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

Evolution of Electronic Communications Market in 2015

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Preface

The Report of the National Regulatory Agency for Electronic Communications and Information Technology (ANRCETI) **Evolution of electronic communications market in 2015** is based on the data statistical reports submitted by electronic communications providers. In drafting the report, ANRCETI also used the data published by the International Telecommunications Union (ITU).

ANRCETI collects and processes providers' quarterly statistical reports regarding the situation on all electronic communications market segments, pursuant to Law on Electronic Communications no.241 of 15.11.2007 (hereinafter - Law 241/2007). On basis of reported data, ANRCETI specialists evaluate the development trends of market segments and perform market analysis. On quarterly basis, ANRCETI publishes on its official website charts and reports as to the market situation, while yearly, before April 30, makes publicly available the report on market evolution for the preceding year.

Readers are welcome to provide comments, suggestions and ask questions on the contents and format of this Report to the e-mail address: raport.statistic@anrceti.md

Key indicators of electronic communications market

Indicators	2014	2015	Change
MOBILE TELEPHONY			
Users	4.373.328	4.323.489	-1,1%
- active users - individuals	3.500.494	3.465.094	-1,0%
- active users - businesses	237.631	248.043	4,4%
In-networks traffic (mln. minutes)	6.092,1	6.315,7	3,7%
MoU (monthly minutes per users)	211	226	7,1%
SMS (mln.)	1.162,1	983,6	-15,4%
MMS (mln.)	2,1	2,0	-3,9%
Penetration rate per 100 inhabitants	122,9%	121,6%	-1,3 p.p.
revenues (mln. lei)	3.477,4	3.539,3	1,8%
ARPU (monthly)	65,6	67,8	3,4%
MOBILE INTERNET ACCESS SERVICES			
Users mobile Internet access, total (2G, 3G, 4G):	1.688.416	1.760.060	4,2%
- users mobile broadband (3G, 4G)	1.188.415	1.341.119	12,80%
- utilizatori dedicated mobile Internet access	279.504	298.429	6,8%
Users (M2M subscribers)	20.014	25.089	25,4%
Mobile Internet access penetration rate per 100 inhabitants	47,4%	49,4%	2 p.p.
- mobile broadband penetration rate	33,4%	37,7%	4,3 p.p.
- dedicated mobile broadband penetration rate	7,9%	8,4%	0,5 p.p.
Revenues mobile Internet access[1] (mln. lei)	482,2	579,1	20,1%
- Revenues dedicated mobile Internet access (mln. lei)	267,2	320,6	20,0%
ARPU dedicated mobile Internet access (monthly)	85,0	92,5	8,8%
Traffic dedicated mobile Internet (modem), TB	26.719	32.907	23,2%
Traffic mobile Internet voice users (phone), TB	2.147	6.179	187,8%
FIXED TELEPHONY			
Subscribers (lines)	1.218.274	1.202.466	-1,3%
- individuals	1.083.351	1.070.250	-1,2%
- businesses	134.923	132.216	-2,0%
Penetration rate per 100 inhabitants	34,2%	33,8%	-0,4 p.p.
Total In-network traffic (mln. minutes)	2.258,4	2.020,2	-10,5%
MoU (monthly minutes per users)	250	224	-10,6%
Revenues (mln. lei)	1.002,1	1.018,4	1,6%
ARPU (monthly)	68	70	2,4%
FIXED INTERNET ACCESS			
Subscribers	509.195	534.393	4,9%
- individuals	481.435	505.523	5,0%
- businesses	27.760	28.870	4,0%
Penetration rate per 100 inhabitants	14,3%	15,0%	0,7 p.p.
Revenues (mln. lei)	939,9	1.050,5	11,8%
ARPU (monthly)	160,5	168,3	4,9%
Total external Internet capacity (Gbps)	239,7	326,0	36,0%
Revenues data transmission (mln. lei)	56,7	60,8	7,2%
BROADCASTING AND RE-TRANSMISSION OF AUDIOVISUAL PROGRAMS			
Pay TV subscribers	274.039	275.290	0,5%
Pay TV penetration rate per 100 inhabitants	7,70%	7,73%	0,03 p.p.
Revenues (mln. lei)	370,2	366,1	-1,1%
ARPU Pay TV (monthly)	48,3	47,3	-2,0%
Revenues from other electronic communications activities (mln. lei)	745,0	627,3	-15,8%
Total revenues in electronic communications sector (mln. lei)	6.801,7	6.922,2	1,8%
Total investments in electronic communications sector (mln. lei)	2.375,4	2.041,2	-14,1%

[1] Revenues from Internet access services via mobile devices are also included. They are presented as information, to show the total revenues on mobile Internet access market. Additionally, these revenues are part of the total revenues on the mobile market, given that they are additional services to the basic service – mobile telephony.

1 General overview of the market

1.1 Dynamics of revenues

According to the statistical data, reported to ANRCETI by electronic communications providers (313 active providers) in 2015 the turnover of the electronic communications sector (fixed and mobile telephony, Internet access at fixed and mobile locations, broadcasting and re-transmission of audiovisual programs, other electronic communications activities increased over 2014, by 1,8% to a total of 6 bn. 922 mln. lei.

Like in previous years, the most significant revenues increase was attested on the mobile market - 3 bn. 539,3 mln. lei (1,8 % increase). The revenues from Internet access at fixed locations increased by 11,5% up to 1 bn. 50,5 mln. lei, those of access to dedicated mobile Internet access – by 20% reaching 320,6 mln. lei, of fixed telephony services – by 1,6% up to 1 bn. 18,4 mln. lei. Meanwhile, the revenues generated by broadcasting and re-transmission of audiovisual programs services decreased by 1,1%, down to 366,1 mln. lei, while the revenues from other electronic communications activities[2] decreased by 15,8%, to 627,3 mln. lei (Chart 1).

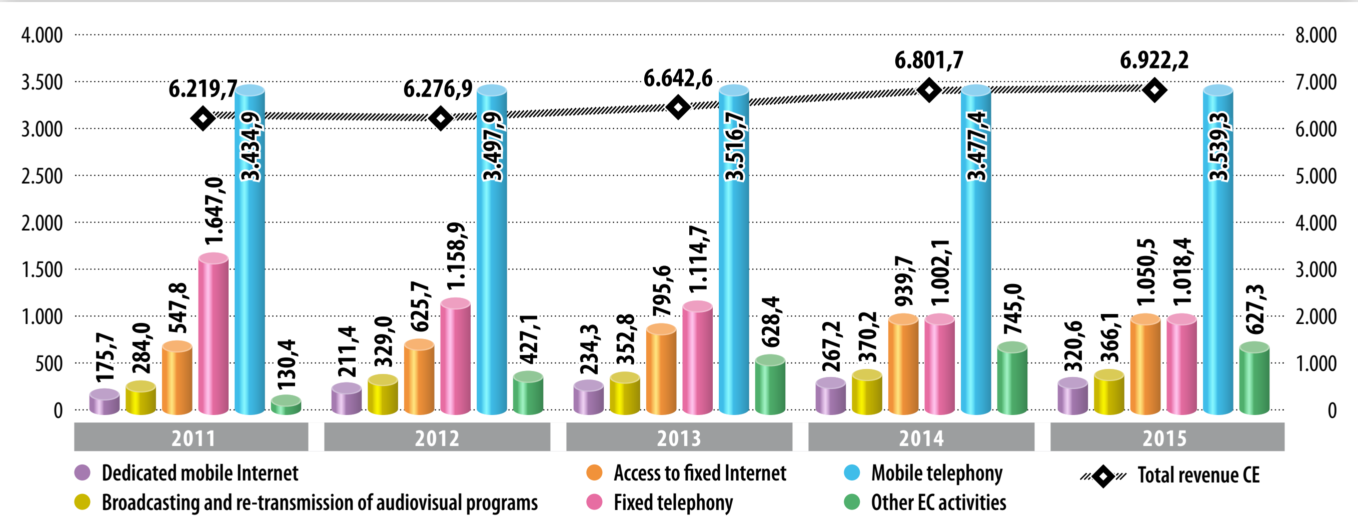

Chart 1 Evolution of revenues in electronic sector sector (mln. lei)

Source: **ANRCETI**

The share of mobile telephony revenues within the total electronic communications revenue was 51,1%, fixed telephony – 14,7%, fixed Internet access – 15,2%, broadcasting and retransmission of audiovisual programs – 5,3%, dedicated mobile Internet access – 4,6% and revenues from other electronic communications activities – 9,1% (Chart 2).

[2] Revenues from other electronic communications activities include the revenues that are not part of the five basic segments of the electronic communications market and are generated by installation, operation, management or provision of electronic communications networks or associated infrastructure to a third party *(Art.2 of Law on Electronic Communications 241/2007)*, data transport, etc.

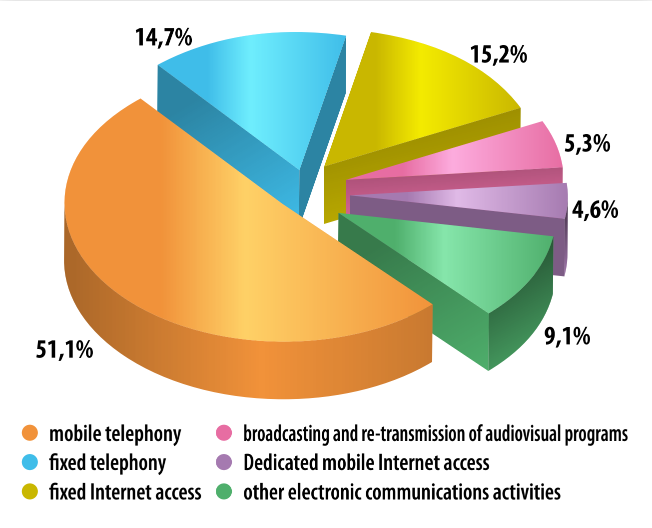

Chart 2 Structure of the electronic communications market, by revenues

Source: **ANRCETI**

In 2015, the fixed Internet access market accounted for the most significant monthly average revenue per user (ARPU) – 168,3 lei. This indicator for the dedicated mobile Internet access market was *92,5* lei, fixed telephone market – *70,1* lei, mobile telephony market – 67,8 lei, pay TV market – 47,3 lei (Chart 3).

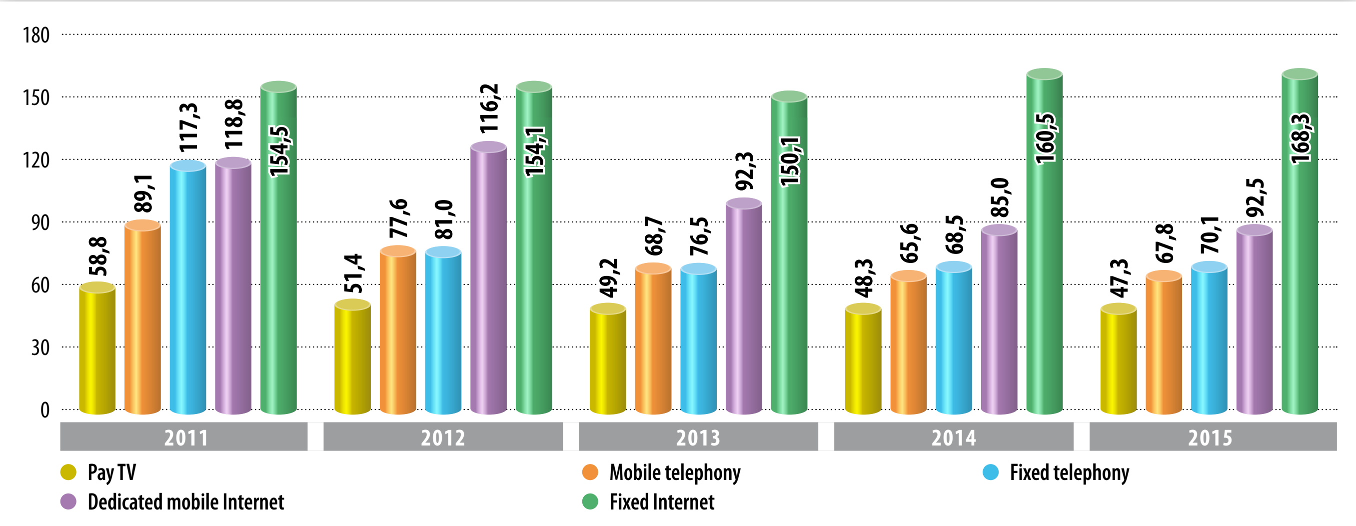

Chart 3 Evolution of average monthly revenue per user - ARPU (lei)

Source: **ANRCETI**

In 2015, Orange Moldova had the highest volumes of sales - 2 bn. 540,2 mln. lei or 36,7% of the total, followed by Moldtelecom - 1 bn. 923,8 mln. lei or 27,8% of the total and Moldcell -1 bn. 136,1 mln. lei or 16,4% of the total. The cumulative sales of other providers was 1 bn. 322,2 mln. lei sau 19,1% of the total of revenues generated by the electronic communications sector. (Chart 4).

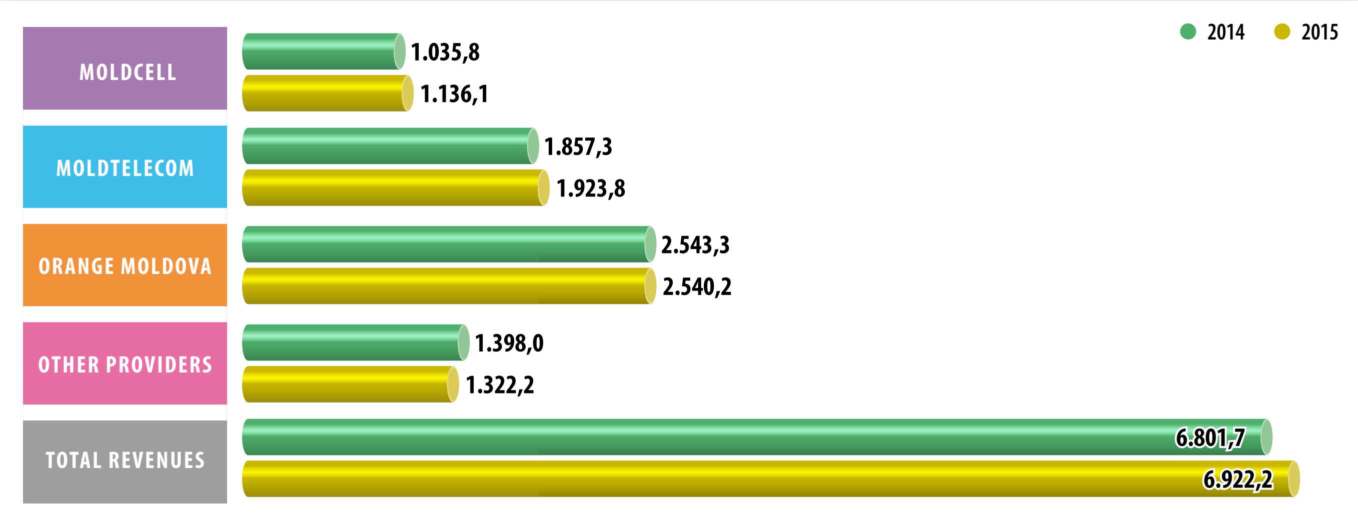

Chart 4 Dynamics of providers' sales in 2014 - 2015 (mln. lei)
Source: **ANRCETI**

1.2 Evolution of the number of end users

In 2015, the number of end users on the five electronic communications market segments evolved differently (Chart 5). The number of subscribers to dedicated mobile Internet access services grew 6,8% over 2014, the number of fixed Internet subscribers – by 4,9% and the number of pay TV subscribers – by 0,5%. On the other hand, the number of mobile users dropped 1,1%, the number of fixed telelhony subscribers dropped 1,3%. This development was caused by the market saturation phenomenon and the effects of telephone number portability.

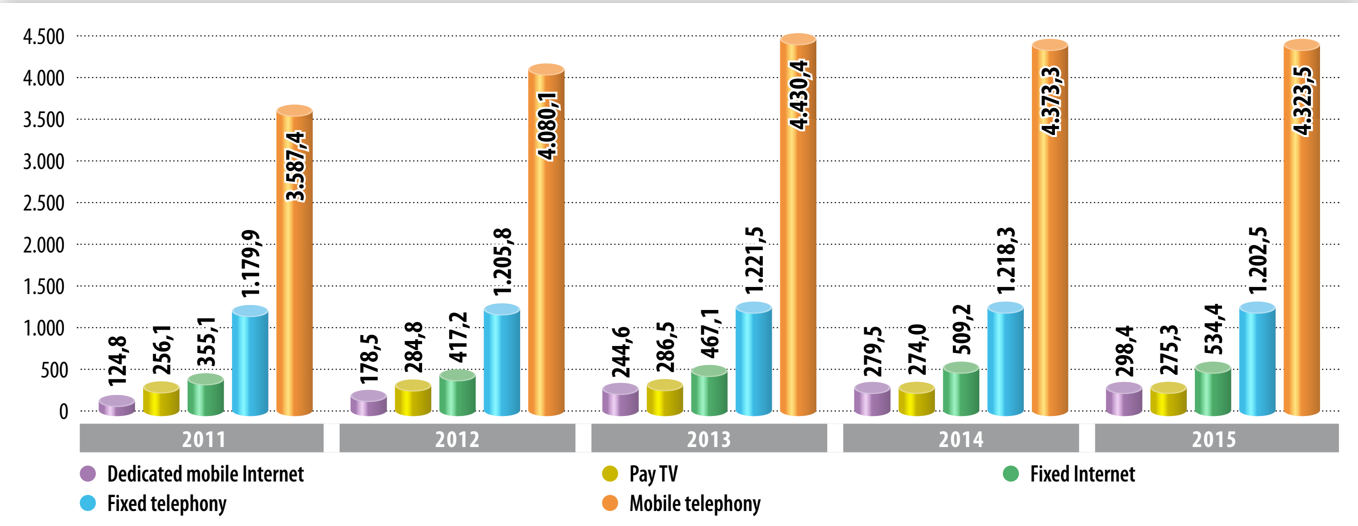

Chart 5 Evolution of the number of end users of electronic communications services (thousand)
Source: **ANRCETI**

The different evolution of the number of end-users brought about changes of penetration rates per 100 inhabitants. The value of this indicator on the fixed Internet access market increased to 15%, on the market for dedicated mobile Internet access – to 8,4%, whereas on the mobile market dropped to 121,6%, on fixed telephony market – to 33,8%, on the pay TV market remained unchanged, as in 2014 – 7,7% (Chart 7).

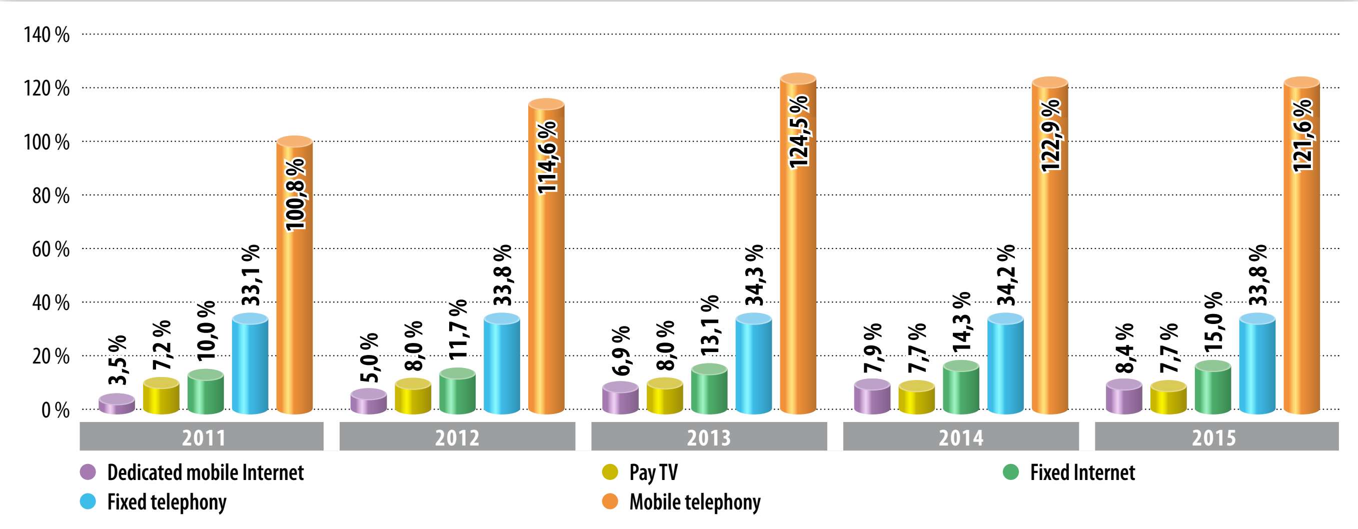

Chart 6 Evolution of electronic communications service penetration rates

Source: **ANRCETI**

1.3 Evolution of voice traffic in mobile and fixed networks

In 2015, mobile and fixed telephone users generated 8,34 bn. minutes total voice traffic, which is 0,2% decrease compared to 2014. The voice traffic in mobile telephony networks increased 3,7% and reached 6,32 bn. minutes, while the traffic in fixed networks dropped 10,5% and constituted 2,02 bn. minutes. (Chart 7).

