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

Evolution of Electronic Communications Market in 2016

www.anrceti.md

Contents

This Report was developed based on the statistical data for 2016, submitted to the National Regulatory Agency for Electronic Communications and Information Technology (ANRCETI) by authorized providers of public electronic communications networks and services.

ANRCETI collects and processes statistical data as regards the quarterly situation on electronic communications market segments, pursuant to the Law on Electronic Communications no.241 of 15.11.2007, with subsequent amendments (hereinafter – *Law no. 241/2007*). Based on reported data, ANRCETI specialists evaluate the market trends and make market analysis. On quarterly basis, ANRCETI publishes on its official Web site reports that cover the situation on electronic communications market segments, while every year, before April 30, publishes the report on market evolution for the previous year.

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

Main electronic communications market indicators

Indicators	2015	2016	Change
MOBILE TELEPHONY SERVICES			
Users	4.323.489	4.429.277	2,4%
- individuals (active)	3.465.094	3.535.663	2,0%
- businesses (active)	248.043	252.827	1,9%
Total volume of traffic in mobile networks (million minutes)	6.315,7	6.208,3	-1,7%
Average number of minutes consumed monthly by a user - MoU (minutes)	226	225	-0,4%
Mesajes SMS (million)	983,6	888,5	-9,7%
Mesajes MMS (million)	2,0	1,9	-6,8%
Service penetration rate per 100 inhabittants	121,61%	124,66%	3,05 p.p.
Revenues (million lei)	3.600,9	3.441,9	-4,4%
Average monthly revenue per user - ARPU (in lei)	69,0	66,2	-4,1%
MOBILE INTENET ACCESS SERVICES			
Mobile Internet access users, total (2G, 3G, 4G):	1.761.122	1.919.376	9,0%
- mobile broadband users (3G, 4G)	1.157.546	1.589.691	37,3%
- dedicated mobile Internet users	298.429	303.871	1,8%
Mobile Internet penetration rate per 100 inhabittants	49,48%	54,02%	4,45 p.p.
- mobile broadband penetration	40,90%	53,29%	12,3 p.p.
- dedicated mobile Internet penetration	8,38%	8,55%	0,15 p.p.
Mobile Internet traffic, voice users, TB	6.179	10.264	66,1%
Dedicated mobile Internet traffic, TB	32.907	35.260	7,2%
Revenues mobile Internet access* (million lei)	579,1	713,2	23,2%
Revenues dedicated mobile Internet access (million lei)	259,0	278,7	7,6%
Average monthly revenue per user – ARPU dedicated mobile Internet (in lei)	74,7	77,1	3,3%
Revenues M2M (million lei)	25.089	30.606	22,0%
Subscribers M2M		8,71	
FIXED TELEPHONY SERVICES			
Subscribers (telephone lines)	1.202.466	1.171.287	-2,6%
- individuals	1.070.250	1.032.332	-3,5%
- businesses	132.216	138.955	5,1%
Service penetration rate per 100 inhabittants	33,82%	32,97%	-0,86 p.p.
Total volume of traffic in fixed networks (million minutes)	2.090,2	1.823,9	-12,7%
Average number of minutes monthly consumed by a user - MoU (minutes)	224	198	-11,5%
Revenues (million lei)	1.018,4	876,1	-14,0%
Average monthly revenue per user - ARPU (in lei)	70,1	61,5	-12,3%
FIXED INTERNET ACCESS SERVIES			
Subscribers	534.393	557.403	4,3%
- individuals	505.523	526.993	4,2%
- businesses	28.870	30.410	5,3%
Service penetration rate per 100 inhabittants	15,0%	15,7%	0,66 p.p.
Revenues (million lei)	1.050,5	1.105,2	5,2%
Average monthly revenue per user - ARPU (in lei)	168,3	169,4	0,7%
Total external internet capacity (Gbps)	326	341	4,60%
Data transmission revenues (million lei)	60,8	62,2	2,3%
AUDIOVISUAL BROADCASTING AND RE-TRANSMISSION			
Pay TV subscribers	275.290	269.971	-1,9%
Service penetration rate per 100 inhabittants	7,74%	7,60%	-0,15 p.p.
Revenues (million lei)	367,1	297,8	-18,9%
Average monthly revenue per user - ARPU (in lei)	47,6	46,4	-2,5%
Revenues from other electronic communications activities (million lei)	638,4	731,0	14,5%
Total revenues in electronic communications sector (million lei)	6.934,17	6.730,64	-2,9%
Total investments in electronic communications sector (million lei)	2.041,17	1.454,46	-28,7%

[1] This indicator also includes revenues from Internet access services via mobile phone. They are presented as information to reflect the total revenues on the Internet access market. These revenues make a component of the total volume of revenues attested on the mobile telephone market, given that they are generated from services additional to the basic service – mobile telephony.

1 Market development. General description

1.1 Development of revenues

Statistical data presented to ANRCETI by the 314 active providers of public electronic communications networks and services show that in 2016 the total volume of revenues from electronic communications services (mobile telephony, mobile Internet, fixed telephony, fixed Internet, audiovisual broadcasting and re-transmission, other electronic communications activities), attested, for the first time in the recent five years, a decrease compared to 2015, estimated at 203,6 million lei (- 2,9%) and totaled 6 billion 730 million lei.

The decrease was caused by lower revenues from three market segments: mobile telephony, fixed telephony, audiovisual broadcasting and re-transmission. Thus, the revenues on the mobile telephony markets showed 3 billion 441,9 million lei, down by 4,4%, on the fixed telephony market - 876,1 million lei, down by 14% and on the audiovisual broadcasting and re-transmission market - 297,8 million lei, down by 18,9%. Meanwhile, the revenues from fixed Internet access services grew by 5,2% up to 1 billion 105,25 million lei, from dedicated mobile Internet access services (via modems/cards/USBs) - by 7,6% up to 278,7 million lei, while the revenues from other electronic communications activities[2] increased by 14,5% up to 731 million lei (Chart 1).

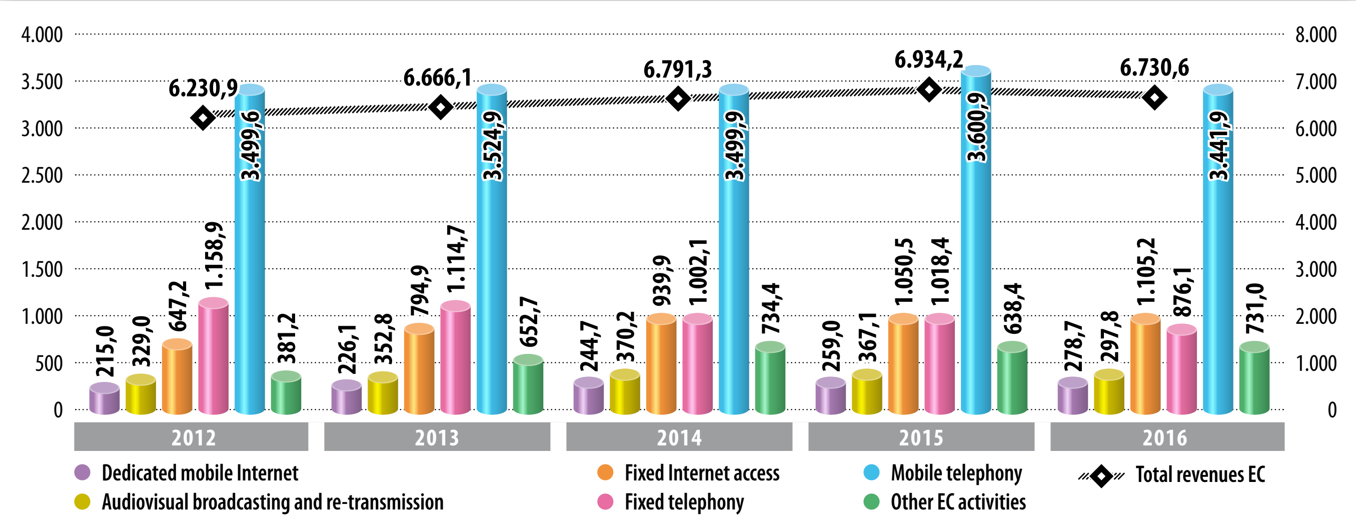

Chart 1 Development of revenues in electronic communications sector (million lei)

Source: **ANRCETI**

The developments on the electronic communications market segments produced changes in its structure. Thus, compared to 2015, the share of fixed telephony in electronic communications dropped from 14,7% to 13%, of audiovisual broadcasting and re-transmission services – from 5,3% to 4,4%, of mobile telephony - from 51,9 to 51,1%. However, the share of fixed Internet access services grew from 15,1% to 16,4%, of dedicated mobile Internet access services - from 3,7% to 4,1%, while the revenues from other CE activities - from 9,2% to 10,9% (Chart 2).

[2] Revenues from other CE activities represent revenues of electronic communications network providers that are not part of the five segments of the electronic communications market and are generated from installation, operation, management or making available, to an authorised third party, of electronic communications networks or associated infrastructure (Art. 2 of *Law 241/2007*), data transmission, etc.

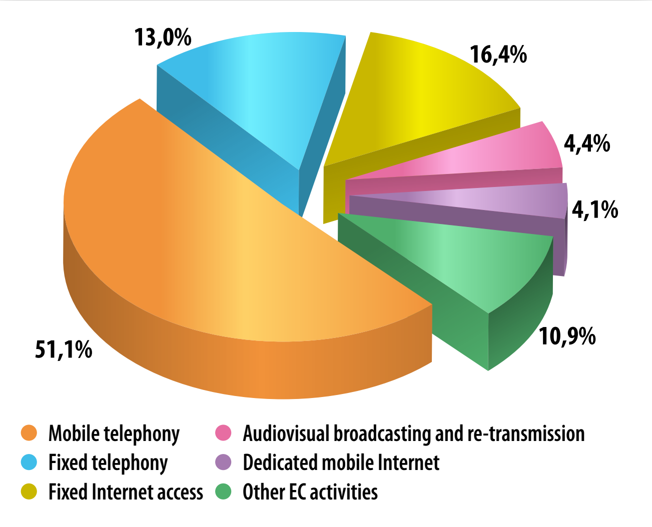

Chart 2 Structure of electronic communications market, by revenues

Source: **ANRCETI**

Like in previous years, in 2016, the most significant average monthly revenue per user (ARPU) –169,4 lei – was attested on the fixed Internet access market. On the dedicated mobile Internet market this indicator was 77,1 lei, on the mobile telephony market – 66,2 lei, on the fixed telephony market - 61,5 lei and on the pay TV market - 46,4 lei (Chart 3).

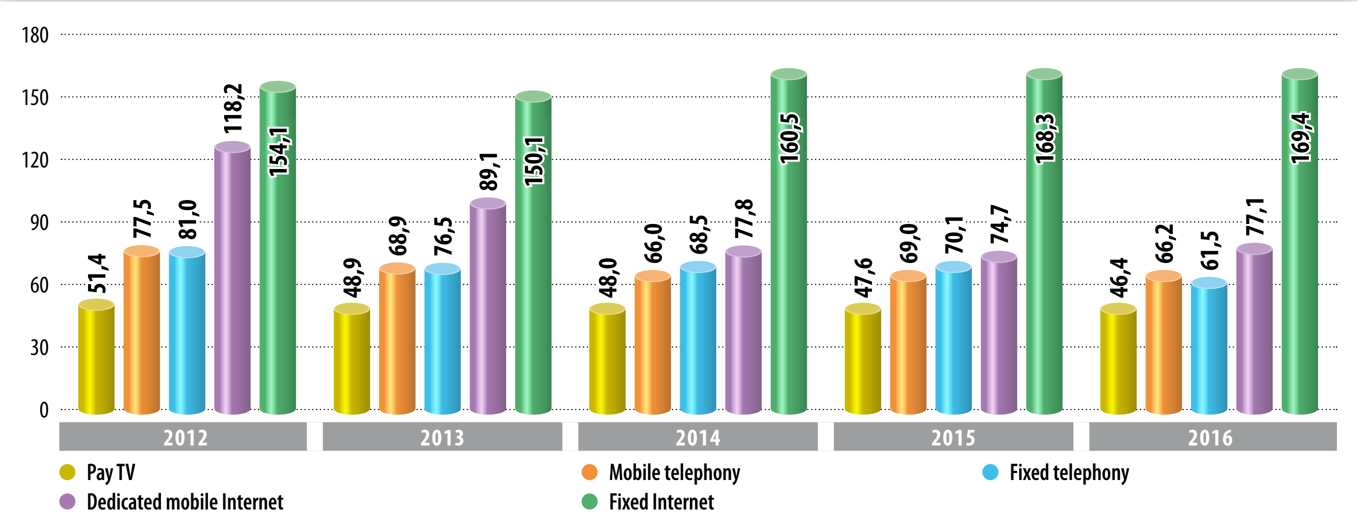

Chart 3 Development of monthly revenue per user - ARPU (lei)

Source: **ANRCETI**

Statistical data show that JSC „Orange Moldova" had the highest revenues - 2 billion 424,3 million lei or 36% of the total revenues in electronic communications sector. The revenues of JSC „Moldtelecom" were 1 billion 874,6 million lei or 27,9% of the total, the revenues of JSC „Moldcell" - 1 billion 112,9 million lei or 16,5% of the total. The revenues of other providers jointly were 1 billion 318,8 million lei or 19,6% of the total (Chart 4).

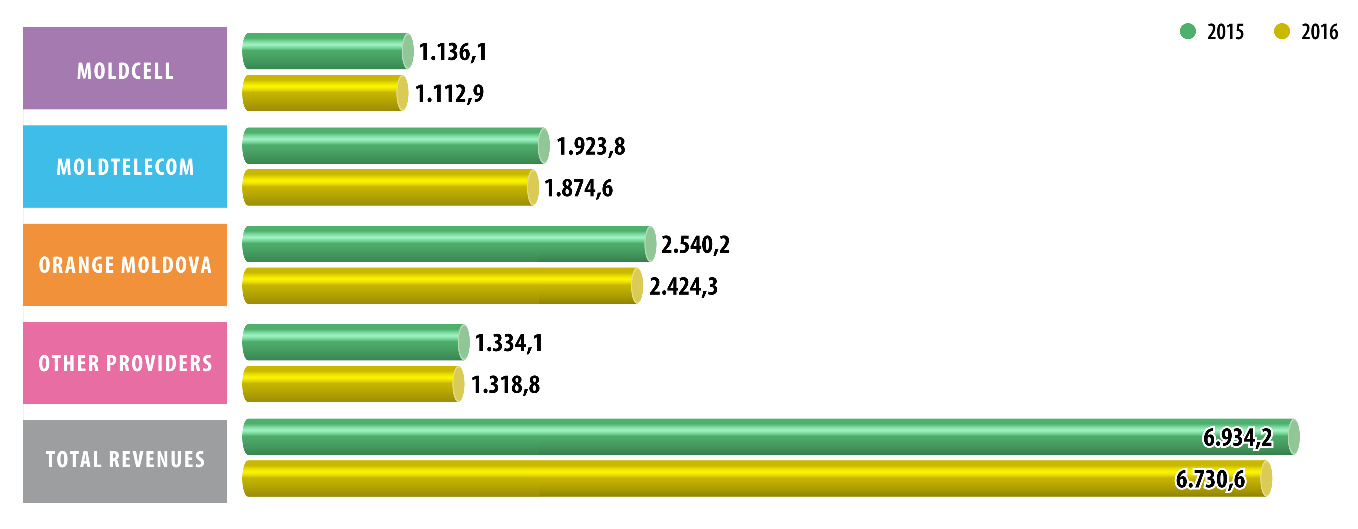

Chart 4 Development of providers' revenues in 2015 - 2016 (million lei)
Source: **ANRCETI**

1.2 Development of the number of end users

In 2016, the number of end users increased on three electronic communications market sectors. The number of fixed Internet access users increased over 2015 by 4,3%, up to 557,4 thousand, of mobile telephony users - by 2,4% up to 4 million 429,3 thousand, of dedicated mobile Internet access users - by 1,8% up to 303,9 thousand. However, the number of fixed telephony subscribers dropped by 2,6% and was estimated at 1 million 171,3 thousand, while the number of Pay TV (cable and IP TV) subscribers dropped by 1,9% and was 270 thousand. (Chart 5).

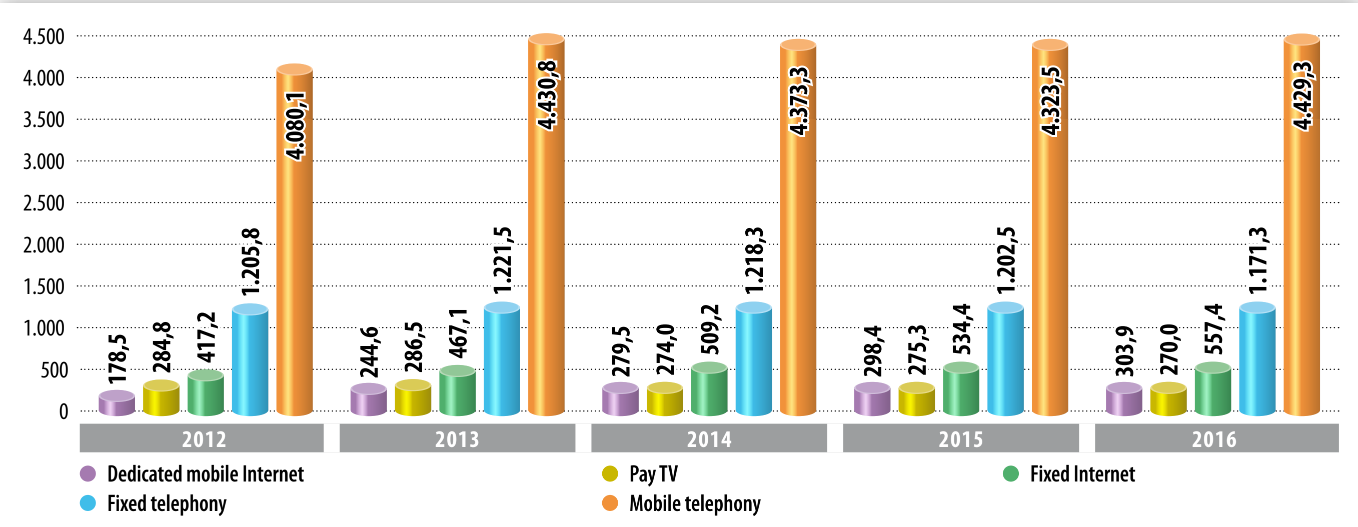

Chart 5 Development of the number of electronic communications service users (thousand)
Source: **ANRCETI**

The developments described above led to changes of the service penetration rates per 100 inhabittants. The mobile telephony and fixed Internet access penetration rates increased to 124,7% and 15,7% accordingly, of dedicated mobile Internet access – to 8,5%. But the fixed telephony penetration rate dropped to 33,0%, the pay TV penetration rate – to 7,6% (Chart 6).

