

ROYAUME DU MAROC  
LE PREMIER MINISTRE



## *FIXED TELEPHONY IN MOROCCO*

### *Quarterly Observatory\** *March 2007*

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

# SUMMARY

## FIXED TELEPHONY MARKET

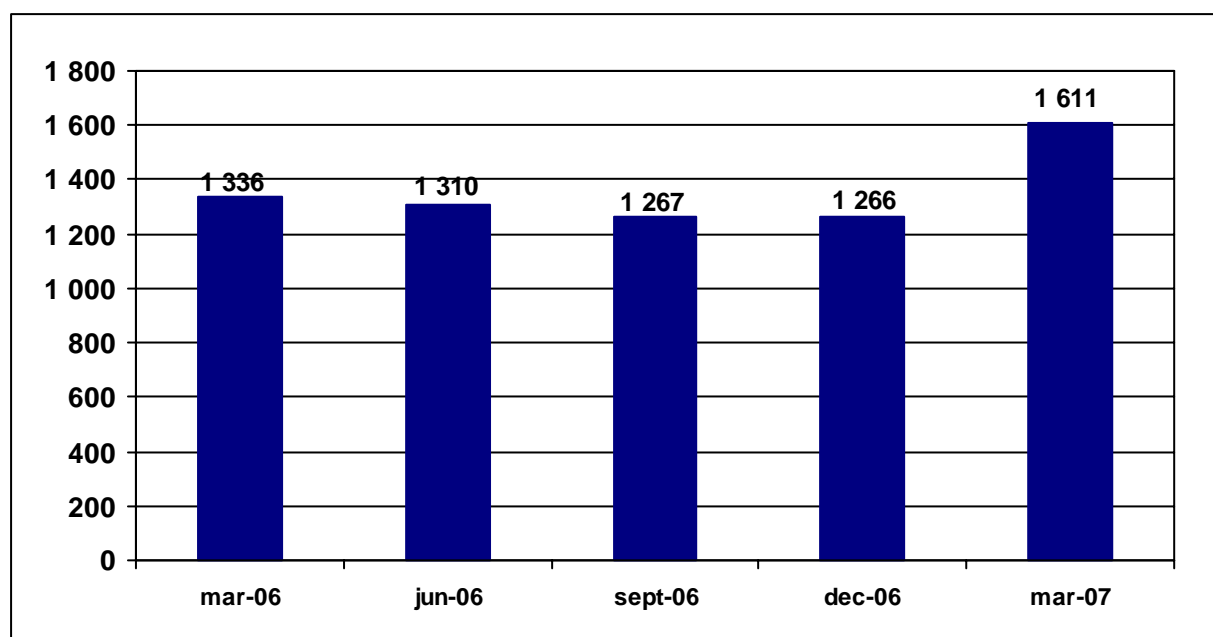
- GLOBAL MARKET
- PENETRATION RATE
- RESIDENTIALS SEGMENT
- PROFESSIONALS SEGMENT
- PUBLIC PAYPHONES

## Global fixed telephony market

### Fixed lines number<sup>1</sup>

Fixed lines	Mar-06	Jun-06	Sept-06	Dec-06	Mar-07
Market size <sup>2</sup>	1 336 025	1 309 619	1 267 122	1 266 119	1 611 002
Dont mobilité restreinte	-	-	-	-	337 376
quarterly growth <sup>3</sup>	- 5 131	- 26 406	- 42 497	- 1 003	344 883
Growth (%) <sup>4</sup>	- 0.38%	- 1.98%	- 3.24%	- 0.08%	27.24%
Penetration rate	4.47%	4.38%	4.24%	4.24%	5.39%