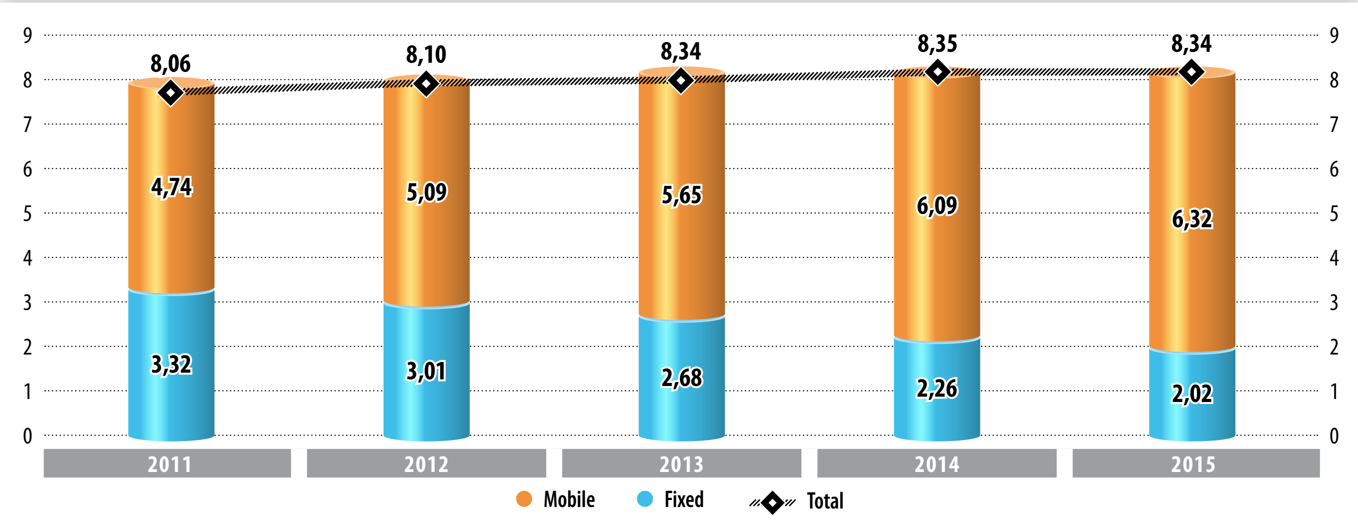

Chart 7 Evolution of voice traffic in mobile and fixed line networks (bn. minutes)

Source: **ANRCETI**

In 2015 the share of traffic generated in mobile networks (this includes in-network traffic and mobile to mobile network traffic) and the traffic generated in fixed networks, in the structure of total telephone voice traffic, was 66,3% and, accordingly 17,5%. (Chart 8).

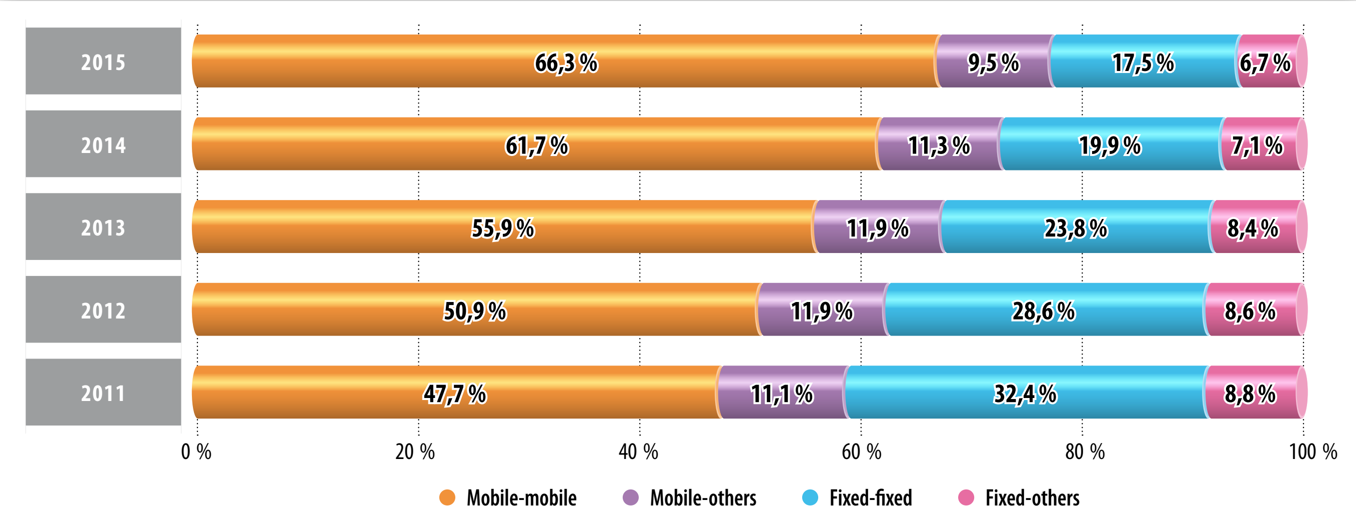

Chart 8 Shares of types of traffic in the structure of total voice traffic in mobile and fixed telephony networks

Source: **ANRCETI**

The increase of the share of traffic generated in mobile networks as related to fixed networks occurred due to the tendency of traffic migration from fixed to mobile networks, which happened in the recent years both at national level and globally. This trend is generated by the advantages of mobile telephone services: accessibility everywhere, mobility and possibility, with the increasing use of smartphones, to access the Internet via mobile phone, which is not possible with a fixed terminal device.

1.4 Dynamics of investments

In 2015, the total volume of investments in the electronic communications sector decreased compared to 2014 by 14,1%, to the amount of 2,041 bn. lei (Chart 9). Like in the previous years, the most significant volume of investments - 1,3 bn. lei - was directed to the development of mobile communications networks. However, compared to 2014, their volume dropped by 23%. Meanwhile, the volume of investments in fixed networks grew 3,7% up to 649 mln. lei, in broadcasting networks – by 85,3% up to 76,9 mln. lei (Chart 9).

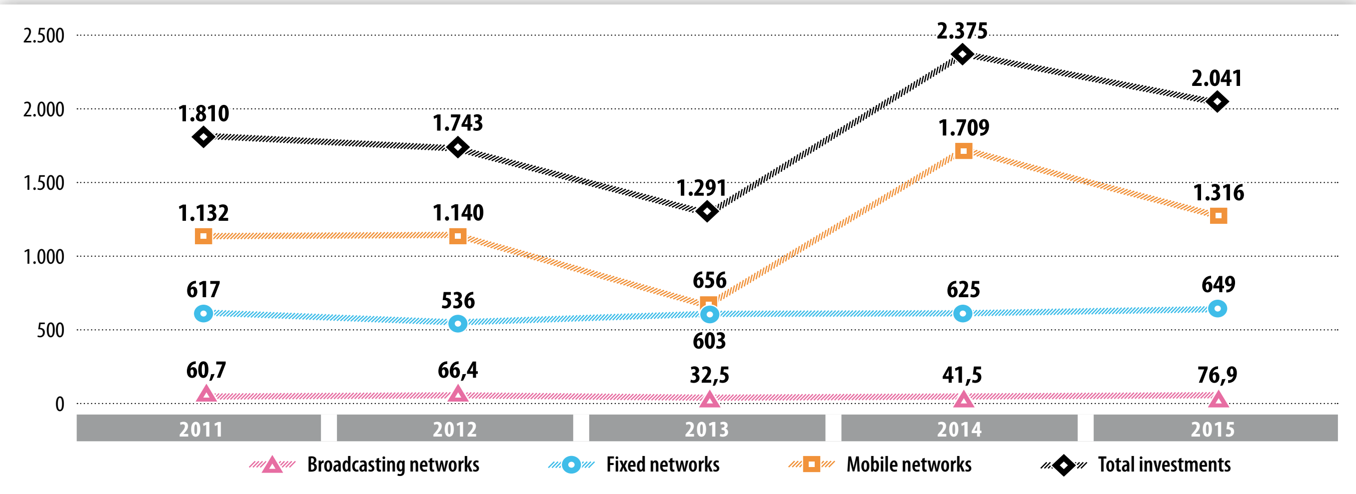

Chart 9 Evolution of investments by types of electronic communications networks (mln. lei)

Source: **ANRCETI**

The data in the Chart above show that about 2/3 of the total investments in electronic communications was directed to the development of mobile communications networks. The correlation investments – revenue in the sector was 29,4%, the yearly average in the recent five years being 28%. Thus, in 2015, 29,4 lei from every 100 lei generated from electronic communications activity was re-invested in the sector development. For the mobile networks segment, the correlation investment – revenues was 34%, for the fixed network segment - 30% and for the audiovisual broadcasting networks – about 11%.

2 Mobile telephony

2.1 Dynamics of the market

In 2015, the total sales on the mobile telephony market slightly increased as compared to 2014 – by 1,8%, up to 3 bn. 539,3 mln. lei. The revenues of Moldcell grew 6,7% up to 1 bn. 017,3 mln. lei, the revenues of Moldtelecom - by 11,3% up to 136,7 mln. lei, whereas those of Orange Moldova slightly reduced (by 0,7%), showing 2 bn. 385,3 mln. lei (Chart 10).

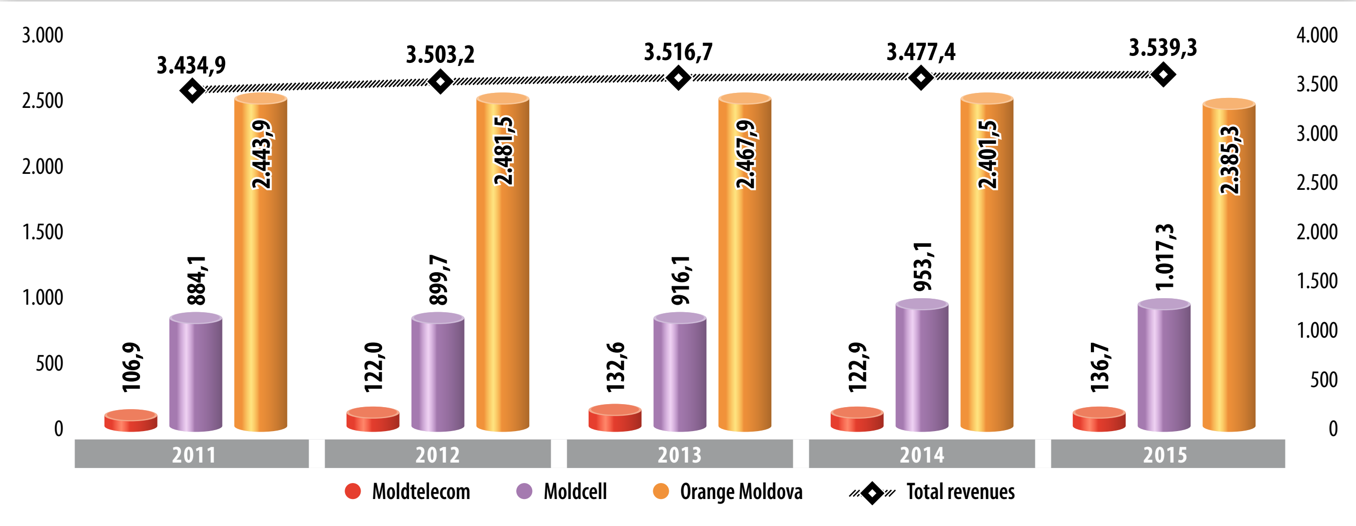

Chart 10 Evolution of revenues by mobile telephony providers (mln. lei)

Source: **ANRCETI**

The table below represents the break-down of revenues per wholesale and retail mobile markets (individuals and businesses).

Table no.1 Revenues on wholesale and retail mobile markets (mln. lei)

Indicators	2011	2012	2013	2014	2015	Schimbare 2014-2015
Revenues wholesale market	1.112,15	1.161,64	1.152,04	1.264,32	1.295,66	2,5%
Revenues retail market:	2.215,25	2.322,82	2.270,03	2.120,63	2.172,84	1,3%
individuals	1.859,76	1.788,49	1.871,32	1.793,48	1.822,10	1,6%
businesses	355,48	457,05	398,71	327,14	325,93	-0,4%
Venituri din alte servicii	*107,52*	*0,31*	*69,18*	*68,39*	*70,73*	

Source: **ANRCETI**

The data from the table show that about 1/3 of the total revenues (37%) were generated on the wholesale market[3], and 2/3 - on the retail market[4]. The revenues generated from individuals represented more than half of total revenues (51%) of the mobile market or 84% of the r etail market. The analysis of the revenues generated by businesses show that they paid for mobile services 0,4% less than in 2014, although the voice traffic voice volume increased. On the one

[3] The wholesale market includes interconnection services, offered to other electronic communications providers: call/SMS/Internet termination services, traffic transit services, etc.

[4] The retail market includes services provided to end users, individuals and businesses.

hand, this is due to the fact that businesses apply technical solutions enabling them to make cheaper calls, such as internal phones with SIM cards, corporate web solutions to communicate via the Internet at low cost or even free (Skype for Business, etc.), while on the other hand, mobile providers have very generous corporative offers.

Table no.2 **Revenues on retail market: from subscriptions and pre-paid cards (mln. lei)**

Indicators	2011	2012	2013	2014	2014	Change 2014-2015
Revenues subscriptions	1.135,96	1.275,32	1.225,63	1.162,28	1.290,19	8,8%
Revenues prepay cards	1.079,29	1.047,50	1.044,40	958,35	882,65	-7,9%

Source: **ANRCETI**

The data from the table show that the amount of revenues generated from subscription services were higher (59%) than the revenues from pre-pay card owners, although the share of the latter in the structure of mobile users is 75%.

Following this evolution, the monthly average revenue per mobile user (ARPU) decreased compared to 2014 by 3,4% and made 67,8 lei (Chart 11). The highest was the ARPU by Orange Moldova – 78,4 lei. The ARPU of Moldcell was 57,2 lei and the ARPU of Moldtelecom – 34,4 lei. The average revenue per individual user[5] was 43,9 lei and per corporate user[6] – 113,4 lei

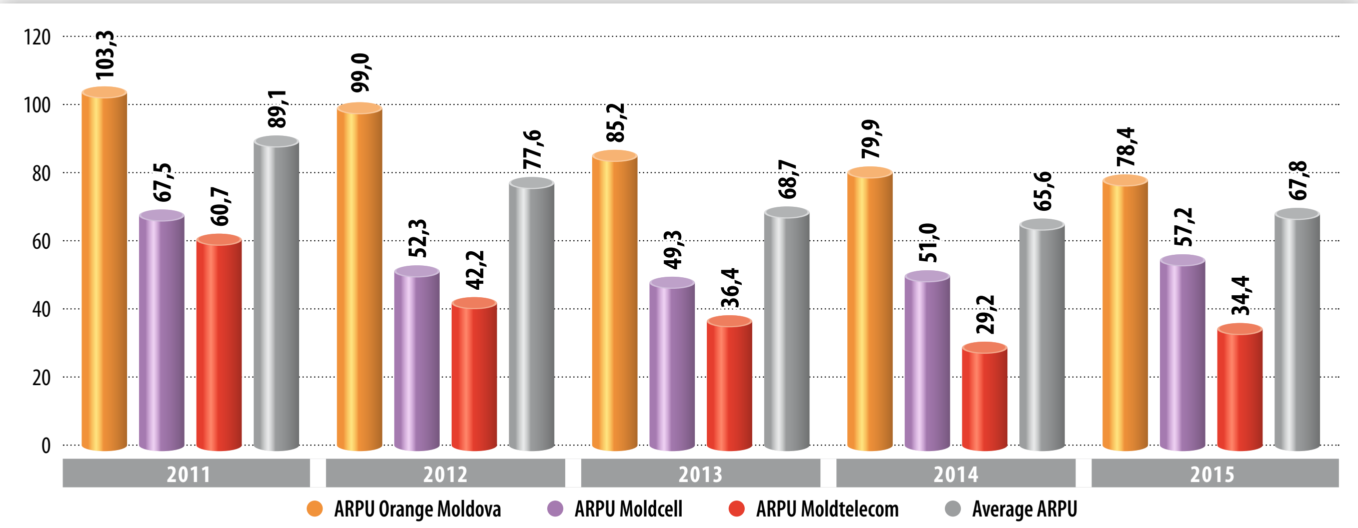

Chart 11 **Evolution of average monthly revenue per mobile user - ARPU (lei)**

Source: **ANRCETI**

2.2 Mobile users and penetration rate

In 2015, the number of mobile users continued to decreace for the second consecutive year. Compared to 2014, their number dropped 1,1% to 4 mln. 323 thousand. The mobile penetration rate was 121,6%, decreased by 1,3 p.p. (Chart 12).

[5] Average bill value paid by an individual user, VAT excluded
[6] Average bill value paid by a business, VAT excluded

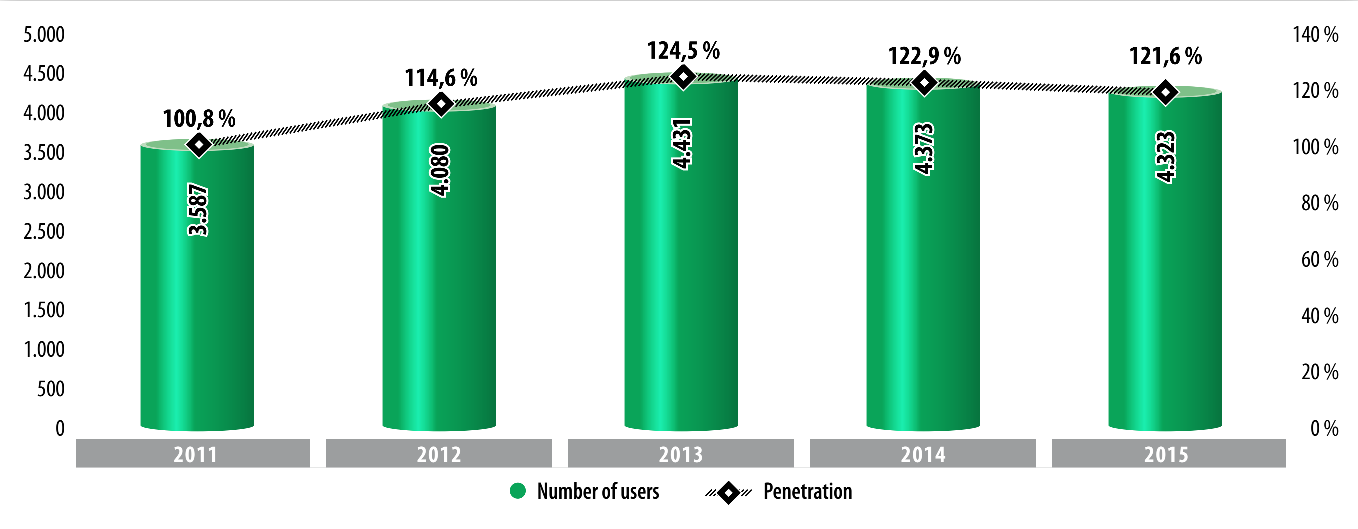

Chart 12 **Evolution of the number of users (thousand) and mobile penetration rates (%)**

Source: **ANRCETI**

Compared to other countries/communities, the mobile penetration rate in the Republic of Moldova (Chart 13) exceeds the global average (96,8%) by 24,8 p. p. This indicator is 15,6 p. p. higher than in Romania and 22,4 p.p. lower than in Ukraine. Also, this indicator is 1,1 p. p. higher than the average in EU states (120,5%) and 16,5 p. p. lower than the average in CIS countries (138,1%).