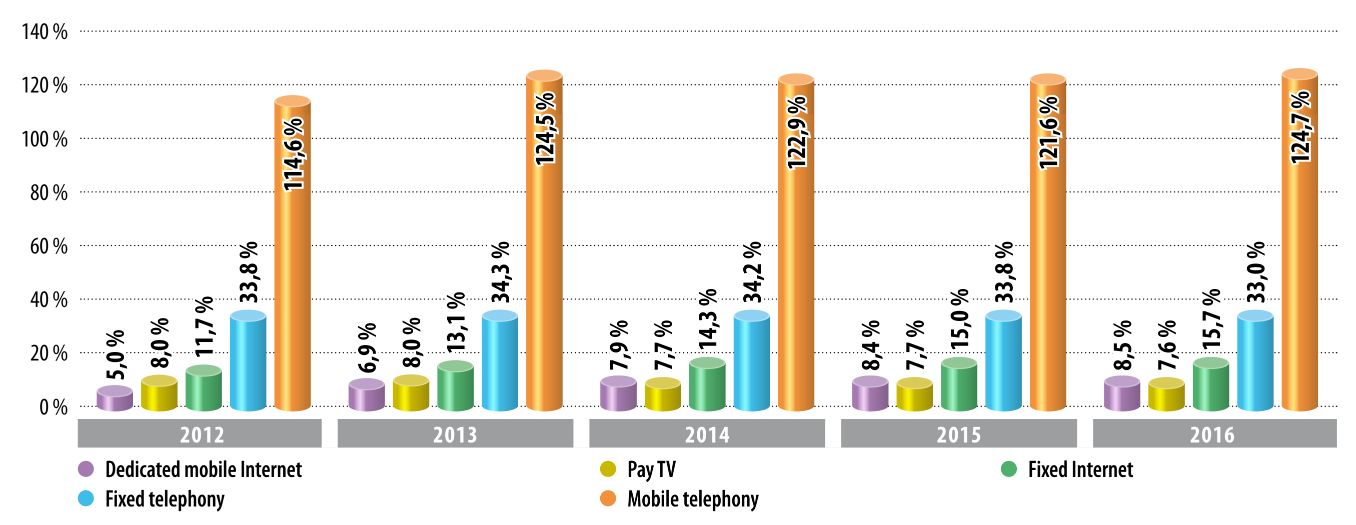

Chart 6 **Development of electronic communications service penetration rates**

Source: **ANRCETI**

1.3 Development of voice traffic in mobile and fixed networks

According to the statistical data submitted by providers, in 2016, the cumulative volume of voice traffic in mobile and fixed networks was subject to the first decrease in the last five years. The total volume of this traffic reduced compared to 2015, by 4,4% and was estimated at 8,03 billion minutes. This reduction was caused by the decrease of both types of traffic. Thus, the voice traffic in fixed networks reduced by 12,7% and was estimated at 1,82 billion minutes, whereas in mobile networks - by 1,7% down to 6,21 billion minutes. (Chart 7).

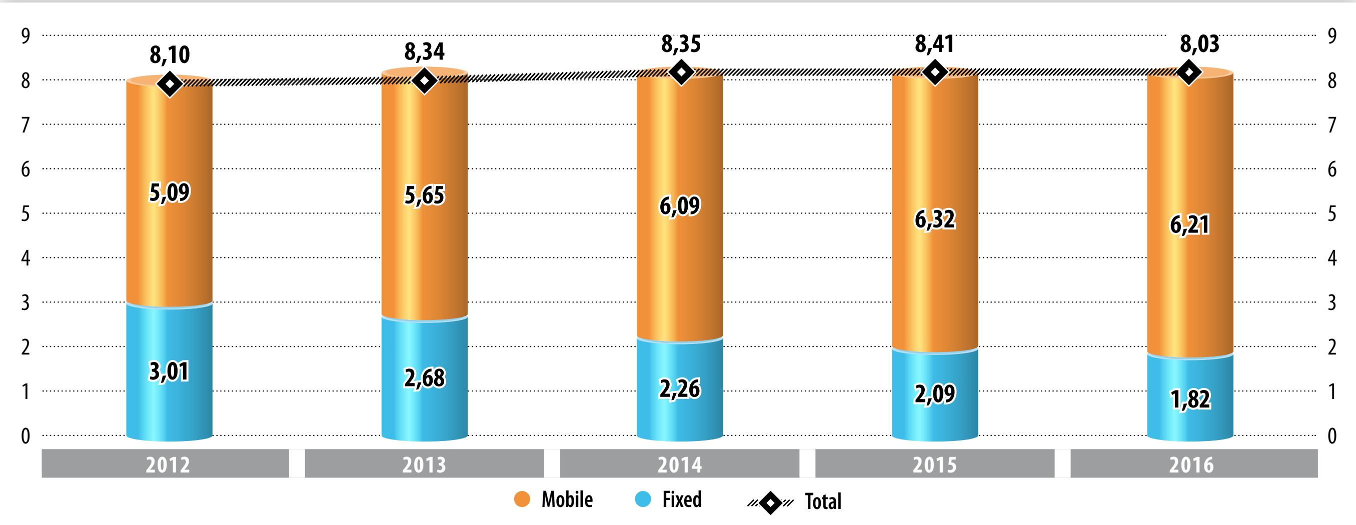

Chart 7 **Development of voice traffic in mobile and fixed networks (billion minutes)**

Source: **ANRCETI**

The development of voice traffic in mobile and fixed networks show that in 2016, though this indicator decreased, however, the mobile traffic share (this includes traffic in individual networks and traffic to other mobile networks) in the total traffic structure continued increasing, while the share of fixed traffic continued decreasing.

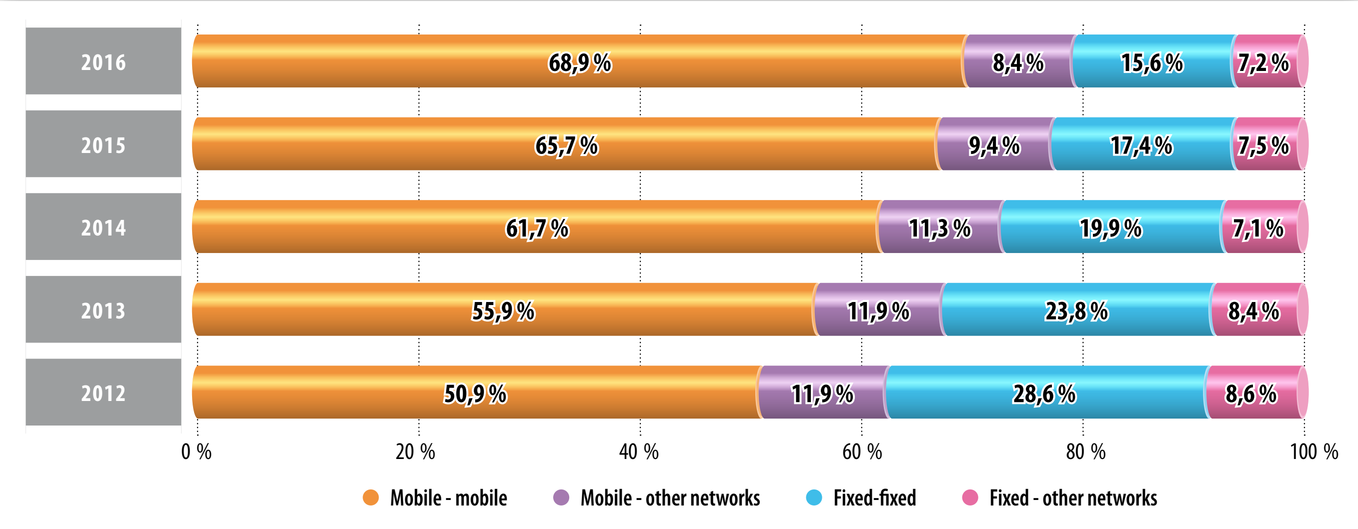

Chart 8 Share of traffic types in the total voice traffic structure in mobile and fixed networks

Source: **ANRCETI**

The trend of increase of mobile voice traffic share in the total traffic structure is generated by the change in users' preferences from fixed to mobile telephony and the intensified migration of traffic from fixed to mobile networks.

1.4 Development of investments

According to the statistical data presented by providers, in 2016, the investments in electronic communications sector decreased faster than in 2015. Their total volume went down by 28,7% and was estimated at 1,454 billion lei. The investment decrease was perceived on all market segments. The value of investments in mobile networks dropped, compared to 2015, by 41,9% and was estimated at 765 million lei, in audiovisual networks - by 7,6%, estimated at 71 million lei, in fixed networks – by 4,6%, estimated at 618 million lei (Chart 9).

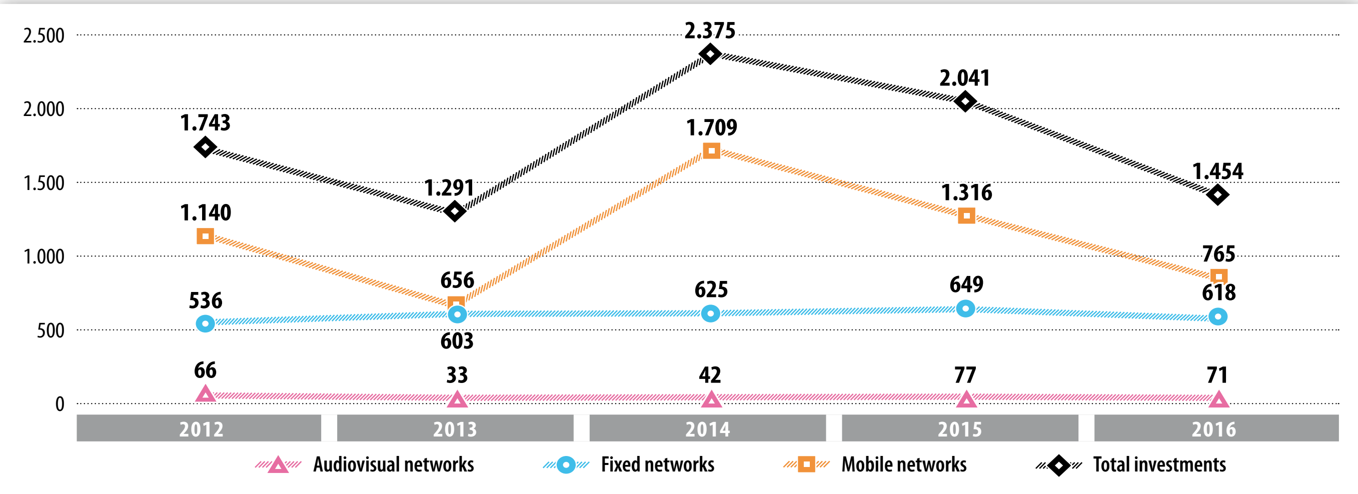

Chart 9 Development of investments, by types of electronic communications networks (million lei)

Source: **ANRCETI**

From the point of view investments – revenues ratio, the highest value of this indicator was 30% - attested on the fixed network segments. On the segment of audiovisual broadcasting and re-transmission networks the value of this indicator was about 24%, while on the mobile network segment - 21%.

2 Mobile telephony

2.1 Market development

In the timeframe under report, for the first time in the last five years, the total volume of revenues on the mobile telephony market dropped compared to 2015 by 4,4% and was estimated at 3 billion 441,9 million lei. This development was determined by the drop of revenues of JSC „Orange Moldova" and JSC „Moldcell". The revenues of the first provider dropped by 5,4% to a total of 2 billion 255,5 million lei, the revenues of the second provider - by 3,6% to a total of 1 billion 40,4 million lei. Meanwhile, the revenues of JSC „Moldtelecom" from mobile telephony services increased by 6,8% up to 146 million lei (Chart 10).

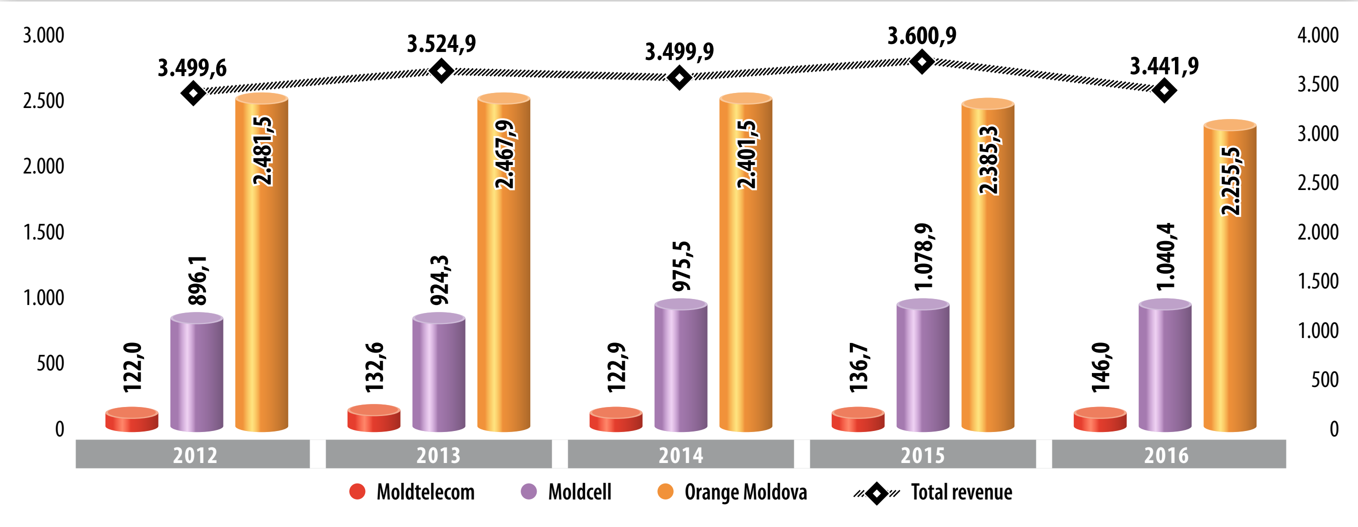

Chart 10 **Development of mobile providers' revenues (million lei)**

Source: **ANRCETI**

The analysis of revenues show that revenues from individual users made up more than half (54%) of the total revenues on the mobile telephony market or 80% of the retail market, the rest being generated by business users. In 2016, businesses paid more by 3,1% compared to 2015 for mobile telephony services.

According to the same analysis, in 2016, the revenues from subscription-based mobile telephony services increased over 2015 by 16,2% and exceeded 1 billion 499,8 million lei, while the revenues from pre-paid card basic services dropped by 7,3% and were estimated at 818,1 million lei. The table below shows the development of these indicators in the last five years.

Table no. 1 **Revenues estimated on the retail market: subscription-based and pre-paid card- based**

Indicators	2012	2013	2014	2015	2016	Change 2015-2016
Revenues from subscriptions (million lei)	1.293,7	1.251,0	1.186,4	1.290,2	1.499,8	16,2%
Revenues from pre-paid cards (million lei)	1.047,5	1.044,4	958,3	882,6	818,1	-7,3%

Source: **ANRCETI**

As a result of this development, the average monthly revenue per mobile user (ARPU) decreased, compared to 2015, by 4,1% and equaled 66,2 lei. The highest ARPU was attested by JSC „Orange Moldova" – 75,3 lei. JSC „Moldcell" attested an ARPU of 57,6 lei and JSC „Moldtelecom" – 36,5 lei (Chart 11). The average monthly revenue per individual user[3] was 44,4 lei, per business[4] - 112,9 lei.

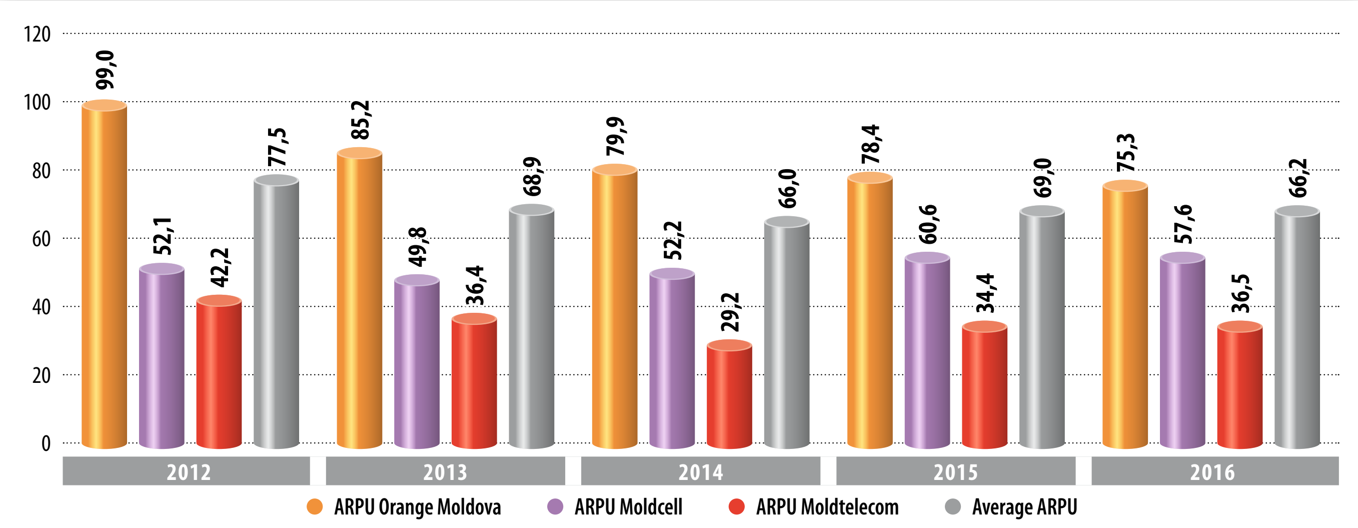

Chart 11 **Development of average monthly revenue per mobile telephony user - ARPU (lei)**
Source: **ANRCETI**

ANRCETI estimations show that in the reporting period the market shares of the three mobile service providers by turnover were subject to minor changes. At the end of 2016, the marklet share of JSC „Orange Moldova" reduced by 0,7 p. p. and was estimated at 65,5%, while the the market shares of JSC „Moldcell" and JSC „Moldtelecom" increased by 0,3 p. p. and, accordingly, by 0,5 p. p., totalling 30,2% and, accordingly, 4,2%.

