

ROYAUME DU MAROC  
LE PREMIER MINISTRE



## *FIXED TELEPHONY IN MOROCCO*

### *Quarterly Observatory\** *September 2009*

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

# SUMMARY

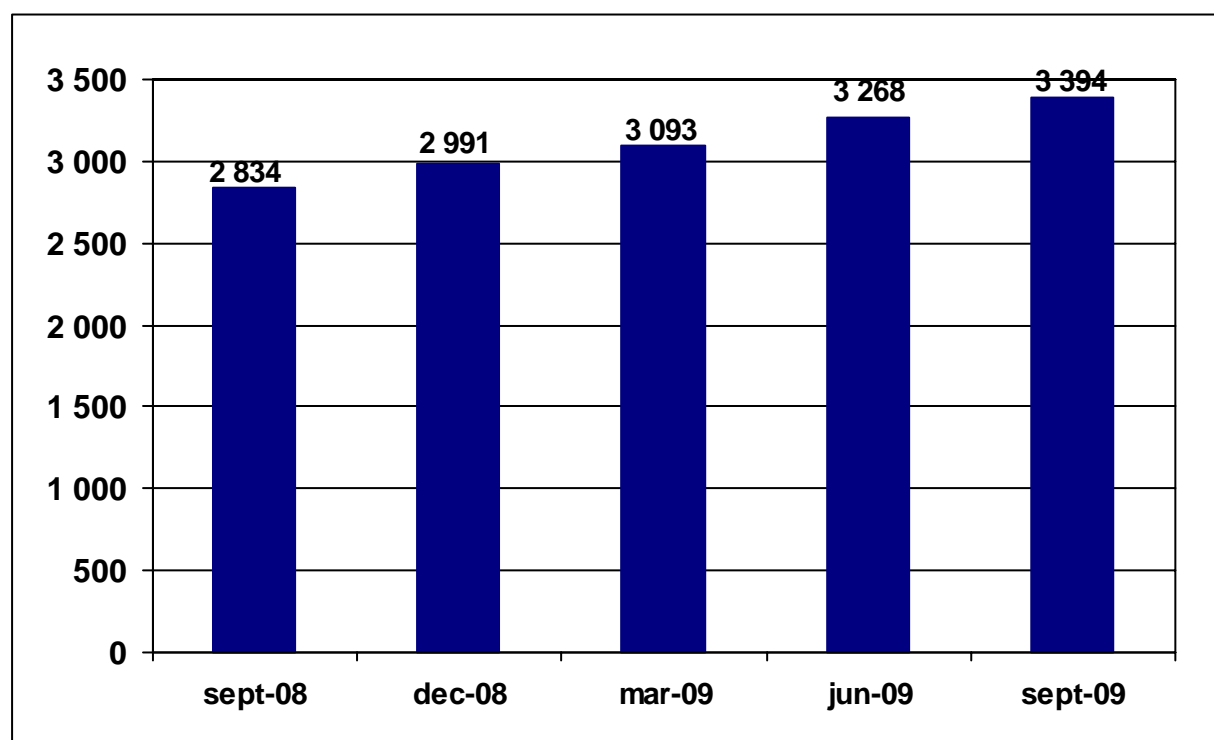
## FIXED TELEPHONY MARKET

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

### Fixed lines number

Fixed lines	Sept-08	Dec-08	Mar-09	Jun-09	Sept-09
Market size <sup>1</sup>	2 834 475	2 991 158	3 093 054	3 267 518	3 393 992
Of which restricted mobility	1 510 801	1 681 819	1 791 199	1 963 994	2 110 084
quarterly growth <sup>2</sup>	72 692	156 683	101 896	174 464	126 474
Growth (%) <sup>3</sup>	2.63%	5.53%	3.41%	5.64%	3.87%
Penetration rate <sup>4</sup>	9.19%	9.70%	9.92%	10.48%	10.89%

