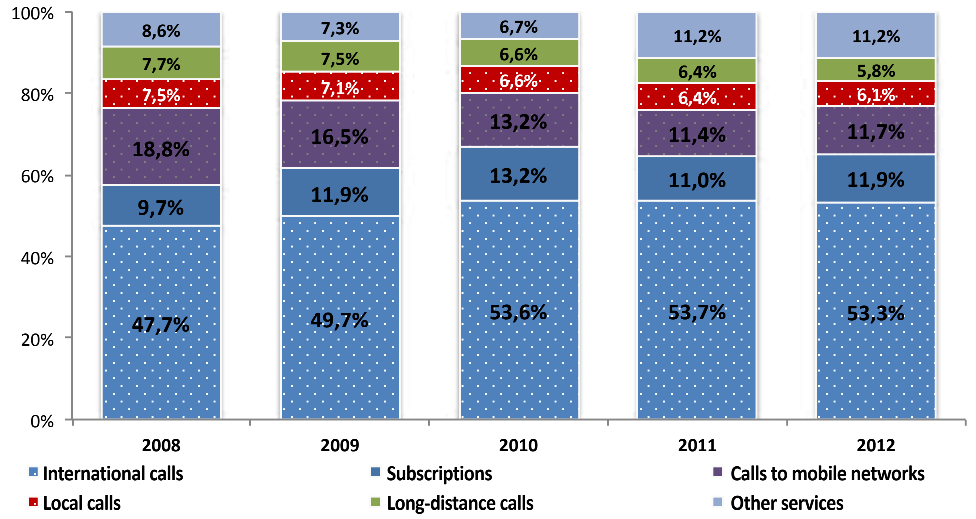


Figure 37 Structure of revenues from fixed telephony services

The average monthly revenue per user (ARPU) of fixed telephony service providers decreased by 7,9% and resulted in 108,0 lei. The average monthly revenue per individual user[1] was 45,3 lei, per business users[2] - 120 lei. JSC "Moldtelecom" had 111,4 lei ARPU (dropped by 7,1%), alternative providers – 51,3 lei (increased by 0,3%) (Figure 38).

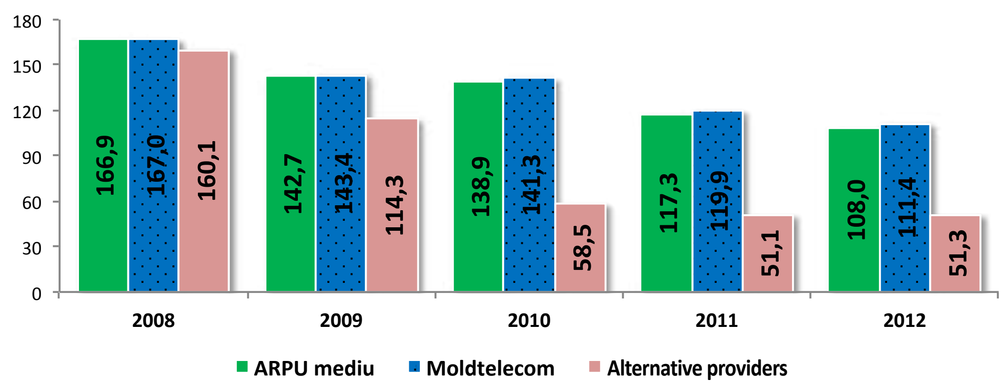


Figure 38 Evolution of average monthly revenue per subscriber - ARPU (lei)

3.2. Subscribers and penetration

The number of subscribers to fixed telephony services[3] increased over 2011, by 25,9 thousand or by 2,2% and reached 1 million 205,8 thousand. At the end of 2012, 88,4% of the total number of fixed telephony subscribers were individual users, 11,6% - business users. By place of residence, 629,3 thousand subscribers (52,2%) were urban resident and 576,5 thousand (47,8%) – rural residents.

[1] Bill paid by a individual user, without VAT
[2] Bill paid by a business user, without VAT
[3] Fixed subscriber lines were taken into account, as for the VoIP services – the telephone numbers assigned to users.

In the timeframe under report, the subscriber base of JSC "Moldtelecom" decreased by 4,0 thousand customers, the ones of alternative providers increased by about 29,9 thousand. As per the situation on 31.12.2012, JSC "Moldtelecom" had 1 million 123,2 thousand subscribers, alternative providers – 82,6 thousand. The penetration rate of fixed telephony services per 100 inhabitants increased by 0,73 p.p. and reached 33,87% (Figure 39). In urban areas this indicator was 42,36%, in rural – 27,8%.

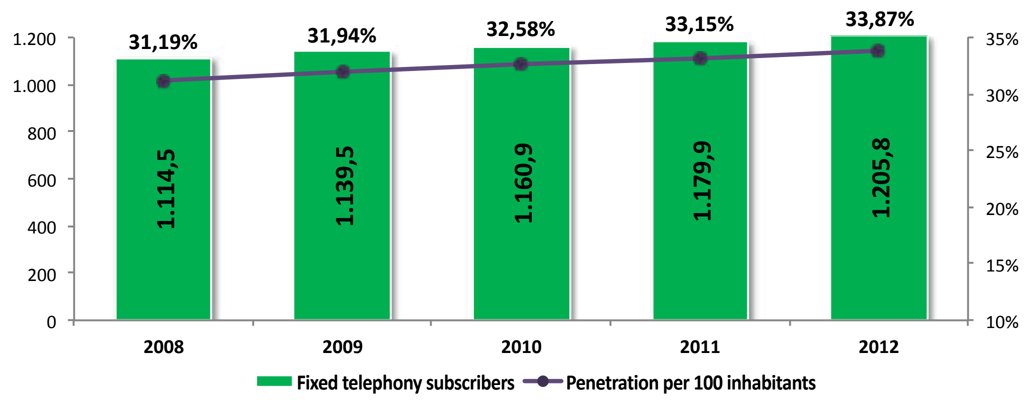


Figure 39 Number of subscribers (thousand) and penetration rates of fixed telephony services

As per 31.12.2012, according to the number of subscribers, the incumbent JSC "Moldtelecom" held 93,15% market share, six alternative providers – a share between 0,27% and 1,82% (Table 2), the other providers – market shares even smaller.

Table 2 Market shares of providers, according to number of subscribers

Supplier	2008	2009	2010	2011	2012
Moldtelecom	97,65%	97,50%	96,79%	95,54%	93,15%
Sun Communications	0,00%	0,07%	0,19%	1,11%	1,82%
Starnet	0,06%	0,04%	0,11%	0,40%	1,56%
Orange Moldova	0,33%	0,26%	0,77%	0,98%	1,12%
Arax-Impex	0,64%	0,83%	0,97%	1,07%	1,11%
Riscom	0,29%	0,30%	0,29%	0,29%	0,28%
CFM	0,36%	0,29%	0,28%	0,25%	0,27%

As compared to the situation in other states/regions, the penetration rate of fixed telephony in Moldova exceeds global average (17%) by 17 p.p. In comparison with the situation in neighboring states, this indicator is by 6 p.p higher than in Ukraine (28%) and by 12 p.p. higher than in Romania (22%). This indicator exceeds by 8 p.p. the 26% average from the CIS countries, but is 10 p.p. lower than the 44% average in the EU. (Figure 40).

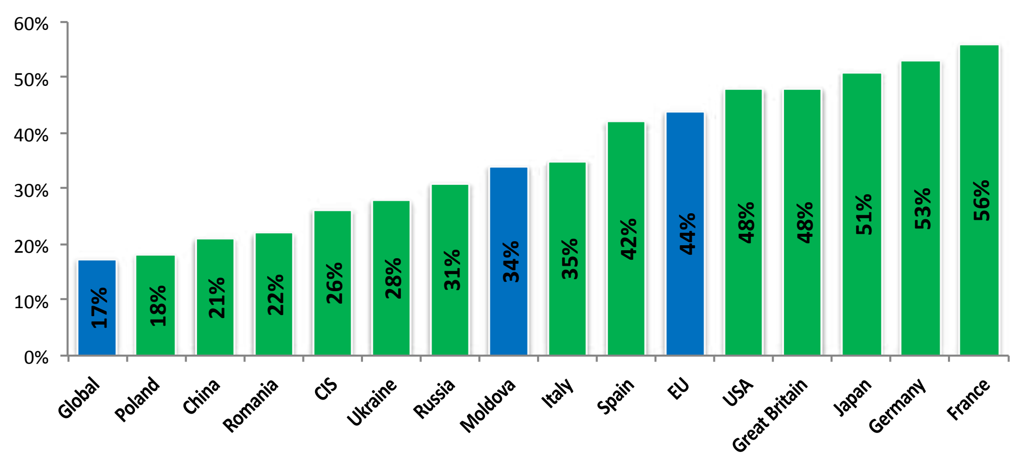


Figure 40 Penetration rates of fixed telephony services in Moldova and other states/regions

[1] Statistical data from ITU Report for 2011.

