



**AGENCE NATIONALE DE RÉGLEMENTATION DES TÉLÉCOMMUNICATIONS**

## *FIXED TELEPHONY IN MOROCCO*

### *Quarterly Observatory\** *December 2005*

- This document is published as an indication. Dispositions appearing in it are to be considered for information purposes.

# SUMMARY

## FIXED TELEPHONY MARKET

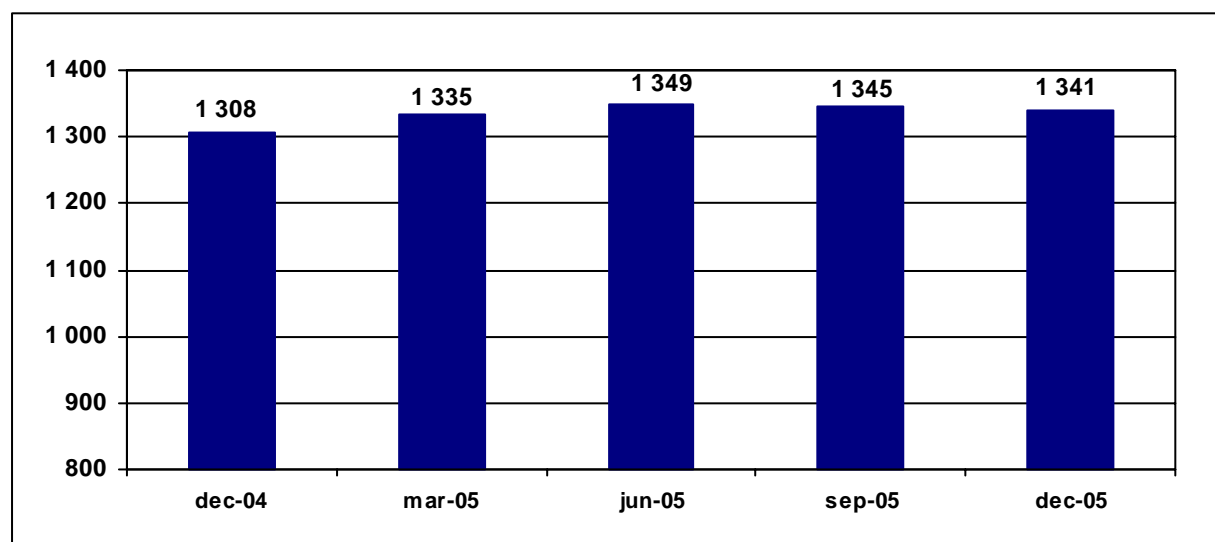
- GLOBAL MARKET
- PENETRATION RATE
- RESIDENTIALS SEGMENT
- PROFESSIONALS SEGMENT
- PUBLIC PAYPHONES

## Global fixed telephony market

### Fixed lines number

Fixed lines	dec-04	mar-05	jun-05	sep-05	dec-05
Market size	1 308 569	1 335 328	1 349 098	1 344 725	1 341 156
quarterly growth <sup>1</sup>	9 081	26 759	13 770	- 4 373	- 3 569
Growth (%) <sup>2</sup>	0,70%	2,04%	1,03%	- 0,32%	- 0,27%
Penetration rate	4,38%	4,47%	4,51%	4,50%	4,49%

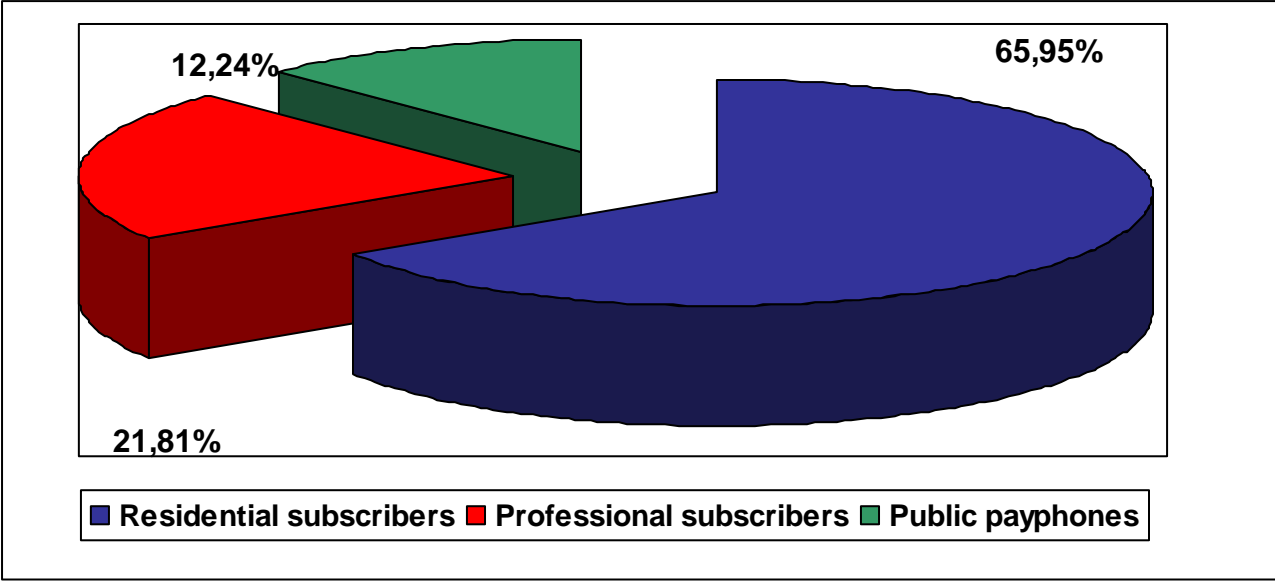
### Quarterly Evolution of Fixed telephony market size (in thousands)