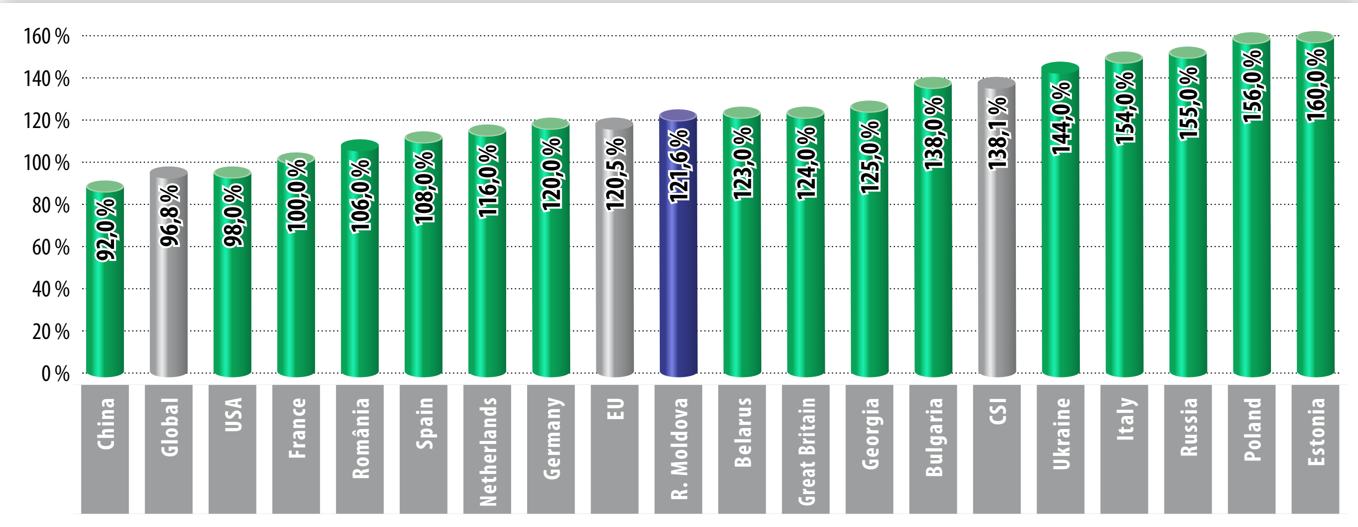

Chart 13 **Penetration rates[7] of mobile services in Moldova and other states/comunities**

Source: **ANRCETI**

As per 31.12.2015, 85,9% of the total users of mobile telephony services were active[8] users, while 14,1% - passive users. Compared to 2014, the correlation active-passive users practically remained at the same level. (Chart 14).

[7] Statistical data from ITU Report for 2014.

[8] According to ANRCETI methodology, active users are those users who consumed and paid for at least one service within the last three months before the statistical data were reported. Passive users are those who did not use or pay for any service.

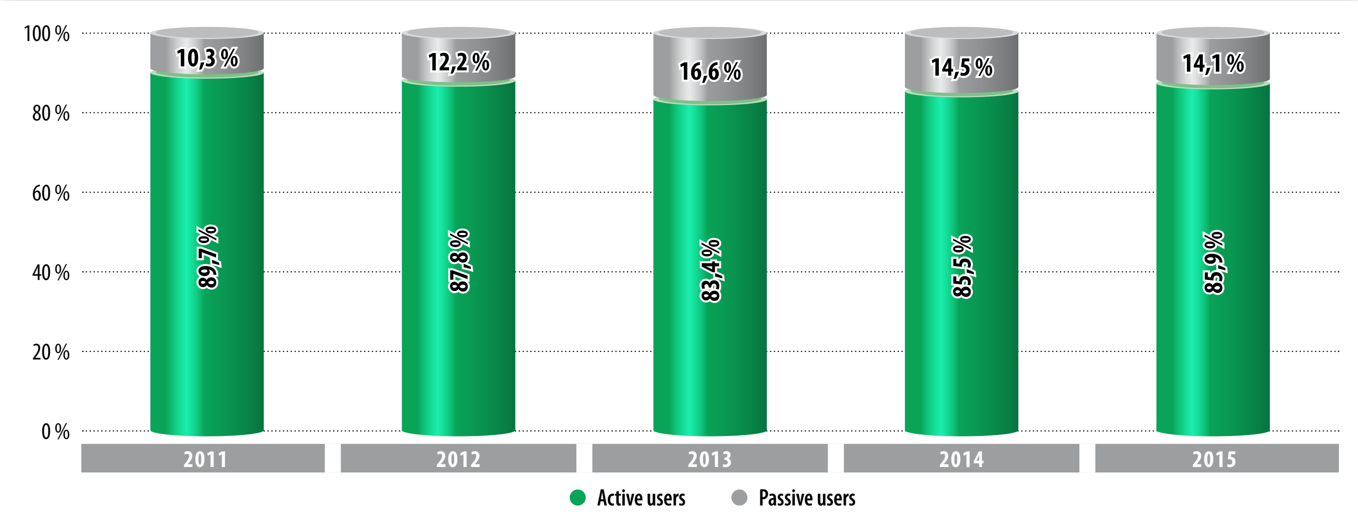

Chart 14 Structure of the mobile market, by types of users (active/passive)
Source: **ANRCETI**

In 2015, the share of subscription mobile users increased compared to 2014 by 2,6 p. p. up to 25,3%, the number of pre-pay users decreased the same amount, making 74,7% (Chart 15).

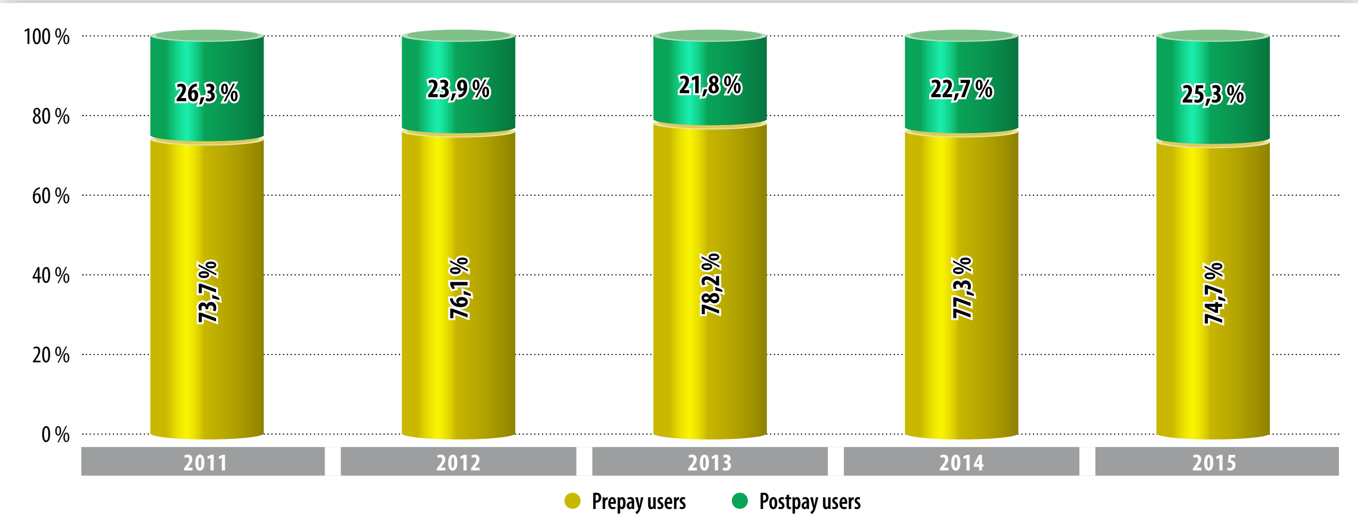

Chart 15 Structure of mobile market by types of users (prepay, postpay)
Source: **ANRCETI**

2.3 Evolution of voice traffic in mobile networks

In 2015, the total volume of voice traffic in mobile networks increased 3,7% over 2014 and exceeded 6,31 bn. minutes. The MoU indicator (average number of minutes of use per user per month) increased 6,9% or 15 minutes and made up 226 minutes (3 hours and 46 minutes). For Orange Moldova and Moldcell this indicator increased from 266 to 274 minutes, and from 149 to 170, accordingly, for Moldtelecom the indicator increased from 102 to 114 minutes (Chart 16). As well, the total number of SMS was 983,6 mln., which means that a user has sent a monthly average of 22 SMS.

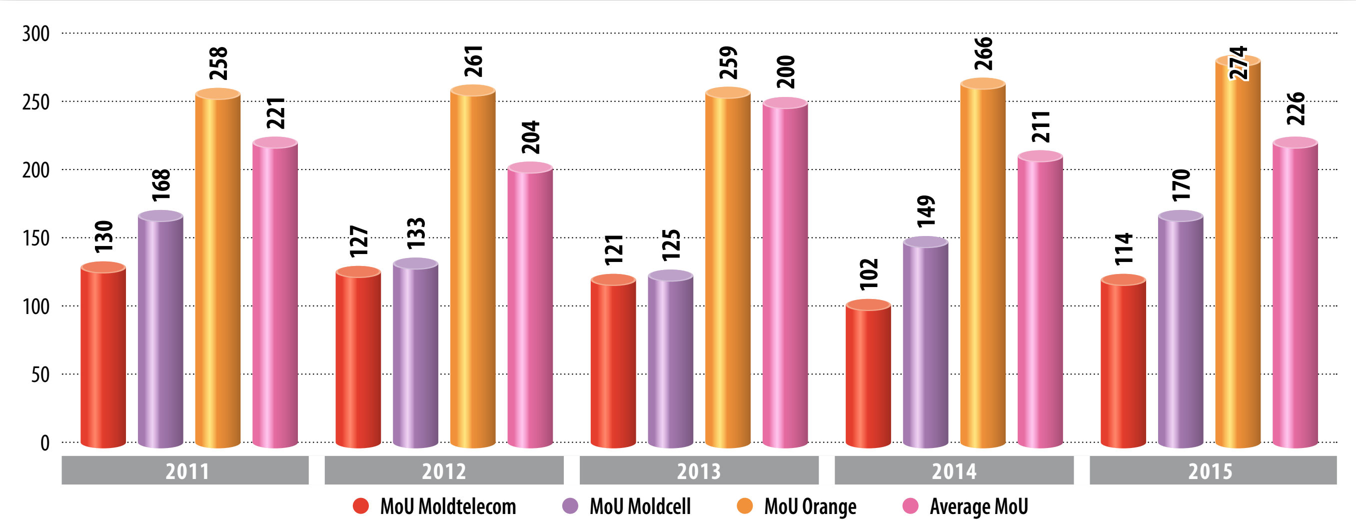

Chart 16 Evolution of MoU indicator (minutes)

Source: **ANRCETI**

2.4 Rates of radio signal coverage of territory and population

The data offered by the three mobile providers - Orange Moldova, Moldcell and Moldtelecom (Unite) show that in 2015 the 2G si 3G networks coverage rates practically stayed the level as in 2014.

As per 31.12.2014, Orange Moldova provided 99% of 2G territory and population coverage, Moldtelecom (CDMA2000 1x in 450 MHz) – 98,38% and 98,87%, Moldcell – 97,36 and 96,82%.

In terms of 3G territory coverage, Orange Moldova provided 99%, Moldtelecom – 94,20% and Moldcell – 77,71% (Chart 17).

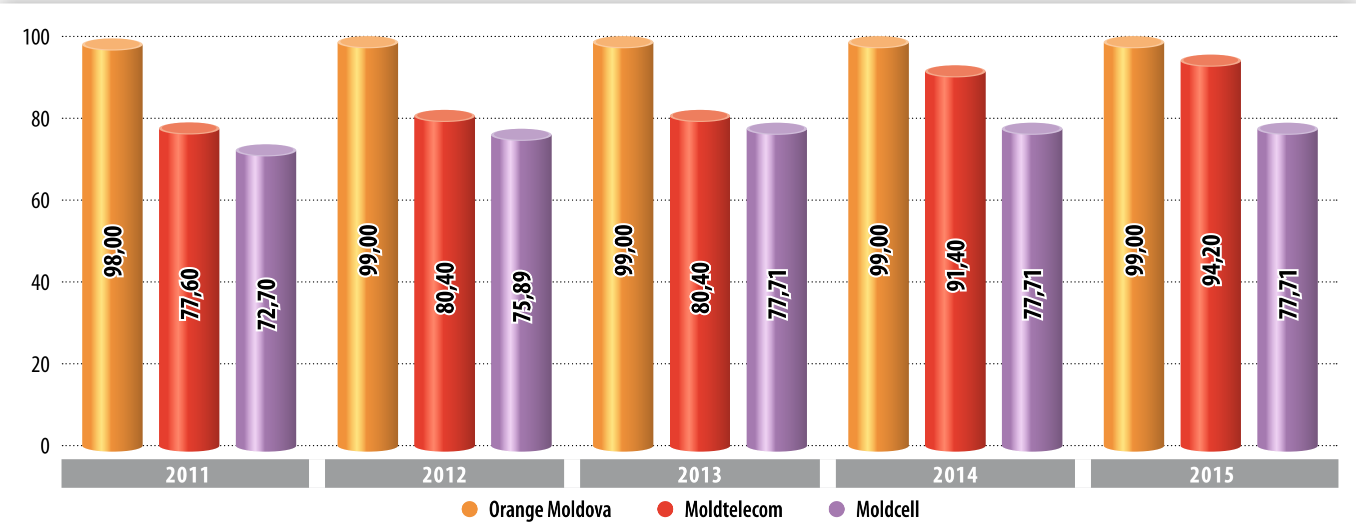

Chart 17 Rates of territory coverage with 3G networks (%)

Source: **ANRCETI**

The data regarding 3G population coverage show that in 2015 the highest coverage rate - 99% - was provided by Orange Moldova, followed by Moldtelecom - 96,7% and Moldcell – 62% (Chart 18).

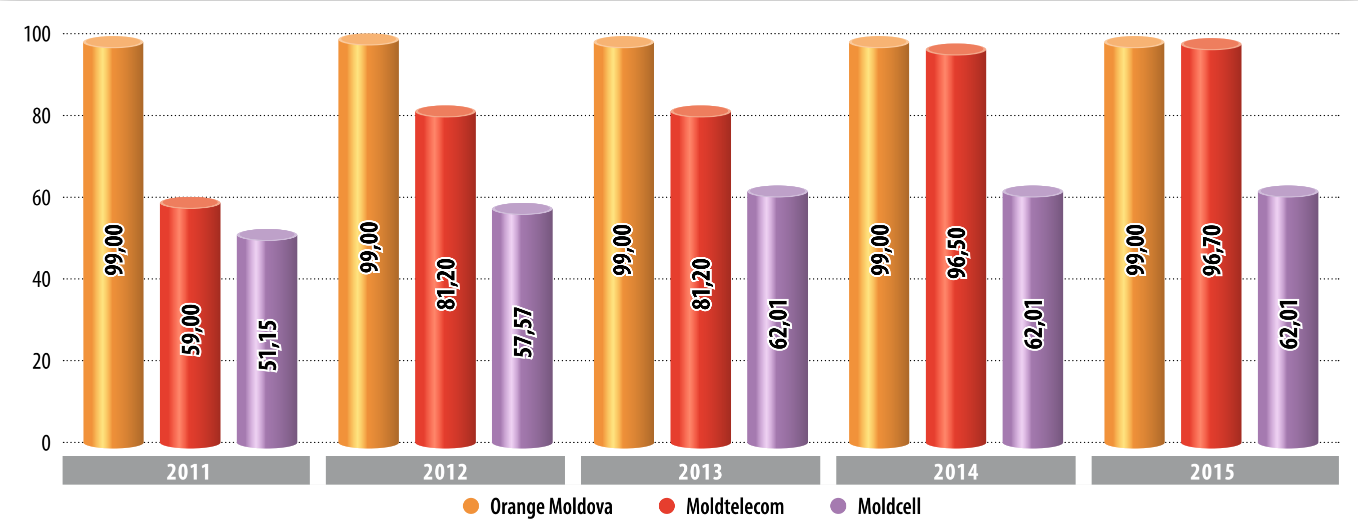

Chart 18 Rate of population coverage with 3G networks (%)

Source: **ANRCETI**

As for 4G/LTE population coverage, during 2015 Orange Moldova increased in this indicator over 2,5 times: from 33% to 84%. Moldcell provided a coverage rate of 29,7% (up 15,4 p.p.) and Moldtelecom", which launched 4G services in 2015, reached at the end of the year 21,1% coverage rate (Chart 19).

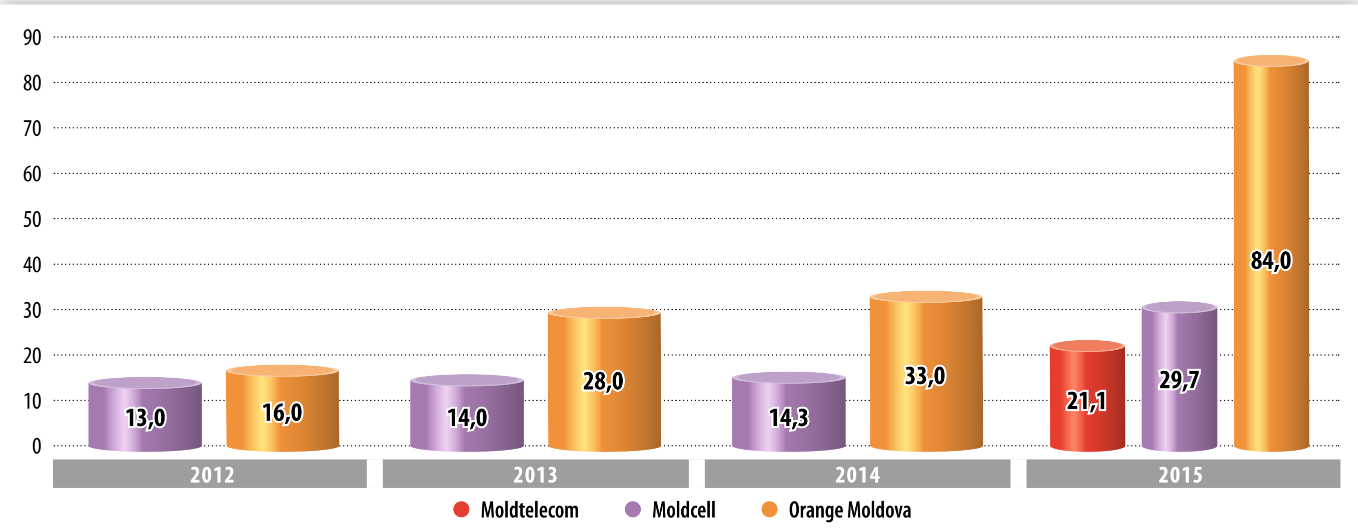

Chart 19 Rate of 4G/LTE population coverage (%)

Source: **ANRCETI**

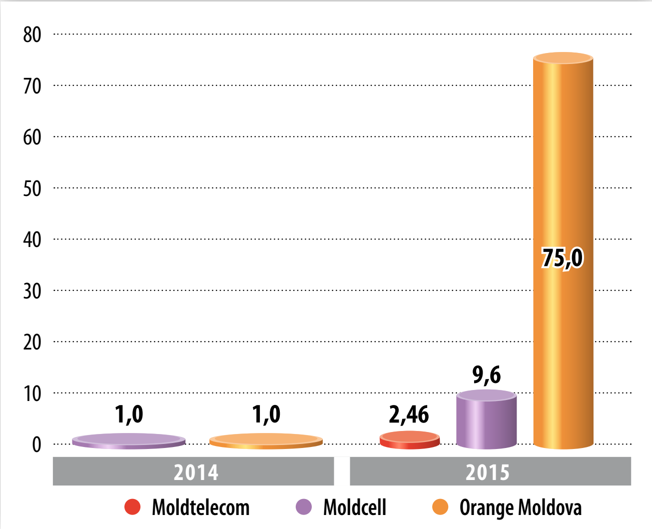

Chart 20 Rate of 4G networks territory coverage (%)

The data on 4G territory coverage show that in 2015 the highest coverage rate - 75% - was provided by Orange Moldova. The rate provided by Moldcell was 9,6% and the rate provided by Moldtelecom – 2,46% (Chart 20).

3 Fixed telephony

3.1 Dynamics of the market

In 2015, the total volume of sales on the fixed telephony market slightly increased – by 1,6% and reached 1 bn. 018,4 mln. lei. This growth was achieved due to higher revenues from wholesale call termination services. Sales by the incumbent Moldtelecom grew 0,9% up to 951,5 mln. lei, the sales of alternative providers - cu 12,9% si au însumat 66,9 mln. lei (Chart 21).