3.3 Evolution of traffic

In 2012, the total volume of traffic in fixed telephony networks decreased by 8,8%, it was 3 billion 29,5 million minutes. All traffic types generated in fixed telephony networks decreased. So, the voice traffic to international destinations dropped by 14% (down to 62,9 million minutes), to fixed networks – by 10,7% (down to 2,3 billion minutes) and to mobile networks – by 1,1% (down to 118,7 million minutes) (Figure 41).

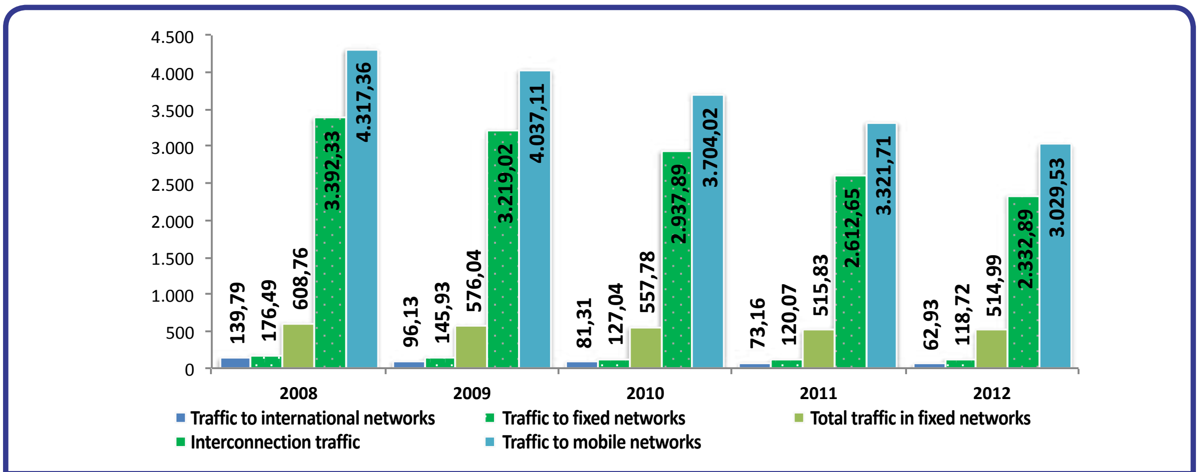


Figure 41 Evolution of traffic on the market for fixed telephony services (million minutes)

In 2012, the MoU indicator (average number of minutes monthly consumed by a subscriber) on the fixed telephony market dropped by 10,6% and constituted 211 minutes (3 hours 31 minutes) (Figure 42).

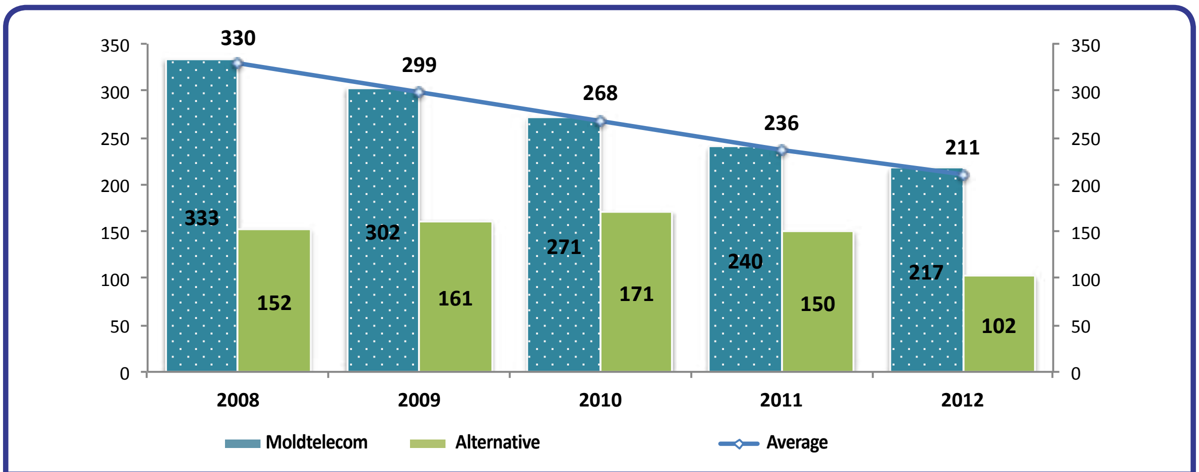


Figure 42 Evolution of MoU indicator (minutes)

The structure of voice traffic shows that the fixed telephone is mainly used by subscribers for calls in fixed networks. The biggest share in the total voice traffic in fixed telephony networks - 77,0% - is held by the traffic within fixed networks (Figure 43). This state of things is due to the very low tariffs for in-network calls and high tariffs for fixed-mobile calls.

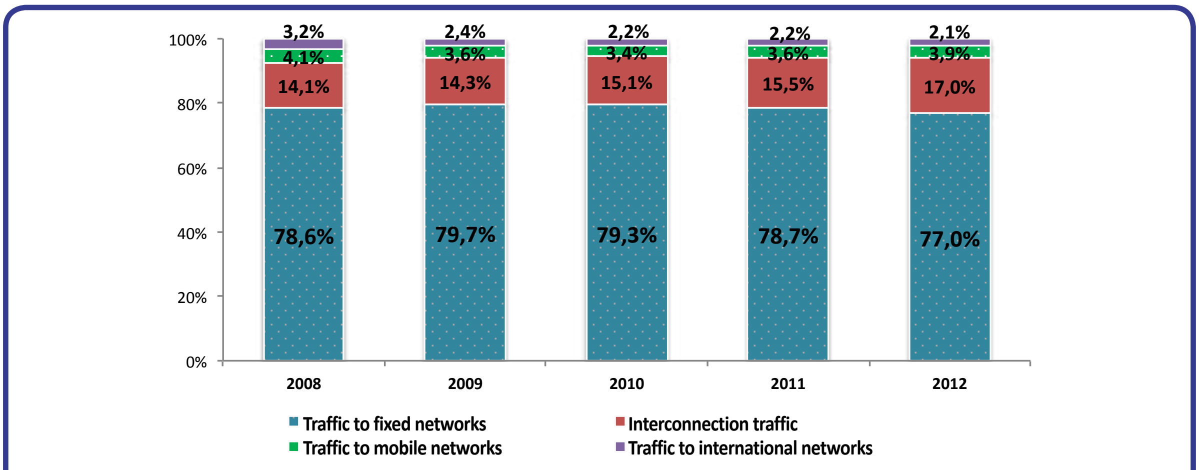


Figure 43 Shares of traffic type in the structure of total traffic in fixed networks

4.1 General data. Dynamics of the market

In 2012, the International Internet bandwidth increased over 2011 by 17% and totaled 143,54 Gbps. This evolution was driven by the increase in the number of Internet users, more frequent access of video content and electronic mass – media, the increased duration of Internet navigation and the diversification of ways of Internet access (by tablets and smart phones). According to the specialized web site www.netindex.com, as of 31.03.2013, the average Internet access speed (download) for Moldova was 21,98 Mbps. According to this indicator, Moldova was ranked 20th in the worlds, ahead of Ukraine, ranked 28 (17,73Mbps) and following Romania ranked 12 (28,2 Mbps).

In 2012, there were 58 providers on the market for fixed broadband and data transmission services. According to the date reported by these providers, the total volume of sales on this market increased over 2011 by 19,2% and totaled 808,1 million lei. The turnover of JSC "Moldtelecom" grew by 24,2% and equaled 563,8 million lei, the one of „Starnet" LLC – by 13,0% and made up 120,3 million lei, the one of JSC "Orange Moldova" – by 4,4% and made up 28,3 million lei (Figure 44).

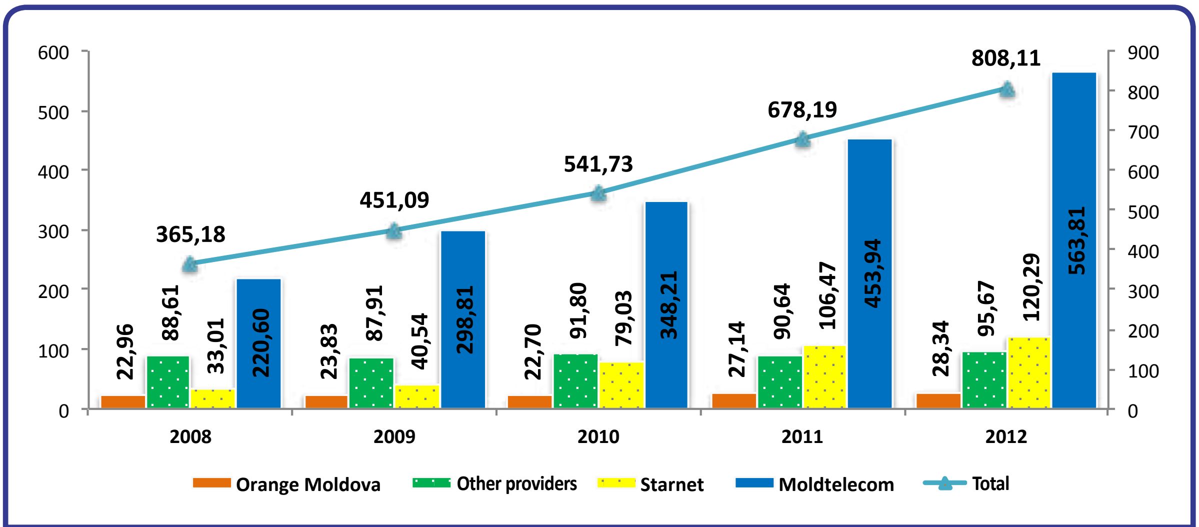


Figure 44 Evolution of revenues of providers (million lei)

As a result of this evolution, the market share of JSC "Moldtelecom", according to revenues was 69,8%, the share of „Starnet" LLC – 14,9% and the one of JSC "Orange Moldova" – 3,5%. The joint share of the other providers on this market decreased to 11,8% (Figure 45).