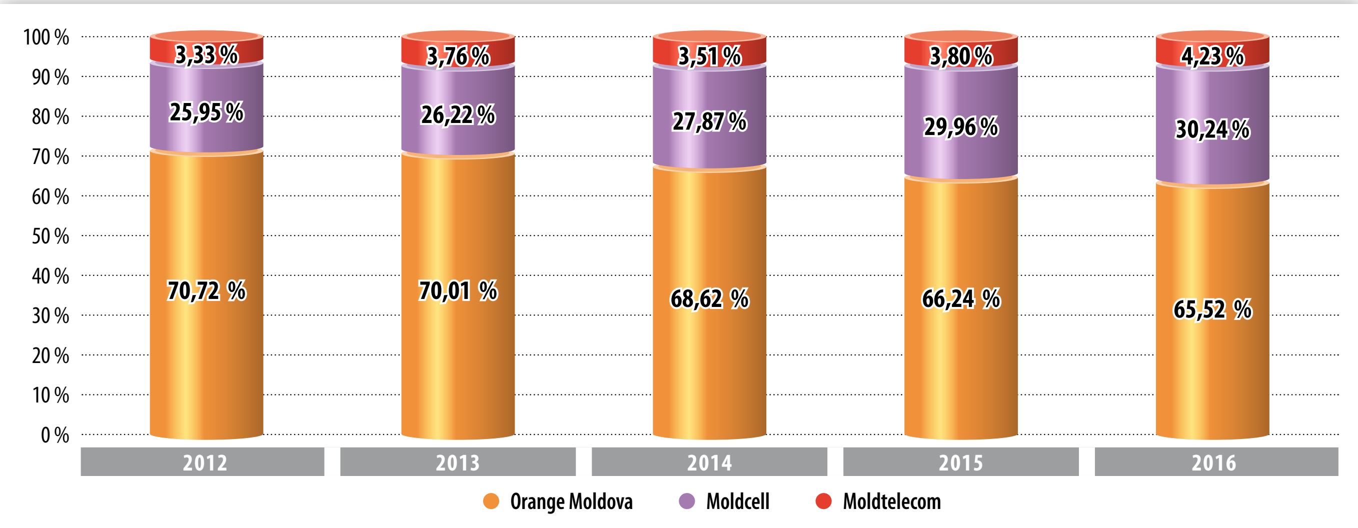

Chart 12 **Development of mobile providers' market shares, by turnover**
Source: **ANRCETI**

[3] Average value of the bill paid by an individual user, without VAT
[4] Average value of the bill paid by a business user, without VAT

2.2 End users and penetration rate

While the revenues from mobile telephony services decreased, the number of users of these services went up compared to 2015, by 2,4% and was estimated at 4 million 429 thousand (SIM cards). This increase was caused by the extension of the subscriber base by all the three mobile telephony providers. Thus, JSC „Moldtelecom" extended its subscriber base by 29,6 thousand (+9,2%), up to 350,7 thousand, JSC „Orange Moldova" - by 57,8 thousand (+2,3%), up to 2 million 567,8 thousand and JSC „Moldcell" - by 18,4 thousand (+1,2%), up to 1 million 510,7 thousand. As a result, the service penetration rate per 100 inhabittants increased by 3,1 p.p. and made up 124,7% (Chart 13).

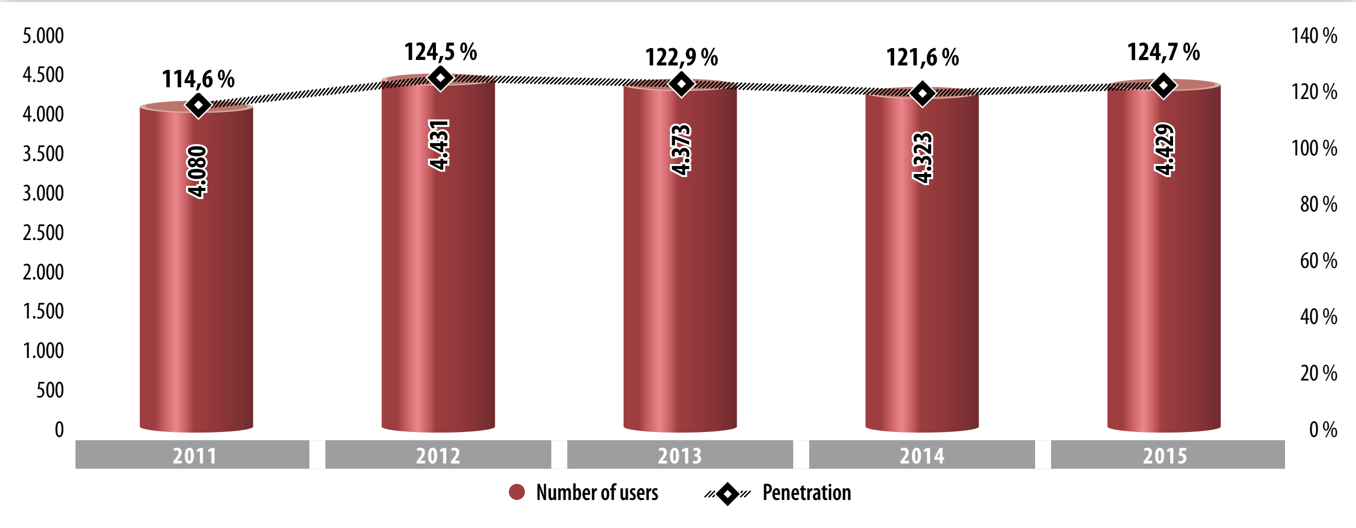

Chart 13 Development of the number of mobile users (thousand) and penetration rate (%)

Source: **ANRCETI**

As per 31.12.2016, 85,5% of the total number of mobile users were active[5] and 14,5% - passive. In the timeframe 2014 - 2016, the proportion active users – passive uswers kept the same level. (Chart 14).

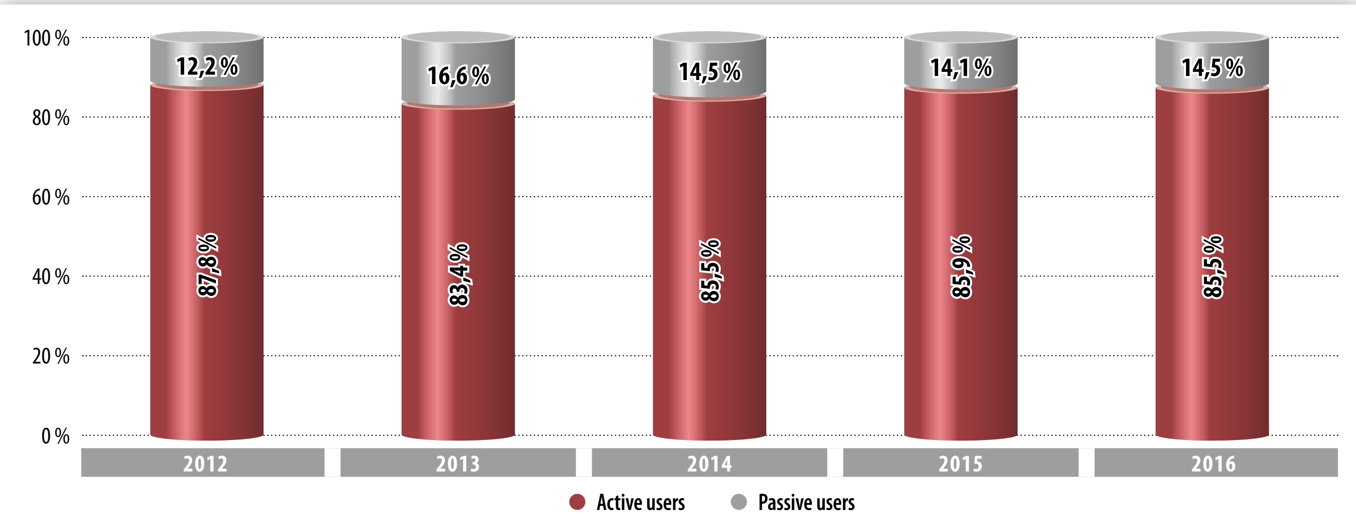

Chart 14 Structure of mobile telephony market, by category of users (active/pasive)

Source: **ANRCETI**

In 2016, the share of mobile users by subscriptions attested a slight increase over 2015, by 1,5 p. p. and was 26,8%, while the share of pre-paid card users decreased the same amount and was estimated at 73,2% (Chart 15).

[5] According to ANRCETI methodology, active users are those users that in the last three months before the statistical data reporting consumed and paid for at least one service, while passive users are those users that consumed and paid for no service whatsoever.

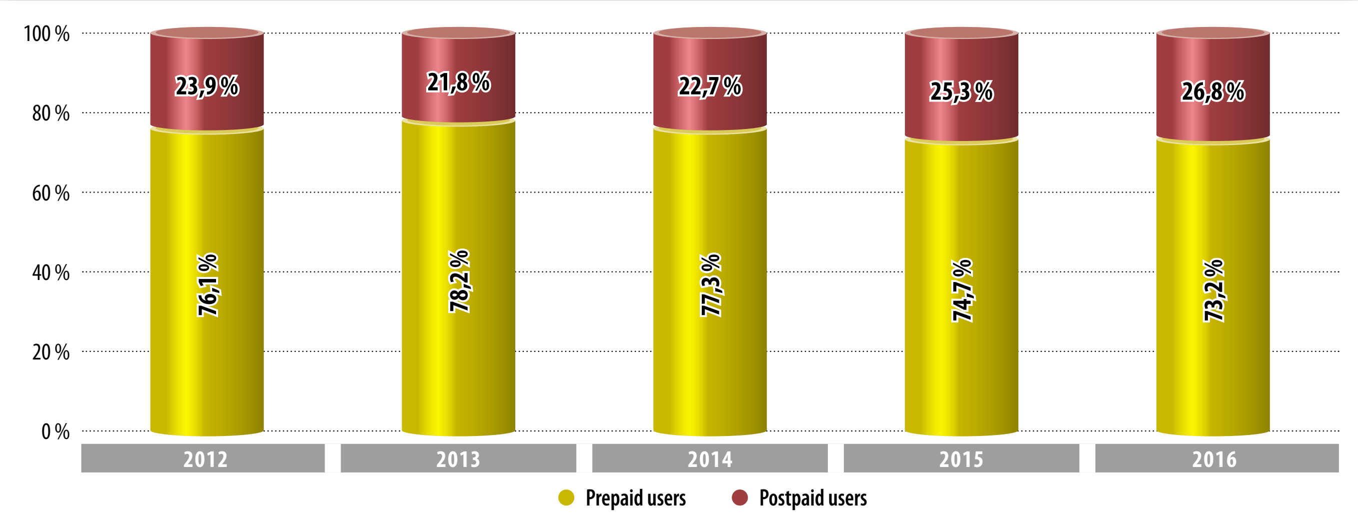

Chart 15 Structure of mobile telephony market, by payment method (prepaid/postpaid)

Source: **ANRCETI**

2.3 Development of voice traffic

According to the data presented to ANRCETI by the three mobile telephony providers, the total volume of voice traffic in mobile networks dropped, compared to 2015, by about 107,5 million minutes (-1,7%) to a total of 6 billion 208,3 million minutes. Thus, the international outbound traffic via mobile networks decreased by 18,9% and was estimated at 119 million minutes, while the traffic in individual mobile telephony networks dropped by 1,8% and was estimated at 4,5 billion minutes. However, the voice traffic to other networks increased, compared to 2015 by 10,5% up to over 1 billion minutes, whereas the traffic to fixed networks increased by 5,6% to a total of 270 million minutes.

The negative development of the total voice traffic volume was mainly caused by the reduction of this indicator attested by JSC „Orange Moldova". The volume of traffic in this provider's network dropped by 214,3 million minutes (-4,9%) to 4,1 billion minutes. At the same time, the voice traffic in the networks of JSC„Moldcell"and JSC „Moldtelecom" increased by 100,6 million minutes (+6,1%) and, accordingly, by 6,3 million minutes (+2%), to a total of 1,8 billion minutes and, accordingly, 317,5 million minutes. This evolution led to a slight decrease of the average monthly traffic (-0,5%) per mobile user up to 225 minutes (three hours and 45 minutes), the average duration of a call being 1,7 minutes. With JSC „Orange Moldova", this indicator dropped from 274 to 267 minutes, with JSC „Moldcell" and JSC „Moldtelecom" - increased from 170 to 179 minutes and, accordingly, from 114 to 118 minutes. (Chart 16).

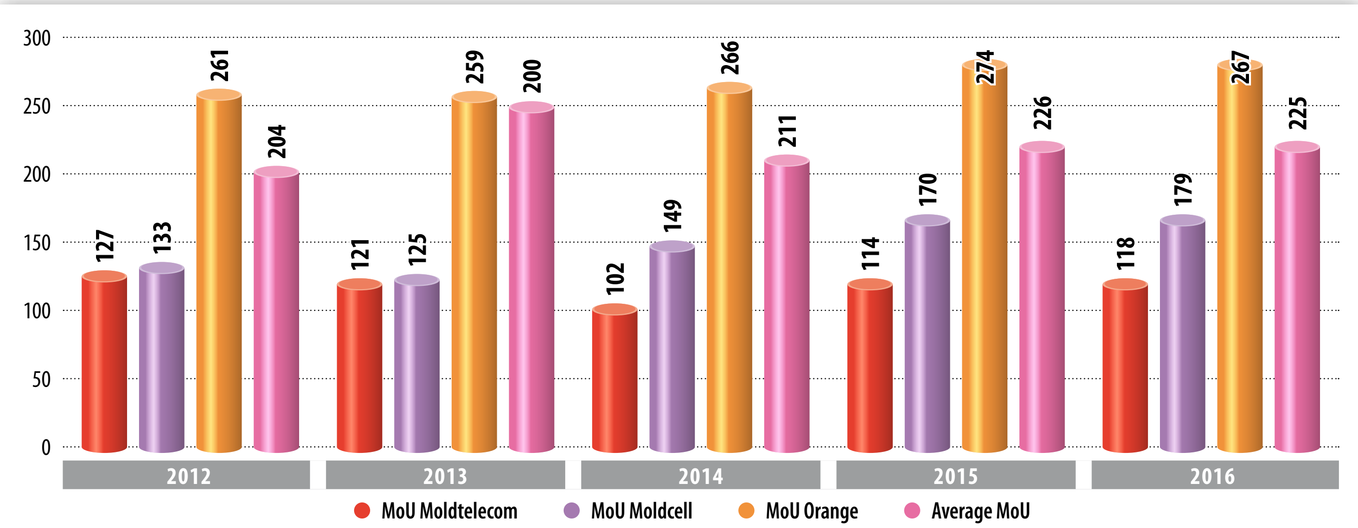

Chart 16 Development of the MoU indicator (minutes)

Source: **ANRCETI**

In the reporting timeframe, the SMS and MMS traffic was also subject to negative development. The number of SMS and MMS messages sent by users dropped by 9,7% and, accordingly, by 6% to a total of 888,5 million 1,9 million. According to ANRCETI estimations, in 2016 one mobile user sent on average 20 SMS messages per month.

2.4 Territory and population coverage rates

The data provided by the three mobile providers show that in 2016 the rates of territory and population coverage with radio signal, generated by 3G networksof these providers practically stayed the same level as in 2015. As per 31.12.2016, JSC„Orange Moldova" and JSC„Moldcell" reported territory coverage rates equal to those of 2015: 99% and 77,71%, while JSC„Moldtelecom" – 98%, higher by 3,8 p. p. compared to 2015 (Chart 17).

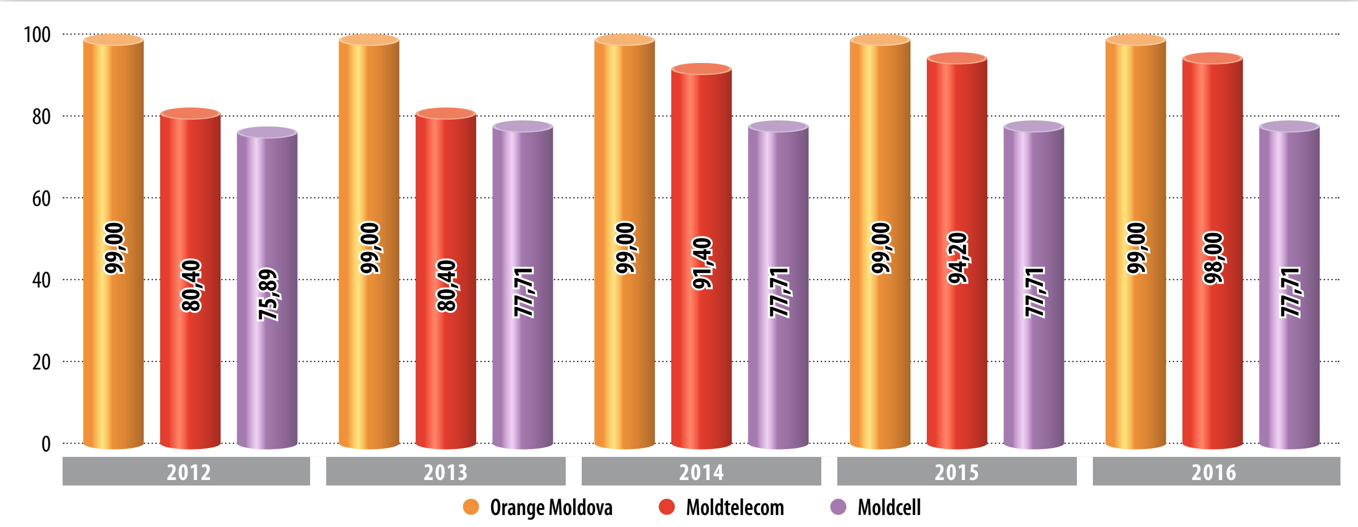

Chart 17 Rates of territory coverage with radio signal from 3G mobile networks (%)

Source: **ANRCETI**

A similar situation was attested in terms of population coverage with radio signal generated by 3G mobile networks. JSC„Orange Moldova" and JSC „Moldcell" maintained the coverage rates at the 2015 level, while JSC„Moldtelecom" increased that level by 1,3 p. p. – up to 98% (Chart 18).