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



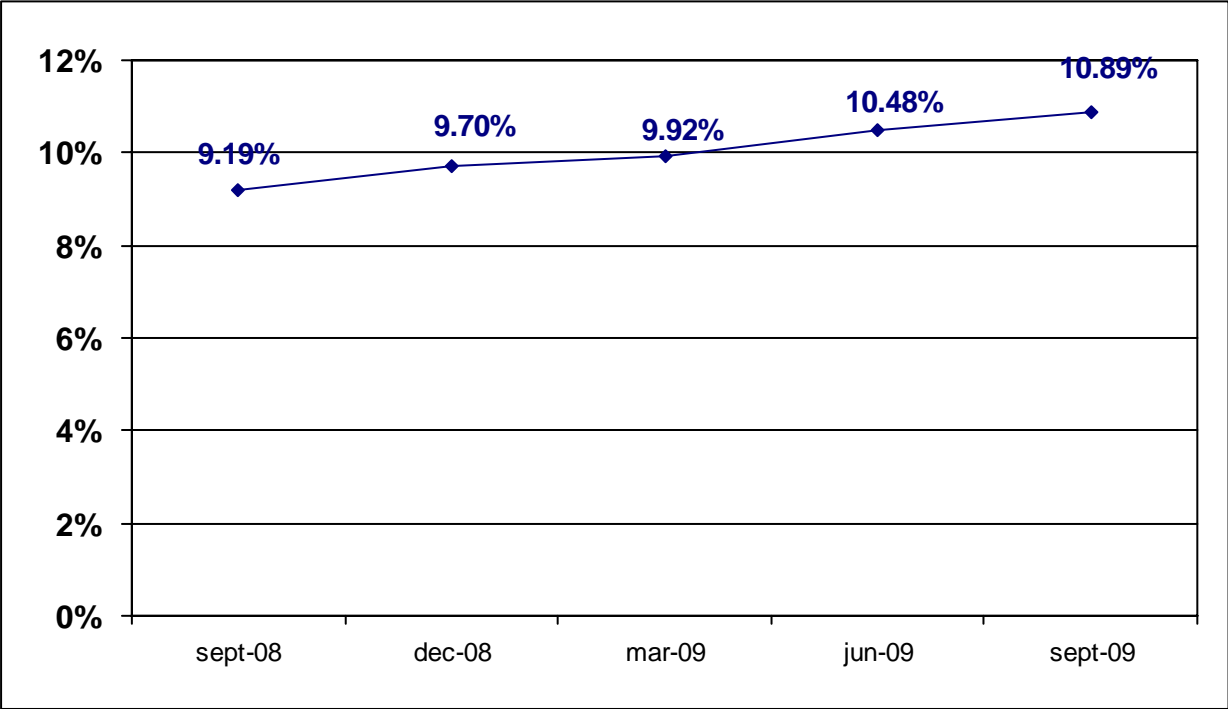
<sup>1</sup> This figure includes residential and professional subscribers and payphones using fixed telephony network.

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

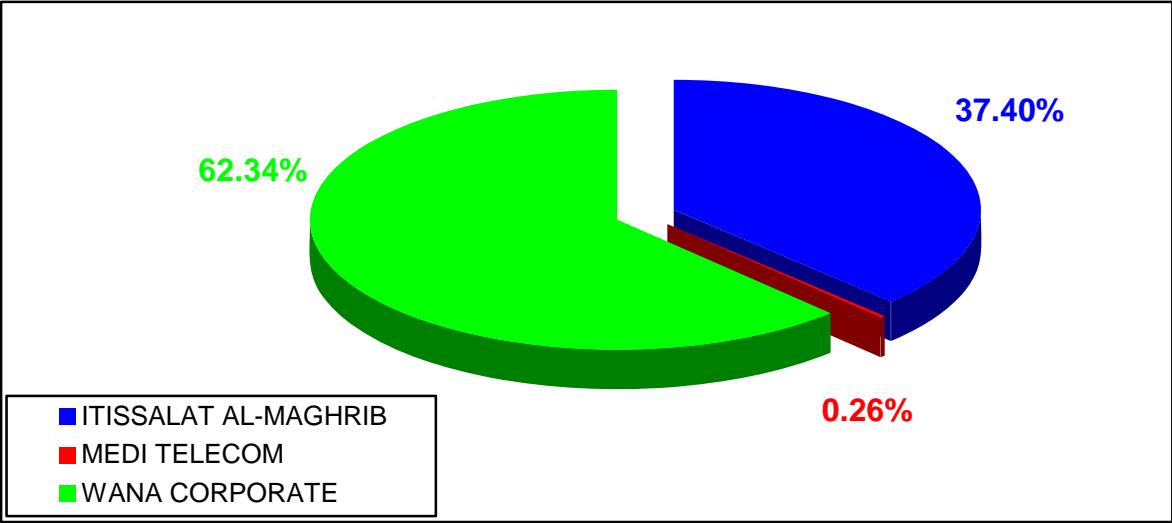
<sup>3</sup> % of growth at the quarter N equals to the difference between the market size of N and N-1 divided by the market size of N-1.