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



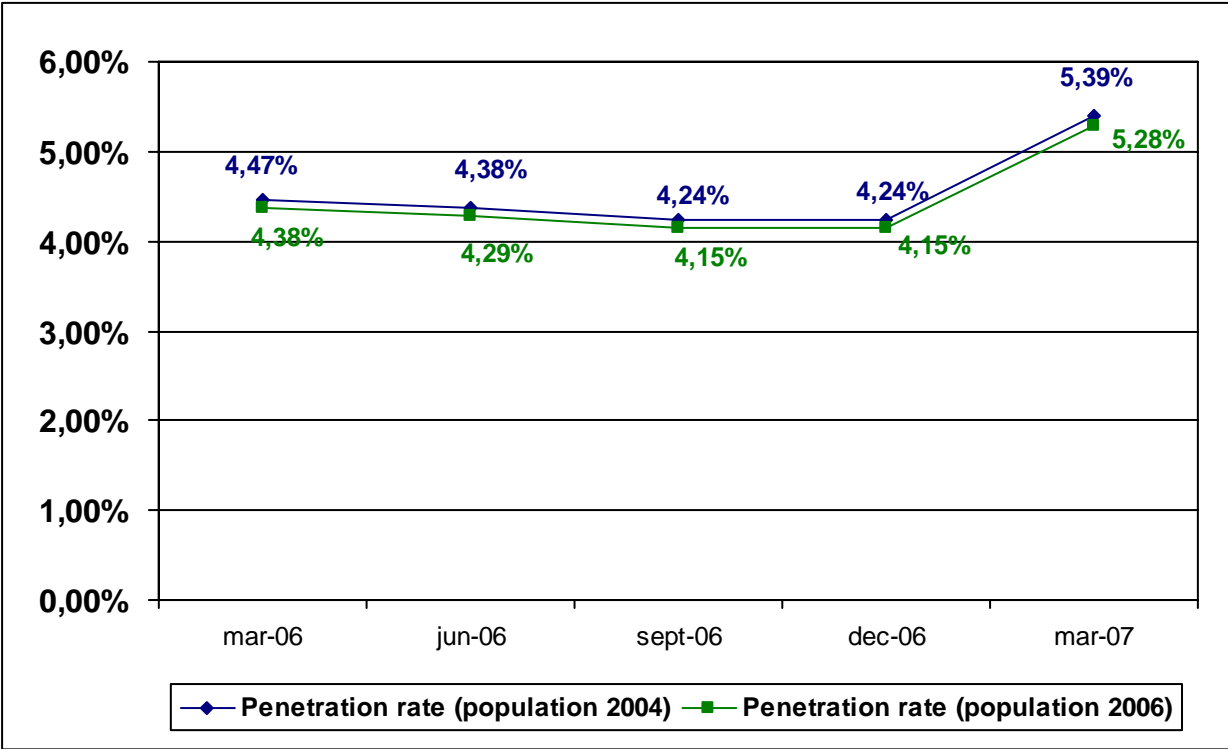
<sup>1</sup> A draft decision for the definition of a subscriber to Fixed telephony is in process in coordination with the different operators.

<sup>2</sup> This figure is calculated on the basis of data communicated by the three operators. It could be modified in the next publications after the adoption of the decision relating to the definition of a subscriber to the Fixed telephony.

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

<sup>4</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.