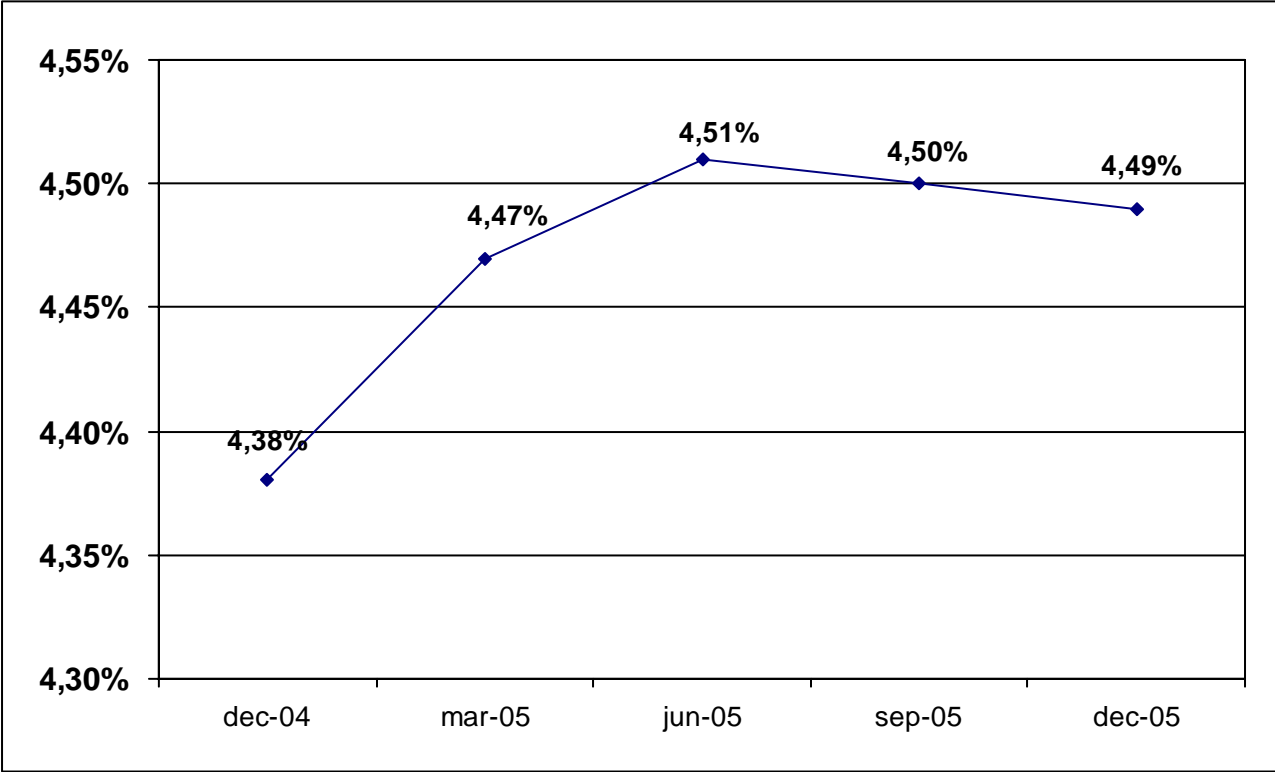
<sup>1</sup> The growth at the quarter N equals to the difference between the market size of N and N-1.

<sup>2</sup> % of growth at the quarter N equals to the difference between the market size of N and N-1 divided by the market size of N-1.