<sup>4</sup> The accounting of the penetration rate for fixed telephony by the ANRT Market Observatory is based on the population projections published by the Statistics Department/HCP based on the General census of population 2004. Starting from March of the year N, the reference population for accounting this rate results from Statistics Department/HCP projections of the year N-1.

Quarterly Evolution of penetration rate



Market shares at September 30<sup>th</sup> 2009

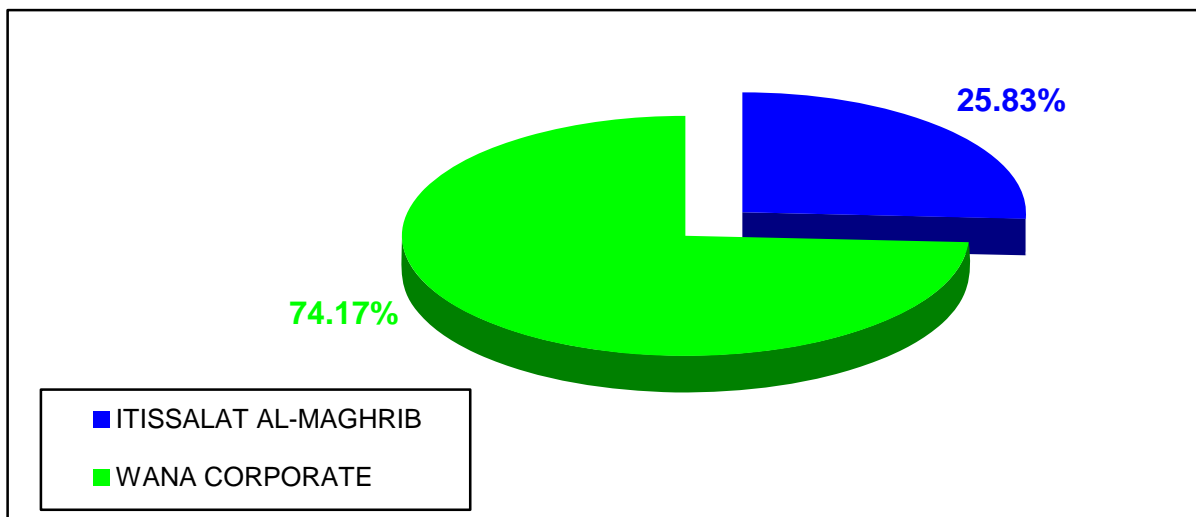


## RESIDENTIALS SEGMENT

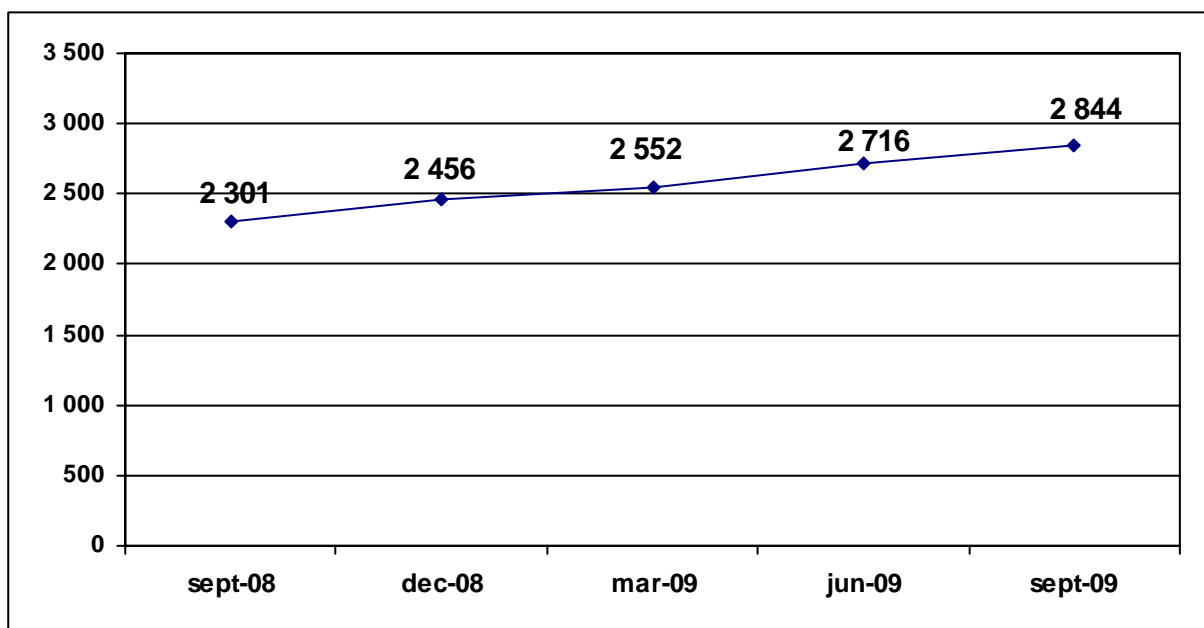
Number of residential subscribers:

Residential subscribers	Sept-08	Dec-08	Mar-09	Jun-09	Sept-09