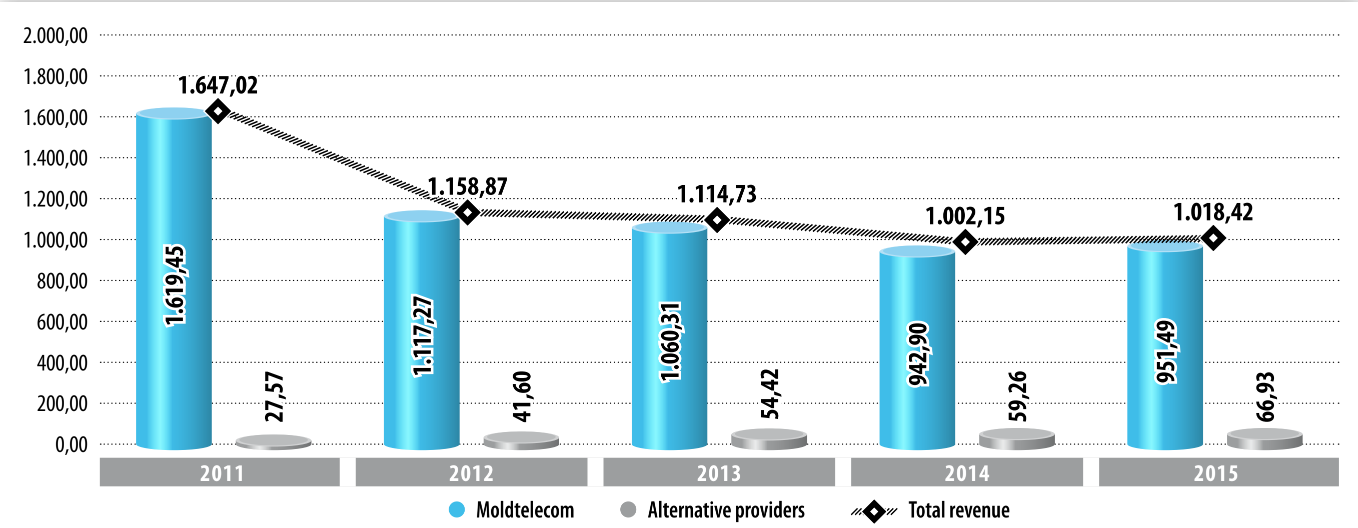

Chart 21 Evolution of revenues on the fixed telephony market (mln. lei)

Source: **ANRCETI**

As a result of higher sales volumes, the average monthly revenue per user (ARPU) of fixed telephony providers was 70,1 lei, 2,4 % increase compared to 2014. For Moldtelecom the ARPU was 73,0 lei (increased 2,8%), for alternative providers – 45 lei (increase 3,1%).(Chart 22). The average monthly revenue per individual user was 27 lei (4,5 lei or 14,3% decrease), per business user - 85 lei (7,9 lei or 8,5% decrease).

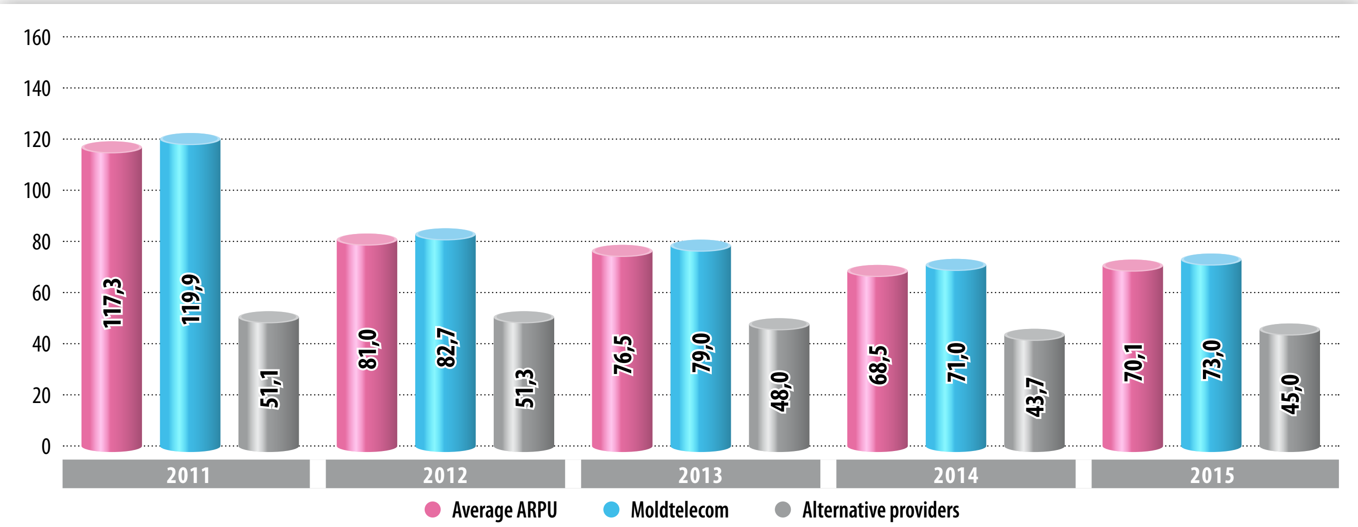

Chart 22 Evolution of average monthly revenue per fixed subscriber - ARPU (lei)

Source: **ANRCETI**

3.2 Fixed telephony subscribers and penetration

In 2015, the number of fixed telephony subscribers[9] dropped 15,8 thousand or 1,3% and made 1 mln. 202,5 thousand The decrease occurred due to the reduction of Moldtelecom's subscriber base by 23,8 thousand (-2,2%), which showed 1 mln. 74,5 thousand. Meanwhile, the subscriber base of the 24 alternative providers increased by about 8 thousand (+6,7%) reaching 127,9 thousand. As a result of this evolution, the subscription per 100 inhabitants decreased 0,4%, which equaled 33,82%. (Chart 23). By subscribers' place of residence, or urban areas, this indicator was 44,1%, in rural 26,4%.

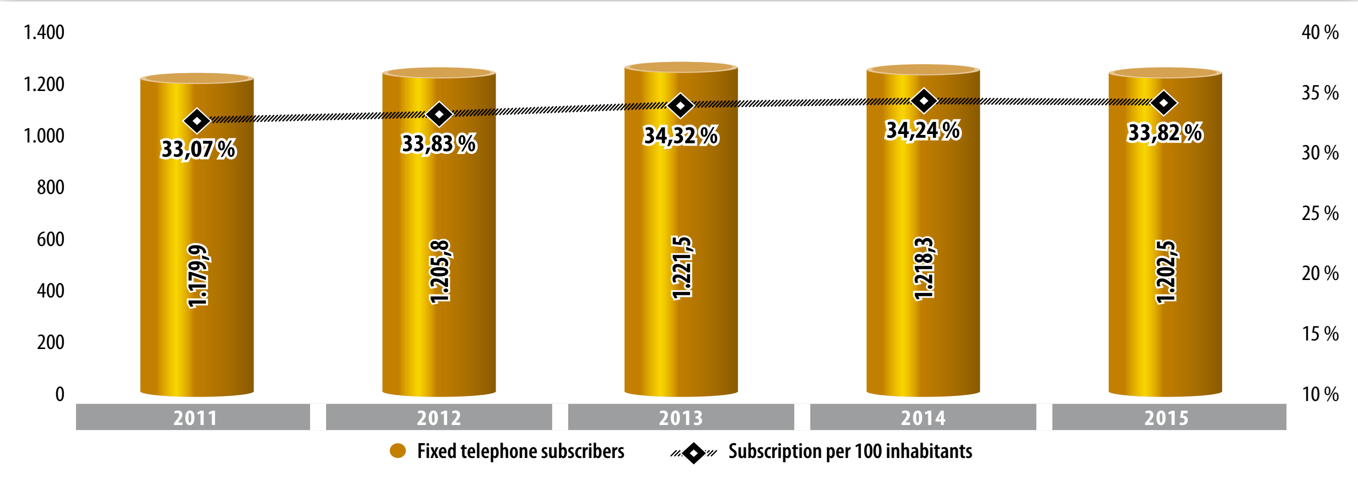

Chart 23 Number of subscribers (thousand) and fixed-line penetration rates

Source: **ANRCETI**

89% of the total subscribers were individual subscribers, 11% - businesses. More than half of the number of subscribers - 655,7 thousand – were urban residents, while 546,7 thousand (45,5 %) - rural. As per 31.12.2015, the market share of the incumbent Moldtelecom, by number of subscribers, was 89,4%, six alternative providers (Starnet Solutions, Sun Communications, Orange Moldova, Arax – Impex, Riscom and Moldova Railway) had market shares between 0,2% and 4%, the rest of alternative providers – market shares lower than 0,2%. Compared to the situation in other states/communities, in 2015 the fixed telephony penetration rate in the Republic of Moldova was higher than in Ukraine and Romania by 8,8 p. p. and by 12,8 p. p. accordingly. At the same time, this indicator was 4,5 p. p. lower than the 38,3% average in EU countries (Chart 24).

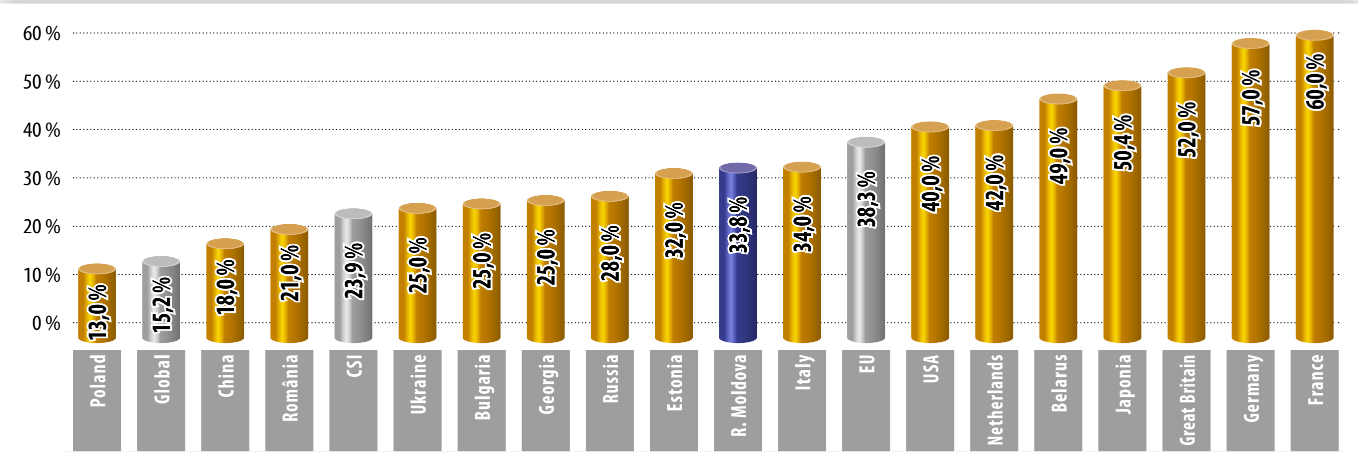

Chart 24 Fixed penetration rates[10] in Moldova and other countries/communities

Source: **ANRCETI**

[9] Calculations include fixed subscriber lines, for VoIP services – telephone numbers allocated to end users.
[10] Statistical data from ITU Report for 2014.

3.3 Evolution of traffic in fixed telephony networks

In 2015, the total volume of voice traffic in fixed telephone networks dropped 10,5%, compared to 2014, down to 2 bn. 20 mln. minutes, which was the result of declines on most traffic segments. Thus, the voice traffic to international destinations decreased about 27,4%, to mobile networks - 11,2% and the interconnection traffic – 3%. However, the voice traffic to other fixed networks went up 22%. of The total outbound calls, 46,3% were directed to mobile networks, 38,6% - to other fixed networks and 15,1% - to international destinations.

In the reporting timeframe, the MoU indicator (average number of minutes consumed by a subscriber) on the fixed-line market dropped 10,6% compared to 2014 and equaled 224 minutes (3 hours and 44 minutes), one call lasting on average 2 hours and 22 minutes (Chart 25).

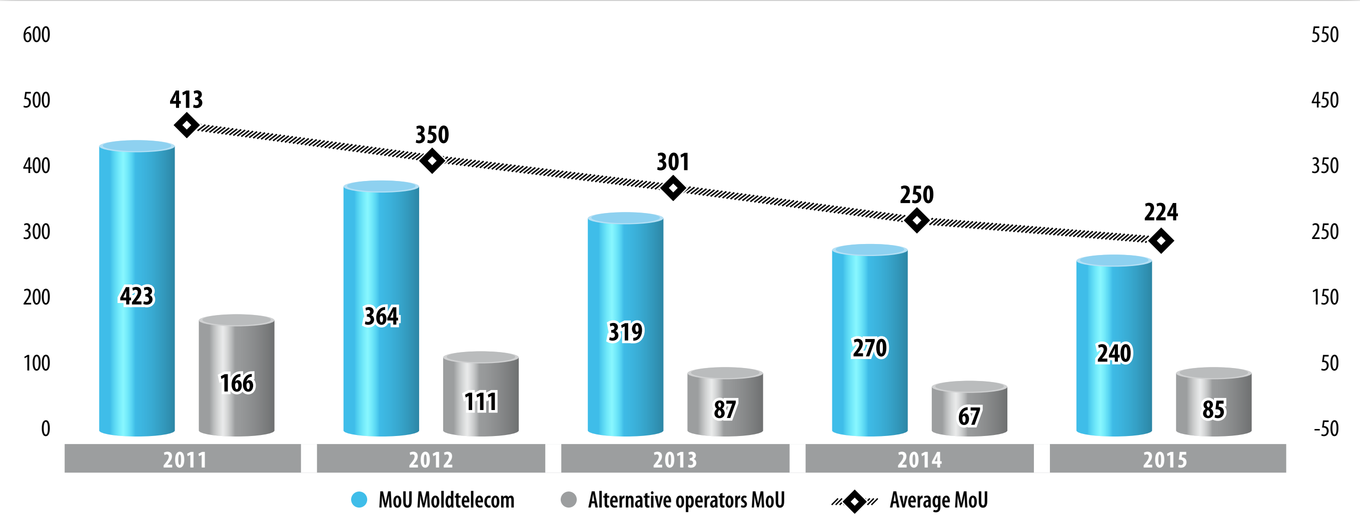

Chart 25 Evolution of MoU Indicators (minutes)

Source: **ANRCETI**

4 Fixed and mobile Internet access

In 2015, the capacity of Internet access channels from R. Moldova increased 35,8% over 2014, from 239,7 to 326 Gbps. This evolution was caused by the increase of investments in the development of fiber and 4G networks, increased number of users of Internet access services and speeds, more frequent Internet access from different devices (computer, laptop, smartphone and tablet).

4.1 Evolution of revenues from fixed and mobile Internet services

According to the data reported by 80 fixed and three mobile Internet access providers, the total sales volume on the two segments of the Internet access market increased over 2014, by 15% and exceeded 1,6 bn. lei. This revenues were about 23,5% of the electronic communications market. The most advanced revenue growth rate - 35% - was recorded on the market for mobile Internet access via mobile phone (revenues mobile Internet access voice users)

Table no.3 Revenues from fixed and mobile Internet access services (mln. lei)

Indicators	2011	2012	2013	2014	2015
Fixed Internet access	540,2	652,6	785,3	927,7	1.050,4
Mobile Internet acces	256,4	383,4	407,9	482,2	579,1
Including: revenues mobile Internet voice users[11]	*103,3*	*113,5*	*148,2*	*190,9*	*258,6*
Revenues dedicated Internet access	*153,1*	*269,9*	*259,7*	*291,3*	*320,5*
Total revenues fixed and mobile Internet access	**796,6**	**1.036,0**	**1.193,2**	**1.409,8**	**1.629,6**
Share of revenues from fixed Internet access	67,7%	62,8%	66,1%	66,1%	64,5%
Share of revenues from mobile Internet access	32,3%	37,2%	33,9%	33,9%	35,5%

Source: **ANRCETI**

4.1.1 Dynamics of revenues from fixed Internet access services

The data reported by fixed Internet access service providers show that the total volume of sales on this market increased 11,8% over 2014 up to 1 bn. 50,45 mln.lei, the highest volumes of sales being recorded by Moldtelecom, Starnet Solutions and Sun Communications

The sales of Moldtelecom increased 66,5 mln. lei or 11,0% and reached over 669,82 mln. lei, Starnet Solutions - 28,7 mln. lei sau cu 13,8% and reached 236,82 mln. lei, the ones of Sun Communications – 12,5 mln. lei or 34,6% and reached 48,65 mln. lei. The cumulative volume of sales made by the other 77 suppliers of those services increased by 2,8 mln. lei up to 95,17 mln. lei. (Chart 26).

[11] Revenues from Internet access via mobile phones are presented as information in order to reflect the total revenues on the Internet access market. Additionally, these revenues can be found as part of the total amount of revenues recorded on the mobile market, given that theay are revenues from services additional to the basic one – mobile telephony.

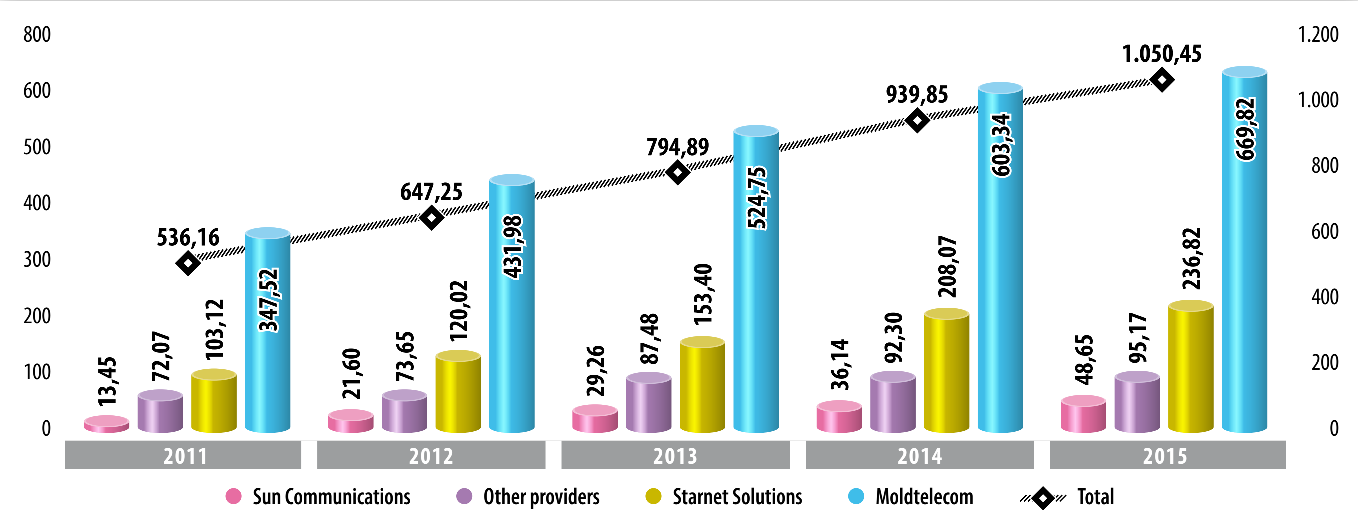

Chart 26 Evolution of revenues collected by fixed Internet access providers (mln. lei)

Source: **ANRCETI**

The data from the Chart below show that over the past five years, the market share of Moldtelecom remained virtually unchanged (2/3 of the market), while the market shares of Starnet Solutions and Sun Communications increased 3.3 p. p., accordingly, 2.1 p. p. (Chart 27).