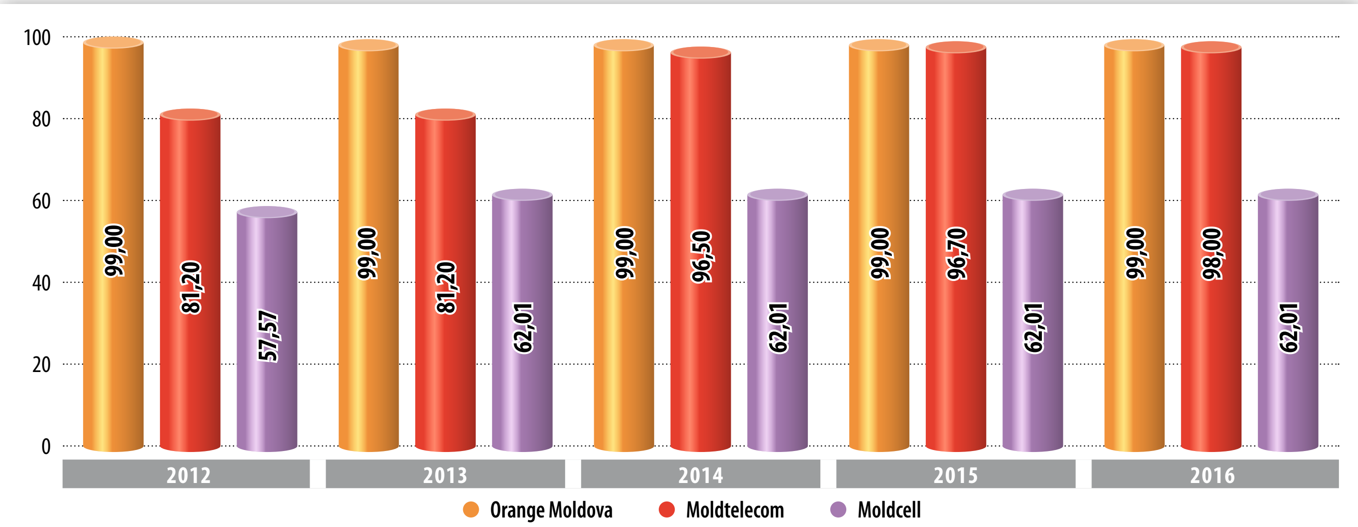

Chart 18 Rates of population coverage with radio signal from 3G mobile networks (%)

Source: **ANRCETI**

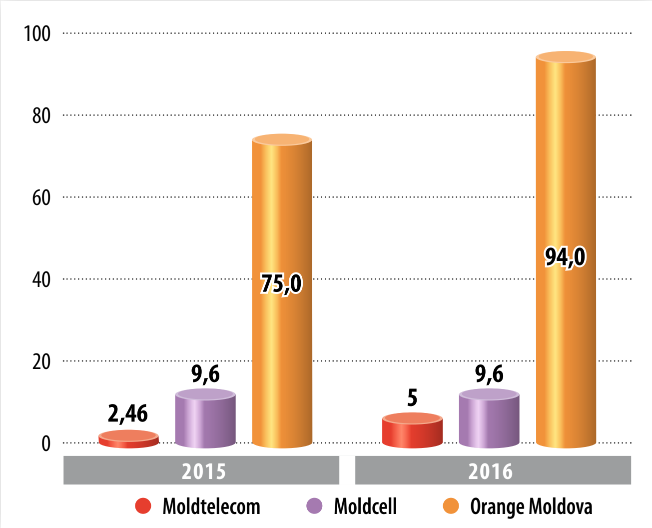

Chart 19 Rates of territory coverage with 4G mobile networks (%)

Source: **ANRCETI**

As for the territory coverage with radio signal from 4G mobile networks, it is notable that in 2016 the biggest increase of this indicator – 19 p.p. - was attested with JSC „Orange Moldova": from 75% to 94%. JSC „Moldtelecom" increased this rate by 2,5 p. p. – up to 5%, while JSC „Moldcell" maintained the rate at the 2015 level - 9,6% (Chart 19).

A similar evolution was reported for the rates of population coverage with radio signal from 4G networks. With JSC „Orange Moldova", this indicator increased from 84% to 97%, with JSC „Moldtelecom" – from 21,1% to 29%, while JSC „Moldcell" maintained the rate at the 2015 level - 29,7% (Chart 20).

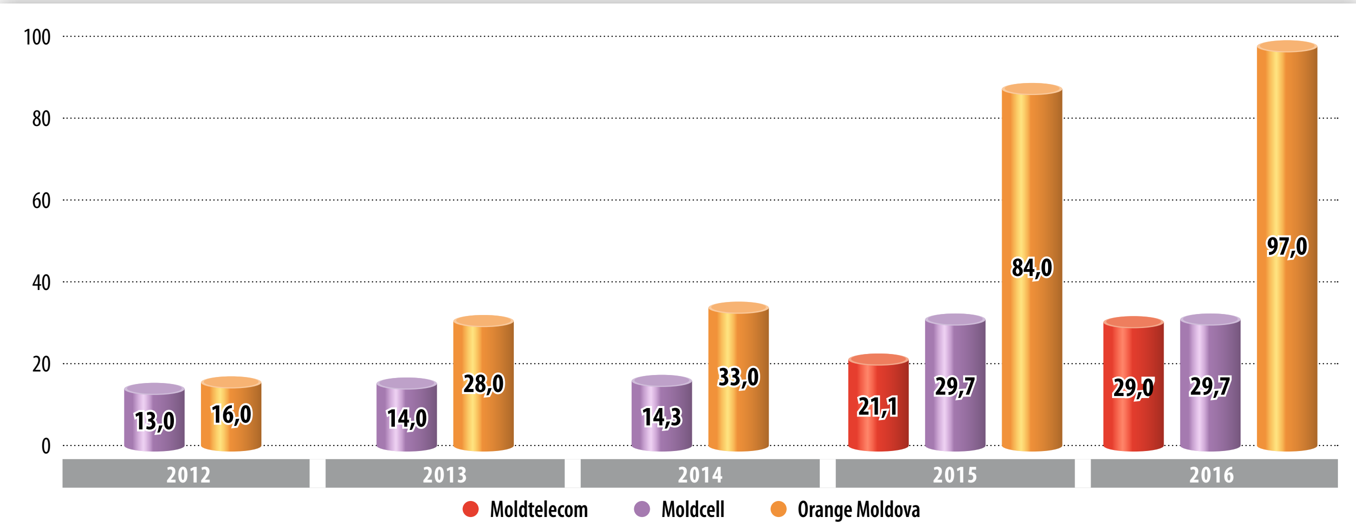

Chart 20 Rates of population coverage with radio signal from 4G networks (%)

Source: **ANRCETI**

3 Fixed telephony

3.1 Market development

In 2016, the total volume revenues on the fixed telephony market decreased most significantly in the last five years - 14% - and reached 876,1 million lei. This decrease was caused by the lower number of subscribers and voice traffic in fixed networks. Practically all the fixed telephony providers reported reduced revenues. Thus, the revenues of JSC „Moldtelecom" dropped by 11,2% and were estimated at 844,8 million lei, those of alternative operators – by 53,3%, estimated at 31,3 million lei (Chart 21).

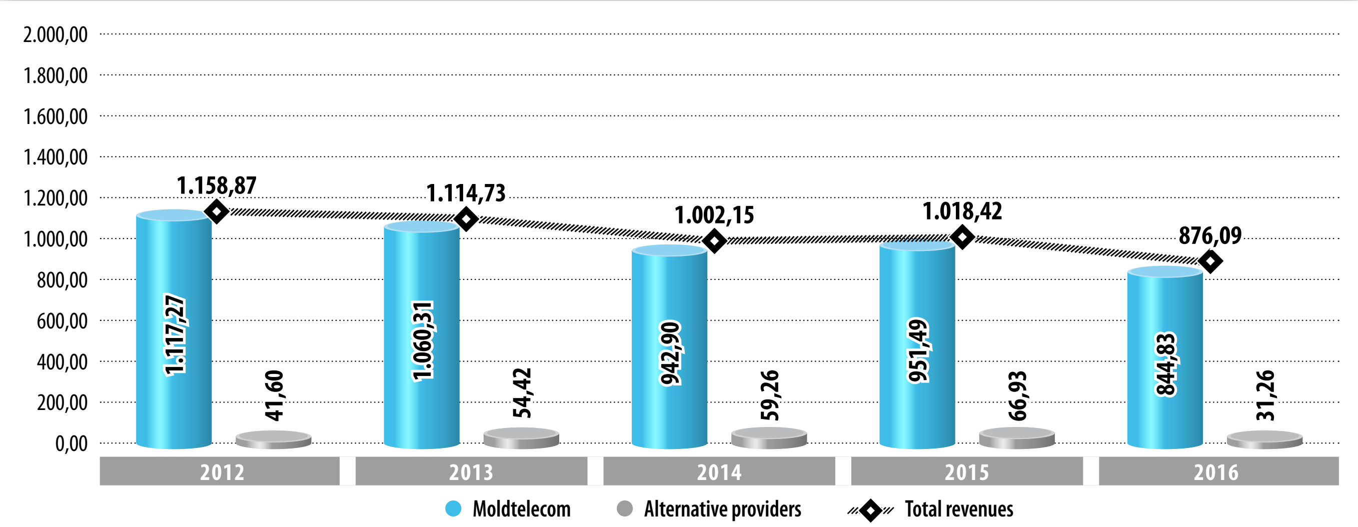

Chart 21 Development of revenues on the fixed telephony market (million lei)

Source: **ANRCETI**

Following the decrease of the total revenues, the average monthly revenue per users (ARPU) for fixed telephony services decreased by 12,3% to the total of 61,5 lei. This indicator with JSC „Moldtelecom" was 66,5 lei (down by 8,9%), with alternative providers - 20,4 lei (down by 54,7%) (Chart 22). The average monthly revenue per individual users was 24,3 lei (down by 2,6 lei or 9,8%) and per business users - 73,2 lei (down by 11,8 lei or 13,9%).

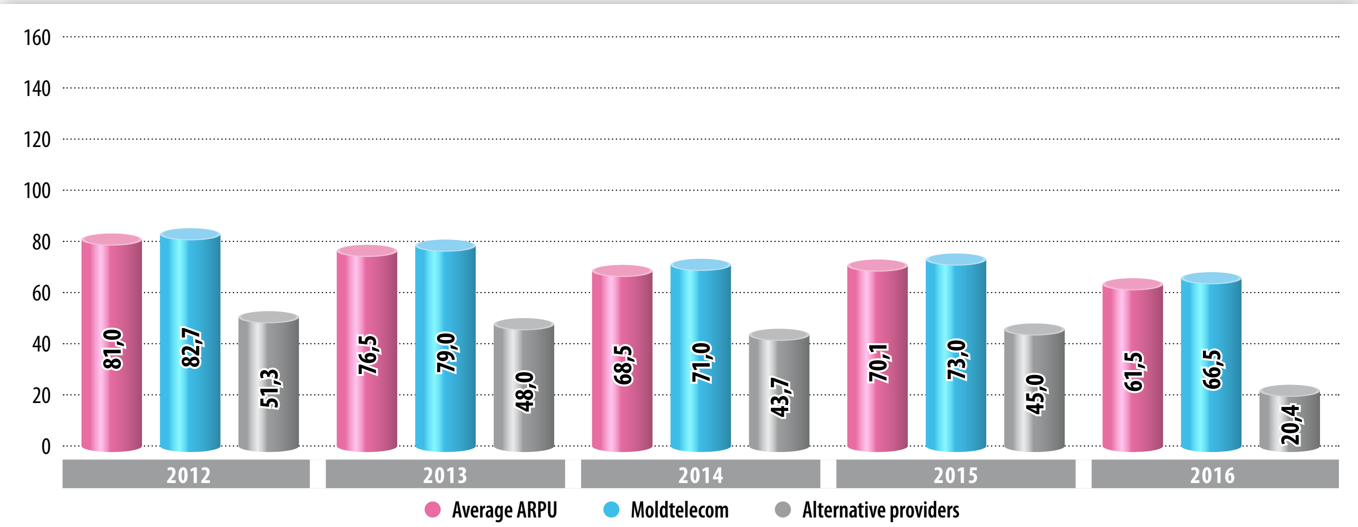

Chart 22 Development of the average monthly revenue per fixed telephony subscriber - ARPU (lei)

Source: **ANRCETI**

In 2016, the market shares of fixed telephony providers, by revenues, slightly changed. The market share of JSC „Moldtelecom" grew by 3 p. p. and was estimated at 96,4%, at the end of 2016, while the cimmulative market share of alternative providers reduced the same amount and was reported as 3,6%, (Chart 23).

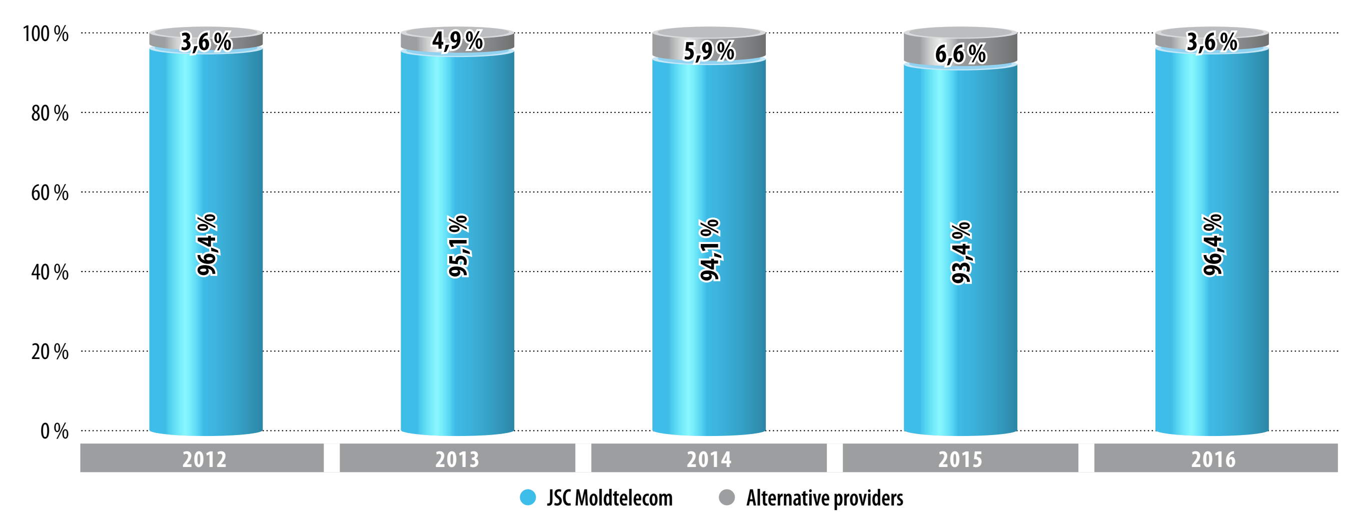

Chart 23 **Development of market shares of fixed telephony providers, by revenues**

Source: **ANRCETI**

3.2 Subscribers and penetration rate

In 2016, the number of fixed telephony[6] subscribers decreased by 31,2 thousand (-2,6%) to a total of 1 million 171,3 thousand. The reduction of the number of subscribers was determined by the decrease of the subscriber base of JSC „Moldtelecom" by 30,8 thousand (-2,9%), down to a total of 1 million 43,7 thousand at the end of 2016. However, the subscriber base of the other 24 alternative fixed telephony providers practically remained the same: with only 363 subscribers decrese (-0,28%) to a total of over 127,6 thousand. As a result of this evolution, the fixed penetration rate per 100 inhabittants dropped by 0,85 p. p. showing 32,97% (Chart 24). In terms of subscribers residence area, this indicator was 43,2% in urban areas and 25,5% - in rural aras.

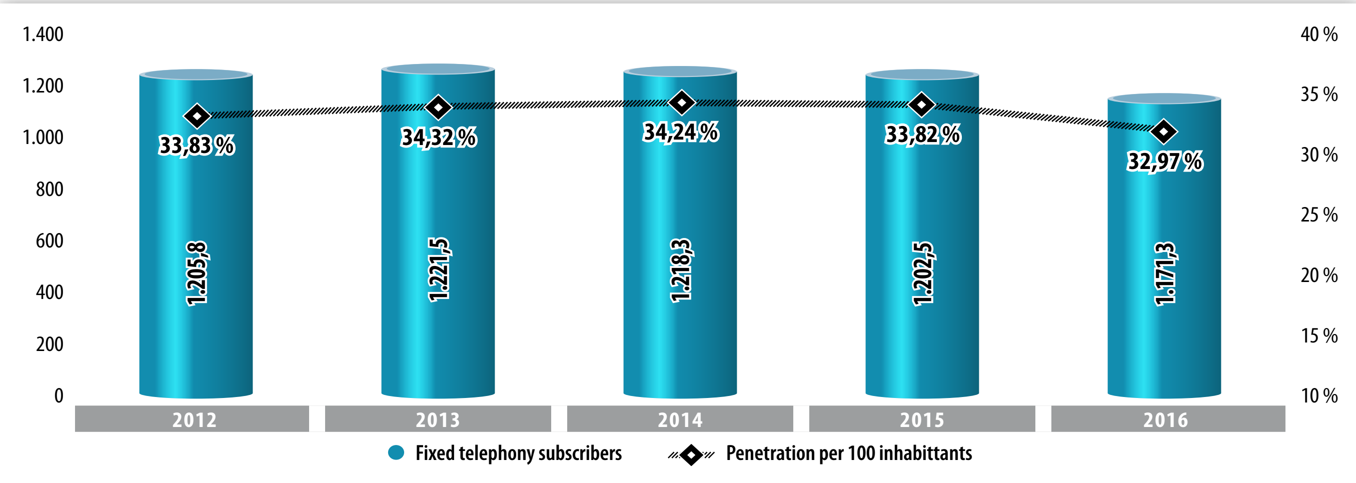

Chart 24 **Number of fixed telephony subscribers (thousand) and penetration rate (%)**

Source: **ANRCETI**

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

At the end of 2016, 89% of fixed telephony subscribers were individuals and 11% - businesses. More than half of the total number of subscribers - 641,6 thousand (54,8%) – resided in urban areas, 529,6 thousand (45,2%) – in rural areas.

3.3 Development of voice traffic

The total volume of voice traffic in fixed networks decreased by 12,7% and were estimated at 1 billion 824 million minutes. This decrease was caused by the reduction of all traffic types. The traffic originated abroad and terminated in the fixed networks in the R. Moldova decreased by 41,1%, the traffic to other fixed networks – by 37,4%, the traffic to international networks – by 25,4%, the traffic to mobile networks – by 10,3% and the interconnection traffic – by 11,4%. From the total of outbound traffic, 54% was directed to mobile networks, 31,4% - to other fixed networks and 14,6% - to international destinations.

