

Moldova

Mobile-broadband penetration in Moldova is similar to the CIS region average. The territory and population is widely covered by 3G/LTE signal.

Mobile services: There are three mobile telecommunication operators in Moldova sharing the market: 65.5 per cent (Orange Moldova), 30.2 per cent (Moldcell) and 4.2 per cent (Moldtelecom).³⁰⁴ The first 3G networks were launched in 2008 by Moldcell and Orange Moldova. LTE services over Moldcell and Orange Moldova networks became available in 2012.³⁰⁵ Orange Moldova dominates LTE deployment having 94 per cent geographic coverage and 97 per cent of the population covered while others had less than 10 per cent territory and 30 per cent population coverage at the end of 2016.³⁰⁶ The mobile broadband market is growing fast in Moldova. In 2016, the number of subscribers increased by 30.1 per cent. Mobile and fixed network portability services were launched in 2013. In 2016, the quantity of ported numbers had reached 1.94 per cent of all mobile subscribers and 0.73 per cent of all fixed subscribers.³⁰⁷

Fixed services: Moldtelecom shares two thirds of the fixed broadband market, Starnet Soluții (20.2 per cent), Sun Communications (5.3 per cent) and over 80 other data transmission service providers (9.9 per cent).³⁰⁸ The fixed broadband market, along with mobile broadband, is one of the fastest developing sectors of the ICT sector in Moldova. In 2016, the number of fixed broadband subscribers increased by 4.3 per cent. Most subscribers (56.5 per cent) use FTTx technologies, far more than xDSL (36.1 per cent) and coaxial cable (6.9 per cent). Subscriptions with connections from 30 to 100 Mbit/s are the most popular (49 per cent of all fixed-broadband connections) with those from 10 to 30 Mbit/s connections used by 35 per cent of subscribers.³⁰⁹ As long as the demand on high-speed Internet service grows, Moldova continues to raise its international Internet bandwidth. In contrast to Internet access, fixed telephony penetration has decreased since 2013. In 2016, fixed telephony operators lost 2.6 per cent of their subscribers.³⁰⁹

Government policy: The telecommunication market in Moldova was liberalized by 2004. By 2014, the market consisted of 30 fixed services operators, 3 mobile services operators, 55 Internet providers and 148 television services providers.³¹⁰ Moldova legislation in the ICT sector is mainly aligned to the European Union legal framework.³¹¹ In 2010, the Program of Broadband Internet Access Development 2010-2013 was approved. Its goal was to overcome

Key indicators for Moldova (2017)	CIS	World
Fixed-telephone sub. per 100 inhab.	28.2	19.8 13.0
Mobile-cellular sub. per 100 inhab.	90.4	138.3 103.6
Active mobile-broadband sub. per 100 inhab.	60.0	72.0 61.9
3G coverage (% of population)	100.0	80.3 87.9
LTE/WiMAX coverage (% of population)	97.0	61.1 76.3
Individuals using the Internet (%)	76.1	68.6 48.6
Households with a computer (%)	75.1	68.1 47.1
Households with Internet access (%)	80.7	73.6 54.7
International bandwidth per Internet user (kbit/s)	115.6	66.8 76.6
Fixed-broadband sub. per 100 inhab.	14.4	17.8 13.6
Fixed-broadband sub. by speed tiers, % distribution		
<i>-256 kbit/s to 2 Mbit/s</i>	3.7	12.2 4.2
<i>-2 to 10 Mbit/s</i>	4.6	25.1 13.2
<i>-equal to or above 10 Mbit/s</i>	91.7	62.7 82.6

Note: Data in italics are ITU estimates. Source: ITU (as of June 2018).

the digital divide between rural and urban areas. The following target indicators were set: 20 per cent of fixed-broadband penetration and 20 per cent of mobile broadband penetration by 2013. The corresponding indicators reached 13.4 per cent for fixed-broadband subscriptions and 47.3 per cent for mobile-broadband subscriptions by 2013.³¹² The programme facilitated subscriber number growth, Internet infrastructure availability and electronic services development. In 2013 the government approved the national strategy of information society development, Digital Moldova 2020. It focuses on three pillars: access and infrastructure (improvement of connectivity and network access), digital content and electronic services (promoting digital content and generating services), and capacities and utilization (strengthening literacy and digital skills to enable innovation and stimulate usage).³¹³ According to the strategy, information society development will be based on a secure digital environment.

Conclusion: Moldova has a dynamic and competitive telecommunication market, which is characterized by high Internet access speeds, high level of mobile services accessibility, and technological development. Telecommunication authorities try to apply best practices of market regulation in order to create a favourable environment for information society development while having minimum intervention from the government.