Quarterly Evolution of penetration rate<sup>5</sup>



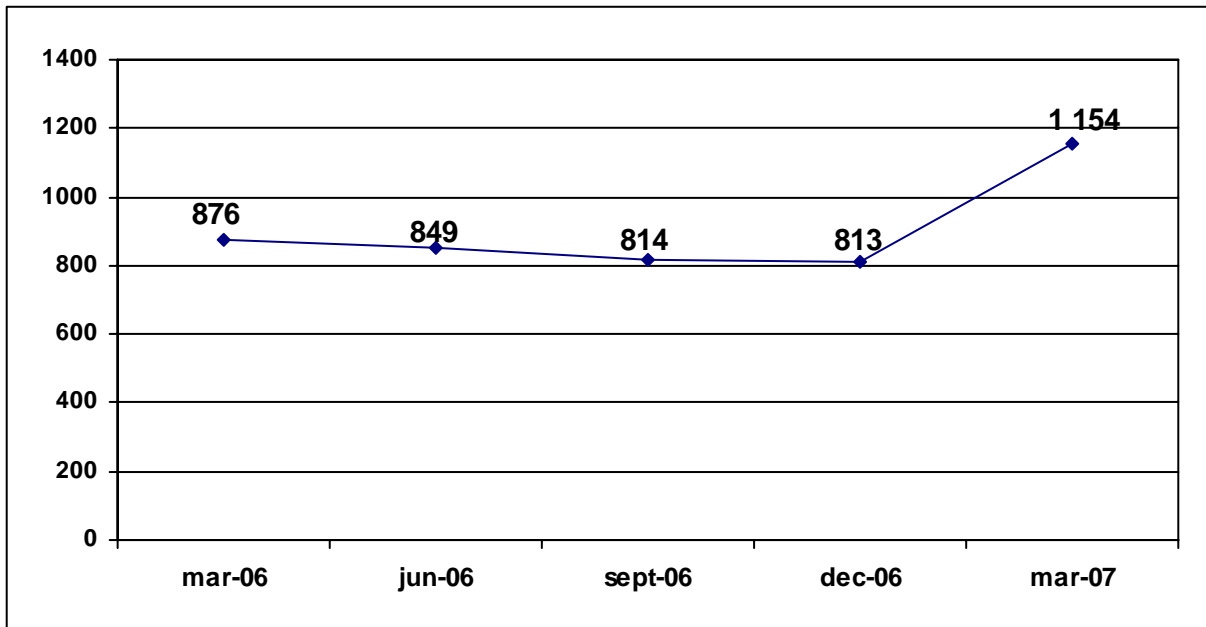
<sup>5</sup> The accounting of the penetration rate for fixed telephony by the ANRT Market Observatory is based on the population projections published by the Statistics Department/HCP based on the General census of population 2004. ANRT also publishes the penetration rates according to 2004 population for information and transition reasons.

## RESIDENTIALS SEGMENT

Number of residential subscribers:

Residential subscribers	Mar-06	Jun-06	Sept-06	Dec-06	Mar-07
Market size	875 725	849 475	813 886	813 000	1 153 882
quarterly growth	- 8 821	- 26 250	- 35 589	- 886	340 882
Growth (%)	- 1%	- 3%	- 4.19%	- 0.11%	41.93%

Quarterly Evolution of residential market size (in thousands)