As a result of the significant reduction of voice traffic in fixed telephony networks, the average monthly traffic via one access line (MoU indicator) decreased, compared to 2015, by 27 minutes (11,5%) and equaled 198 minutes (3 hours and 18 minutes), while the average call duration was 2,3 minutes (Chart 25).

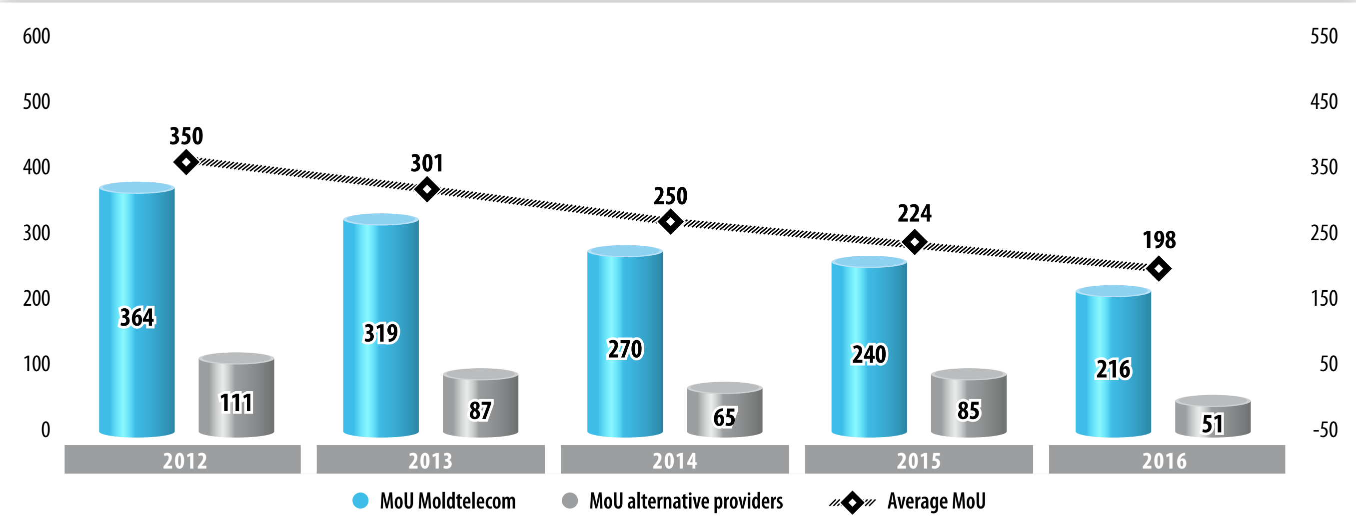

Chart 25 Development of the MoU indicator (minutes)

Source: **ANRCETI**

4 Fixed and mobile Internet access services

In 2016, the fixed and mobile Internet services, similarly with the previous years, continued to be the most dinamic segments in the electronic communications sector. The main indicators of these segments (number of users, data traffic, revenues) increased significantly. The acsending trend of these segments was enhanced by the growing demand for Internet access services, development of the infrastructure of access to the global network based on 3G, 4G technologies and fiber, the more intence competition among providers.

The development of the Internet access infrastructure, the growing number of Internet users, who access the internet from a number of devices (computer, laptop, smartphone, tablet, etc.) and the higher access speeds led to increasing capacities of Internet access channels from the R. Moldova by 4,6%: from 326 Gbps, in 2015, to 341 Gbps, in 2016.

4.1 Development of revenues on the fixed and mobile Internet market

According to the data reported by active fixed amd mobile Internet providers, the total volume of revenues on the two market segments increased over 2015, by 12% and exceeded 1,8 billion lei, which makes 27% of the total value of the electronic communicationsmarket value. The most advanced growing rate of revenues - by 36 % - was reported on the market for mobile Internet access via phones (Revenues mobile Internet access voice users).

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

Indicators	2012	2013	2014	2015	2016
Fixed Internet access	540,2	652,6	785,3	927,7	1.050,4
Mobile Internet access:	256,4	383,4	407,9	482,2	579,1
Including revenues Internet access voice users	*103,3*	*113,5*	*148,2*	*190,9*	*258,6*
Including revenues dedicated Internet access	*153,1*	*269,9*	*259,7*	*291,3*	*320,5*
Total revenues fixed and mobile Internet acces	**796,6**	**1.036,0**	**1.193,2**	**1.409,8**	**1.629,6**
Share fixed Internet access (%)	67,7%	62,8%	66,1%	66,1%	64,5%
Share mobile Internet access (%)	32,3%	37,2%	33,9%	33,9%	35,5%

Source: **ANRCETI**

4.1.1 Development of revenues on the fixed Internet access market

According to the data reported by 83 active providers of fixed Internet access services, the total volume revenues on this market grew, compared to 2015, by 5,2% up to 1 billion 105,23 million lei. The highest revenues from these services were reported by JSC „Moldtelecom" and „Sun Communications" LLC.

The revenues of JSC „Moldtelecom" increased by 44,3 million lei (+6,6%) to a total of 714,14 million lei, the revenues of „Sun Communications" LLC by 9,7 million lei (+20%) and reached 58,38 million lei. The revenues of „Starnet Solutions" LLC dropped by 13,4 million lei (- 5,7%) to a total of 223,39 million lei. The cumulative volume of revenues of the other 80 increased by 14,1 million lei up to 109,32 million lei (Chart 26).

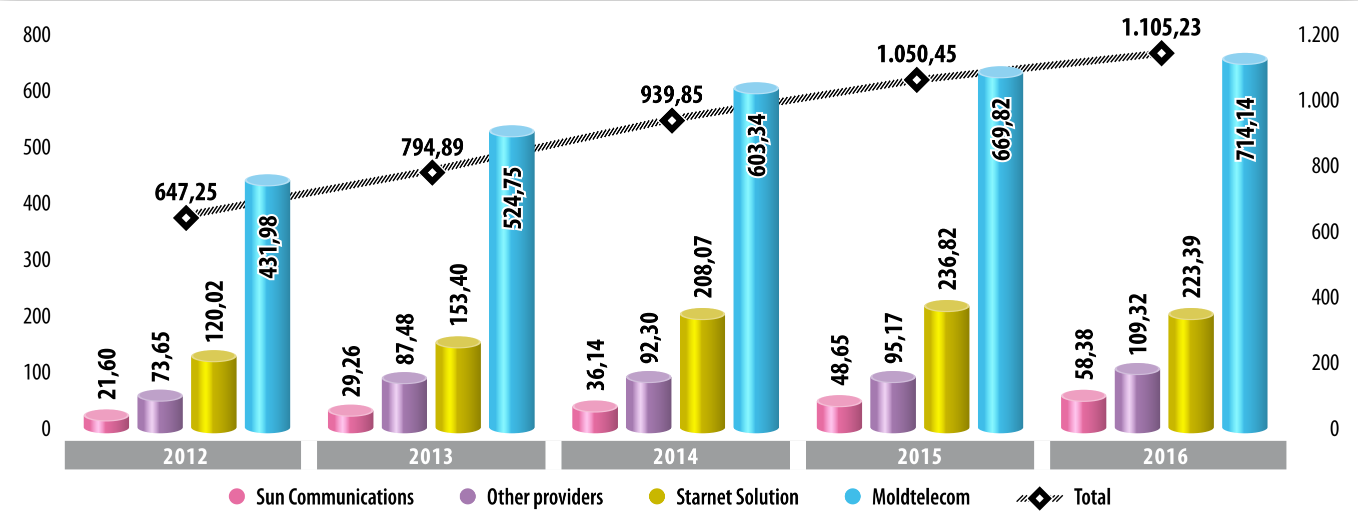

Chart 26 Development of revenues on the fixed Internet access market (million lei)

Source: **ANRCETI**

In the last five years, the market shares of the providers on the fixed Internet access market by revenues did not change significantly. In this timeframe, the market share of JSC „Moldtelecom" practically remained unchanged (2/3 of the market), while the market shares of „Starnet Solutions" LLC and „Sun Communications" LLC grew by 1,7 p. p. and 2 p. p. accordingly and were estimated at 20,2% and 5,3%. At the same time, the cumulative share of the other providers decreased by 1,5 p. p., to 9,9% (Chart 27).

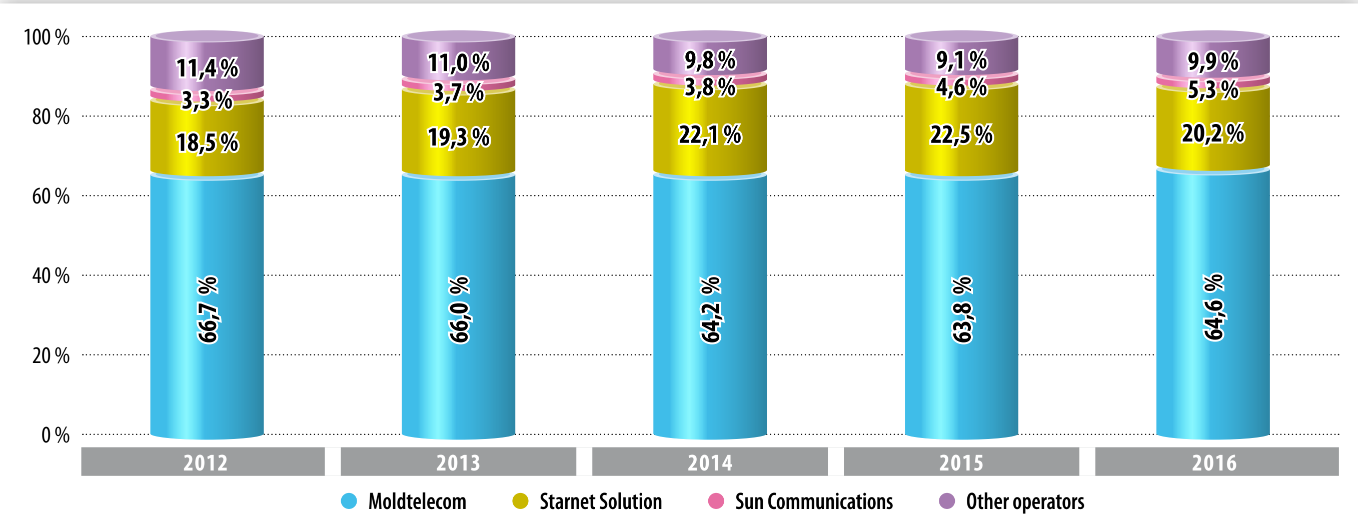

Chart 27 Market shares of providers of fixed Internet access services, by revenues

Source: **ANRCETI**

As a result of the revenue increase from fixed Internet access services, the average monthly revenue per user (ARPU) increased by 0,7% and was estimated at 169,4 lei (Chart 28). The average monthly revenue per individual user was 158 lei, for a business users - 395 lei.

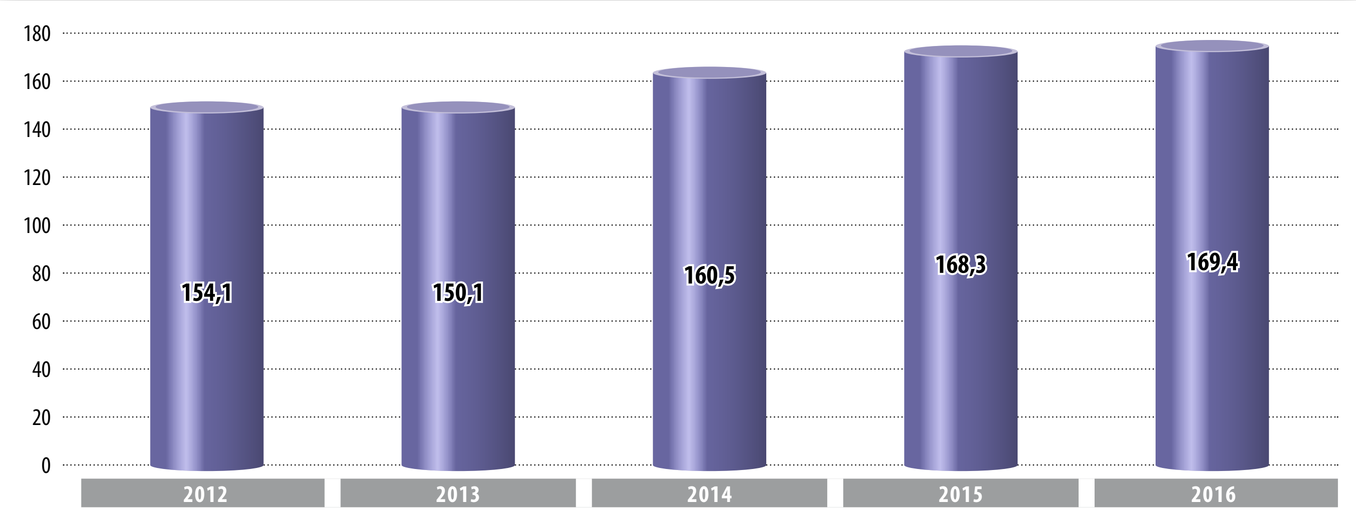

Chart 28 Development of average monthly revenue per user for fixed Internet access services - ARPU (lei)

Source: **ANRCETI**

4.1.2 Development of revenues on the mobile Internet access market

In 2016, the total volume of revenues by three mobile providers (JSC „Orange Moldova", JSC „Moldcell" and JSC „Moldtelecom" (Unite) from broadband (3G, 4G, via modems/cards/USB – dedicated access) increased over 2015, by 23,14% up to 713,2 million lei. The revenues of JSC„Moldcell" increased by 37,2% up to 195,5 million lei, of JSC„Orange Moldova" – by 23,1% and reached 419,8 million lei, those of JSC „Moldtelecom" - by 3,9% up to 97,9 million lei (Chart 29).

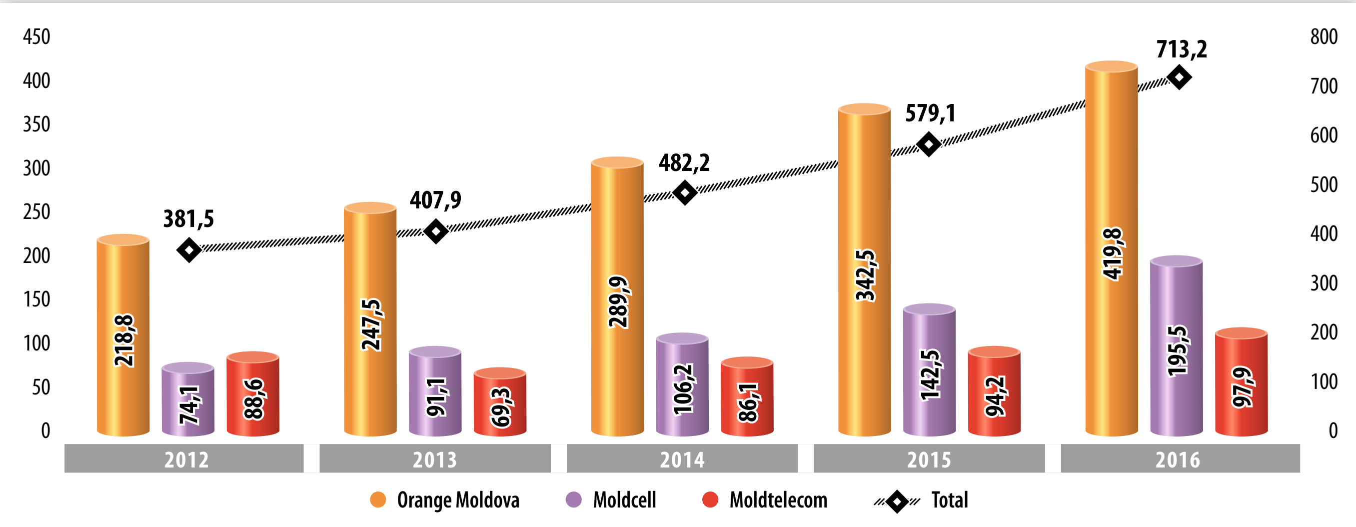

Chart 29 Development of revenues on the mobile broadband market (million lei)

Source: **ANRCETI**

In 2016, the market shares of mobile Internet access providers by revenues did not change significantly. The market shares of JSC „Moldtelecom" and JSC „Orange Moldova" decreased by 2,8 p. p. and by 0,2 p. p. and were estimated at 13,7% and 58,9% while the market share of JSC „Moldcell" increased by 2,6 p. p. up to 27,4% (Chart 30).

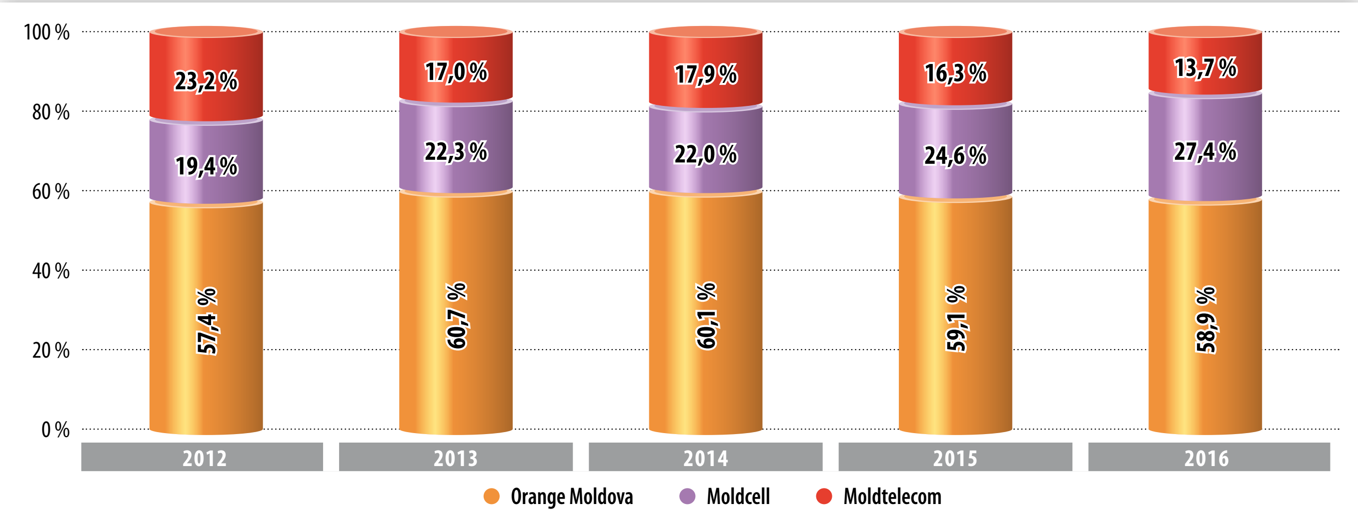

Chart 30 Market shares of mobile Internet access providers by revenues

Source: **ANRCETI**

The statistical data show that the total volume al revenues grew over 2015, by about 7,6% to a sum of 278,7 million lei. JSC „Orange Moldova" reported 125,3 million lei revenues from these services, JSC „Moldcell"– 64,2 million lei and JSC „Moldtelecom" – 89,2 million lei (Chart 31).