Fixed Market Repartition at December 31<sup>st</sup>



Quarterly Evolution of penetration rate

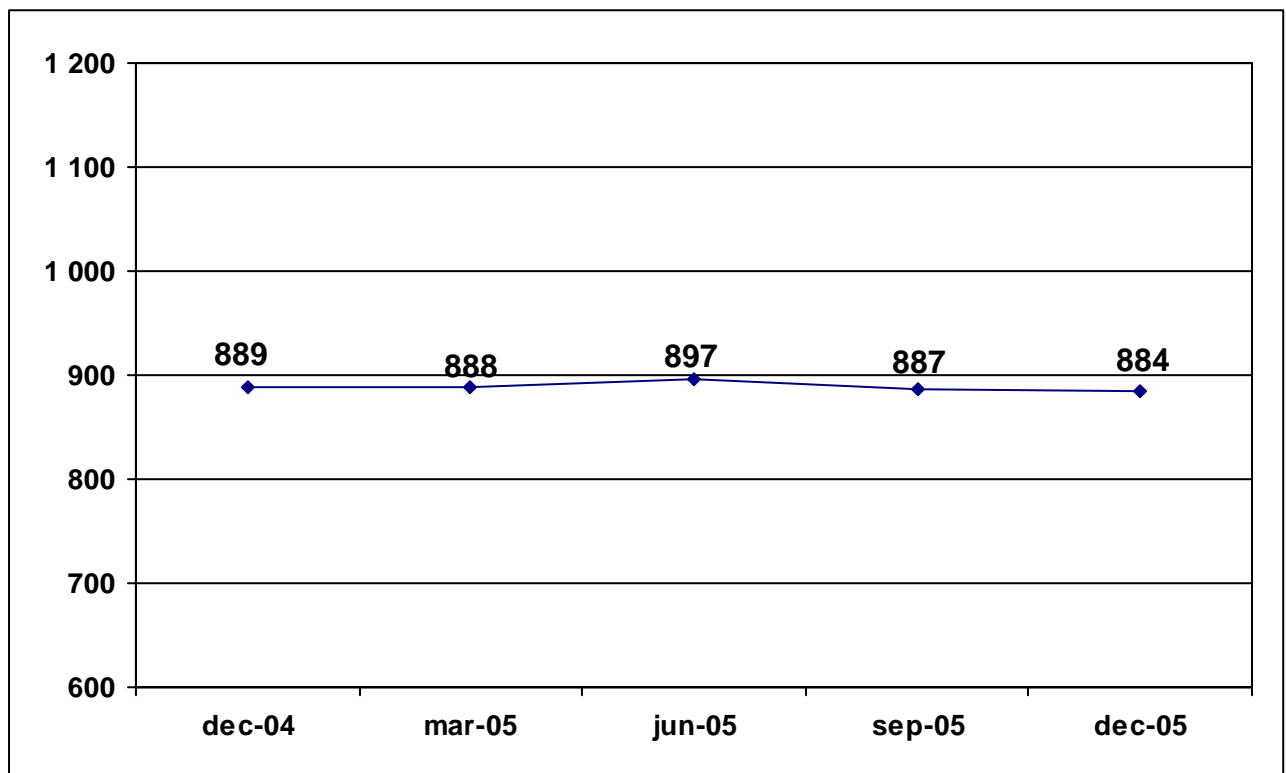


## RESIDENTIALS SEGMENT

Number of residential subscribers:

Residential subscribers	dec-04	mar-05	jun-05	sep-05	dec-05
Market size	889 623	888 678	896 583	887 337	884 546
quarterly growth	- 44 110	- 945	7 905	- 9 246	- 2 791
Growth (%)	- 4,72%	- 0,11%	0,89%	- 1,03%	- 0,31%

Quarterly Evolution of residential market size (in thousands)