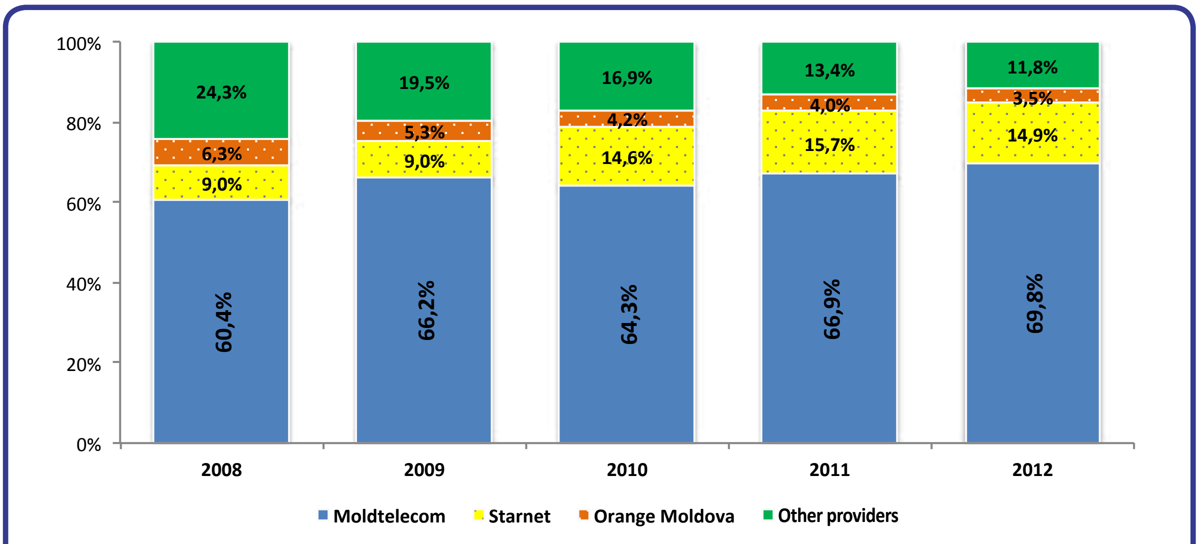


Figure 45 Market shares of providers, according to turnover

The average monthly revenue per user (ARPU) of Internet access providers dropped, as compared to 2011, by 2,46% and made 141,12 lei (Figure 46). The average monthly revenue per individual user[1] was 109,4 lei, per business user[2] - 511,4 lei. It is notable that, for 3 years now, this market registers decrease of costs incurred by end users for fixed broadband services, a tendency determined mainly by the competitive offers proposed by the providers aimed at getting new customers.

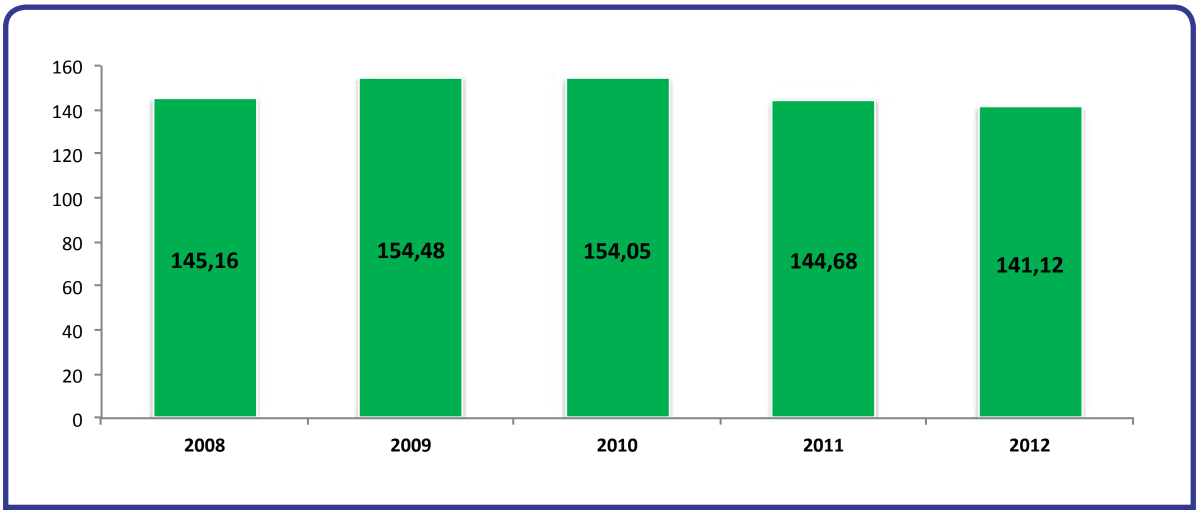


Figure 46 Evolution of the monthly revenue per user - ARPU (lei)

4.2 Subscribers and penetration

In the reporting timeframe, the total number of subscribers to fixed broadband increased over 2011 by 17,5% and reached 417,2 thousand. At the end of 2012, 94,9% of the total number of subscribers to these services were individual users and 5,1% - business users. Within the same timeframe, the penetration rate of these services per 100 inhabitants increased by 1,7 p.p. and made up 11,7% (Figure 47).

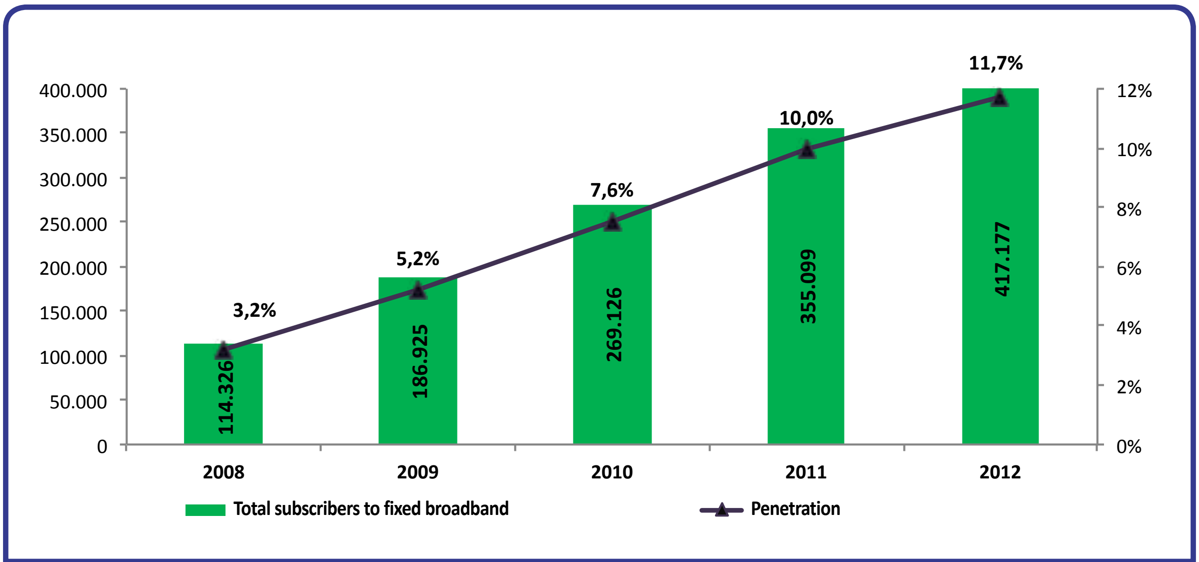


Figure 47 Number of subscribers and penetration of Fixed broadband

As compared with the situation in other countries/regions, the penetration rate of fixed broadband services in Moldova exceeds the global average (8,6%) by 3,12 p.p. Comparatively with the neighboring states, this indicator is by 0,96 p.p higher than in Ukraine (10,76%) and by 3,71 p.p. lower than in Romania (15,39%). Also, the value of this indicators is by 2,42 p.p. higher that the 9,3% average in CIS countries and by 16,52 p.p lower than the 27,2% average in EU countries. (Figure 48).

