

# Moldova

Internet users in Moldova enjoy largely unfettered access despite the government's restrictive and increasingly authoritarian tendencies overall. Development of the Internet has been rapid, propelled by a national ICT strategy that is harmonized with the European Union as well as the large diaspora population for whom telecommunications and the Internet are important channels of communication, and, possibly, for the transfer of remittances. Although filtering does not occur at the backbone level, both filtering and surveillance occur at the places where most Moldavians access the Internet: cybercafés and workplaces. Moldovan security forces have developed the capacity to monitor the Internet, and national legislation concerning "illegal activities" is strict.



Transdniester. The Transdniester region operates as an independent (albeit unrecognized) state with separate telecommunications and broadcasting networks.

Moldova has one of the lowest Internet development levels in Eastern Europe, and ranks 109th worldwide on the U.N. Global E-readiness Survey of 2005.<sup>1</sup> Yet the government has prioritized information communications technology (ICT) as means for national development and adopted a National ICT Strategy designed to align the sector with EU norms and standards via the EU-sponsored Electronic South Eastern Europe initiative (eSEE). Certain aspects of "e-government," such as the state registration

## Background

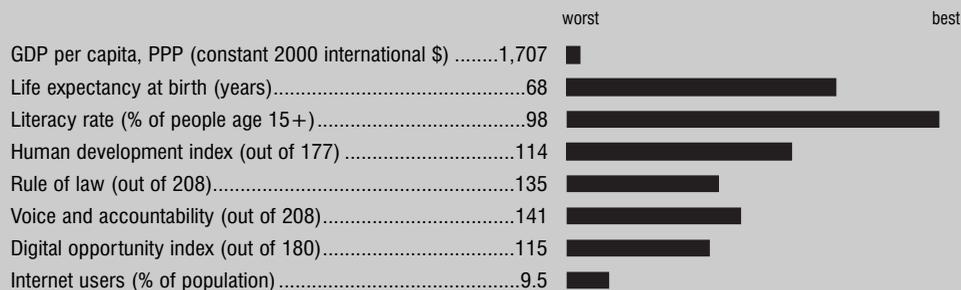
In the early 1990s, as a newly sovereign state, Moldova experienced both political and economic turmoil. Separatist movements erupted in two regions: Gagauzia, which later obtained autonomy, and the unrecognized breakaway state of

### RESULTS AT A GLANCE

| Filtering         | No evidence of filtering | Suspected filtering | Selective filtering | Substantial filtering | Pervasive filtering |
|-------------------|--------------------------|---------------------|---------------------|-----------------------|---------------------|
| Political         | ●                        |                     |                     |                       |                     |
| Social            | ●                        |                     |                     |                       |                     |
| Conflict/security | ●                        |                     |                     |                       |                     |
| Internet tools    | ●                        |                     |                     |                       |                     |

| Other factors | Low | Medium | High | Not applicable |
|---------------|-----|--------|------|----------------|
| Transparency  |     |        |      | ●              |
| Consistency   |     |        |      | ●              |

**KEY INDICATORS**

**Source (by indicator):** World Bank 2005, 2006a, 2006a; UNDP 2006; World Bank 2006c, 2006c; ITU 2006, 2004

database (registru.md) that acts as a central portal for all government department and services, are highly advanced and have been used as a model for other Commonwealth of Independent States (CIS) countries. Some human rights groups have voiced concerns that the database is too comprehensive and lacks oversight. Given that the legal basis for protecting citizens' rights to privacy is not yet defined, the information held in the database represents a risk for unwarranted (and unprecedented) surveillance. The president, a former internal ministry general, supports the register, which is not surprising given that it was originally developed within the Ministry of Internal Affairs. The telecommunications sector in Moldova is formally liberalized, but the government has faced problems privatizing the main operator.

### Internet in Moldova

Internet use in Moldova has tripled since 2002 and penetration currently stands at 10 percent of the population.<sup>2</sup> However, development is constrained by a lack of quality infrastructure, low affordability, and the slow development of the telecommunications sector. A national survey indicates that 24.1 percent of the population

claim the Internet is very expensive and difficult to afford.<sup>3</sup> Ownership of personal computers is low, with only 3 percent penetration (as of 2004). Nearly half of users access the Internet from their place of work, 33.6 percent use Internet at home, and 8.1 percent use public access points.<sup>4</sup>

Moldova has seven tier-one providers: Globnet, Moldtelecom, Telemedia, MDL.NET (MegaDat), Dynamic Network Technologies (DNT), Relsoft, and Riscom. A further eleven Internet service providers (ISPs) provide access to all regions of the country. International Internet traffic is routed by way of providers in Europe. The telecommunications market is dominated by Moldtelecom, which retains its near monopoly position in the market. Most of the other ISPs rent infrastructure from Moldtelecom. All ISPs exchange traffic via an Internet exchange point located at Moldtelecom.

Fixed-line and mobile teledensity remain underdeveloped, as do Internet and broadband penetration; however, all have recorded solid growth.<sup>5</sup> According to the national telecom regulator, dialup connections in the first nine months of 2006 rose by 88.9 percent (375,500), while broadband connections in this period tripled to 16,900. International Internet bandwidth in the

country is 410 Mb/s for 2005.<sup>6</sup> In 2006, mobile phone ownership jumped to 32.2 percent. There are more than fourteen operators providing Voice-over Internet Protocol (VoIP) services on the international voice market, although Moldtelecom has retained the largest share.<sup>7</sup> Operators need to obtain a license in order to offer IP services.