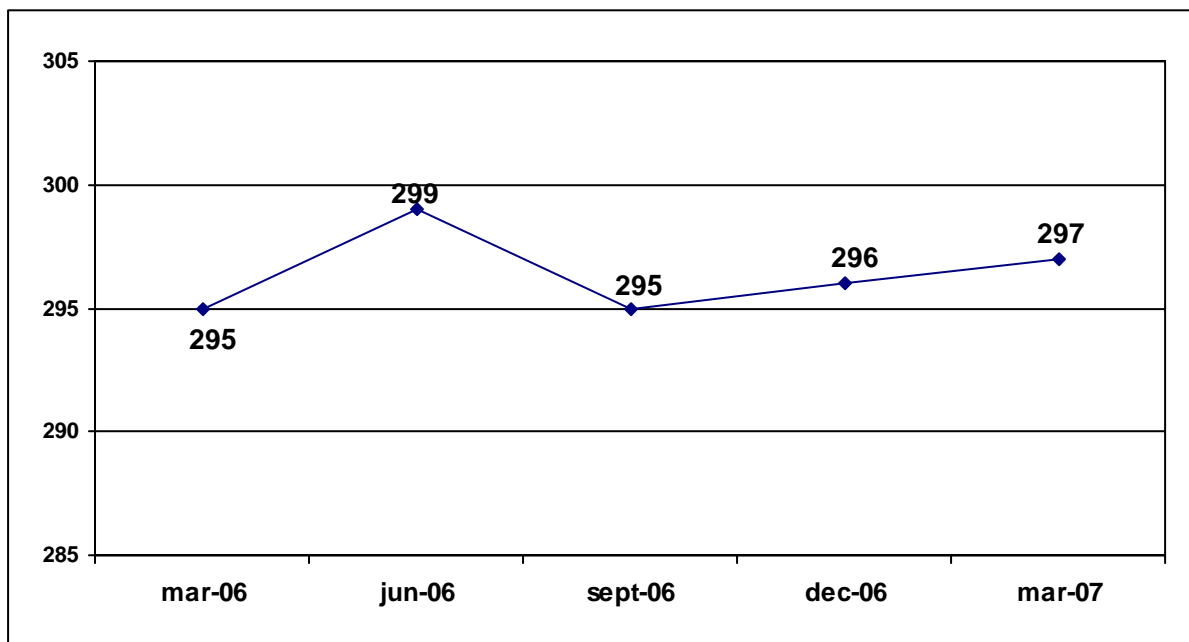


## PROFESSIONALS SEGMENT

### Number of Professional subscribers

Professional subscribers	Mar-06	Jun-06	Sept-06	Dec-06	Mar-07
Market size	295 408	298 771	294 886	295 762	296 860
quarterly growth	2 889	3 363	- 3 885	876	1 098
Growth (%)	0.99%	1.14%	- 1.30%	0.30%	0.37%

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

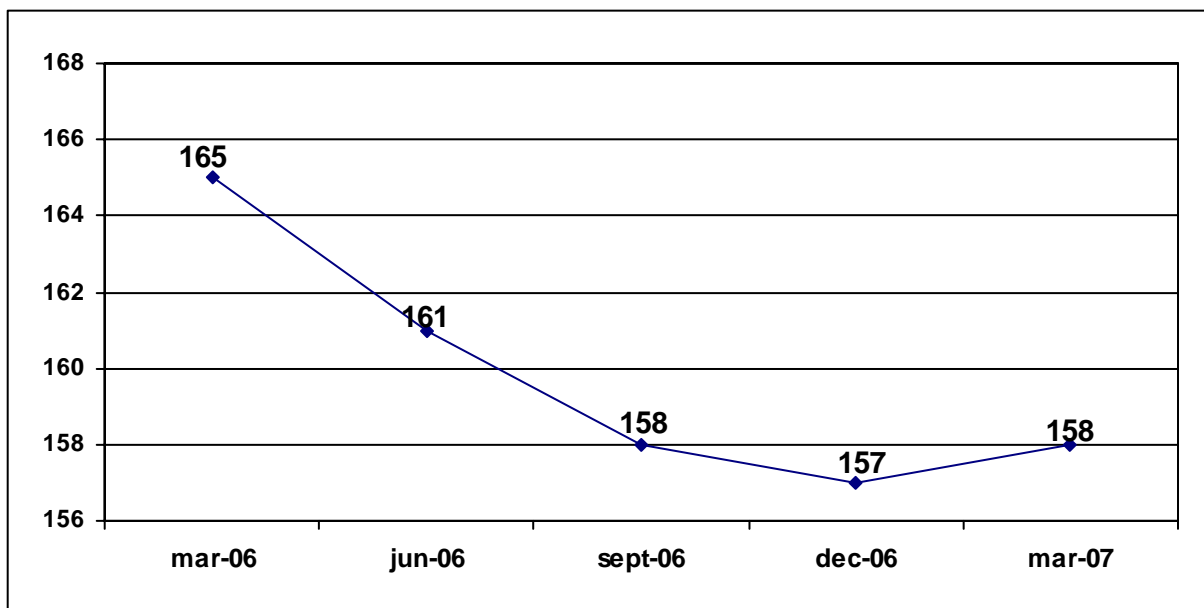


## PUBLIC PAYPHONES

### Number of Public payphones<sup>6</sup>

Public payphones	Mar-06	Jun-06	Sept-06	Dec-06	Mar-07
Market size	164 892	161 373	158 350	157 357	157 736
quarterly growth	801	- 3 519	- 3 023	- 993	379
Growth (%)	0.49%	- 2.13%	- 1.87%	- 0.63%	0.24%

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



<sup>6</sup> The public payphones includes phone shops, coin and card public telephones.