[1] Bill pre-paid by a individual user, without VAT
[2] Bill pre-paid by a business user, without VAT

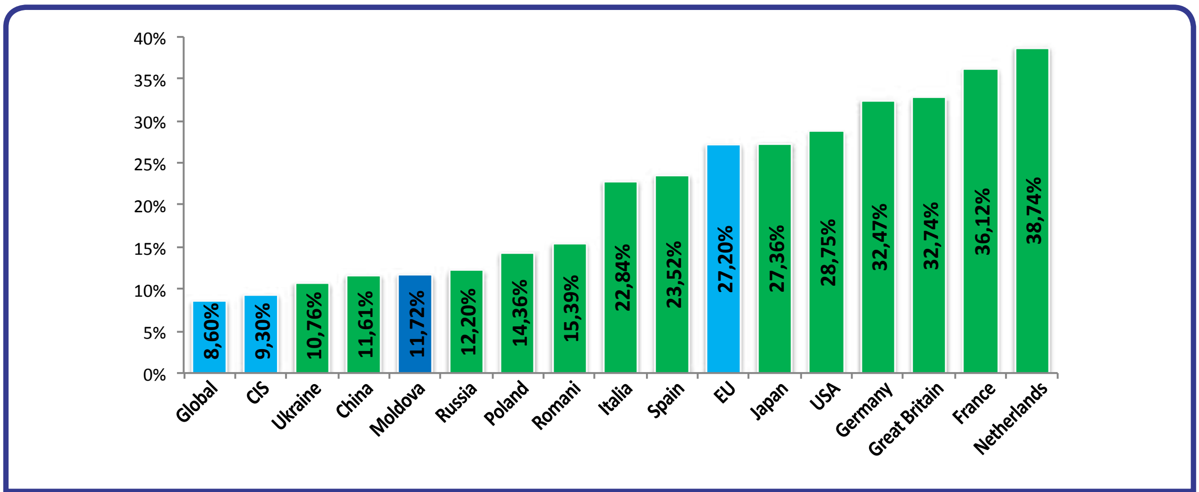


Figure 48 Penetration[1] rates of fixed broadband in Moldova and other countries/regions

Though in 2012 the market share of JSC "Moldtelecom", according to the number of subscribers decreased, this providers still holds the biggest market share - 68,4%. The market share of „Starnet" LLC remained the same level - 17,6% (Figure 49).

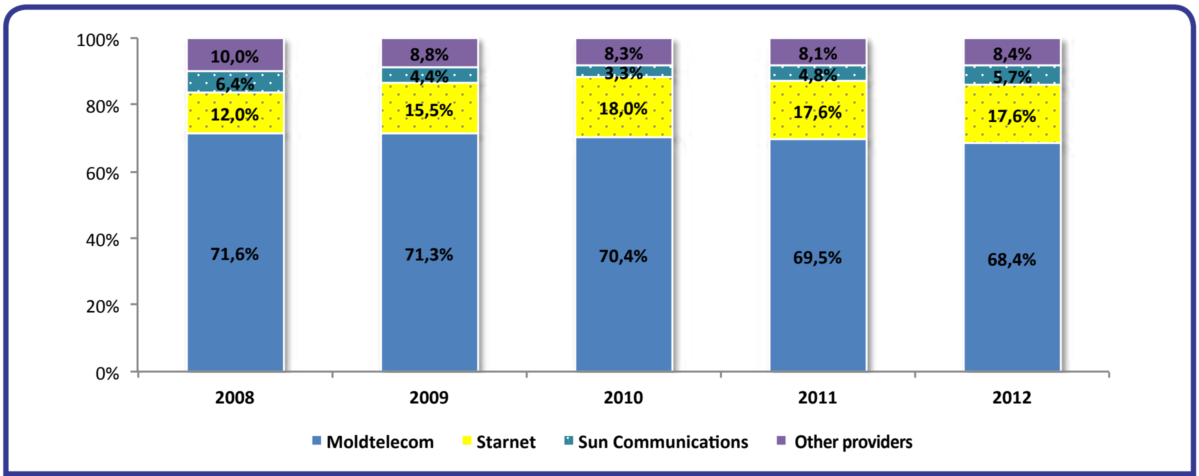


Figure 49 Market shares of providers, according to the number of subscribers

In 2012, the biggest number of connection of new subscribers (increase) to its network was registered by JSC "Moldtelecom"– 38,5 thousand (62% of the net connections number). „Starnet" LLC connected to its network 10,7 thousand new subscribers (17,3%), „Sun Communications" LLC – 6,7 thousand (10,88%), other providers jointly - 6,1 thousand subscribers (9,8%) (Figure 50).

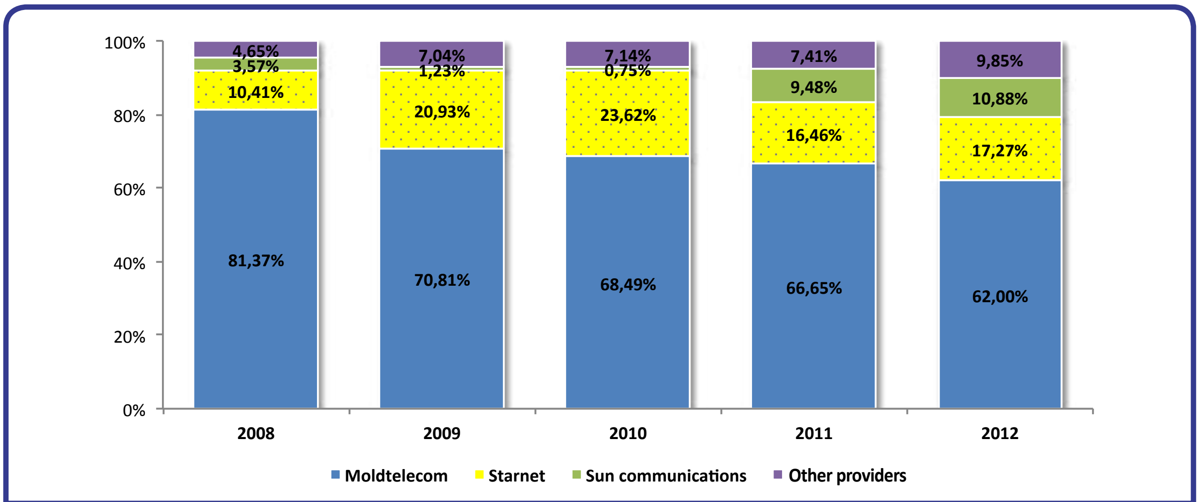


Figure 50 Evolution of new connections (increase) fixed broadband

[1] Statistical data from ITU Report for 2011.

In 2012, the xDSL and FTTx technologies were most frequently used for fixed broadband. The number of subscribers connected to the Internet via xDSL technology grew by 3,2% and reached 203,0 thousand, via FTTx increased by 34,3% and totaled 189,3 thousand, the number of subscribers connected via coaxial cable (DOCSIS technology) increased by 44,5% and exceeded 23,4 thousand subscribers (Figure 51).

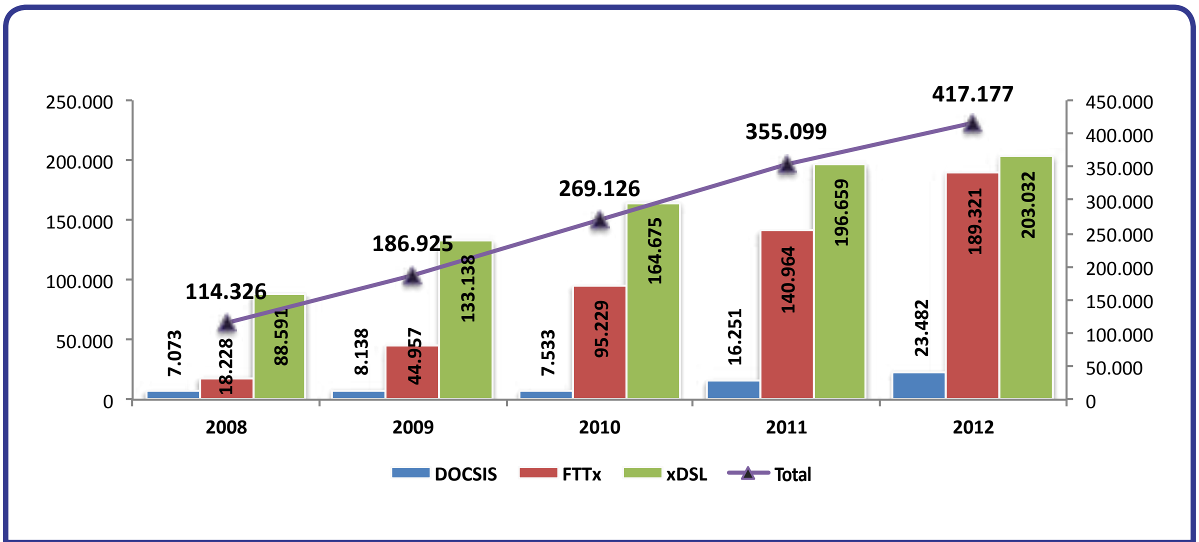


Figure 51 Number of subscribers to fixed broadband, according to technology used

In 2012, the share fixed broadband subscribers at fixed locations based on FTTx subscribers increased by 5,68 p. p. and constituted 45,4%, the share of xDSL subscribers decreased by 6,7 p.p. down to 48,7% (Figure 52).