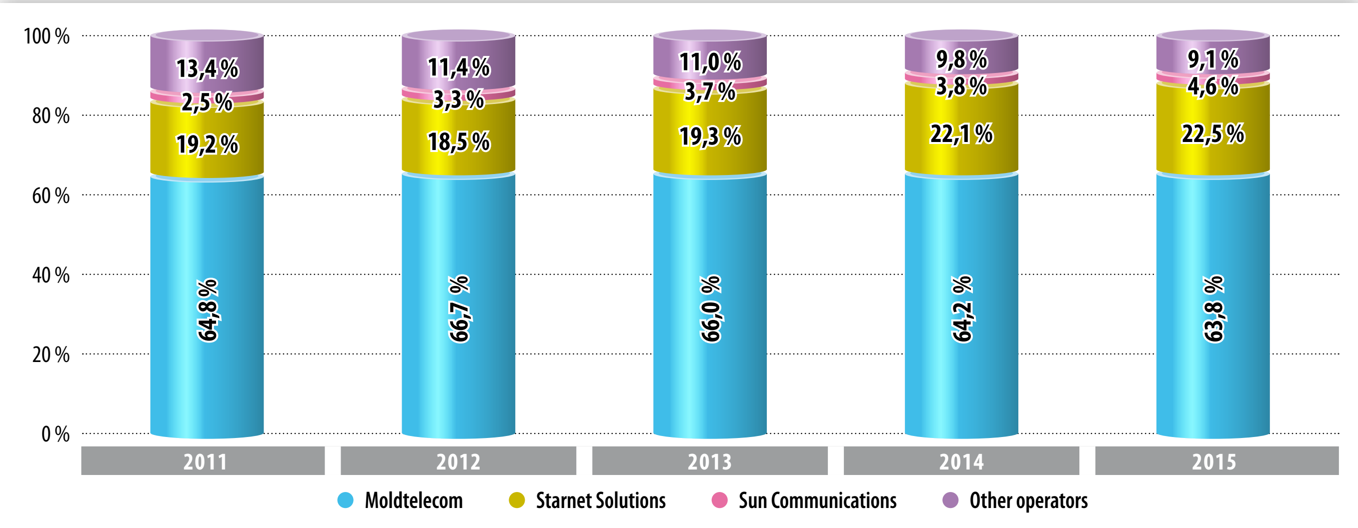

Chart 27 Market shares of fixed Internet access providers, by revenues

Source: **ANRCETI**

As a result of revenue increase for fixed Internet access, the average monthly revenue per user (ARPU) increased 4,9% over 2014, making up 168,3 lei (Chart 28). The ARPU per individual subscriber was 151,2 lei, while the ARPU per business subscriber was 540,8 lei.

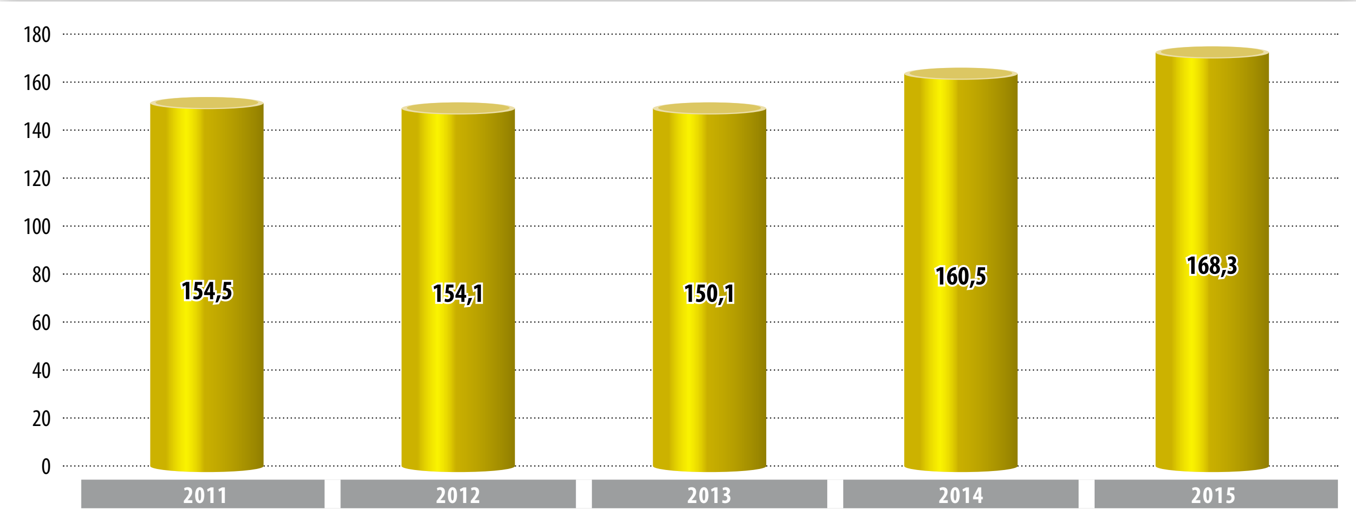

Chart 28 Evolution of average monthly revenue per user (ARPU) of fixed Internet access services (lei)
Source: **ANRCETI**

This indicator increased due to the growing number of end users that prefer the advantageous packages proposed by providers that include free or at reduced rates (TV and free HD channels included, mobile Internet traffic at reduced rates, voice fixed-mobile minutes at discounted rates) and high speed Internet access.

4.1.2 Dynamics of revenues from mobile Internet access services

In 2015, the total revenues of the three mobile providers (Orange Moldova, Moldcell and Moldtelecom (Unite) from sales of Internet access services at mobile locations (Internet access via mobile phone as an additional service and dedicated Internet access) increased over 2014 by 20% and reached 579,1 mln. lei. This is 1/3 of the cumulated volume of revenues collected on the market for fixed and mobile Internet access. The revenues of Moldcell increased by 34,2% and made about 142,5 mln. lei, those of Orange Moldova – 1by 8,1% and reached 342,5 mln. lei, the revenues of Moldtelecom - by 9,4% to a total of 94,2 mln. lei (Chart 29).

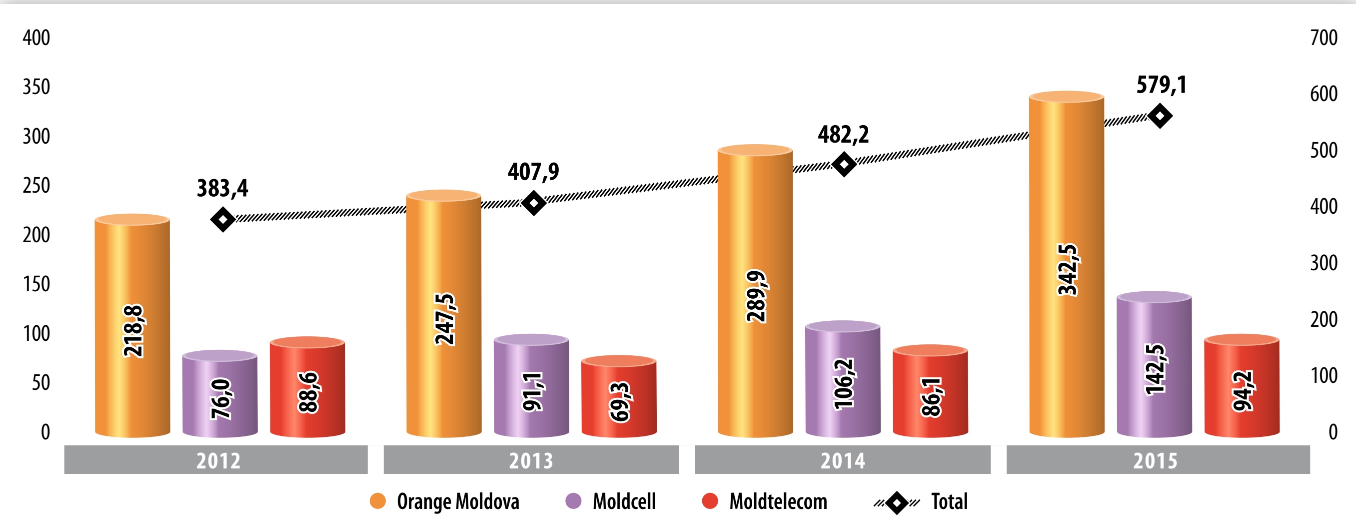

Chart 29 Evolution of revenues on mobile Internet access market (mln. lei)
Source: **ANRCETI**

In 2015, the market shares of the three mobile Internet access providers did not change significantly. According to ANRCETI estimations, the share of Orange Moldova on this market segment was 59,1%, followed by Moldcell with 24,6% and Moldtelecom – 16,3% (Chart 30).

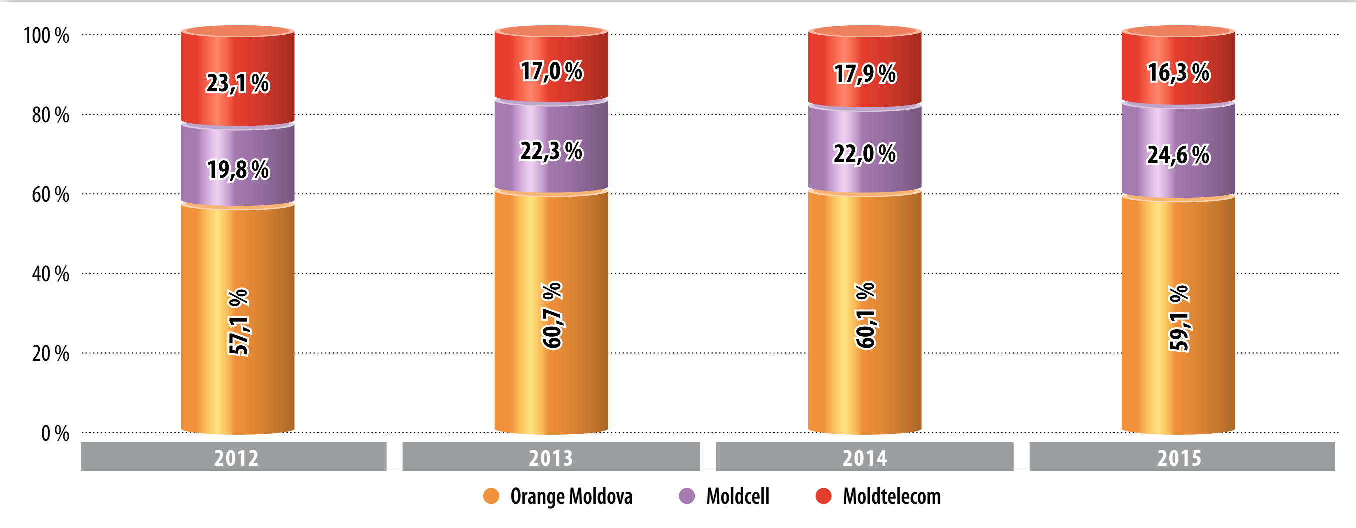

Chart 30 Market shares of mobile Internet access providers, by revenues

Source: **ANRCETI**

Statistical data also show that the total of revenues collected by the three mobile providers from dedicated mobile Internet access services increased 20% over 2014 up to 320,6 mln. lei. The volume of sales by Orange Moldova was 119,5 mln. lei, Moldcell– 113,9 mln. lei and Moldtelecom – 87,2 mln. lei (Chart 31).

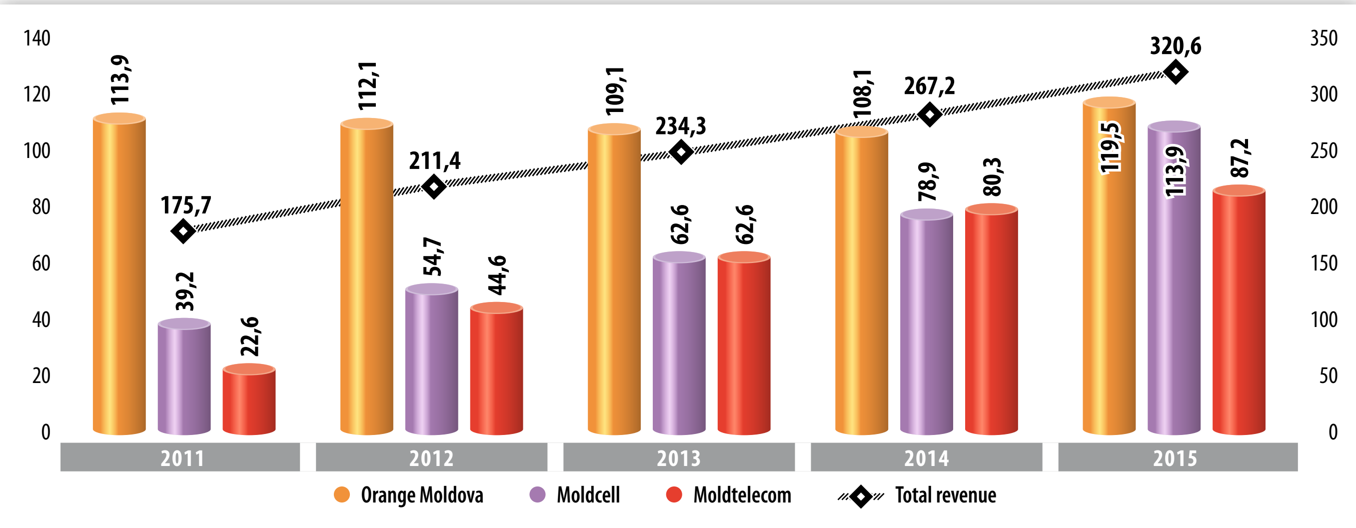

Chart 31 Evolution of revenues on the market for dedicated mobile Internet access services (mln. lei)

Source: **ANRCETI**

In the reporting year, the shares of the market for dedicated mobile Internet access by revenues were distributed as follows: Orange Moldova – 37,3%, Moldcell - 35,5% and Moldtelecom – 27,2% (Chart 32). The data in the Chart below show that in the recent five years the market share of Orange Moldova declined by 27,5 p. p, while the shares of Moldcell and Moldtelecom increased 13,2 p. p. and 14,3 p. p accordingly.

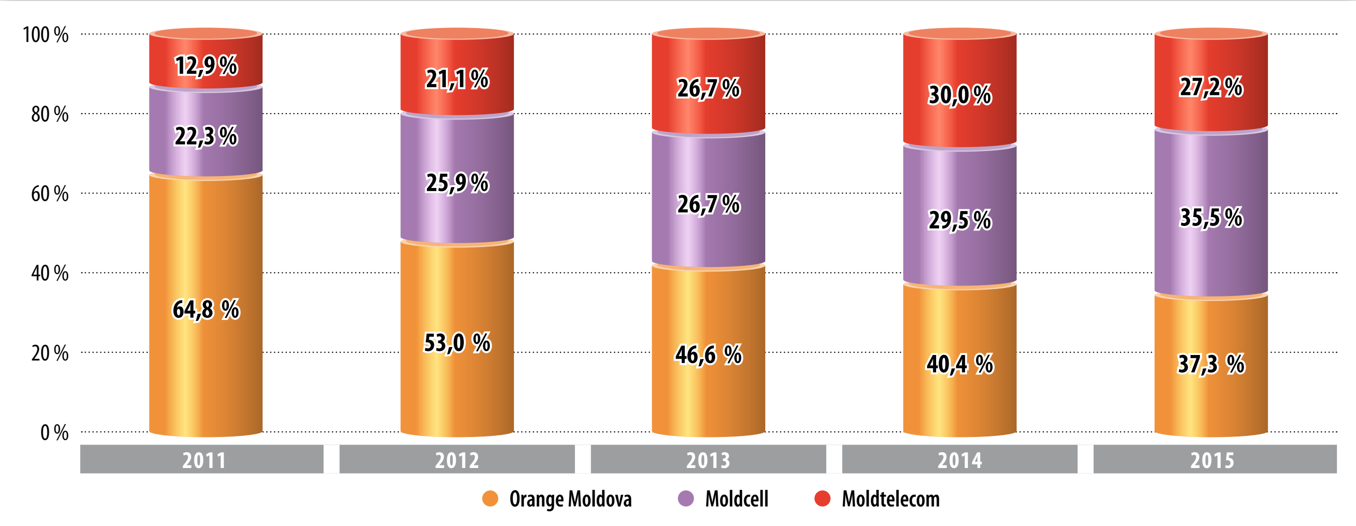

Chart 32 **Market shares of dedicated mobile Internet access service providers, by turnover**

Source: **ANRCETI**

The average monthly revenue per user (ARPU) for dedicated mobile Internet access increased over 2014 by 8,8%, to a total of of 92,5 lei. Moldtelecom had the highest ARPU - 97,7 lei, followed by Moldcell - 95,5 lei, and Orange Moldova – 86,4 lei (Chart 33).

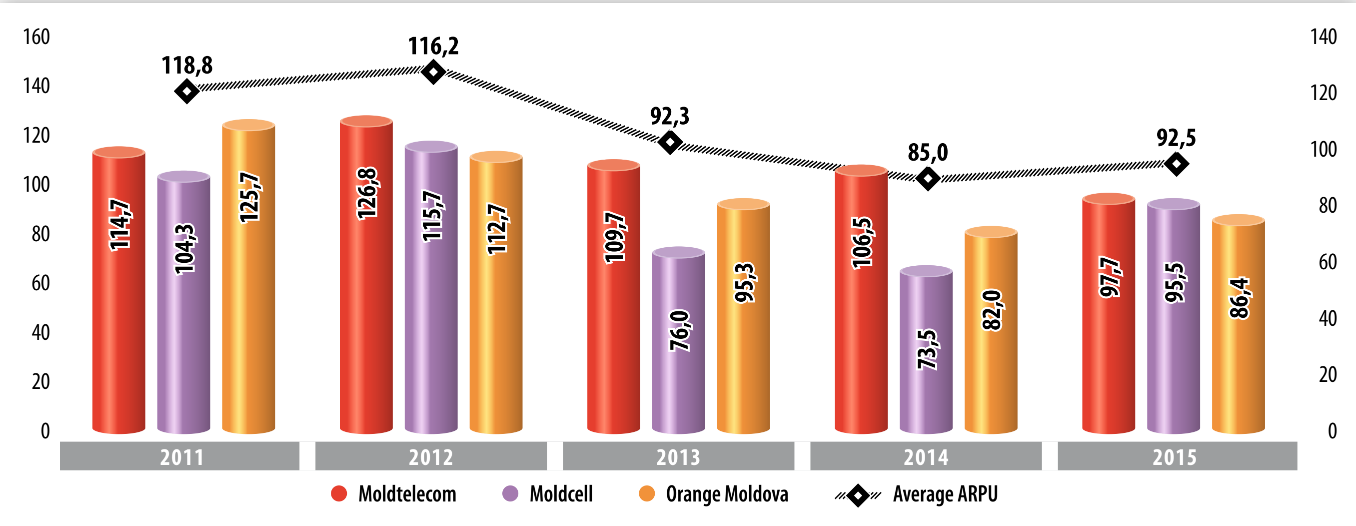

Chart 33 **Average monthly revenue per user (ARPU) of dedicated Internet access service providers (lei)**

Source: **ANRCETI**

4.2 Subscribers and penetration rates of fixed and mobile Internet access services

In 2015, the number of subscribers to fixed Internet access services increased 4,9% over 2014 and reached 534,4 thousand, while the number of mobile Internet access users (via mobile phone, modems - 2G, 3G, 4G) increased by 4,2% and exceeded 1 mln. 760 thousand. The analysis of the increase of fixed and mobile connections in absolute values shows that within one year the number of mobile Internet access users increased 71,6 thousand, while the number of fixed Internet access users - 25,2 thousand.

Table no.4 Evolution of the number of subscribers to fixed and mobile Internet access services

Indicators	2011	2012	2013	2014	2015	Change 2015-2014
1. Broadband access at fixed locations	**352.157**	**413.833**	**467.072**	**509.195**	**534.393**	**4,9%**
2. Internet access at mobile locations:	409.760	1.536.074	1.632.251	1.688.416	1.760.060	4,2%
2.1 including users of mobile broadband access	468.475	863.839	1.017.920	1.188.415	1.341.119	12,8%
2.1.1 including subscribers to dedicated mobile Internet	124.813	178.459	244.602	279.504	298.429	6,8%
2.1.2. including users of broadband access, voice users	343.662	685.380	773.318	908.911	1.042.690	14,7%
Users of Internet access via mobile phone (2G, 3G, 4G)	**284.947**	**1.357.615**	**1.387.649**	**1.408.912**	**1.461.631**	**3,7%**
1. Penetration fixed Internet access	10,0%	11,7%	13,1%	14,3%	15,0%	+ 0,7 p.p.
2. Penetration mobile Internet acces	11,5%	43,2%	45,9%	47,4%	49,4%	+2,0 p.p.
2.1 including penetration for mobile broadband	13,1%	24,3%	28,6%	33,4%	37,7%	+4,3 p.p.
2.1.1 including penetration for dedicated mobile Internet access	3,5%	5,0%	6,9%	7,9%	8,4%	+0,5 p.p.

Source: **ANRCETI**

The data in the Chart below show that within one year, the number of broadband users (3G, 4G) increased 12,8% up to 1 mln. 341,1 thousand, while the number of subscribers to fixed broadband increased 5% and exceeded 534,4 thousand. The fast increase in the number of mobile broadband users confirms the fact that Moldovans prefer high speed Internet (Chart 34).