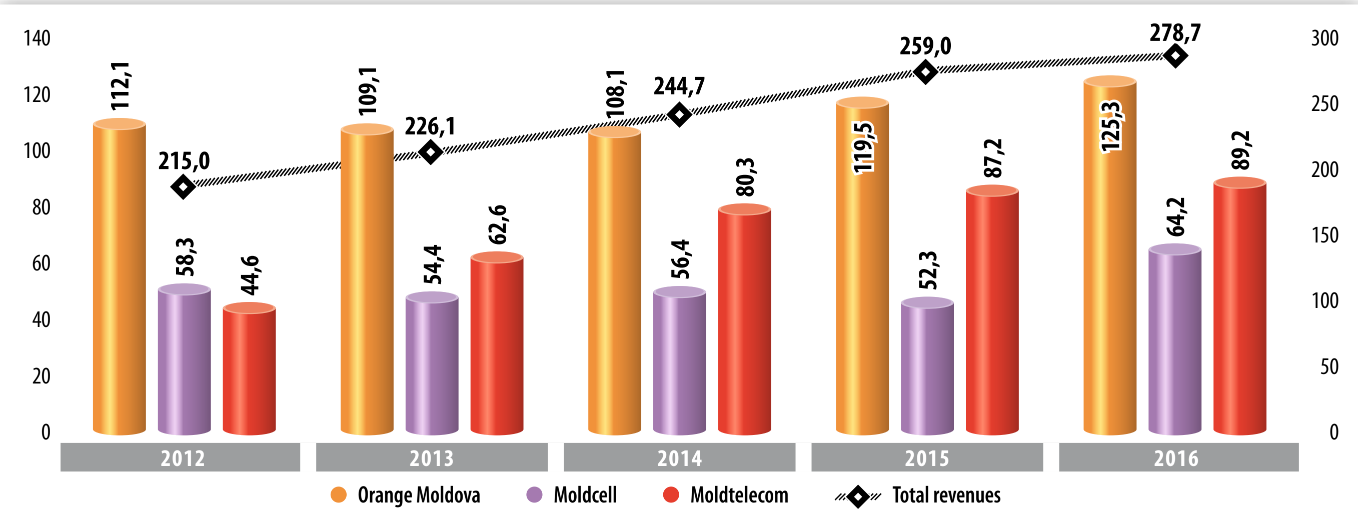

Chart 31 Development of revenues on the dedicated mobile Internet access services (million lei)

Source: **ANRCETI**

In the last five years, the market shares of the three dedicated mobile Internet providers by revenues, evolved differently. In this timeframe, the market share of JSC „Orange Moldova" decreased by 7,1 p. p. and was estimated at 45%, while the market share of JSC „Moldcell" decreased by 4,1% p. p. and made up 23%. The market share of JSC „Moldtelecom" increased by 11,2 p. p. and reached 32% (Chart 32).

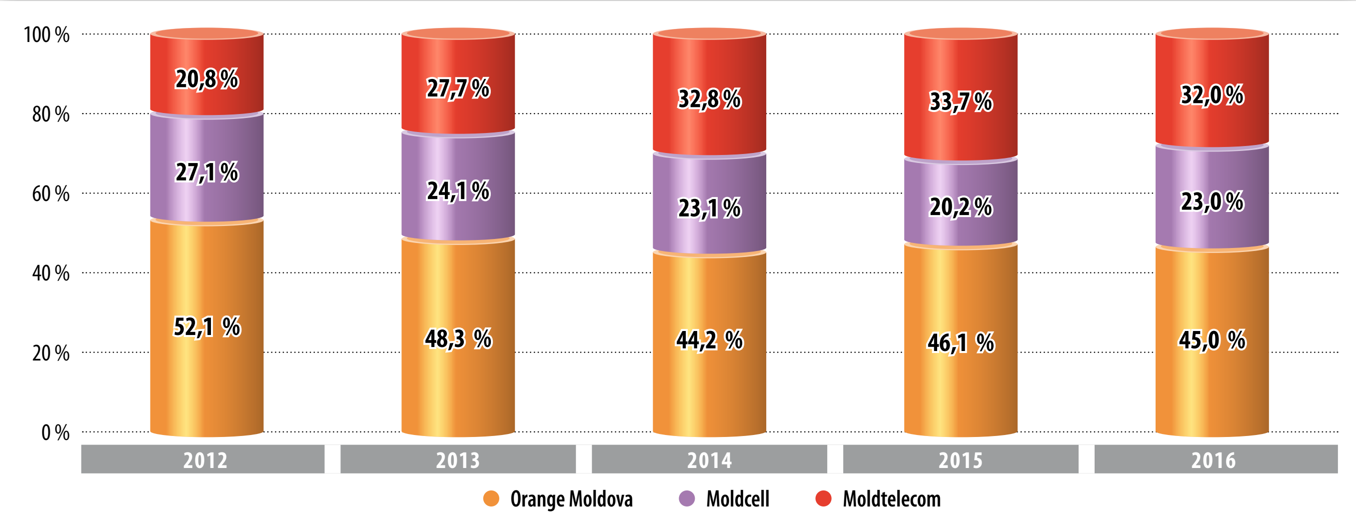

Chart 32 Market shares of providers of dedicated mobile Internet access services, by revenues

Source: **ANRCETI**

As a result of the increase of the total volume of revenues from the dedicated mobile Internet access services, the average monthly revenue per subscriber (ARPU) increased by 3,3%, to 77,1 lei. The biggest ARPU was reported by JSC „Orange Moldova" – 91,8 lei. The ARPU of JSC „Moldtelecom" was 84 lei , of JSC „Moldcell" - 54,1 lei (Chart 33).

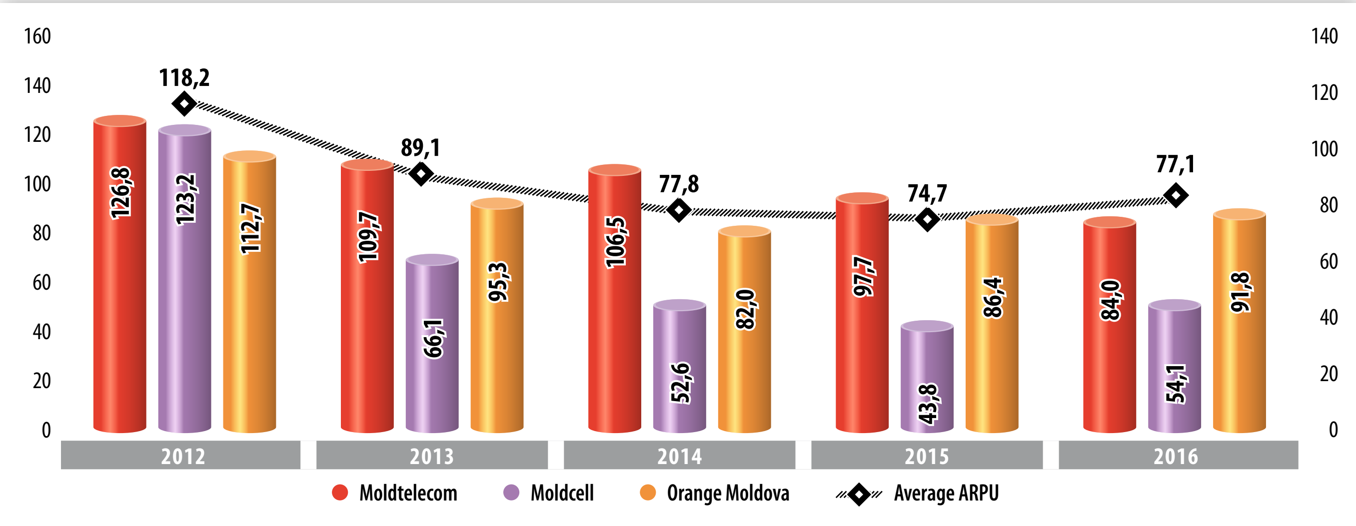

Chart 33 Average monthly revenue per subscriber (ARPU) to dedicated dedicated mobile Internet access (lei)

Source: **ANRCETI**

4.2 Subscribers and penetration rate of fixed and mobil Internet access services

In 2016, the number of subscribers to fixed Internet access services grew, compared to 2015, by 4,3% up to 557,4 thousand, while the number of users of mobile Internet access (via 2G, 3G, 4G and via modems/cards/USB – dedicated acces) increased 9% and exceeded 1 million 919 thousand.

According to the statistical data submitted by providers, during one year the number of mobile Internet users grew by 158,2 thousand, while the number of subscribers to fixed internet access services - 23 thousand.

Table no. 3 Development of the number of fixed and mobile Internet access users (thousand)

Indicators	2012	2013	2014	2015	2016	Change 2016-2015
1. Fixed Internet access	417,2	467,0	509,2	534,4	557,4	4,3%
2. Mobile Internet access:	1.536,1	1.632,2	1.688,4	1.761,1	1.919,4	9,0%
2.1 including broadband users (3G, 4G), voice users	685,4	778,7	936,6	1.157,5	1.589,7	37,3%
2.2 Including subscribers to dedicated mobile Internet access	178,4	244,6	279,5	298,4	303,9	1,8%
1. Fixed Internet access penetration rate	11,7%	13,1%	14,3%	15,0%	15,7%	+ 0,7 p.p.
2. Mobile Internet access penetration rate	43,1%	45,9%	47,4%	49,5%	54,0%	+4,4 p.p.
2.1 Including mobile broadband penetration rate	24,3%	28,6%	34,2%	40,9%	53,2%	+12,3 p.p.
2.2 Including dedicated mobile Internet penetration rate	5,0%	6,9%	7,9%	8,4%	8,5%	+0,2 p.p.

Source: **ANRCETI**

The same statisctical data show that during one year the number of mobile broadband users (3G, 4G and dedicated access) increased by 30,1% and reached 1 million 893,6 thousand, while the number of subscribers to fixed broadband increased by 4,3% and exceeded 557,4 thousand. The fast growth of the number of users attested on the mobile broadband segment confirms the fact that more and more consumers prefer high speed Internet. (Chart 34).

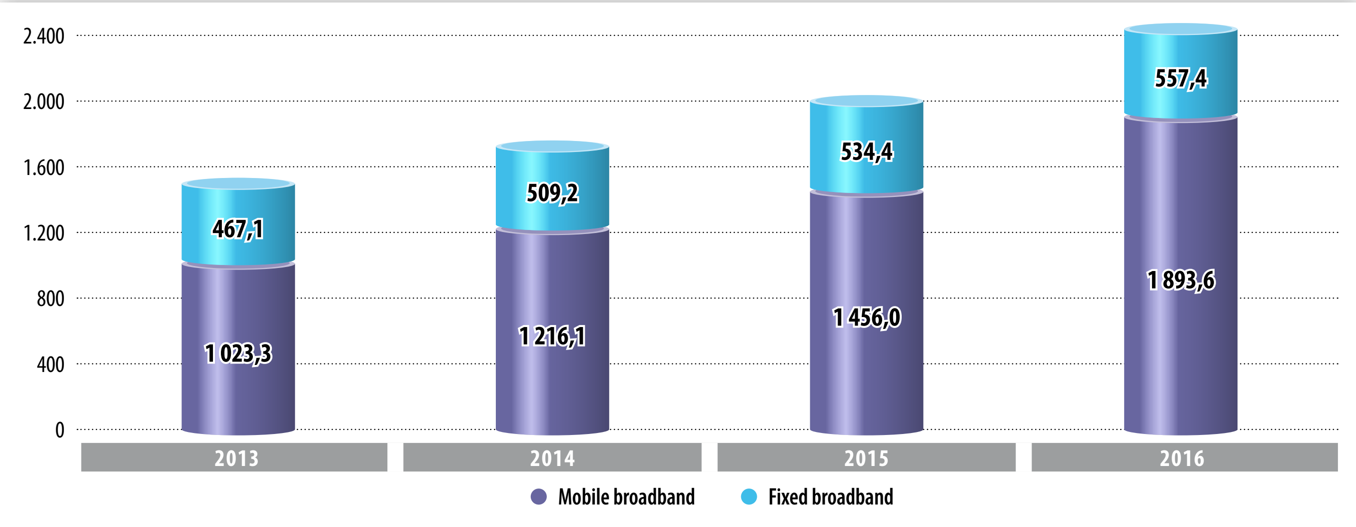

Chart 34 Development of the number of fixed and mobile broadband (thousand)

Source: **ANRCETI**

In 2016, the total volume of traffic generated by mobile broadband users increased by 16,5% to over 45,5 million GB. From this traffic volume, about 10,25 million GB was generated by mobile users by means of smartphones and 35,25 million GB – by dedicated Internet access users. A user of mobile Internet via smartphone generated on average a monthly traffic of about 560 MB, by 56% less than in 2015, while a user of dedicated mobile Internet – a monthly traffic of 9,8 GB, în increased by 4,6% over 2015.

With reference to dedicated mobile Internet users, statistical data show that in 2016 their number increased by 1,8% and reached 303,9 thousand, while the penetration rate of these services per 100 inhabittants went up by 0,1 p. p., to 8,5% (Chart 35).

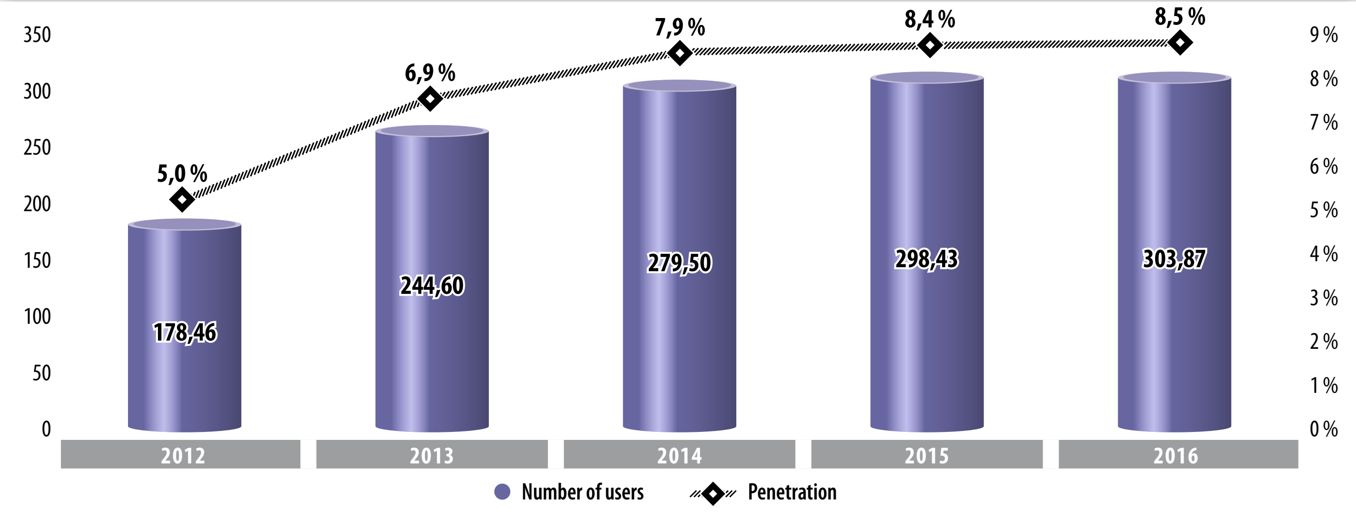

Chart 35 **Development of the number of users (thousand) and penetration rate of dedicated mobile Internet (%)**

Source: **ANRCETI**

As a result of the bigger number of users, the service mobile Internet penetration rate per 100 inhabittants increased by 4,4 p. p. and exceeded 54%, the rate of broadband services - by 6,5 p. p. and reached 53,3%, while the rate of dedicated mobile Internet services went up by 0,1 p. p. and was estimated at 8,5%. The service penetration rate of fixed Internet increased 0,7 p. p. up to 15,7% (Chart 36).

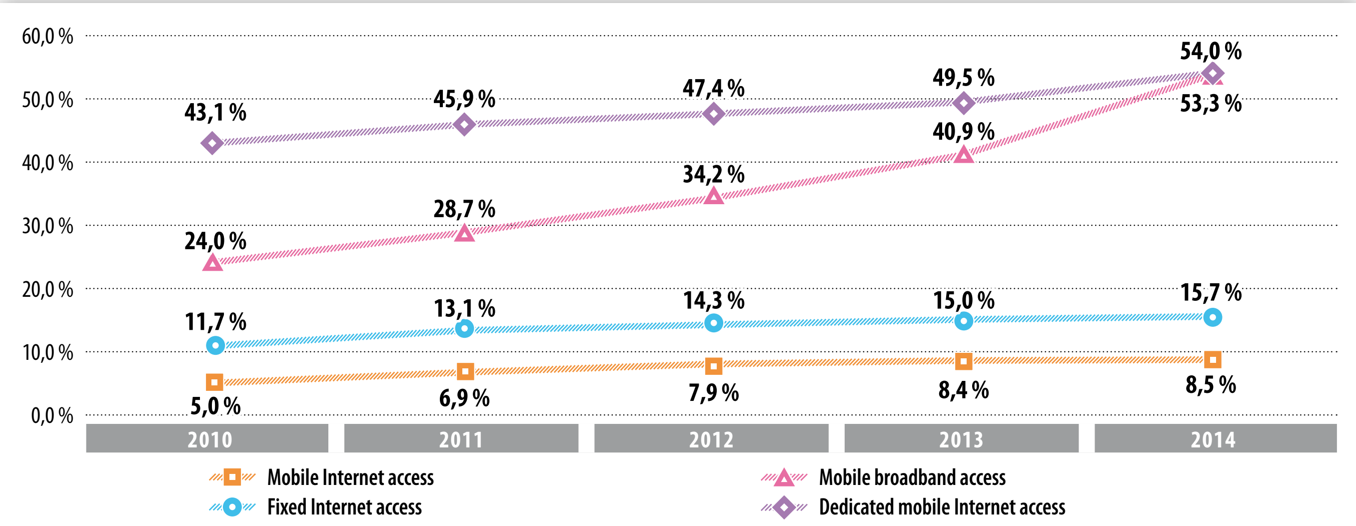

Chart 36 **Development mobile and fixed penetration rates**

Source: **ANRCETI**

4.2.1 Fixed Internet access technologies and data transfer speeds

According to the data presented by fixed Internet providers, the growing number of subscribers to these services was reported exclusively due to the increasing number of users connected via fiber (FTTx - *Fiber to the premises*). Their number increased in one year by about 25,9 thousand (+9%) and exceeded 315,1 thousand. The number of subscribers onnected via xDSL (*Digital Subscriber Line*) dropped by over 2 thousand (- 1%) to 201,5 thousand, those connected via coaxial cable decreased by 2,2% to more than 38,5 thousand (Chart 37).