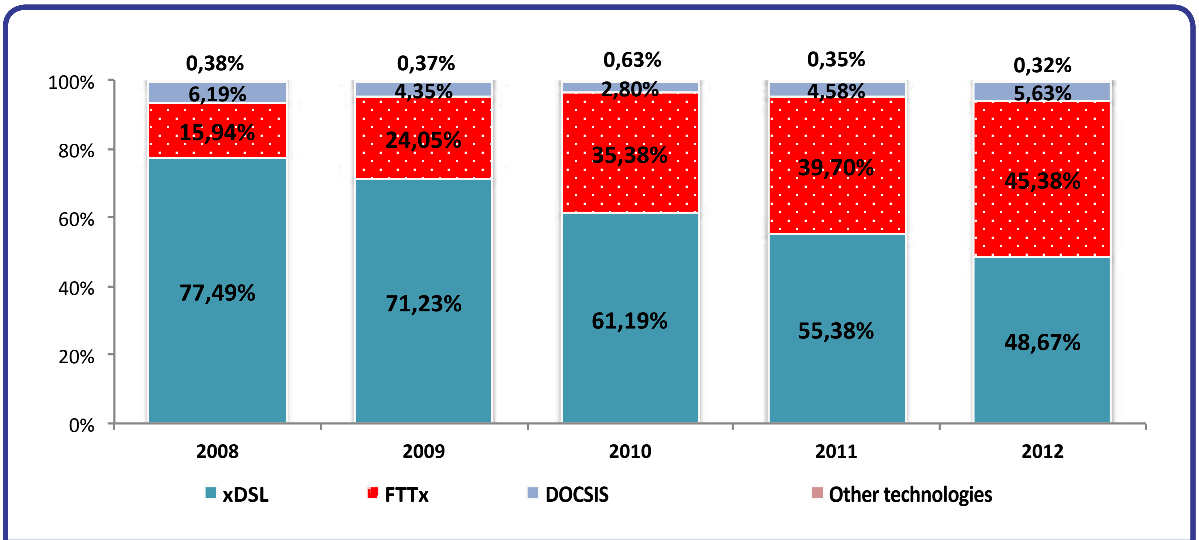


Figure 52 Shares of technologies for fixed broadband

The increase of FTTx subscribers was caused by the expansion of these types of networks in rural and urban areas of the country and by the substitution of xDSL subscribers with FTTx ones, where such networks are available. The substitution of subscribers is determined by technological advantages (speed, quality) in favor of the users of FTTx access over the xDSL access.

The territorial development of fixed broadband in 2012 continued to be featured by high concentration of subscribers in Chisinau municipality, where more than 42% of the total number of subscribers to these services reside. According to the data presented by the providers, 63,6% of the total number of subscribers are urban residents and 36,4% - rural. At the end of 2012, the penetration rate of fixed broadband, per 100 households, in Chisinau municipality was 65%, in other territorial-administrative units – between 14 and 42% (Table no.3).

Table 3 Fixed broadband provided in territorial-administrative units of the Republic of Moldova, as per 31.12.2012

no.	Administrative-territorial unit,	Total subscribers BB	Penetration of BB services per 100 households	Subscribers				Share of BB access technologies			
				xDSL	FTTx	coaxial cable	other technologie	xDSL	FTTx	coaxial cable	other technologie
1	**Mun. Chisinau**	181.226	65,01%	27.922	131.535	21.713	56	15,4%	72,6%	12,0%	0,0%
2	**Mun.Balti**	23.487	42,76%	7.494	14.655	1.330	8	31,9%	62,4%	5,7%	0,0%
3	**D. Anenii Noi**	8.039	29,66%	6.985	1.052	0	2	86,9%	13,1%	0,0%	0,0%
4	**D. Basarabeasca**	2.756	28,64%	2.394	362	0	0	86,9%	13,1%	0,0%	0,0%
5	**D. Briceni**	6.884	27,03%	6.022	862	0	0	87,5%	12,5%	0,0%	0,0%
6	**D. Cahul**	11.963	30,48%	8.470	3.434	58	1	70,8%	28,7%	0,5%	0,0%
7	**D. Cantemir**	4.949	27,17%	4.584	365	0	0	92,6%	7,4%	0,0%	0,0%
8	**D. Calarasi**	5.233	19,12%	3.948	1.283	0	2	75,4%	24,5%	0,0%	0,0%
9	**D. Caușeni**	6.595	22,03%	5.981	613	0	1	90,7%	9,3%	0,0%	0,0%
10	**D. Cimislia**	5.154	26,71%	3.996	1.158	0	0	77,5%	22,5%	0,0%	0,0%
11	**D. Criuleni**	5.607	24,19%	5.241	365	0	1	93,5%	6,5%	0,0%	0,0%
12	**D. Donduseni**	3.045	16,99%	2.856	189	0	0	93,8%	6,2%	0,0%	0,0%
13	**D. Drochia**	7.047	21,43%	6.271	776	0	0	89,0%	11,0%	0,0%	0,0%
14	**D. Dubasari**	2.144	19,49%	2.122	22	0	0	99,0%	1,0%	0,0%	0,0%
15	**D. Edinet**	7.714	25,53%	5.457	2.256	0	1	70,7%	29,2%	0,0%	0,0%
16	**D. Falesti**	6.230	18,88%	4.905	1.324	0	1	78,7%	21,3%	0,0%	0,0%
17	**D. Floresti**	7.010	21,31%	5.298	1.601	0	111	75,6%	22,8%	0,0%	1,6%
18	**D. Glodeni**	4.769	22,21%	4.343	426	0	0	91,1%	8,9%	0,0%	0,0%
19	**D. Hincesti**	9.087	24,32%	7.051	2.036	0	0	77,6%	22,4%	0,0%	0,0%
20	**D. Ialoveni**	9.755	32,94%	7.893	1.213	649	0	80,9%	12,4%	6,7%	0,0%
21	**D. Leova**	4.107	24,31%	3.685	422	0	0	89,7%	10,3%	0,0%	0,0%
22	**D. Nisporeni**	4.327	20,98%	4.141	186	0	0	95,7%	4,3%	0,0%	0,0%
23	**D. Ocnita**	4.279	20,69%	3.922	357	0	0	91,7%	8,3%	0,0%	0,0%
24	**D. Orhei**	10.403	25,17%	6.381	4.020	0	2	61,3%	38,6%	0,0%	0,0%
25	**D. Rezina**	3.772	21,25%	2.702	1.070	0	0	71,6%	28,4%	0,0%	0,0%
26	**D. Riscani**	5.073	19,29%	4.244	829	0	0	83,7%	16,3%	0,0%	0,0%
27	**D. Singerei**	7.156	23,03%	5.374	1.782	0	0	75,1%	24,9%	0,0%	0,0%
28	**D. Soroca**	7.857	21,48%	5.062	2.794	0	1	64,4%	35,6%	0,0%	0,0%
29	**D. Strașeni**	8.318	29,78%	5.810	2.507	0	1	69,9%	30,1%	0,0%	0,0%
30	**D. Soldanesti**	2.260	14,89%	2.235	25	0	0	98,9%	1,1%	0,0%	0,0%
31	**D. Stefan Voda**	4.654	20,01%	4.112	542	0	0	88,4%	11,6%	0,0%	0,0%
32	**D. Taraclia**	4.354	33,86%	3.977	377	0	0	91,3%	8,7%	0,0%	0,0%
33	**D. Telenesti**	4.513	18,71%	4.251	262	0	0	94,2%	5,8%	0,0%	0,0%
34	**D. Ungheni**	10.001	25,83%	5.337	4.663	0	1	53,4%	46,6%	0,0%	0,0%
35	**UTA Gagauzia**	17.409	37,61%	12.340	5.068	0	1	70,9%	29,1%	0,0%	0,0%
	Total	**417.177**	**34,79%**	**202.806**	**190.431**	**23.750**	**190**	**48,6%**	**45,6%**	**5,7%**	**0,0%**

5 BROADCASTING SERVICES

5.1 General data. Dynamics of the market

In 2012, the market for broadcasting services continued to be marked by the development of multichannel digital TV services. This sector was operated by 130 providers. The total volume of sales in this sector increased over 2011 by 15,85% and reached 328,96 million lei. Multichannel TV services had the highest share - 50,7% (166,8 million lei) – in the structure of this market, air radio and TV services had 49,3% (162,1 million lei) - (Figure 53).