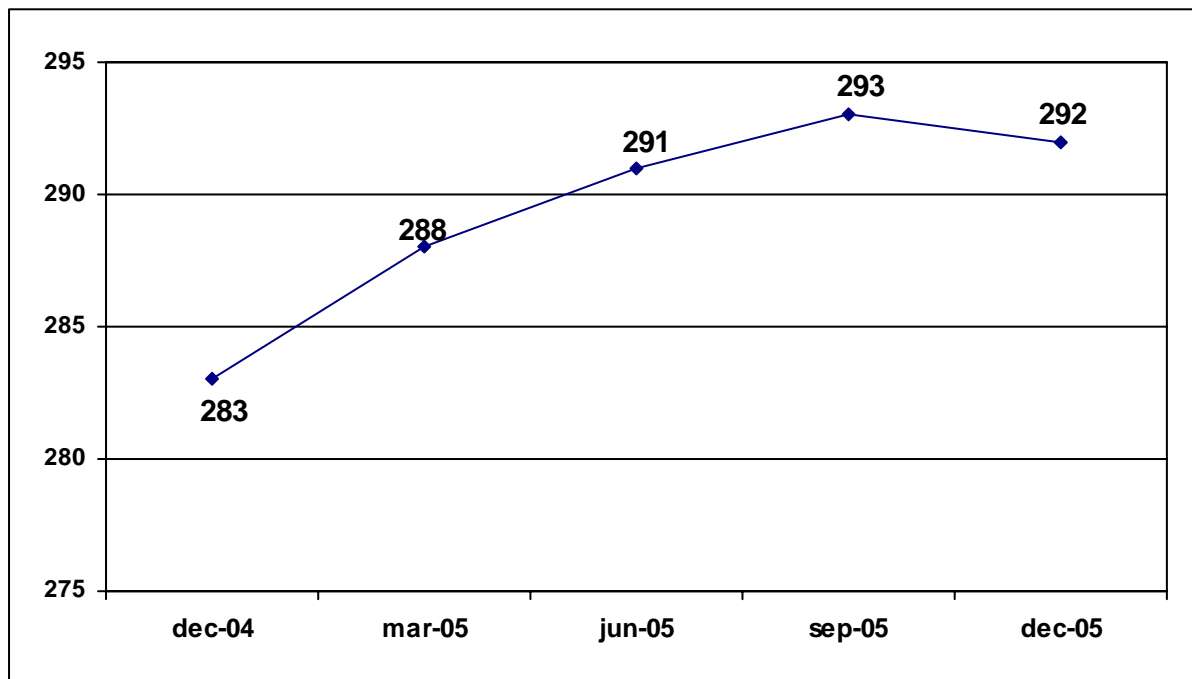


## PROFESSIONALS SEGMENT

### Number of Professional subscribers

Professional subscribers	dec-04	mar-05	jun-05	sep-05	dec-05
Market size	283 186	287 992	291 347	293 182	292 519
quarterly growth	18 712	4 806	3 355	1 835	- 663
Growth (%)	7,08%	1,70%	1,16%	0,63%	- 0,23%

### Quarterly Evolution of Professional market size (in thousands)

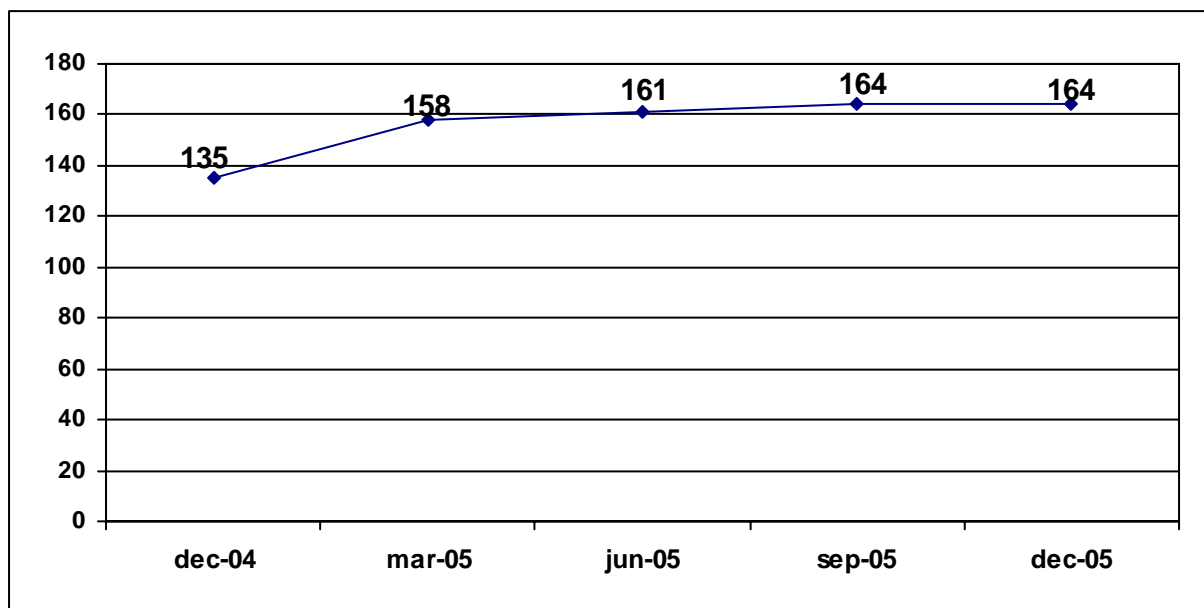


## PUBLIC PAYPHONES

### Number of Public payphones<sup>1</sup>

Public payphones	dec-04	mar-05	jun-05	sep-05	dec-05
Market size	135 760	158 658	161 168	164 206	164 091
quarterly growth	34 479	22 898	2 510	3 038	- 115
Growth (%)	34,04%	16,87%	1,58%	1,88%	- 0,07%

### Quarterly Evolution of Public payphones market size (in thousands)



<sup>1</sup> The public payphones includes phone shops, coin and card public telephones.