Over 3,000 domain names are registered in the country code top-level domains (".md"),<sup>8</sup> The most popular languages accessed by Internet users are Romanian, Russian, and English. The most-visited local Web site is the news agency site Azi (www.azi.md). The most-used search engines are www.ournet.md, www.super.md, and www.mail.ru.

### **Legal and regulatory frameworks**

To meet requirements set by the World Trade Organization, the telecommunications market was liberalized on January 1, 2004. The main operator decreased its tariffs on average by 25 percent, allowing other providers into the market.<sup>9</sup> However, low computer penetration rates and inconsistent government policy remain major impediments to Internet growth. The state has officially committed to developing Moldova's information society, including promoting e-governance, although certain policies undermine with these objectives. The main telecommunications operator and top-tier ISP in the country, Moldtelecom, remains under state control despite large-scale criticism. ISPs rent access from Moldtelecom's well-developed infrastructure, which increases their costs and diminishes their competitiveness.

The ISPs are licensed by the National Agency for Telecommunications and Information Regulation (NATIR),<sup>10</sup> the main telecommunications regulator in Moldova. The law and corresponding regulation do not require special requirements for receiving a license. NATIR is responsible for issuing and suspending licenses, establishing license fees, and enforcing sanc-

tions where necessary. In addition it regulates the management of the country's highest-level Internet domain (".md"). NATIR was established with an amendment to the Law on Telecommunications, which introduced a licensing regime for most Internet and telecommunications services. A new law on e-communications entered the parliament in 2006 as part of an effort to harmonize national legislation with European standards. The drafted law envisions broader rights for the final user and wider access to public networks, and provides for more-efficient market liberalization. The draft law also seeks to establish a new independent body to regulate telecommunications.

The Supreme Security Council (SSC), which oversees implementation of the president's decrees related to national security, monitors ministries' and state agencies' various activities to ensure national security. The SSC Ministry of Information Development carries out government policies related to information and communications and encourages collaboration between state and private organizations. The National Security and Information Service is empowered with broad authority to monitor and gather information on Internet usage.

### **ONI testing results**

ONI carried out testing on three of the tier one ISPs: Globnet, Moldtelecom, and Telemedia. The tests revealed no evidence of filtering for any of the categories of content tested.

ONI research determined that some ISPs perform a differentiated multilevel filtering as a means of protection against various network attacks and spam or viruses. There was, however, no evidence of ISP-level filtering based upon sensitive political or social content. More commonly this type of filtering occurs at the level of business workplaces and cybercafés. ONI researchers performed a survey among more than 600 businesses to determine the level of filtering at work enterprises.<sup>11</sup> The results indicate

that filtering or surveillance of Internet exists in all types of businesses. Some practice “sanitized” access to Internet, where employees can access only a limited number of sites directly related to the work they perform. Other enterprises allow employees to access the Internet, but filter out sexual, “harmful,” and “entertainment” content.

In cybercafés access is limited more by surveillance than by direct filtering. Specific content is prohibited and, if accessed, the user is fined. Approximately 56 percent of cybercafés’ administrators surveyed by ONI admitted to filtering and surveillance activities. Other administrators stated that they noted that some Web sites are inaccessible, but would not confirm that they used any specific filtering system in the cybercafé itself.

### Conclusion

Despite increasingly authoritarian tendencies, the Internet in Moldova remains largely unaffected by filtering, at least at the backbone level. At “edge” locations, such as cybercafés and some enterprises, ONI research revealed filtering that restricted access to certain content and services. Given that over half (55 percent) of all Moldovans access the Internet through their workplace or cybercafés, this form of filtering has a significant impact on the way in which Moldovans “experience” the Internet. ONI research also suggests that Moldovan security forces have developed mechanisms to monitor Internet content. Given a relatively underdeveloped legislative base protecting citizen’s rights and privacy, there are few checks and balances in place to prevent authorities from taking a more aggressive stance on policing Internet content.

2. International Telecommunication Union, *World Telecommunication Indicators 2006*.
3. A study conducted by the Centre of Sociological Politological and Psychological Investigation and Analysis CIVIS, 2005.
4. Centre of Sociological Politological and Psychological Investigation and Analysis CIVIS, 2005.
5. See Paul Budde Communication Pty Ltd., Moldova: Telecoms Market Overview & Statistics, April 2, 2006.
6. International Telecommunication Union, *World Telecommunication Indicators 2006*.
7. See Paul Budde Communication Pty Ltd., Moldova: Telecoms Market Overview & Statistics, April 2, 2006, p. 6.
8. Super.md, <http://www.super.md>.
9. See Paul Budde Communication Pty Ltd., Moldova: Telecoms Market Overview & Statistics, April 2, 2006.
10. Article 8 of the Law on Licensing Certain Types of Activities, [http://www.anrti.md/en/acte/Leg\\_licente.htm#cap8](http://www.anrti.md/en/acte/Leg_licente.htm#cap8) (last accessed April 30, 2007). The Law on Telecommunications and the Regulation of Licensing of Telecommunications and Informatics No. 5 of 2002 are also relevant to the licensing regime of IT services.
11. Less than half of the interviewed enterprises are connected to the Internet, and the majority of these have no more than two computers with access to the Net. The number of employees allowed to use computers with access is limited to nine in companies of medium size (from 50 to 249 employees). The use of Internet is three times more intensive in urban enterprises than rural ones. Dialup access is used by 52.6 percent of businesses, with 39.7 percent using broadband technologies.

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### NOTES

1. Department of Economic and Social Affairs, U.N. Global E-Government Readiness Report 2005, <http://unpan1.un.org/intradoc/groups/public/documents/un/unpan021888.pdf>.