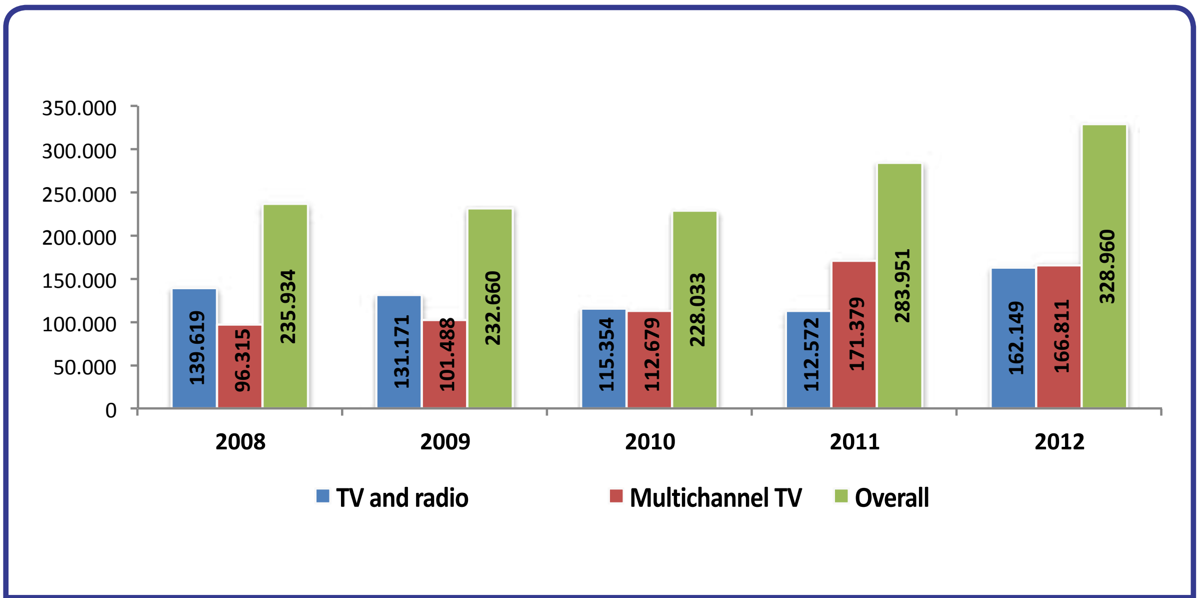


Figure 53 Evolution of revenues of broadcasting services (thousand lei)

Statistics shows that the revenues of the providers of multichannel TV services reduced by 2,7%, whereas the average monthly revenue per user (ARPU) reduced by 12,6% and made 51,39 lei (Figure 54).

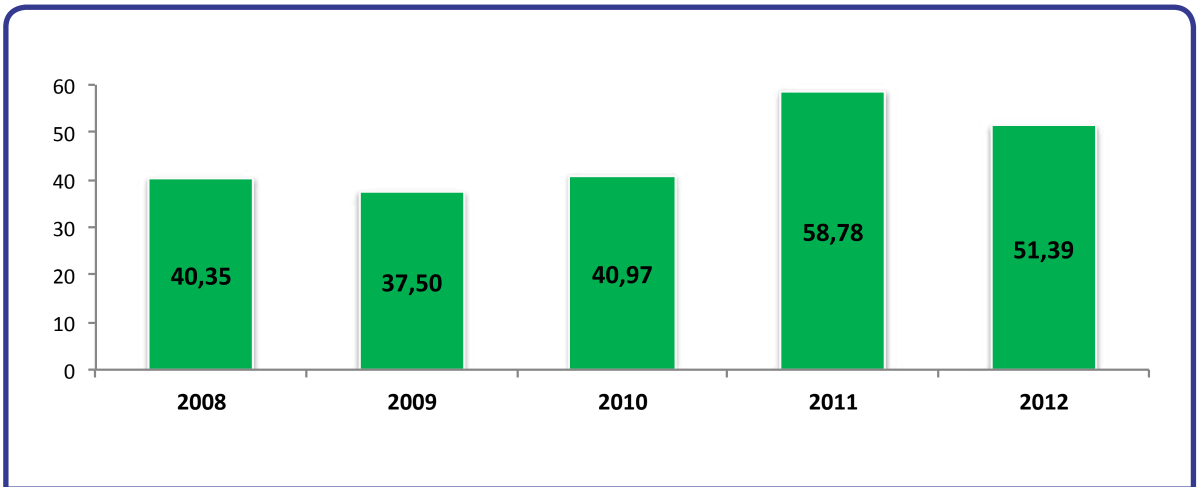


Figure 54 Evolution of average monthly revenue per user - ARPU (lei)

The ARPU of the biggest provider on this market segment - „Sun Communications" LLC (according to turnover and number of subscribers) - was 41,2 lei, the ARPU of JSC "Moldtelecom" –83,4 lei.

In the year under report, the most important shares of the multichannel TV market according to turnover were held by „Sun Communications" LLC – 32,6%, JSC "Moldtelecom" – 23,7%, „Focus-Sat" LLC – 7,3% and „A.M.T." LLC – 4,4%, (Figure 55).

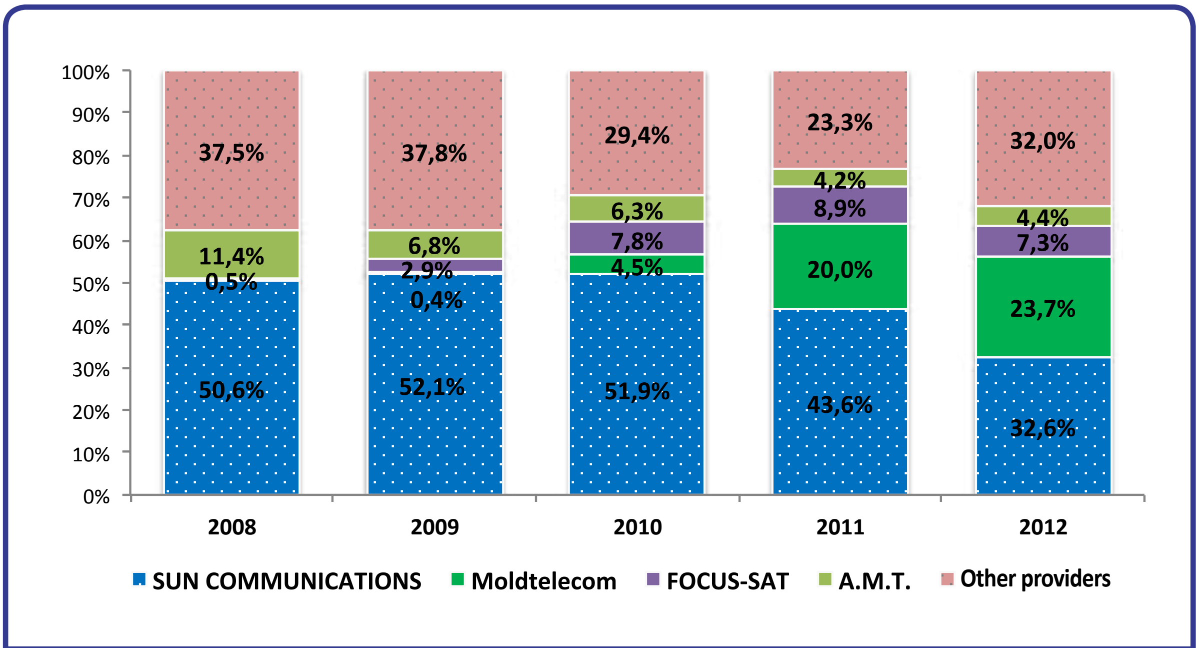


Figure 55 Market shares of multichannel TV services according to turnover

5.2 Subscribers and penetration

In 2012, the number of subscribers to multichannel TV services increased over 2011, cu 11,2% and reached 284,8 thousand. The majority of subscribers to these services - 82,0% - are urban population, 18,0% - rural. The penetration rate of multichannel TV penetration per 100 inhabitants increased by 0,8% and constituted 8,0% (Figure 56).

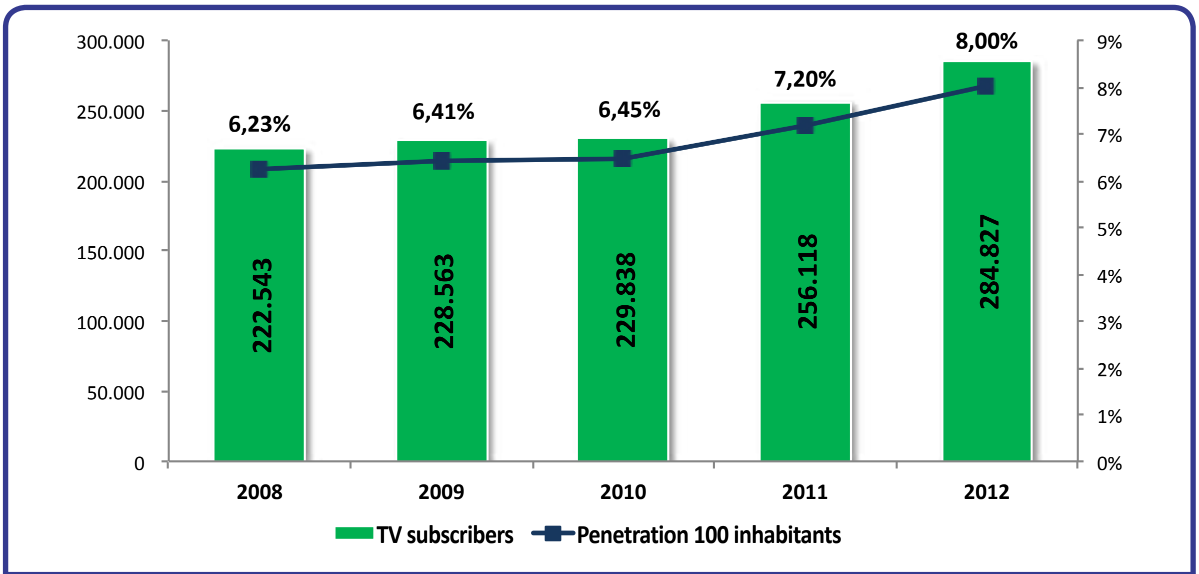


Figure 56 Number of subscribers and penetration rates of multichannel TV services

Of the total number of subscribers to multichannel TV services, 227,4 thousand (79,8%) are subscribers of coaxial cable TV networks, 46,8 thousand (16,4%) – to IPTV, 7,7 thousand (2,7%) – to satellite TV (DTH) and 2,8 thousand (1,0%) to MMDS networks (Figure 57).