Market size	2 301 348	2 455 864	2 551 969	2 716 312	2 843 789
quarterly growth	68 716	154 516	96 105	164 343	127 477
Growth (%)	3.08%	6.71%	3.91%	6.44%	4.69%

Market share at September 30<sup>th</sup>, 2009



Quarterly Evolution of residential market size (in thousands)

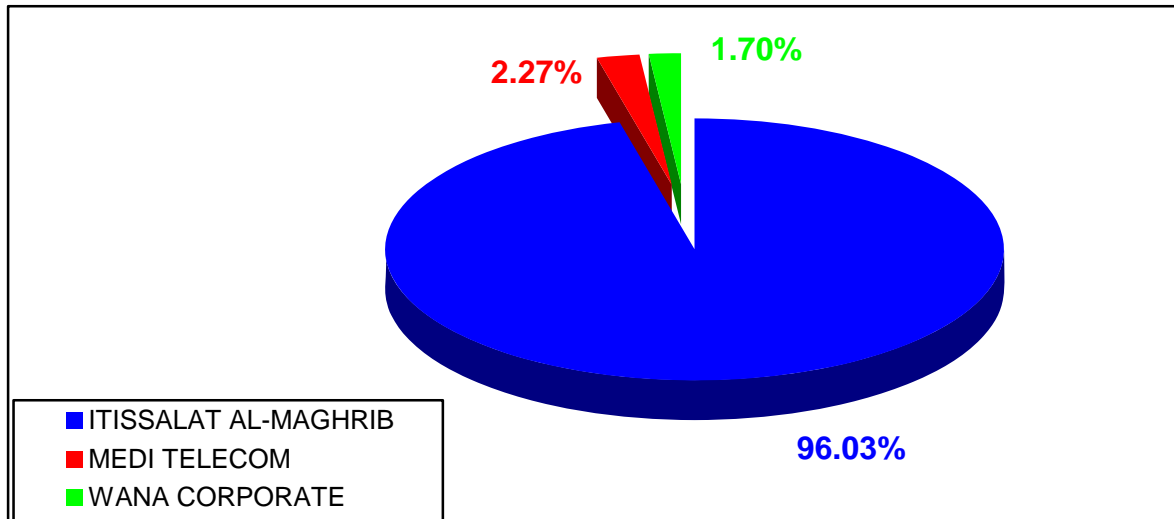


## PROFESSIONALS SEGMENT

### Number of Professional subscribers

Professional subscribers	Sept-08	Dec-08	Mar-09	Jun-09	Sept-09
Market size	372 629	375 222	380 737	387 512	386 632
quarterly growth	5 291	2 593	5 515	6 775	- 880
Growth (%)	1.44%	0.70%	1.47%	1.78%	- 0.23%

### Market share at September 30<sup>th</sup>, 2009



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