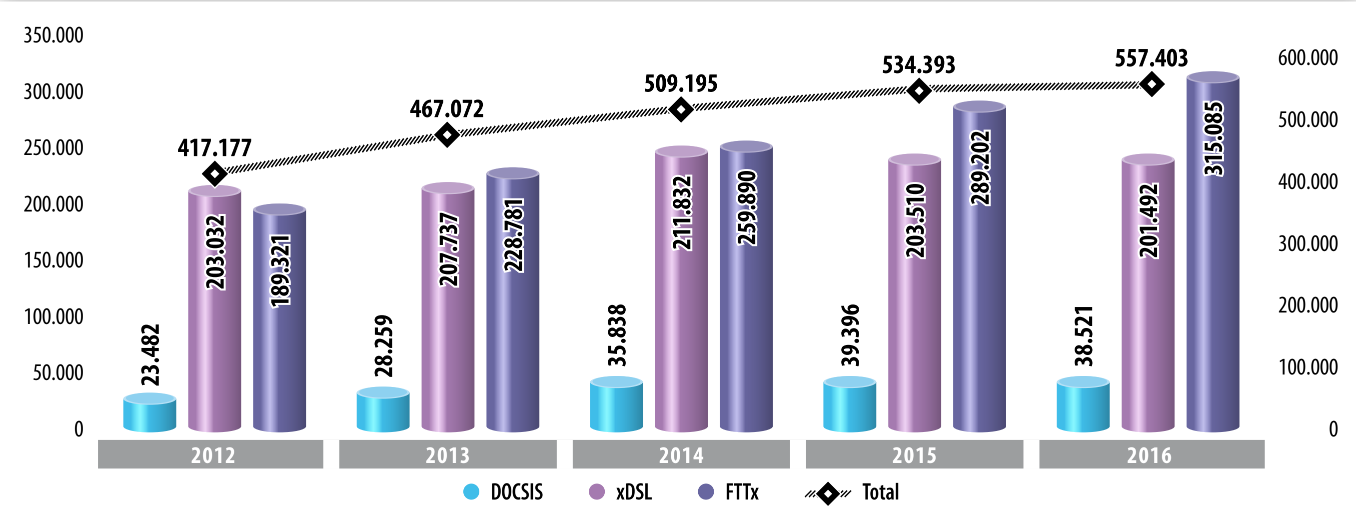

Chart 37 Development of the number of fixed Internet subscribers, by technology

Source: **ANRCETI**

The share of FTTx fixed Internet connections grew over 2015 by 2,4 p.p. to 56,5%. Whereas the share of xDSL connections dropped by 2 p. p. and was estimated at 36,1%, the number of coaxial cable connections - by 0,5 p. p. to 6,9% (Chart 38).

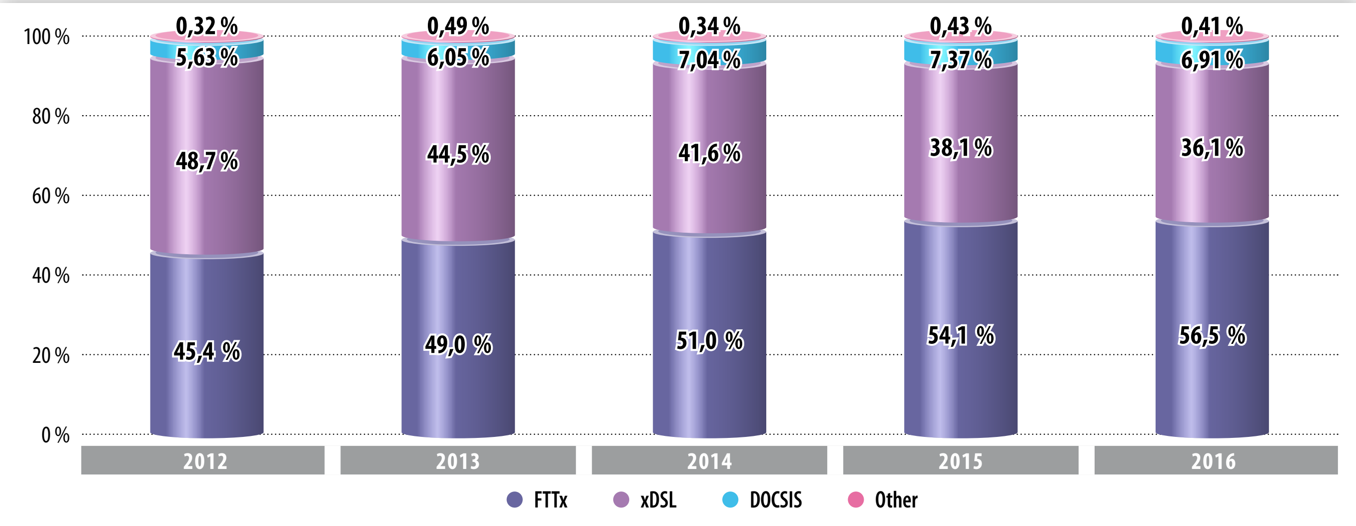

Chart 38 Shares of fixed Internet connections, by access technology

Source: **ANRCETI**

The analysis of fixed Internet connections by data transfer speeds, contracted by subscribers, show that in 2016, the most significant increase was reported for the connections of 30 Mbps and 100 Mbps. The number of these subscribers increased by 11,02% and reached 266,5 thousand.

From the total of fixed Internet connections, 49% allow speeds between 30 and 100 Mbps, 35% - connections between 10 and 30Mbps, 6% - between 2 and 10Mbps, 6% - ovwer 100 Mbps, other about 4% - lower than 2 Mbps. (Chart 39).

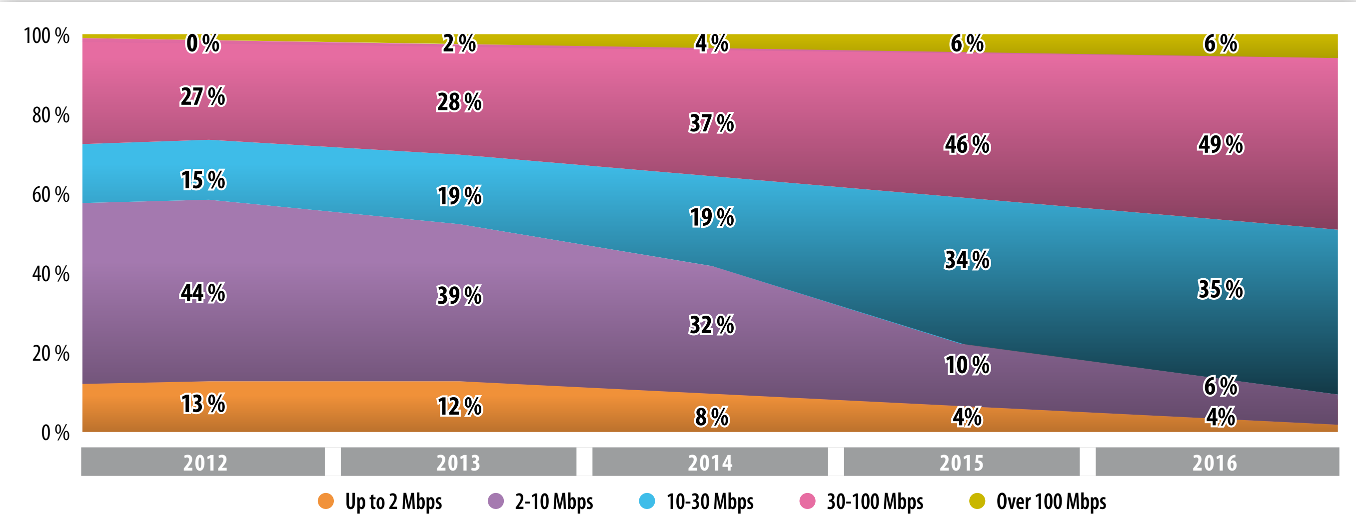

Chart 39 **Share of fixed Internet connections, by data transfer speeds**

Source: **ANRCETI**

In terms of residence areas of subscribers, 61,4% reside in urban areas and 38,6% - in rural areas.

Similarly to the previous years, the biggest part of fixed Internet subscribers - 40,4% – is concentrated in Chisinau municipality. At the end of 2016, the fixed Internet penetration rate in Chisinau per100 households was 80%. In most of territorial-administrative units this indicator varied between 23 and 50%. Other information about the territorial development of fixed Internet access services are provided in the Annex to this Report.

5 Audiovisual broadcasting and retransmission

5.1 Market development

Statistical data presented by authorized providers of public electronic communications networks and services show that in 2016 the total volume of revenues on this market decreased more significantly than in 2015. This indicator dropped by 18,9% to about 297,8 million lei. The revenues of air TV and radio market decreased by 30,5% to 146 million lei, which makes 49% of the value of the audiovisual broadcasting and retransmission market, while the revenues of the Pay TV market (cable TV and IP TV) decreased by 3,2% to 151,8 million lei or 51% of the market value (Chart 40).

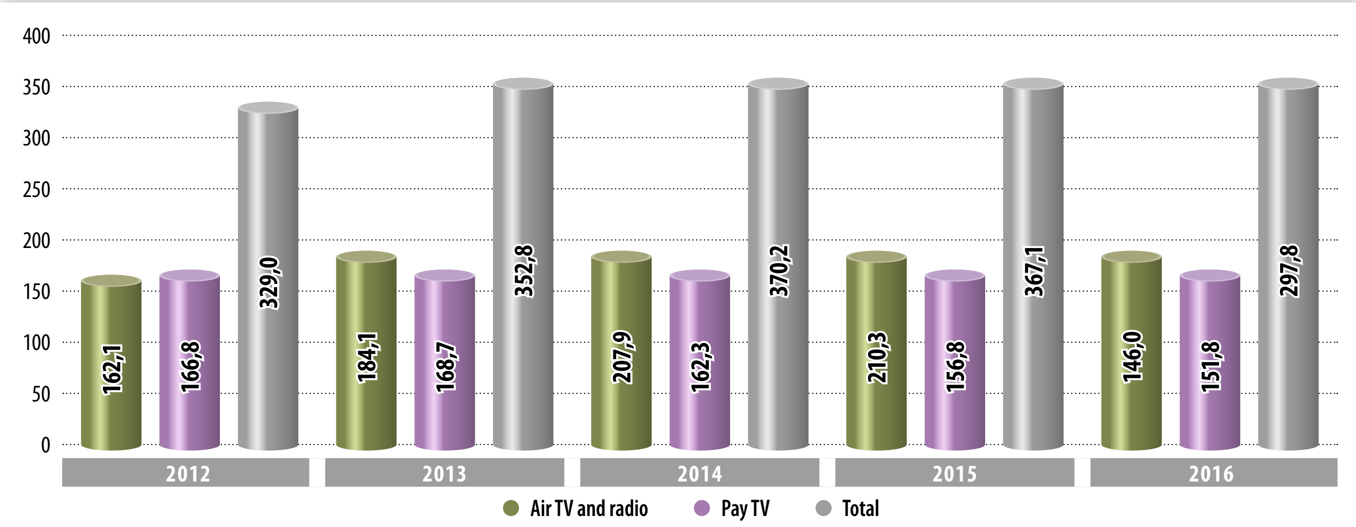

Chart 40 **Development of revenues on the audiovisual broadcasting and re-transmission market (million lei)**

Source: **ANRCETI**

According to the statistical data submitted by 108 active providers of pay TV services, the decrease of the total volume of revenues from these services was caused by the decreasing number of subscribers and volume of cable TV services. The revenues of cable TV services decreased by 10,6 million lei (-10,8%) to 88 million lei. However, the revenues from IP TV services increased by 5,6 million lei (+9,7%) and exceeded 63,7 million lei. As a result of this evolution, the average monthly revenue per subscriber (ARPU) for pay TV services dropped 2,5% to 46,39 lei. (Chart 41).

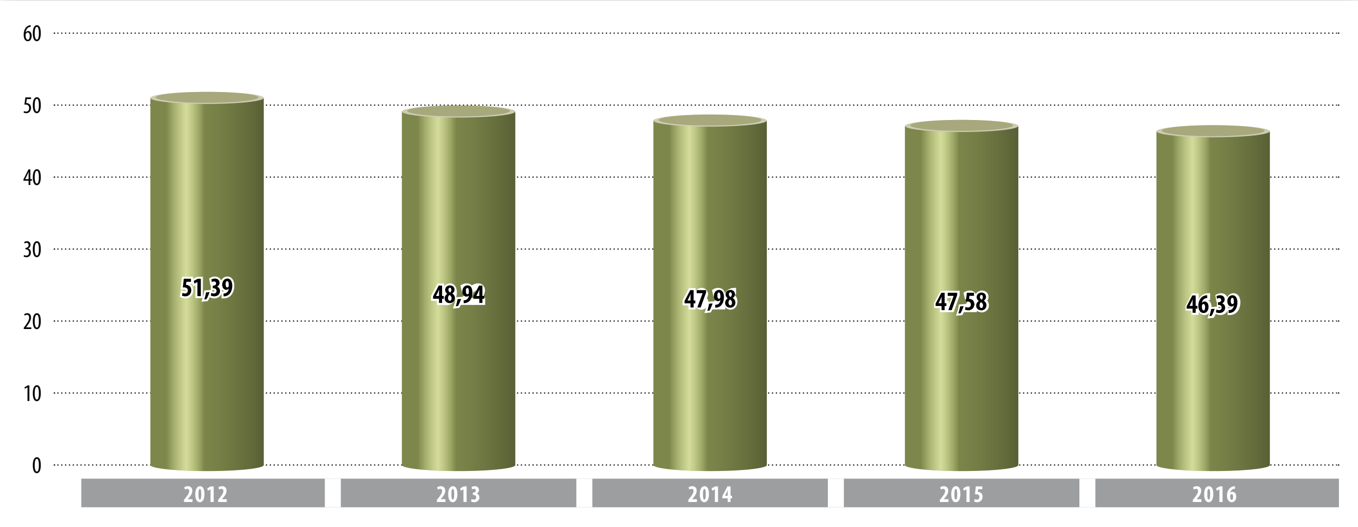

Chart 41 **Development of average monthly revenue per pay TV subscriber - ARPU (lei)**
Source: **ANRCETI**

In 2016, the market shares of pay TV services by revenues slightly changed. The market share of „TV-BOX" LLC and JSC „Moldtelecom" increased over 2015 by 3 p. p. and 1,9 p. p. and made 11,2% and 30,5% accordingly. The market share of „Sun Communications" LLC dropped by 1,1 p. p. and was estimated at 26,6%, while the commulative share of the other 105 providers decreasedby 3,8 p. p. to 31,7%. (Chart 42).

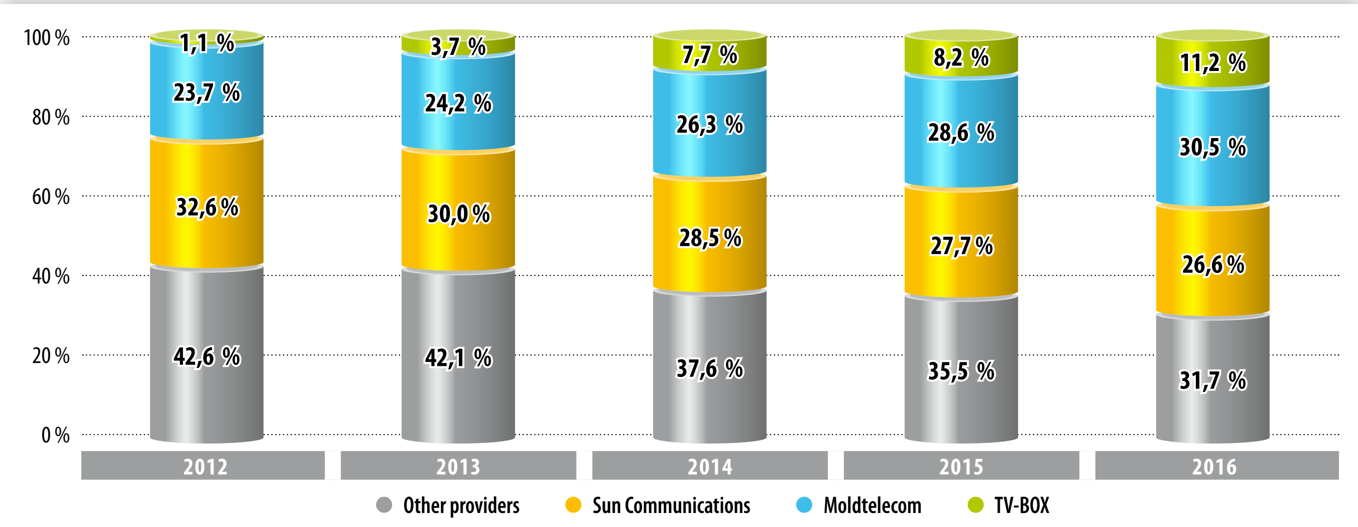

Chart 42 **Development of market shares of pay TV service providers, by revenues**
Source: **ANRCETI**

5.2 Pay TV subscribers and penetration rate

The total number of subscribers to Pay TV services decreased by 5,3 thousand (-1,9%) to over 269,9 thousand. The decrease was caused by the reduction of the number of cable TV subscribers. Their number dropped by 14,6 thousand (-7,1 %) to 191,8 thousand at the end of 2016. However, the subscriber base of IP TV providers grew by 9,3 thousand (+13,6%) and exceeded 78 thousand. As a result, the service penetration rate of pay TV services, per 100 inhabittants, decreased from 7,7%, in 2015, to 7,6%, in 2016, while the penetration rate per 100 households - from 23,23% to 22,79% (Table no.4).