In 2012, the ascending trend of digital multichannel TV services usage became more prominent. The number of users benefitting from digital TV content increased by 28,8% reaching 103,3 thousand, the number of analog users – decreased

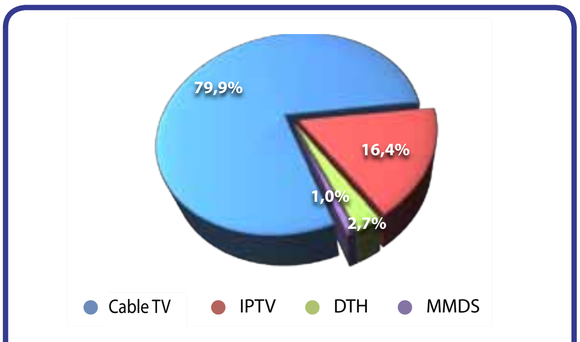


Figure 57 Number of subscribers to multichannel TV services, according to reception technology

by 7,1% down to 182,2 thousand. The share of subscribers to analog multichannel TV services was 63,8%, the share of digital TV users - 36,2% (Figure 58).

Most of the digital TV users are subscribers to coaxial cable digital TV and IPTV (Figure 59). At the end of 2012, the share of subscribers to cable digital TV services was 44,4%, to IPTV - 45,4%.

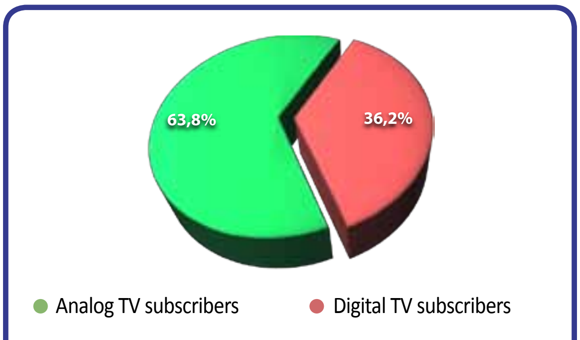


Figure 58 Number of multichannel TV subscribers (analog/digital format)

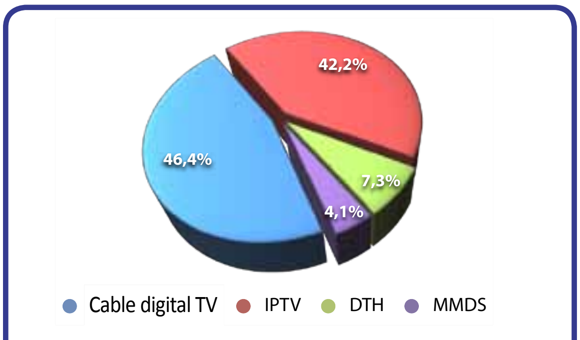


Figure 59 Structure of digital TV services, according to technology of reception

In the timeframe under report, the biggest market share according to the number of subscribers to multichannel TV services - 39,0% (111,1 thousand) – was held by „Sun Communications" LLC , up by 2,4% over 2011. JSC "Moldtelecom" 'share was 29,4%, „A.M.T." LLC –7,81% and „Focus-Sat" LLC – 2,81% (Figure 60).

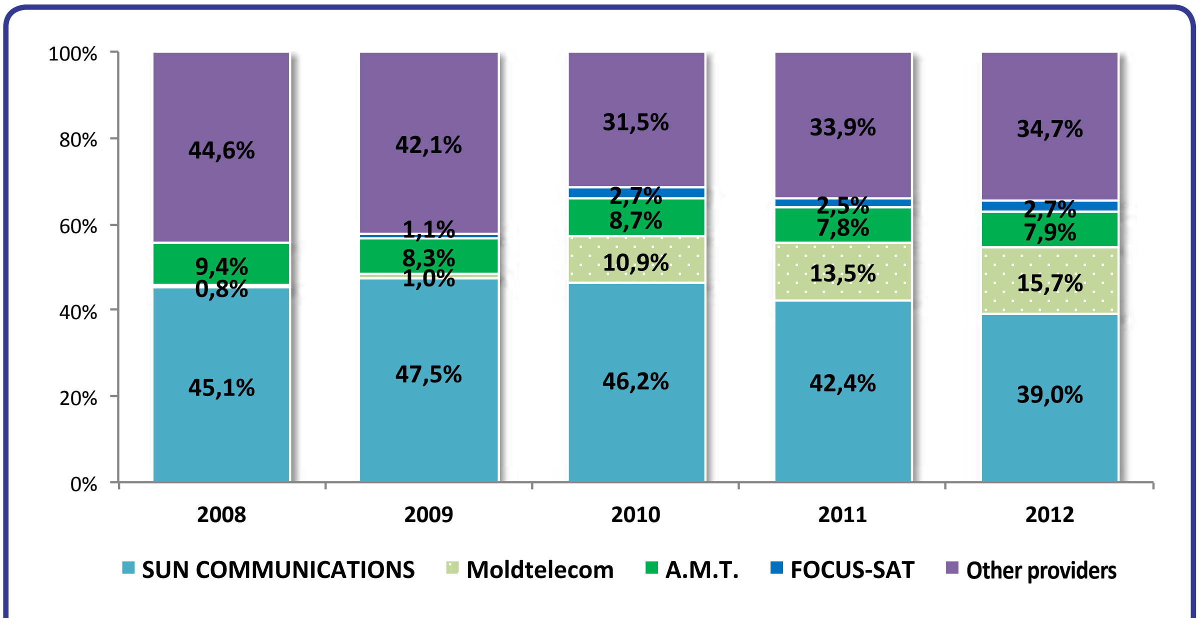


Figure 60 Market shares of multichannel TV providers, according to the number of subscribers

6 CONCLUSIONS. FORECAST FOR 2013

In 2012, the electronic communications sector registered a moderate increase of turnover, by 3,16%. This evolution was basically driven by mobile communications, the main driving force of the sector development, which in 2012 showed signs of market maturity and a slowdown of growth, as well as the reduction of revenues on the fixed telephony market. The slowing down rhythm of sector growth was also caused by the reduction of revenues from call termination in fixed and mobile networks, as a result of the remedies imposed by ANRCETI to SMP providers on those markets.

The most important increase of revenues in 2012 occurred on the market for fixed and mobile broadband and the market for broadcasting services. According to the trend registered in the recent years, these markets will continue to grow in 2013. ANRCETI predicts the most significant growth to occur on the market for fixed and mobile broadband.

The only market with ongoing decline was the fixed telephony market. The evolution of this market fits the global stagnation trend, caused by the substitution of fixed telephony services with other more convenient and affordable services (mobile telephony, OTT applications (Skype, WhatsApp, Viber, etc.).

ANRCETI estimates that in 2013, the electronic communications sector will slightly increase, by 2% and will reach 6,5 - 6,6 billion lei. The increase will be caused by the growing revenues on the mobile communications market (about 3%), fixed broadband and data transmission (about 15%), broadcasting services (12%). On the other hand, the fixed telephony market will further be marked by decreasing revenues (about 8%). On the mobile communications market the number of Users will increase by 10% and exceed 4,7 million, whereas the penetration rate per 100 inhabitants will reach 132%. The number of subscribers to dedicated mobile broadband will go up by 20% and make 214 thousand. At the same time, due to the development of Internet access via mobile networks and the drop of prices for equipment: smart phones, tablets, etc., the number of mobile telephone users consuming mobile Internet services will also grow.

ANRCETI estimations show that in 2013, the number of fixed telephone subscribers will grow by 2% up to 1,23 million, the penetration rate of these services will equal 34,5%. This increase will be determined mainly by the deployment of fixed networks in new residential areas and the development of triple – play services (telephony, broadband and TV). However, the revenues from fixed telephony service provision will continue to decrease. The decrease will be generated by the ongoing migration of traffic from fixed to mobile network and Internet, as well as by the dependence of fixed telephony service providers on the revenues from international calls that are constantly reducing.

In 2013, like in 2010-2012, the market for fixed broadband will by the most dynamic market. The number of subscribers to these services will increase by 15% - 20% and exceed 480 thousand, whereas the penetration rate will reach 13%. The increase of this market will be driven by the growing influence of Internet on everyday life of Internet users (social media, blogging, video sharing, cloud computing, e-services, etc.), development of access infrastructure based on optical networks, increase of the band of access to tariff plans, inclusion of additional services in offers, as well as reduction of tariffs per megabit.

According to ANRCETI estimations, in 2013 the market for broadcasting services will exceed the pace of growth registered in 2012. This market will further be subject to increasing number of subscribers to multichannel digital TV services, which trend is determined by intensifying competition between providers of digital TV services - IPTV and the providers of cable TV.