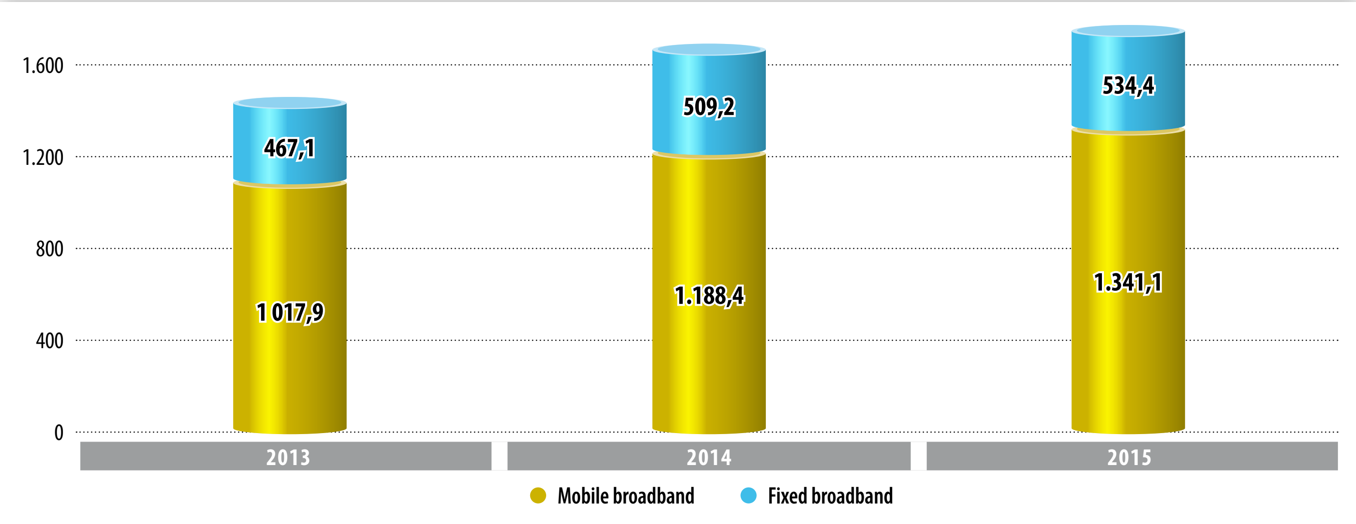

Chart 34 Evolution of the number of fixed and mobile broadband Internet access users (thousand)

Source: **ANRCETI**

From the total number of mobile phone users, 1,46 mln. accessed the Internet by means of a mobile phone through 2G/3G/4G networks, as an additional service to voice service. At the same time, the total mobile Internet traffic generated by these users was 6,18 mln. GB, while the average monthly Internet traffic consumed per user (AUPU) was 352 MB, up 177%.

As a result of the increasing number of users, the penetration rate for mobile Internet access services per 100 inhabitants, went up by 2 p. p. and exceeded 49,4%, the rate of mobile broadband – by 4,3 p. p. and reached 37,7% , while the rate of dedicated mobile Internet access dropped by 0,5 p. p. and made 8,4%. Meanwhile, the penetration rate of fixed Internet access services increased 0,7 p. p. up to 15,0% (Chart 35).

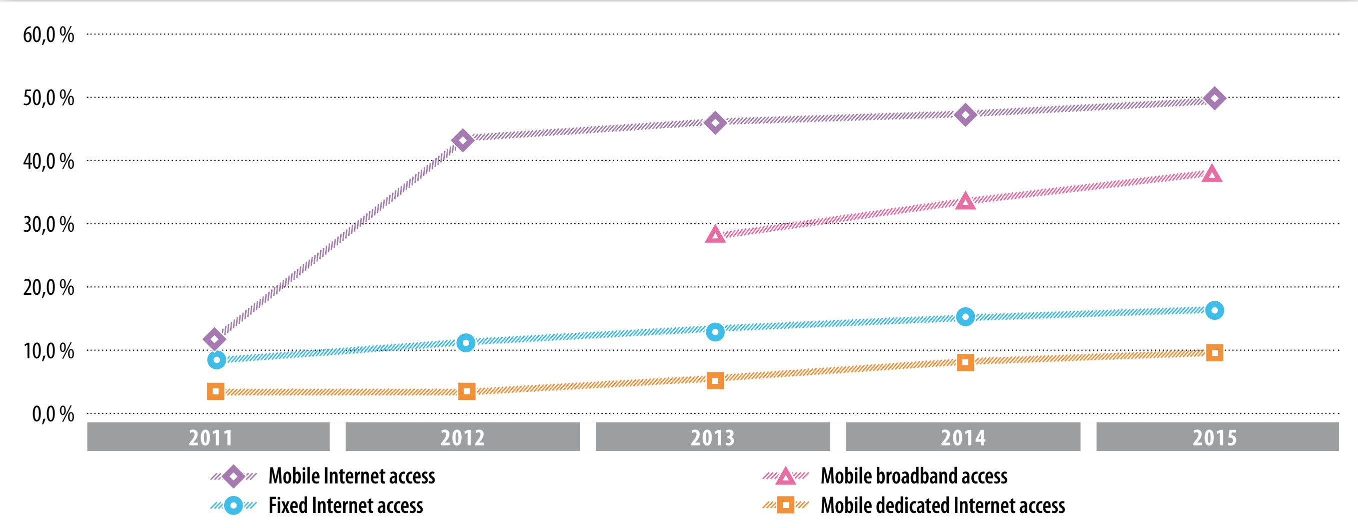

Chart 35 Evolution of penetration rates of fixed and mobile Internet access services
Source: **ANRCETI**

4.2.1 Market shares, penetration rates and technologies of fixed Internet access

In 2015, the market shares of the main fixed Internet access service providers, by number of subscribers, did not change significantly. Moldtelecom still had the largest market share - 65,3%, followed by Starnet Solution and Sun Communications, with 20,7% and 6,6% accordingly. The cumulative share of the other 77 providers on this market made up 7,4% (Chart 36).

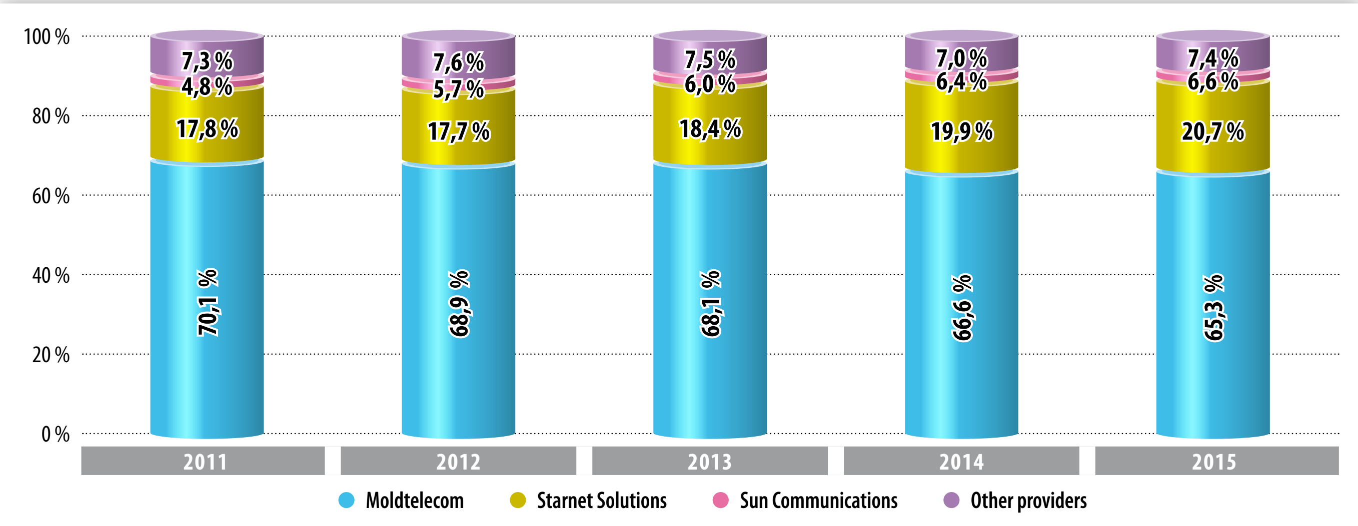

Chart 36 Market shares of main fixed Internet access service providers, by number of subscribers
Source: **ANRCETI**

The 15% penetration rate of fixed Internet access services in Moldova exceeds by 4,7 p. p. the global average (10,3%). This indicator is by 5,7 p. p. higher than the one attested in Ukraine (9,3%) and by 3,5 p. p. lower than the one in Romania (18,5%). However, the value of this indicator is 1,9 p.p. higher than the average in the CIS countries and by 13,6 p. p. lower than the average 28,6 % in EU states.(Chart 37).

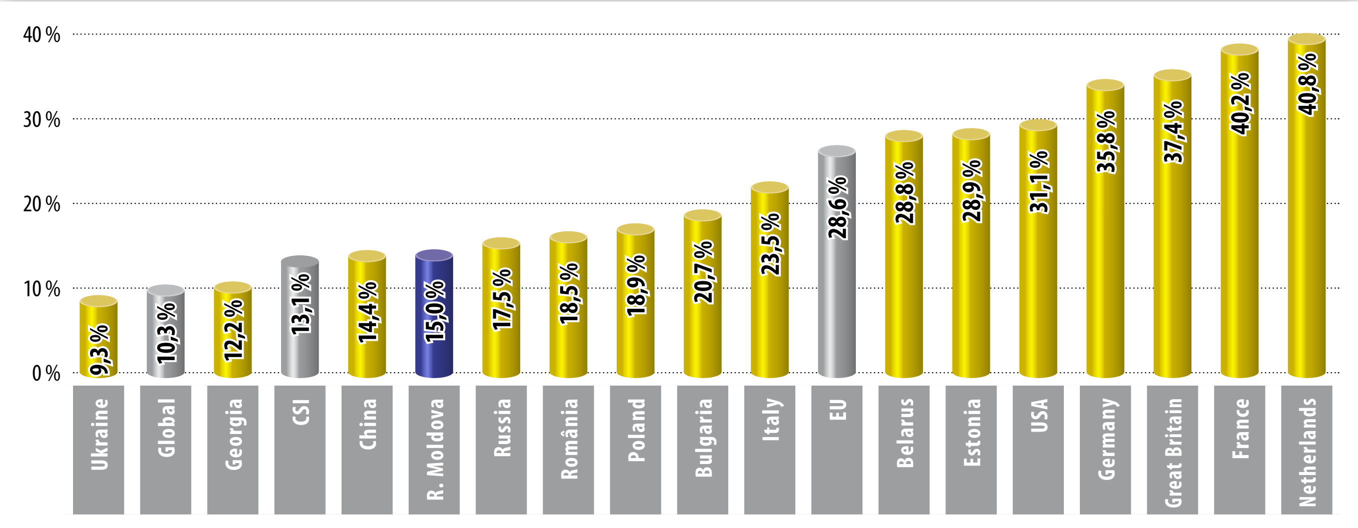

Chart 37 Penetration rates[12] of fixed Internet access services in Moldova and in other countries/communities

In terms of infrastructure of access to subscribers, in 2015 the number of FTTx (*Fiber to the premises*) connections increased 11,3% and exceeded 289,2 thousand, while the number of xDSL (*Digital Subscriber Line*) connections declined about 4 % down to 203,4 thousand. Meanwhile, the number of coaxial cable connections increased by 10% and reached 39,4 thousand. (Chart 38).

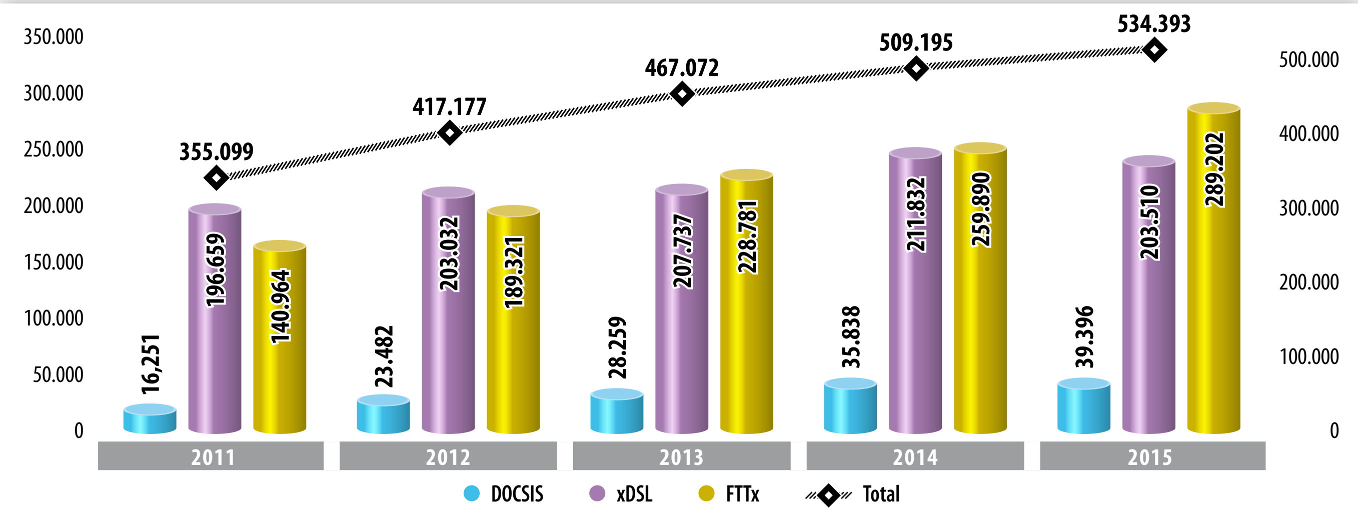

Chart 38 Evolution of the number of subscribers to fixed Internet access services, by technology of access

Source: **ANRCETI**

[12] Statistical data from ITU Report for 2014.

In 2015, the share of FTTx-based connections increased by 3,1 p. p. and showed 54,1%, whereas the share of xDSL-based connections dropped by 3,5 p. p. to 38,1% (Chart 39).

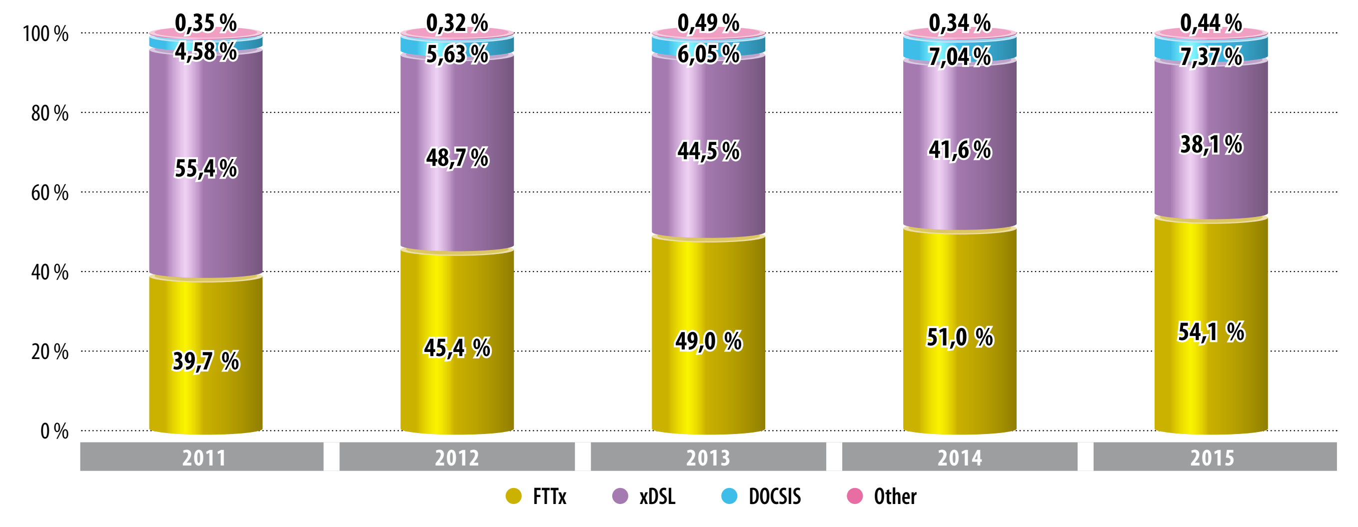

Chart 39 Use of fixed Internet access technologies

Source: **ANRCETI**

The analysis of fixed Internet connections in terms of data transfer speeds, requested by subscribers, shows that in 2015, connections enabling from 30 Mbps to 100 Mbps increased most of all. The number of such subscribers increased over 2014 by 86% and reached 176,2 thousand.

From the total fixed Internet connections, 46% allow speeds of 30 Mbps and lower than 100 Mbps, 33,7% - between 10 Mbps and 30 Mbps, 10,1% - between 2 Mbps and 10 Mbps, 5,7% - over 100 Mbps, the remaining 4,5% - up to 2 Mbps. (Chart 40).

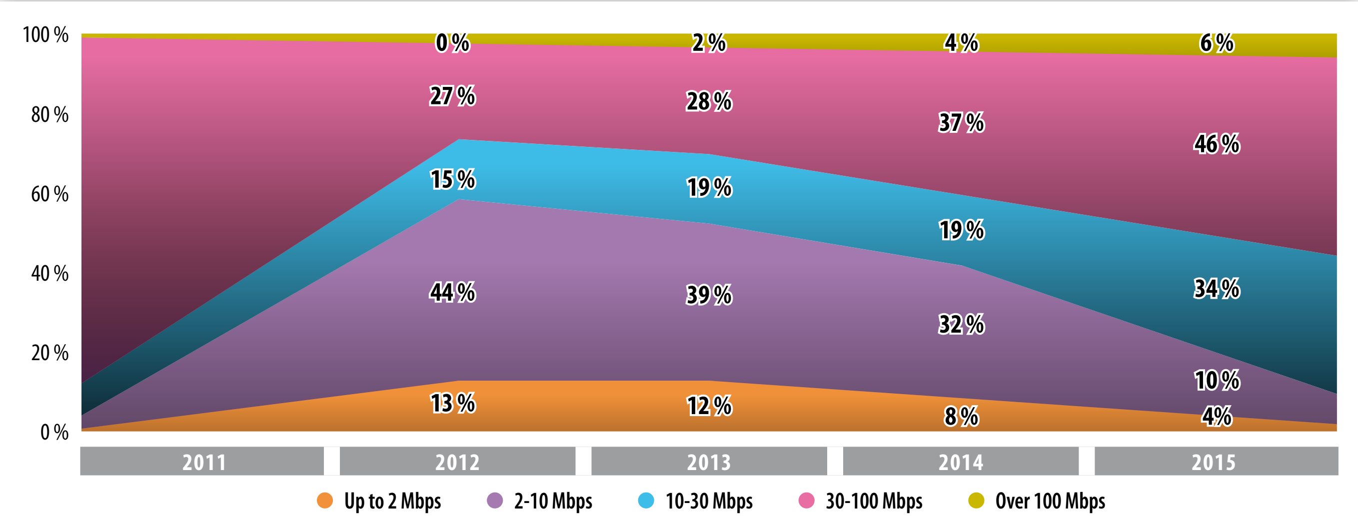

Chart 40 Structure of number of connections to fixed Internet, by data transfer rate

Source: **ANRCETI**

According to data submitted by providers, at the end of 2015 more than half of fixed Internet subscribers were urban residents (60,5%) and the other (39,5%) – rural residents. Most subscribers to these services live in Chisinau municipality (41,3%). The penetration rate of fixed Internet access services in Chisinau per 100 households was 79,6%, while in most administrative-territorial units - this indicator varies between 25 and 40%. (Table no. 5).