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

Indicators	2012	2013	2014	2015	2016
Cable TV subscribers	227.4	224	209,2	206,5	191,8
IPTV subscribers	46,8	55,5	62,6	68,8	78,1
DTH subscribers	7,7	7,4	-	-	-
MMDS subscribers	2,8	2,9	2,1	-	-
Total subscribers	**284,8**	**289,9**	**274,0**	**275,3**	**269,9**
Penetration per 100 inhabittants	8,00%	8,14%	7,70%	7,74%	7,60%
Penetration per 100 housholds	**24,01%**	**24,43%**	**23,11%**	**23,23%**	**22,79%**

Source: **ANRCETI**

With reference to pay TV subscribers' place of residence, statistical data show that similarly with the previous years, most subscribers – 79,5% - are urban residents, 20,5% - live in rural areas.

By the end of 2016 the share of IP TV subscribers increased over 2015 by 3,95 p. p. and was estimated at 28,94%, while the share of cable TV subscribers dropped the same proportion – to 71,06% (Chart 43).

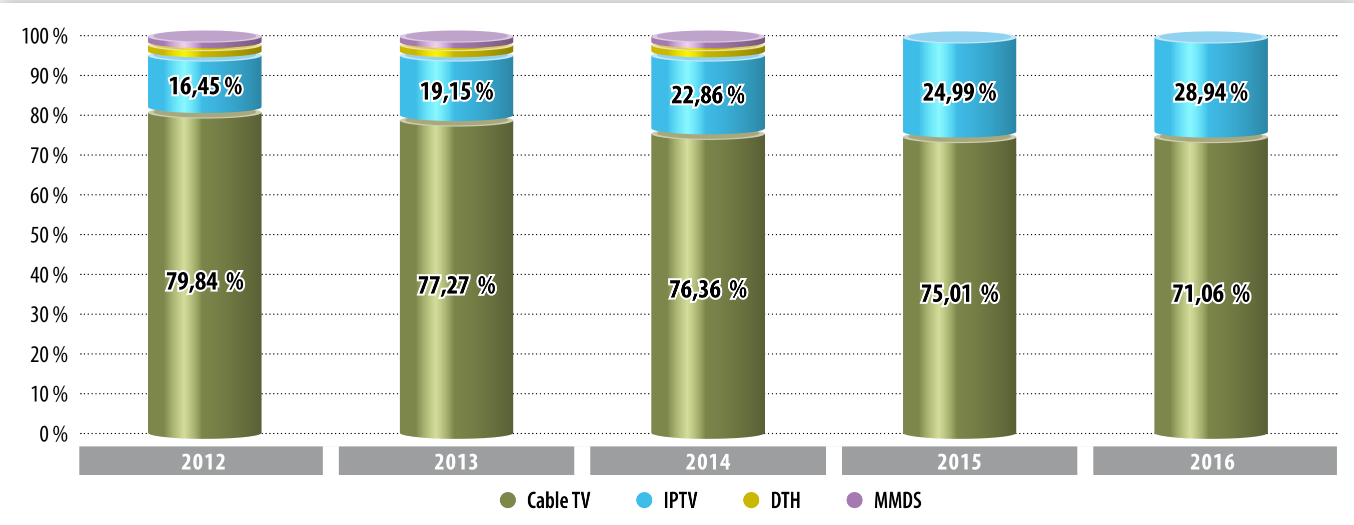

Chart 43 **Share of pay TV subscribers, by reception technology**

Source: **ANRCETI**

In the reporting timeframe, the increasing trend of digital pay TV usage continued, the number of such subscribers reaching 149 thousand. As per 31.12.2016, the share of digital pay TV services increased 3,8 p. p. up to 44,6%, while the share of analog TV services decreased the same amount and was estimated at 55,4% (Chart 44).

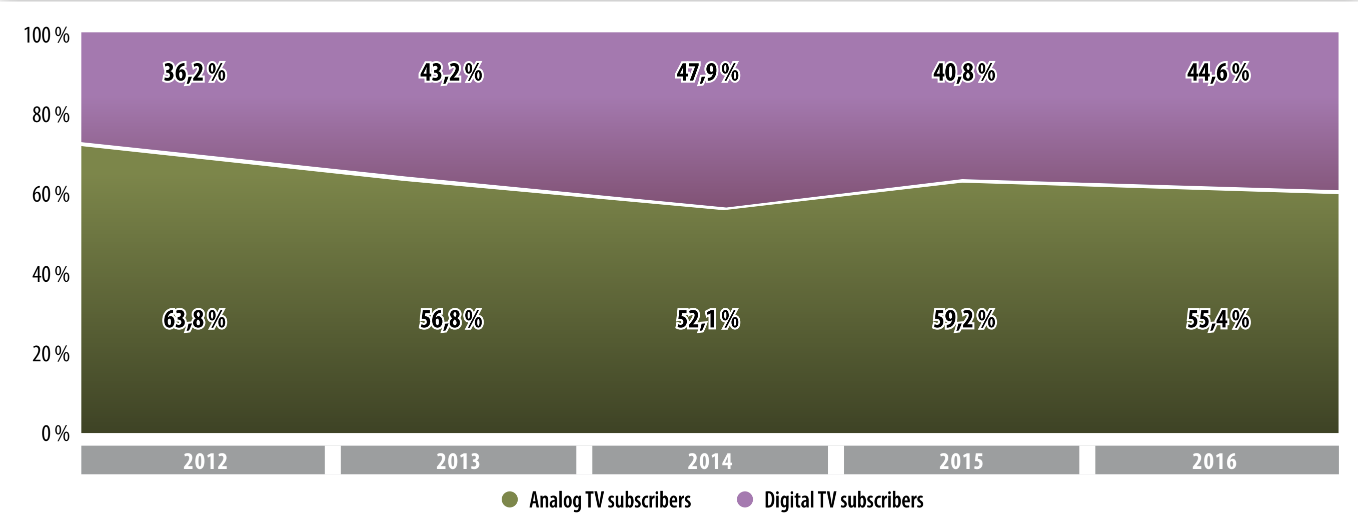

Chart 44 Share of pay TV subscribers, by TV format

Source: **ANRCETI**

The majority of IP TV subscribers and cable subscribers receive digital TV signal. In the last five years, the share of digital IP TV subscribers increased by 7,2 p. p.: from 45,4% to 52,6%, while the number of digital cable subscribers increased by 3 p. p.: from 44,4% to 47,4%. (Chart 45).

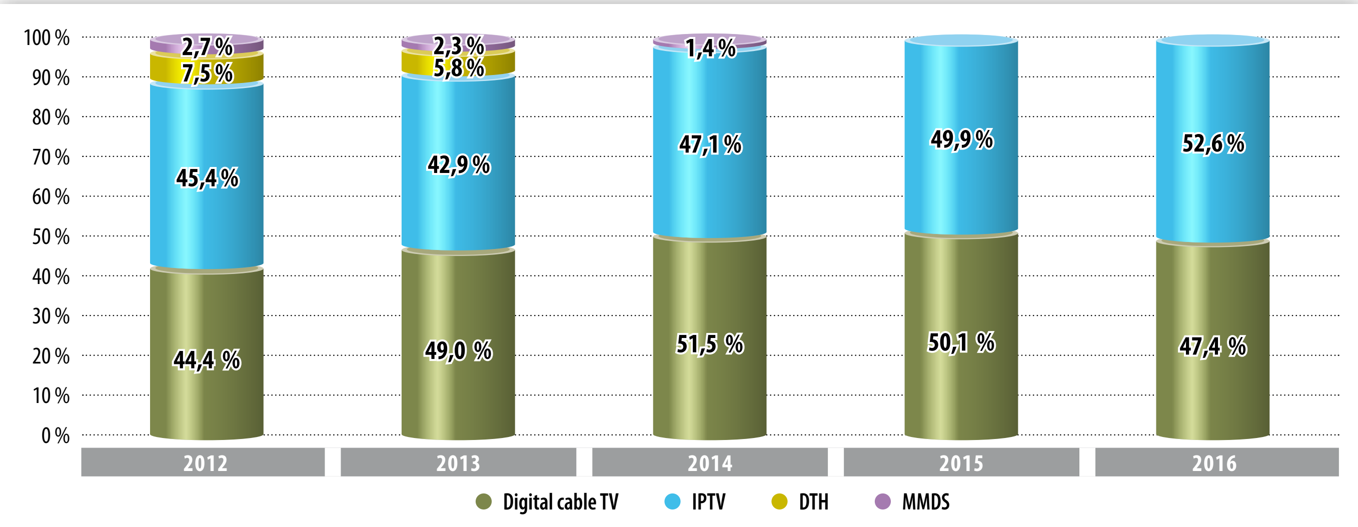

Chart 45 Share of digital TV subscribers, by reception technology

Source: **ANRCETI**

Conclusions

The analysis of the statistical data on the electronic matrket development in 2016 from this Report show that in this timeframe, the tendencies that shaped out in the last three-four years became more emphasised. After a standstill period of time, for the first time in the last five years, the mobile telephony market went through a well-marked derease (4,4%) of revenues, while the fixed telephony market was significantly influenced by the recession attested in the last five years, which led to the decrease of revenues by 145 compared to 2015.

The decrease of revenues on the aforementioned market segments, as well as on audiovisual broadcasting and re-transmission market, caused a decrease of about 3% in the total volume of revenues in the electronic communications sector, down to 6 billion 730,6 million lei. This is the first obvious reduction in the value of the electronic communications market in the last five years.

The decline of fixed and mobile telephony markets is driven by changes in consumers' preferences for voice services from fixed to mobile telephony and from mobile telephony to alternative internet communications services that are cheaper or free (OTT applications: Skype, Viber, WhatsApp, etc.). ANRCETI specialists believe that this trend, which is also evident on the European markets, will become stronger in the coming years, when most consumers will use mobile communications services via smartphones.

Given the downturn in fixed and mobile telephony, mobile and fixed Internet access services continued to increase in in 2016. Thus, the total volume of revenues on the two market segments increased by 12% compared to 2015 and exceeded 1,8 billion lei, which represents about 27% of the total value of the electronic communications market. The upward trend of these markets is driven by increased demand for Internet access services, increased competition between suppliers, the development of access infrastructure based on 3G, 4G and fiber.

ANRCETI estimations show that in the upcoming years the services of access to fixed and mobile Internet will continue to develop most dynamically, being the main drivers of the sector growth.

Annex

Number of subscribers and use of access technologies fixed Internet access technologies in administrative – territorial units of the R. Moldova, as per 31.12.2016

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	225 075	80.74%	8 845	180 560	34 229	1 441	3.9%	80.2%	15.2%	0.6%	28.32%	1.76	0.62	-1.5	2.6	-1.0	-0.2	-3 037	9 679	-1 430	-317	4 895
2	Balti	28 596	52.06%	3 470	23 162	1 956	8	12.1%	81.0%	6.8%	0.0%	19.17%	1.94	0.72	-1.4	-0.6	2.0	0.0	-245	686	626	0	1 067
3	Anenii Noi	10 672	39.37%	6 887	3 536	0	249	64.5%	33.1%	0.0%	2.3%	12.84%	2.26	0.74	-8.7	8.8	0.0	-0.1	-484	1 092	0	5	613
4	Basarabeasca	3 356	34.88%	1 960	1 395	0	1	58.4%	41.6%	0.0%	0.0%	11.57%	2.43	0.81	-8.1	8.1	0.0	0.0	-116	350	0	0	234
5	Briceni	10 095	39.63%	6 543	3 550	0	2	64.8%	35.2%	0.0%	0.0%	13.51%	0.57	0.20	0.2	-0.2	0.0	0.0	116	30	0	0	146
6	Cahul	16 376	41.73%	10 276	5 881	191	28	62.8%	35.9%	1.2%	0.2%	13.11%	2.16	0.68	-0.1	-0.7	0.8	0.0	520	188	133	5	846
7	Cantemir	6 769	37.17%	5 887	881	0	1	87.0%	13.0%	0.0%	0.0%	10.83%	2.23	0.65	-2.3	2.4	0.0	-0.1	210	204	0	-7	407
8	Calarasi	8 242	30.11%	4 995	3 238	0	9	60.6%	39.3%	0.0%	0.1%	10.46%	2.32	0.81	-0.9	0.8	0.0	0.1	314	312	0	9	635
9	Causeni	10 130	33.83%	6 844	3 281	0	5	67.6%	32.4%	0.0%	0.0%	11.01%	2.86	0.93	-6.4	6.4	0.0	0.0	-19	874	0	0	855
10	Cimislia	7 065	36.61%	4 409	2 654	0	2	62.4%	37.6%	0.0%	0.0%	11.53%	2.08	0.65	-3.3	3.3	0.0	0.0	31	369	0	1	401
11	Criuleni	9 741	42.03%	6 130	3 607	0	4	62.9%	37.0%	0.0%	0.0%	13.29%	3.15	1.00	-6.3	6.3	0.0	0.0	-105	835	0	1	731
12	Donduseni	4 750	26.51%	3 442	1 307	0	1	72.5%	27.5%	0.0%	0.0%	10.60%	3.96	1.58	-12.8	12.8	0.0	0.0	-2	712	0	0	710
13	Drochia	10 500	31.94%	5 538	4 305	655	2	52.7%	41.0%	6.2%	0.0%	11.73%	1.33	0.49	-8.9	17.4	-8.5	0.0	-667	1 928	-825	0	436
14	Dubasari	3 720	33.82%	2 651	1 068	0	1	71.3%	28.7%	0.0%	0.0%	10.57%	3.12	0.97	-9.2	9.2	0.0	0.0	-66	409	0	0	343
15	Edinet	10 695	35.40%	6 005	4 688	0	2	56.1%	43.8%	0.0%	0.0%	12.96%	1.36	0.50	0.1	-0.2	0.0	0.0	245	164	0	1	410
16	Falesti	9 255	28.05%	6 176	3 077	0	2	66.7%	33.2%	0.0%	0.0%	10.02%	1.42	0.51	-1.8	1.8	0.0	0.0	155	315	0	0	470
17	Floresti	10 329	31.76%	6 885	3 130	0	314	66.7%	30.3%	0.0%	3.0%	11.65%	1.91	0.70	-0.6	0.2	0.0	0.4	358	203	0	60	621
18	Glodeni	6 781	31.59%	4 944	1 836	0	1	72.9%	27.1%	0.0%	0.0%	11.04%	1.43	0.50	-3.1	3.1	0.0	0.0	21	286	0	0	307
19	Hincesti	13 279	35.54%	8 570	4 708	0	1	64.5%	35.5%	0.0%	0.0%	10.92%	2.05	0.63	-2.7	2.7	0.0	0.0	160	606	0	1	767
20	Ialoveni	14 278	48.22%	6 523	6 398	1 354	3	45.7%	44.8%	9.5%	0.0%	14.32%	2.93	0.87	-2.3	-2.3	4.6	0.0	86	77	705	1	869
21	Leova	5 977	35.38%	4 467	1 510	0	0	74.7%	25.3%	0.0%	0.0%	11.15%	2.50	0.79	-9.7	9.7	0.0	0.0	-224	646	0	0	422
22	Nisporeni	5 907	28.65%	4 286	1 620	0	1	72.6%	27.4%	0.0%	0.0%	8.87%	2.71	0.84	-5.1	5.0	0.0	0.0	134	423	0	1	558
23	Ocnita	5 720	27.65%	5 181	534	0	5	90.6%	9.3%	0.0%	0.1%	10.25%	0.96	0.35	-0.3	0.3	0.0	0.1	162	33	0	3	198
24	Orhei	14 808	35.83%	7 321	7 479	0	8	49.4%	50.5%	0.0%	0.1%	11.77%	4.74	1.56	-9.8	9.8	0.0	0.0	-287	2 247	0	-1	1 959
25	Rezina	5 414	30.50%	3 726	1 685	0	3	68.8%	31.1%	0.0%	0.1%	10.35%	1.92	0.65	0.5	-0.5	0.0	0.0	259	81	0	0	340
26	Riscani	8 103	30.81%	4 626	3 476	0	1	57.1%	42.9%	0.0%	0.0%	11.66%	2.05	0.77	-2.2	2.2	0.0	0.0	144	394	0	0	538
27	Singerei	11 081	35.67%	6 159	4 920	0	2	55.6%	44.4%	0.0%	0.0%	11.89%	2.07	0.69	-1.9	1.9	0.0	0.0	157	487	0	0	644
28	Soroca	10 800	29.53%	6 312	4 487	0	1	58.4%	41.5%	0.0%	0.0%	10.79%	1.48	0.54	1.2	-1.2	0.0	0.0	443	98	0	0	541
29	Straseni	10 063	36.03%	7 123	2 750	0	190	70.8%	27.3%	0.0%	1.9%	11.00%	-0.54	-0.17	1.4	-3.2	0.0	1.8	34	-371	0	186	-151
30	Soldanesti	3 590	23.65%	3 256	333	0	1	90.7%	9.3%	0.0%	0.0%	8.35%	1.55	0.55	-4.7	4.7	0.0	0.0	56	179	0	0	235
31	Stefan Voda	7 397	31.81%	4 595	2 799	0	3	62.1%	37.8%	0.0%	0.0%	10.35%	1.23	0.40	-0.9	0.9	0.0	0.0	111	174	0	0	285
32	Taraclia	4 954	38.53%	3 819	997	136	2	77.1%	20.1%	2.7%	0.0%	11.23%	1.35	0.39	-7.7	9.6	-1.9	0.0	-236	494	-84	0	174
33	Telenesti	7 503	31.11%	5 852	1 650	0	1	78.0%	22.0%	0.0%	0.0%	10.15%	2.56	0.83	-3.9	3.9	0.0	0.0	212	405	0	0	617
34	Ungheni	14 279	36.88%	6 487	7 791	0	1	45.4%	54.6%	0.0%	0.0%	12.18%	2.16	0.71	-1.7	1.7	0.0	0.0	154	682	0	0	836
35	Gagauzia	22 103	47.76%	11 302	10 792	0	9	51.1%	48.8%	0.0%	0.0%	13.71%	0.11	0.03	-2.9	2.9	0.0	0.0	-612	662	0	1	51
	Total	**557 403**	**46.50%**	**201 492**	**315 085**	**38 521**	**2 305**	**36.1%**	**56.5%**	**6.9%**	**0.4%**	**15.66%**	**1.92**	**0.65**	**-1.9**	**2.4**	**-0.5**	**0.0**	**-2 018**	**25 953**	**-875**	**-50**	**23 010**

This report is available in electronic form. To open it, click **Evolution of electronic communications market** or scan the QR code above with the smartphone or tablet.