Data about subscribers and technologies of fixed broadband in 2012

No	Administrative-territorial unit	Total subscribers	Penetration of broadband services per 100 households	Subscribers				Share of broadband access technologies				Penetration per 100 inhabitants	Dynamics of penetration (p.p.)		Dynamics of technology share				Increase of the number of subscribers (units)				
				xDSL	FTTx	Coaxial cable	Other technologies	xDSL	FTTx	Coaxial cable	Other technologies		per 100 households	per 100 inhabitants	xDSL	FTTx	Coaxial cable	Other technologies	xDSL	FTTx	Coaxial cable	Other technologies	Broadband subscribers
1	**Mun. Chisinau**	181.226	65,01%	27.922	131.535	21.713	56	15,4%	72,6%	12,0%	0,0%	22,80%	6,27	2,20	-7,3	5,3	2,5	-0,5	-9.203	21.343	6.202	-854	17.488
2	**Mun.Balti**	23.487	42,76%	7.494	14.655	1.330	8	31,9%	62,4%	5,7%	0,0%	15,74%	6,30	2,32	-15,5	13,4	2,5	-0,4	-2.004	4.853	690	-76	3.463
3	**D. Anenii Noi**	8.039	29,66%	6.985	1.052	0	2	86,9%	13,1%	0,0%	0,0%	9,67%	4,57	1,49	-2,2	3,9	0,0	-1,6	923	424	0	-109	1.238
4	**D. Basarabeasca**	2.756	28,64%	2.394	362	0	0	86,9%	13,1%	0,0%	0,0%	9,50%	7,06	2,34	-4,1	4,1	0,0	0,0	505	174	0	0	679
5	**D. Briceni**	6.884	27,03%	6.022	862	0	0	87,5%	12,5%	0,0%	0,0%	9,22%	4,67	1,59	0,2	-0,2	0,0	0,0	1.054	136	0	0	1.190
6	**D. Cahul**	11.963	30,48%	8.470	3.434	58	1	70,8%	28,7%	0,5%	0,0%	9,58%	7,11	2,23	-13,6	13,1	0,5	0,0	726	2.005	58	1	2.790
7	**D. Cantemir**	4.949	27,17%	4.584	365	0	0	92,6%	7,4%	0,0%	0,0%	7,92%	3,12	0,91	0,0	0,0	0,0	0,0	526	43	0	0	569
8	**D. Calarasi**	5.233	19,12%	3.948	1.283	0	2	75,4%	24,5%	0,0%	0,0%	6,64%	4,32	1,50	-12,2	12,1	0,0	0,0	400	781	0	1	1.182
9	**D. Cauşeni**	6.595	22,03%	5.981	613	0	1	90,7%	9,3%	0,0%	0,0%	7,17%	3,46	1,13	-0,7	1,2	0,0	-0,5	900	163	0	-27	1.036
10	**D. Cimislia**	5.154	26,71%	3.996	1.158	0	0	77,5%	22,5%	0,0%	0,0%	8,41%	4,23	1,33	-16,0	16,0	0,0	0,0	-61	877	0	0	816
11	**D. Criuleni**	5.607	24,19%	5.241	365	0	1	93,5%	6,5%	0,0%	0,0%	7,65%	6,30	1,99	-0,3	0,3	0,0	0,0	1.353	107	0	1	1.461
12	**D. Donduseni**	3.045	16,99%	2.856	189	0	0	93,8%	6,2%	0,0%	0,0%	6,80%	4,00	1,60	-0,2	0,2	0,0	0,0	667	50	0	0	717
13	**D. Drochia**	7.047	21,43%	6.271	776	0	0	89,0%	11,0%	0,0%	0,0%	7,87%	4,13	1,52	0,1	-0,1	0,0	0,0	1.216	142	0	0	1.358
14	**D. Dubasari**	2.144	19,49%	2.122	22	0	0	99,0%	1,0%	0,0%	0,0%	6,09%	11,57	3,62	-1,0	1,0	0,0	0,0	1.251	22	0	0	1.273
15	**D. Edinet**	7.714	25,53%	5.457	2.256	0	1	70,7%	29,2%	0,0%	0,0%	9,35%	5,84	2,14	-13,9	13,9	0,0	0,0	420	1.344	0	0	1.764
16	**D. Falesti**	6.230	18,88%	4.905	1.324	0	1	78,7%	21,3%	0,0%	0,0%	6,74%	2,65	0,95	-11,4	11,4	0,0	0,0	77	797	0	1	875
17	**D. Floresti**	7.010	21,31%	5.298	1.601	0	111	75,6%	22,8%	0,0%	1,6%	7,83%	4,63	1,70	-10,8	10,8	0,0	0,0	556	940	0	26	1.522
18	**D. Glodeni**	4.769	22,21%	4.343	426	0	0	91,1%	8,9%	0,0%	0,0%	7,77%	3,96	1,39	-0,3	0,3	0,0	0,0	762	89	0	0	851
19	**D. Hincesti**	9.087	24,32%	7.051	2.036	0	0	77,6%	22,4%	0,0%	0,0%	7,47%	5,40	1,66	-12,8	12,8	0,0	0,0	660	1.357	0	0	2.017
20	**D. Ialoveni**	9.755	32,94%	7.893	1.213	649	0	80,9%	12,4%	6,7%	0,0%	9,78%	7,22	2,14	-2,4	-4,2	6,7	0,0	1.545	-57	649	0	2.137
21	**D. Leova**	4.107	24,31%	3.685	422	0	0	89,7%	10,3%	0,0%	0,0%	7,66%	1,53	0,48	-0,8	0,8	0,0	0,0	202	56	0	0	258
22	**D. Nisporeni**	4.327	20,98%	4.141	186	0	0	95,7%	4,3%	0,0%	0,0%	6,50%	3,43	1,06	-3,1	3,1	0,0	0,0	566	141	0	0	707
23	**D. Ocnita**	4.279	20,69%	3.922	357	0	0	91,7%	8,3%	0,0%	0,0%	7,67%	3,26	1,21	-1,4	1,4	0,0	0,0	566	108	0	0	674
24	**D. Orhei**	10.403	25,17%	6.381	4.020	0	2	61,3%	38,6%	0,0%	0,0%	8,27%	3,42	1,12	-7,2	8,3	-1,1	0,0	220	1.293	-100	-1	1.412
25	**D. Rezina**	3.772	21,25%	2.702	1.070	0	0	71,6%	28,4%	0,0%	0,0%	7,21%	2,65	0,90	-12,3	12,3	0,0	0,0	-69	539	0	0	470
26	**D. Riscani**	5.073	19,29%	4.244	829	0	0	83,7%	16,3%	0,0%	0,0%	7,30%	3,00	1,13	-8,8	8,8	0,0	0,0	283	505	0	0	788
27	**D. Singerei**	7.156	23,03%	5.374	1.782	0	0	75,1%	24,9%	0,0%	0,0%	7,68%	4,61	1,54	-18,8	18,8	0,0	0,0	-4	1.435	0	0	1.431
28	**D. Soroca**	7.857	21,48%	5.062	2.794	0	1	64,4%	35,6%	0,0%	0,0%	7,85%	3,53	1,29	-19,0	19,0	0,0	0,0	-414	1.707	0	0	1.293
29	**D. Straşeni**	8.318	29,78%	5.810	2.507	0	1	69,9%	30,1%	0,0%	0,0%	9,09%	3,38	1,03	-10,2	10,2	0,0	0,0	-91	1.037	0	0	946
30	**D. Soldanesti**	2.260	14,89%	2.235	25	0	0	98,9%	1,1%	0,0%	0,0%	5,26%	1,38	0,49	-0,6	0,6	0,0	0,0	195	15	0	0	210
31	**D. Stefan Voda**	4.654	20,01%	4.112	542	0	0	88,4%	11,6%	0,0%	0,0%	6,51%	3,29	1,07	0,0	0,0	0,0	0,0	676	89	0	0	765
32	**D. Taraclia**	4.354	33,86%	3.977	377	0	0	91,3%	8,7%	0,0%	0,0%	9,87%	7,00	2,04	-1,4	1,4	0,0	0,0	772	128	0	0	900
33	**D. Telenesti**	4.513	18,71%	4.251	262	0	0	94,2%	5,8%	0,0%	0,0%	6,11%	1,36	0,44	-0,6	0,6	0,0	0,0	285	43	0	0	328
34	**D. Ungheni**	10.001	25,83%	5.337	4.663	0	1	53,4%	46,6%	0,0%	0,0%	8,53%	6,76	2,23	-15,4	15,3	0,0	0,0	262	2.353	0	1	2.616
35	**UTA Gagauzia**	17.409	37,61%	12.340	5.068	0	1	70,9%	29,1%	0,0%	0,0%	10,80%	10,49	3,01	-24,0	24,0	0,0	0,0	425	4.428	0	1	4.854
	Total	**417.177**	**34,79%**	**202.806**	**190.431**	**23.750**	**190**	**48,6%**	**45,6%**	**5,7%**	**0,0%**	**11,72%**	**5,18**	**1,74**	**-6,8**	**6,0**	**1,1**	**-0,3**	**6.147**	**49.467**	**7.499**	**-1.035**	**62.078**

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