Table no.5 Use of Internet access services at fixed locations provided in administrative-territorial units of Moldova, as per 31.12.2015.

no.	Territorial-administrative unit	Total broadband subscribers	Broadband service penetration per 100 households	Subscribers				Share of broadband access technologies			
				xDSL	FTTx	Coaxial cable	Other techn.	xDSL	FTTx	Coaxial cable	Other techn.
1	mun.Chisinau	220.180	78,98%	11.882	170.951	35.659	1.688	5,4%	77,6%	16,2%	0,8%
2	mun. Balti	27.529	50,12%	3.715	22.476	1.330	8	13,5%	81,6%	4,8%	0,0%
3	R. Anenii Noi	10.059	37,11%	7.371	2.444		244	73,3%	24,3%	0,0%	2,4%
4	R. Basarabeasca	3.122	32,44%	2.076	1.045		1	66,5%	33,5%	0,0%	0,0%
5	R. Briceni	9.949	39,06%	6.427	3.520		2	64,6%	35,4%	0,0%	0,0%
6	R. Cahul	15.530	39,57%	9.756	5.693	58	23	62,8%	36,7%	0,4%	0,1%
7	R. Cantemir	6.362	34,93%	5.677	677		8	89,2%	10,6%	0,0%	0,1%
8	R. Calarasi	7.607	27,79%	4.681	2.926		0	61,5%	38,5%	0,0%	0,0%
9	R. Causeni	9.275	30,98%	6.863	2.407		5	74,0%	26,0%	0,0%	0,1%
10	R. Cimislia	6.664	34,53%	4.378	2.285		1	65,7%	34,3%	0,0%	0,0%
11	R. Criuleni	9.010	38,88%	6.235	2.772		3	69,2%	30,8%	0,0%	0,0%
12	R. Donduseni	4.040	22,54%	3.444	595		1	85,2%	14,7%	0,0%	0,0%
13	R. Drochia	10.064	30,61%	6.205	2.377	1.480	2	61,7%	23,6%	14,7%	0,0%
14	R. Dubasari	3.377	30,70%	2.717	659		1	80,5%	19,5%	0,0%	0,0%
15	R. Edinet	10.285	34,04%	5.760	4.524		1	56,0%	44,0%	0,0%	0,0%
16	R. Falesti	8.785	26,62%	6.021	2.762		2	68,5%	31,4%	0,0%	0,0%
17	R. Floresti	9.708	29,85%	6.527	2.927		254	67,2%	30,2%	0,0%	2,6%
18	R. Glodeni	6.474	30,16%	4.923	1.550		1	76,0%	23,9%	0,0%	0,0%
19	R. Hîncesti	12.512	33,49%	8.410	4.102		0	67,2%	32,8%	0,0%	0,0%
20	R. Ialoveni	13.409	45,28%	6.437	6.321	649	2	48,0%	47,1%	4,8%	0,0%
21	R. Leova	5.555	32,88%	4.691	864		0	84,4%	15,6%	0,0%	0,0%
22	R. Nisporeni	5.349	25,94%	4.152	1.197		0	77,6%	22,4%	0,0%	0,0%
23	R. Ocnita	5.522	26,69%	5.019	501		2	90,9%	9,1%	0,0%	0,0%
24	R. Orhei	12.849	31,09%	7.608	5.232		9	59,2%	40,7%	0,0%	0,1%
25	R. Rezina	5.074	28,58%	3.467	1.604		3	68,3%	31,6%	0,0%	0,1%
26	R. Rîscani	7.565	28,77%	4.482	3.082		1	59,2%	40,7%	0,0%	0,0%
27	R. Sîngerei	10.437	33,60%	6.002	4.433		2	57,5%	42,5%	0,0%	0,0%
28	R. Soroca	10.259	28,05%	5.869	4.389		1	57,2%	42,8%	0,0%	0,0%
29	R. Straseni	10.214	36,57%	7.089	3.121		4	69,4%	30,6%	0,0%	0,0%
30	R. Soldanesti	3.355	22,10%	3.200	154		1	95,4%	4,6%	0,0%	0,0%
31	R. Stefan Voda	7.112	30,58%	4.484	2.625		3	63,0%	36,9%	0,0%	0,0%
32	R. Taraclia	4.780	37,18%	4.055	503	220	2	84,8%	10,5%	4,6%	0,0%
33	R. Telenesti	6.886	28,55%	5.640	1.245		1	81,9%	18,1%	0,0%	0,0%
34	R. Ungheni	13.443	34,72%	6.333	7.109		1	47,1%	52,9%	0,0%	0,0%
35	UTA Gagauzia	22.052	47,65%	11.914	10.130		8	54,0%	45,9%	0,0%	0,0%
	Total	**534.393**	**44,58%**	**203.510**	**289.202**	**39.396**	**2.285**	**38,1%**	**54,1%**	**7,4%**	**0,4%**

Source: **ANRCETI**

4.2.2 Subscribers and penetration of dedicated mobile Internet access service

In the reporting period, the number of dedicated mobile Internet users increased over 2014 by 6,8% and reached 298,4 thousand, while the penetration rate per 100 inhabitants increased 0,5 p. p. and constituted 8,4% (Chart 41).

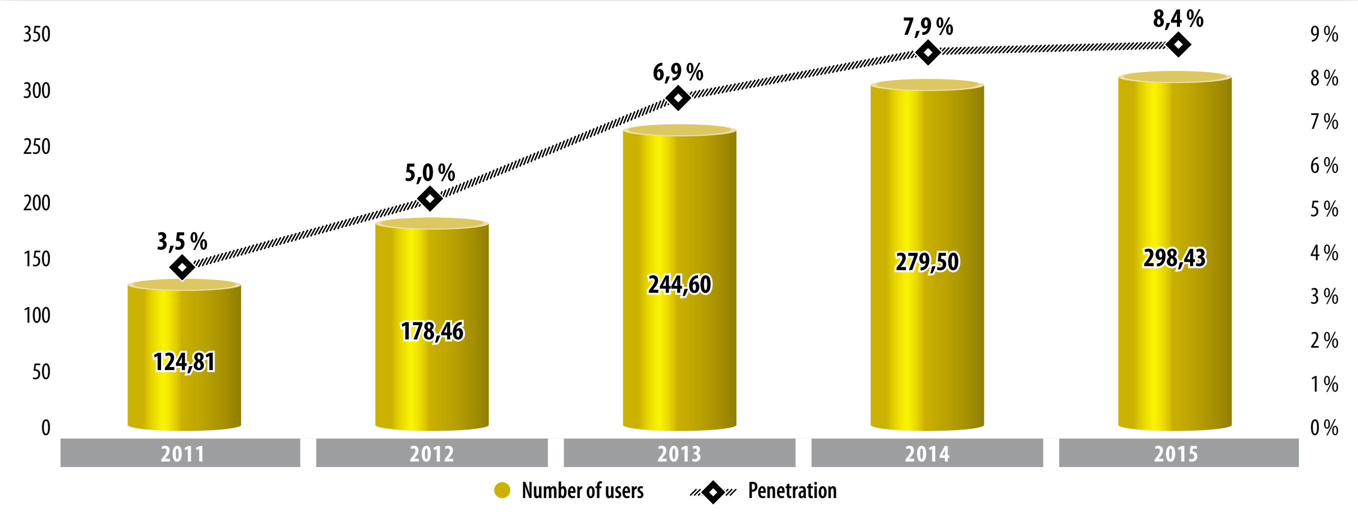

Chart 41 Evolution of number of users (thousands) and dedicated mobile Internet penetration rates (%)

Source: **ANRCETI**

As per 31.12.2015, Orange Moldova had the biggest number of users of dedicated mobile Internet – 83,4 thousand, followed by Moldcell - 100,16 thousand and Moldtelecom - 65,3 thousand. (Chart 42).

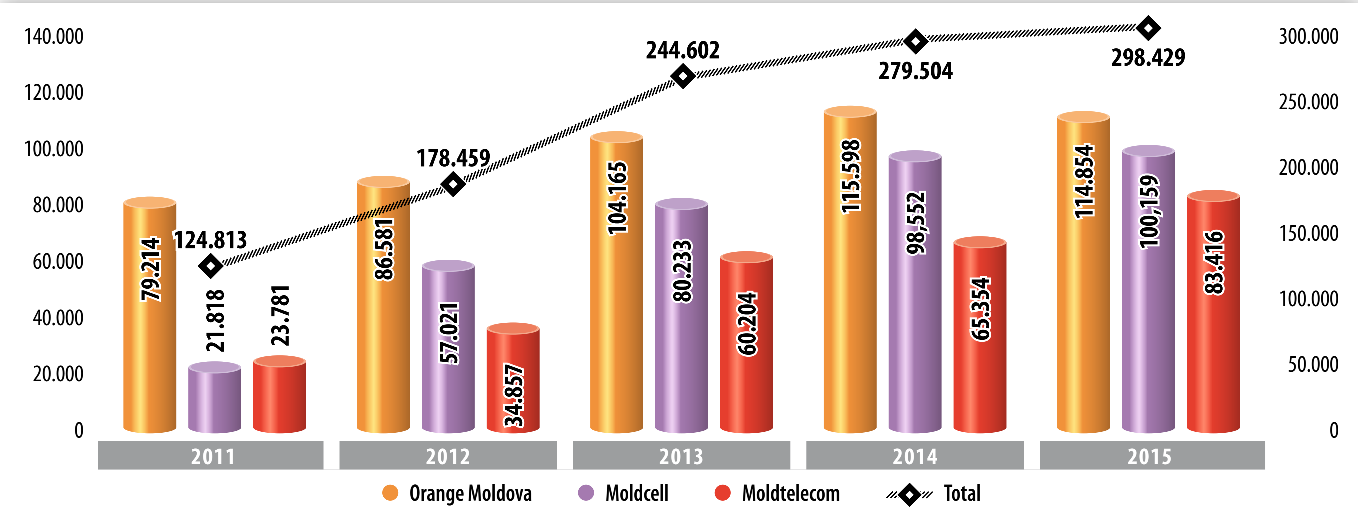

Chart 42 Evolution of the number of dedicated mobile Internet users, per provider

Source: **ANRCETI**

In 2015, the total traffic generated by the users of dedicated mobile Internet services was 32,9 mln. 906 thousand GB, while the monthly average Internet traffic per user (AUPU) was 9,3 GB.

5 Broadcasting and retransmission of audiovisual programs

5.1 Dynamics of the market

According to the statistical reports submitted to ANRCETI by the 166 active providers of these services, in 2015 the total volume of sales dropped compared to 2014 by 1,1% and totaled 366,13 mln. lei. The revenues from air TV and radio broadcasting services equaled 210,3 mln. lei or 57,4% from the total sales on the market for broadcasting and retransmission of audiovisual programs, whereas the revenues from pay TV services made up 155,84 mln. lei or 42,6% of the the turnover of this market. (Chart 43).

The revenues generated by pay TV services dropped by 5%, mainly due to the decreasing number of cable TV subscribers.

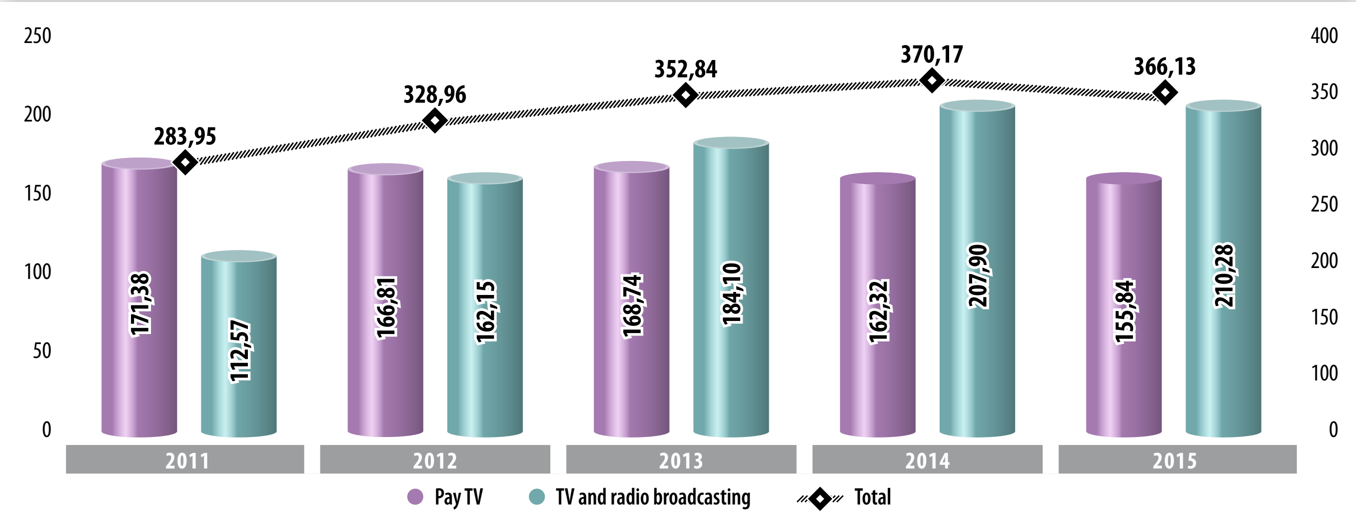

Chart 43 Evolution of revenues from broadcasting and retransmission of audiovisual programs (mln. lei)

Source: **ANRCETI**

The data presented to ANRCETI by the 83 active providers of pay TV services show that in 2015 the situation on this market evolved differently: the segment of IP TV services continued to grow, while the cable TV segment – to decline. The revenued generated by IP TV increased over 2014 by 2,8 mln. lei (+5%) and exceeded 58,1 mln. lei, while the revenued from cable TV services dropped by 9,5 mln. lei (-9%), down to 97,5 mln. lei. As a result, the average monthly revenue per user (ARPU) for pay TV services dropped (the forth consecutive year) by 2% to 47,28 lei. (Chart 44).

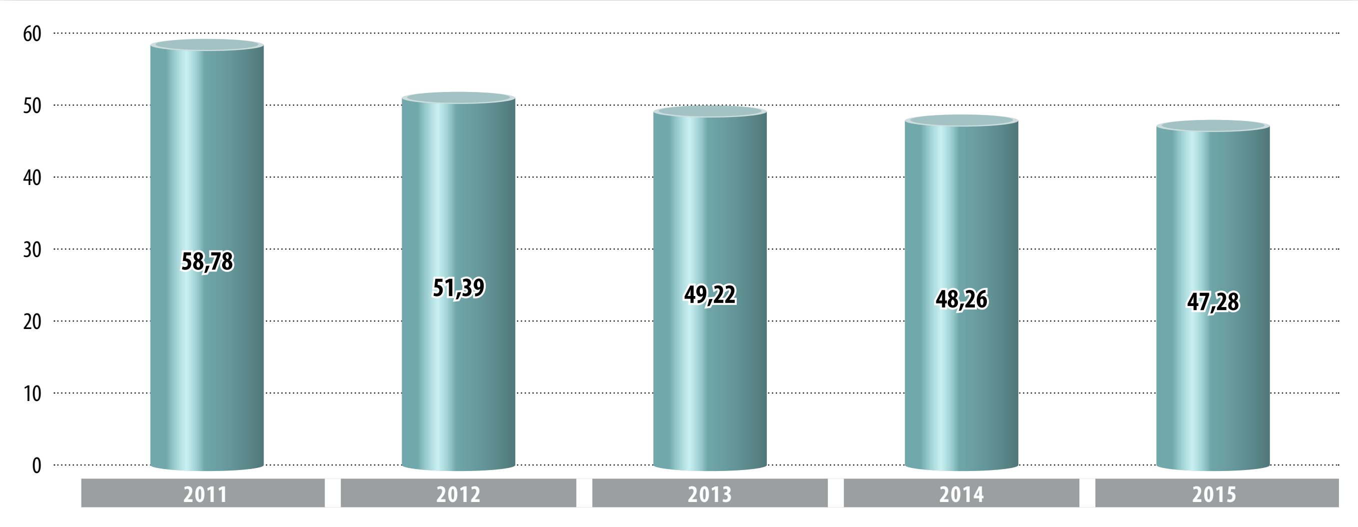

Chart 44 Evolution of average monthly revenue per user for pay TV services - ARPU (lei)

Source: **ANRCETI**

Statistical data show that the average monthly revenues per user (ARPU) of the biggest pay TV providers on this market – Sun Communications and Moldtelecom – have been under decline for the recent three years. In 2015, the ARPU of Sun Communications was 35,9 lei, the ARPU of Moldtelecom – 66,6 lei.

The pay TV market shares by turnover, were the following: Moldtelecom – 28,8%, Sun Communications – 27,8%, TV-BOX – 8,3% and A.M.T. – 3,6%. The other 79 providers total market share was estimated as 31,5 % (Chart 45).

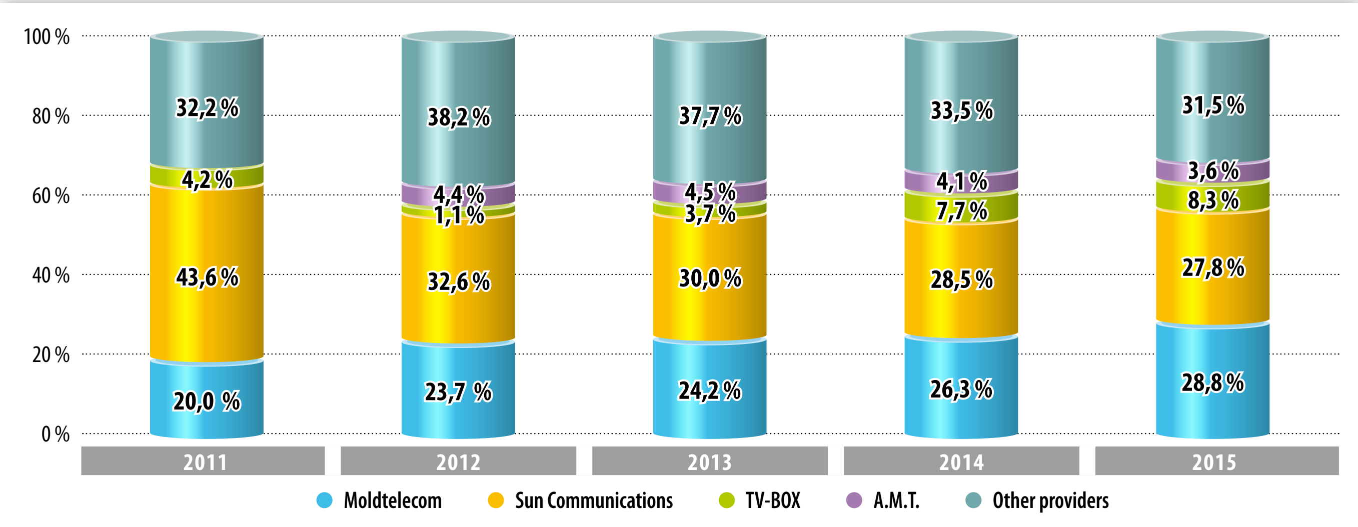

Chart 45 Evolution of market shares of biggest pay TV providers, by revenues

Source: **ANRCETI**

5.2 Subscribers and penetration rate of pay TV services

According to statistical reports by pay TV service providers, in 2015 the number of IP TV subscribers increased by 6,1 thousand (+9,8%) up to 68,8 thousand, while the number of pay TV subscribers dropped by 3,1 thousand (-1,5%) and equaled 206,1 thousand. Generally, the number of pay TV service subscribers slightly increased, by 0,5% up to 275,3 thousand. As a result of this evolution, the penetration rate of pay TV services per 100 inhabitants was 7,73%, whereas the penetration rate per 100 households was estimated at 23%. This means that every fourth household in Moldova uses pay TV services. (Table no.6).

Table no.6 Evolution of the number of pay TVsubscribers and penetration rates

Indicators	2011	2012	2013	2014	2015
Cable TV subscribers	211.186	227.398	220.619	209.258	206.502
IPTV subscribers	35.111	46.847	55.500	62.652	68.788
DTH subscribers	6.282	7.758	7.450	-	-
MMDS subscribers	3.539	2.824	2.940	2.129	-
Total subscribers	**256.118**	**284.827**	**286.509**	**274.039**	**275.290**
Penetration per 100 inhabitants	7,2%	8,0%	8,0%	7,7%	7,73%
Penetration per 100 households	**21,5%**	**24,0%**	**24,1%**	**23,1%**	**23,2%**

Source: **ANRCETI**

Statistical data showed that by the end of 2015 most pay TV subscribers - 77,2% - were urban residents, while 22,8% - were rural residents. The concentration of subscribers in urban area is explained by the fact that in cities, the purchasing power is higher and there are more providers of pay TV with attractive offers, including packages with Internet access and digital TV. Rural residents do not have such conditions, which fact determines them to use TV services via common antennas.

By the end of 2015, from 275,3 thousand of pay TV services, 75% (206,5 thousand) used cable TV, while 25% (68,8 thousand) - IP TV services. More than half of the total of subscribers received digital TV programs via cable networks, while the rest – via IP TV technology. (Chart 46).

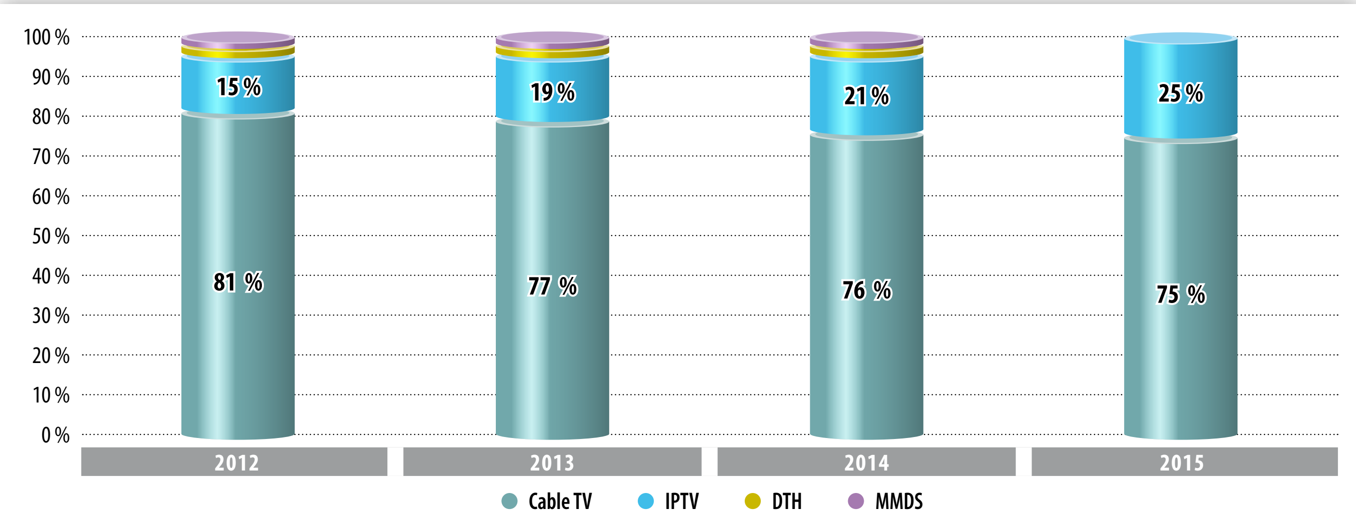

Chart 46 Evolution of the number of pay TV subscribers, by reception technology

Source: **ANRCETI**

In 2015, the ascending trend of digital Pay TV services continued. In the recent years, the number of digital pay TV subscribers almost doubled and reached 138 thousand in 2015. At the end of 2015, the share of analog pay TV subscribers was 59% and the share of digital TV subscribers - was 41%. (Chart 47).

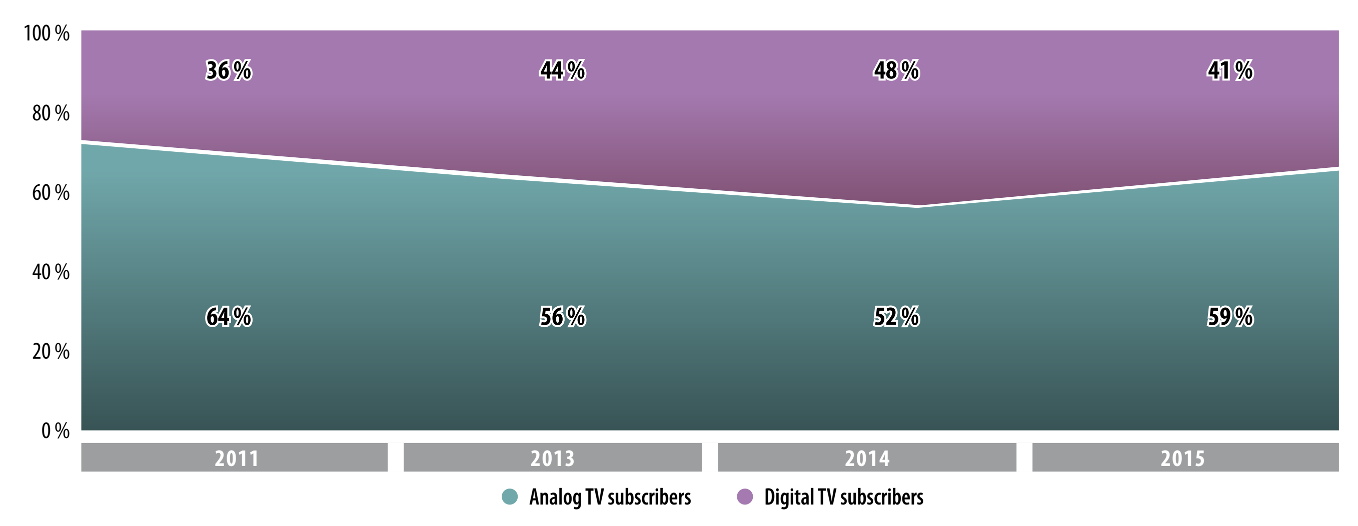

Chart 47 Share of pay TV subscribers, by reception format

Source: **ANRCETI**

Most digital TV subscribers are users of cable digital TV networks and IP TV. The data from the chart below show an increase in the number of subscribers to digital pay TV service based on IPTV technology. At the end of 2015, the share of subscribers to cable digital TV services and to IPTV service became equal: 50 to 50.(Chart 48)

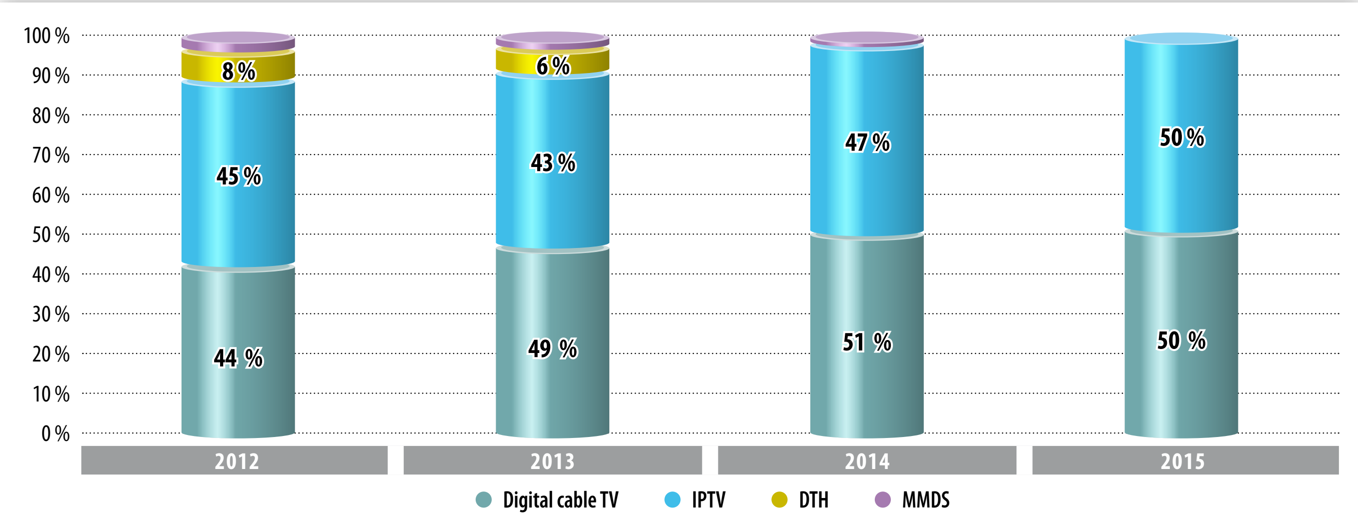

Chart 48 Shares of digital TV subscribers, by reception technology

Source: **ANRCETI**

It should be noted that most subscribers to cable digital TV services are also receiving analogue TV signal, being users of pay TV services both in analog and digital formats.

In 2015, like in the previous years, Sun Communications had the largest share of the pay TV market, by number of subscribers – 35,8% (102,7 thousand). Following is Moldtelecom, with 20,9%, that recently strengthened its market positions by 7,4 p. p. Other two providers's shares – AMT and TV BOX – were estimated at 5,2% and 4,2% accordingly, while the other 79 providers - 33,9 %. (Chart 49).

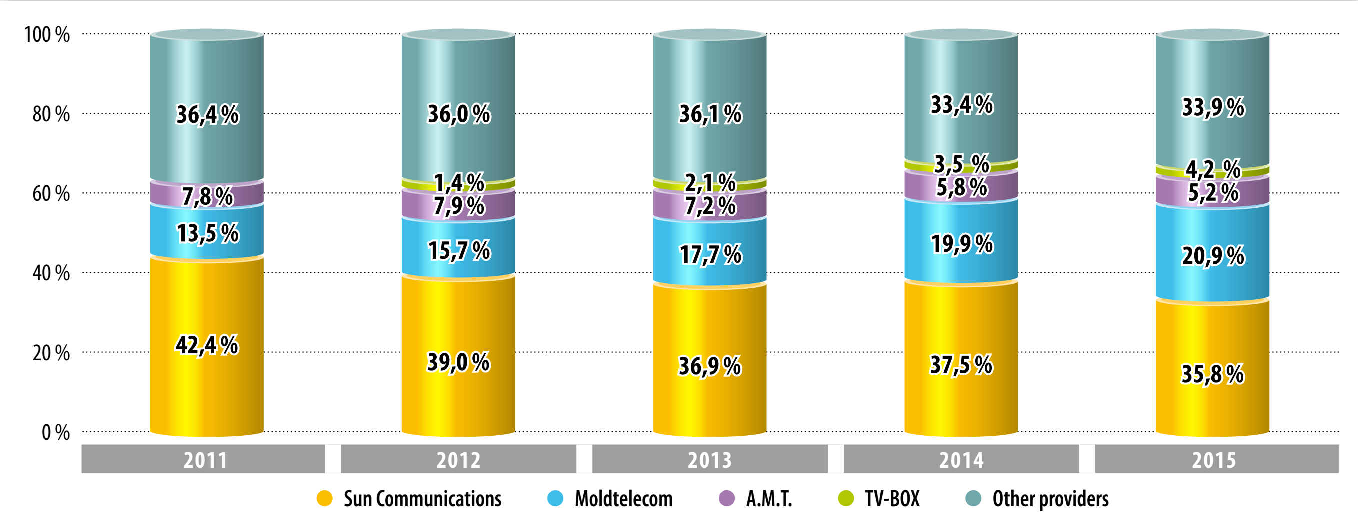

Chart 49 Evolution of market shares of main pay TV service providers, by number of subscribers

Source: **ANRCETI**

Conclusions. Forecast for 2016

The data in this report show that in 2015 the total volume of sales in the electronic communications sector slightly increased – 1,8% and exceeded 6 bn. 922.2 mln. lei. The rate of sales growth in the electronic communications sector was lower 0.6 p.p. than in 2014. The growth rate for this indicator slowed down basically due to decreasing revenues from other activities in the field of electronic communications by 15.8% and revenues on the pay TV market by 1,1%.

The situation of the other four electronic communications market segments - mobile telephony, fixed telephony, Internet access at mobile and fixed locations - was subject basically to the same trends that were evident in 2013 - 2014. It is the upward development of the market for Internet access at mobile and fixed locations, which became the main driver of the sector, at the same time the slowdown of the mobile telephony market growth and the decline on the fixed telephony market in recent years.

According to data submitted by providers, in 2015 the largest growth was attested on the market for Internet access at fixed and mobile locations. The number of users of mobile and fixed Internet increased by 4,4% and totaled about 2 mln. 294 4 thousand, whereas the the cumulative volume of sales of these services - by 16% and exceeded 1,6 bn. lei

According to ANRCETI estimates, the market for fixed and mobile Internet access will continue to be the most dynamic market in the sector. The upward trend of this market is driven by the increasing demand for Internet access services, the development of Internet access infrastructure, based on 3G and 4G technologies, on optical fiber, by convenient and attractive offers.

ANRCETI believes that the main trends that shaped out in 2014-2015 on the electronic communications market will continue to be perceived 2016. The change of consumer preferences in terms of using voice on fixed networks will continue to negatively impact this market. This phenomenon is part of a global trend of stagnation on the fixed telephony market, caused by use of other advantageous services: mobile telephony, OTT (Over The Top) services: Skype, Viber etc.

This trend will also affect the mobile telephony market. The fact that more and more mobile users prefer voice services via Internet (Skype, Viber, etc.), and the effects of number portability service will further reduce the number of mobile subscribers. ANRCETI believes that this trend, which is perceived on the mobile telephony market globally, will be even more prominent in the coming years, when the number of smartphone users increases. Considering the effects of this phenomenon, ANRCETI estimates that in 2016 the basic indicators of the mobile market will evolve the same way as in 2015.

Annex

Number of subscribers and use of fixed Internet access technologies on territorial-administrative units of the Republic of Moldova, as per 31.12.2015

No.	Territorial-administrative unit	Total broadband subscribers	Penetration broadband services per 100 households	Subscribers				Share of broadband access technologies				Penetration per 100 inhabitants	Dynamics of penetration		Dynamics of technology share				Increase of subscriber number				
				xDSL	FTTx	Coaxial cable	Other technologies	xDSL	FTTx	Coaxial cable	Other technologies		xDSL	FTTx	xDSL	FTTx	Coaxial cable	Other technologies	xDSL	FTTx	Coaxial cable	Other technologies	Broadband subscribers
1	Chisinau	220.180	78,98%	11.882	170.951	35.659	1.688	5,4%	77,6%	16,2%	0,8%	27,70%	3,44	1,21	-0,8	-1,2	1,5	0,5	-1.239	4.976	4.746	-1.177	14.846
2	Balti	27.529	50,12%	3.715	22.476	1.330	8	13,5%	81,6%	4,8%	0,0%	18,45%	1,29	0,47	-2,9	3,4	-0,5	0,0	-685	1.500	-109	1	2.008
3	Anenii Noi	10.059	37,11%	7.371	2.444		244	73,3%	24,3%	0,0%	2,4%	12,10%	2,16	0,71	-9,1	8,8	0,0	0,3	-430	976	0	-3	317
4	Basarabeasca	3.122	32,44%	2.076	1.045		1	66,5%	33,5%	0,0%	0,0%	10,77%	1,24	0,41	-21,8	21,8	0,0	0,0	-575	693	0	0	74
5	Briceni	9.949	39,06%	6.427	3.520		2	64,6%	35,4%	0,0%	0,0%	13,32%	4,21	1,44	-12,1	12,1	0,0	0,0	-384	1.455	0	0	849
6	Cahul	15.530	39,57%	9.756	5.693	58	23	62,8%	36,7%	0,4%	0,1%	12,43%	1,22	0,38	-1,6	2,4	-0,7	0,0	57	529	-108	24	1.032
7	Cantemir	6.362	34,93%	5.677	677		8	89,2%	10,6%	0,0%	0,1%	10,18%	1,03	0,30	-3,1	3,0	0,0	0,1	-24	204	0	0	489
8	Calarasi	7.607	27,79%	4.681	2.926		0	61,5%	38,5%	0,0%	0,0%	9,65%	1,84	0,64	-8,0	8,0	0,0	-0,1	-257	765	0	2	873
9	Causeni	9.275	30,98%	6.863	2.407		5	74,0%	26,0%	0,0%	0,1%	10,08%	1,47	0,48	-17,4	17,3	0,0	0,0	-1.208	1.644	0	-6	981
10	Cimislia	6.664	34,53%	4.378	2.285		1	65,7%	34,3%	0,0%	0,0%	10,87%	1,34	0,42	-1,4	1,4	0,0	0,0	77	180	0	0	509
11	Criuleni	9.010	38,88%	6.235	2.772		3	69,2%	30,8%	0,0%	0,0%	12,29%	4,07	1,29	-15,9	15,9	0,0	0,0	-630	1.572	0	-1	1.370
12	Donduseni	4.040	22,54%	3.444	595		1	85,2%	14,7%	0,0%	0,0%	9,02%	0,26	0,10	-4,2	4,2	0,0	0,0	-129	175	0	0	390
13	Drochia	10.064	30,61%	6.205	2.377	1.480	2	61,7%	23,6%	14,7%	0,0%	11,24%	2,62	0,96	-9,4	-1,2	10,6	0,0	-335	96	1.100	0	1.303
14	Dubasari	3.377	30,70%	2.717	659		1	80,5%	19,5%	0,0%	0,0%	9,59%	2,55	0,80	-17,6	17,6	0,0	0,0	-319	601	0	1	118
15	Edinet	10.285	34,04%	5.760	4.524		1	56,0%	44,0%	0,0%	0,0%	12,47%	2,11	0,77	-3,0	3,0	0,0	0,0	65	572	0	0	982
16	Falesti	8.785	26,62%	6.021	2.762		2	68,5%	31,4%	0,0%	0,0%	9,51%	1,27	0,45	-2,6	2,6	0,0	0,0	65	352	0	0	975
17	Floresti	9.708	29,85%	6.527	2.927		254	67,2%	30,2%	0,0%	2,6%	10,95%	1,61	0,59	-1,7	1,3	0,0	0,4	195	277	0	67	1.070
18	Glodeni	6.474	30,16%	4.923	1.550		1	76,0%	23,9%	0,0%	0,0%	10,54%	1,31	0,46	-10,6	10,6	0,0	0,0	-445	725	0	0	602
19	Hincesti	12.512	33,49%	8.410	4.102		0	67,2%	32,8%	0,0%	0,0%	10,29%	2,09	0,64	-6,1	6,1	0,0	0,0	-187	968	0	0	1.051
20	Ialoveni	13.409	45,28%	6.437	6.321	649	2	48,0%	47,1%	4,8%	0,0%	13,45%	1,59	0,36	-10,0	11,7	-1,7	0,0	-1.134	1.691	-202	-1	1.521
21	Leova	5.555	32,88%	4.691	864		0	84,4%	15,6%	0,0%	0,0%	10,36%	1,85	0,58	-4,2	4,2	0,0	0,0	44	269	0	0	453
22	Nisporeni	5.349	25,94%	4.152	1.197		0	77,6%	22,4%	0,0%	0,0%	8,03%	1,34	0,42	-6,7	6,7	0,0	0,0	-125	402	0	0	358
23	Ocnita	5.522	26,69%	5.019	501		2	90,9%	9,1%	0,0%	0,0%	9,90%	0,83	0,31	-0,6	0,6	0,0	0,0	122	47	0	0	466
24	Orhei	12.849	31,09%	7.608	5.232		9	59,2%	40,7%	0,0%	0,1%	10,21%	1,43	0,47	-2,3	2,3	0,0	0,0	66	521	0	-1	1.051
25	Rezina	5.074	28,58%	3.467	1.604		3	68,3%	31,6%	0,0%	0,1%	9,70%	1,04	0,35	0,0	0,0	0,0	0,0	124	59	0	0	347
26	Riscani	7.565	28,77%	4.482	3.082		1	59,2%	40,7%	0,0%	0,0%	10,88%	1,74	0,66	-6,8	6,8	0,0	0,0	-210	666	0	0	981
27	Singerei	10.437	33,60%	6.002	4.433		2	57,5%	42,5%	0,0%	0,0%	11,20%	2,68	0,89	-9,5	9,4	0,0	0,0	-428	1.260	0	0	1.045
28	Soroca	10.259	28,05%	5.869	4.389		1	57,2%	42,8%	0,0%	0,0%	10,25%	1,46	0,53	-1,8	1,8	0,0	0,0	131	402	0	0	556
29	Straseni	10.214	36,57%	7.089	3.121		4	69,4%	30,6%	0,0%	0,0%	11,16%	0,15	0,05	-1,4	2,8	0,0	-1,5	-110	303	0	0	826
30	Soldanesti	3.355	22,10%	3.200	154		1	95,4%	4,6%	0,0%	0,0%	7,80%	0,96	0,34	-0,2	0,2	0,0	0,0	132	14	0	0	366
31	Stefan Voda	7.112	30,58%	4.484	2.625		3	63,0%	36,9%	0,0%	0,0%	9,95%	2,20	0,72	-1,9	1,9	0,0	0,0	198	312	0	1	865
32	Taraclia	4.780	37,18%	4.055	503	220	2	84,8%	10,5%	4,6%	0,0%	10,84%	-2,19	-0,64	-5,4	0,8	4,6	0,0	-515	11	220	0	160
33	Telenesti	6.886	28,55%	5.640	1.245		1	81,9%	18,1%	0,0%	0,0%	9,32%	2,83	0,92	-12,5	12,5	0,0	0,0	-216	897	0	0	677
34	Ungheni	13.443	34,72%	6.333	7.109		1	47,1%	52,9%	0,0%	0,0%	11,47%	1,78	0,59	-2,3	2,3	0,0	0,0	30	659	0	0	1.100
35	Gagauzia	22.052	47,65%	11.914	10.130		8	54,0%	45,9%	0,0%	0,0%	13,68%	2,12	0,61	-2,6	2,6	0,0	0,0	-28	1.002	0	0	1.512
	Total	**534.393**	**44,58%**	**203.510**	**289.202**	**39.396**	**2.285**	**38,1%**	**54,1%**	**7,4%**	**0,4%**	**15,02%**	**5,63**	**1,89**	**-3,5**	**2,6**	**0,7**	**0,2**	**-8.307**	**26.775**	**5.647**	**1.083**	**25.198**

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