



**AGENCE NATIONALE DE RÉGLEMENTATION DES TÉLÉCOMMUNICATIONS**

## *FIXED TELEPHONY IN MOROCCO*

### *Quarterly Observatory\** *March 2006*

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

# SUMMARY

## FIXED TELEPHONY MARKET

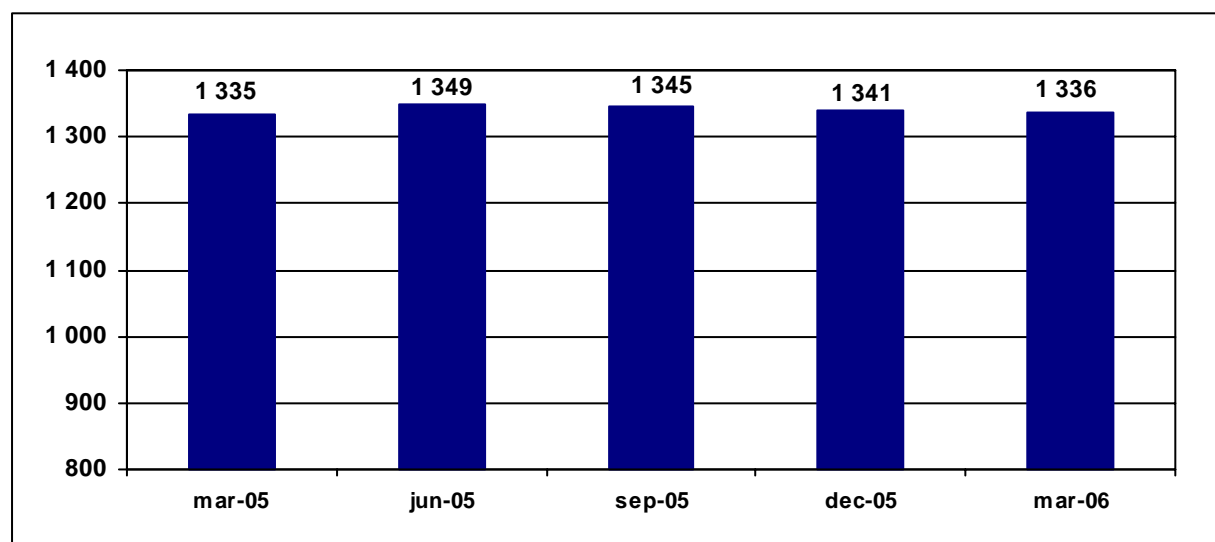
- GLOBAL MARKET
- PENETRATION RATE
- RESIDENTIALS SEGMENT
- PROFESSIONALS SEGMENT
- PUBLIC PAYPHONES

## Global fixed telephony market

### Fixed lines number

Fixed lines	mar-05	jun-05	sep-05	dec-05	mar-06
Market size	1 335 328	1 349 098	1 344 725	1 341 156	1 336 025
quarterly growth <sup>1</sup>	26 759	13 770	- 4 373	- 3 569	-5 131
Growth (%) <sup>2</sup>	2,04%	1,03%	- 0,32%	- 0,27%	-0,38%
Penetration rate	4,47%	4,51%	4,50%	4,49%	4,47%

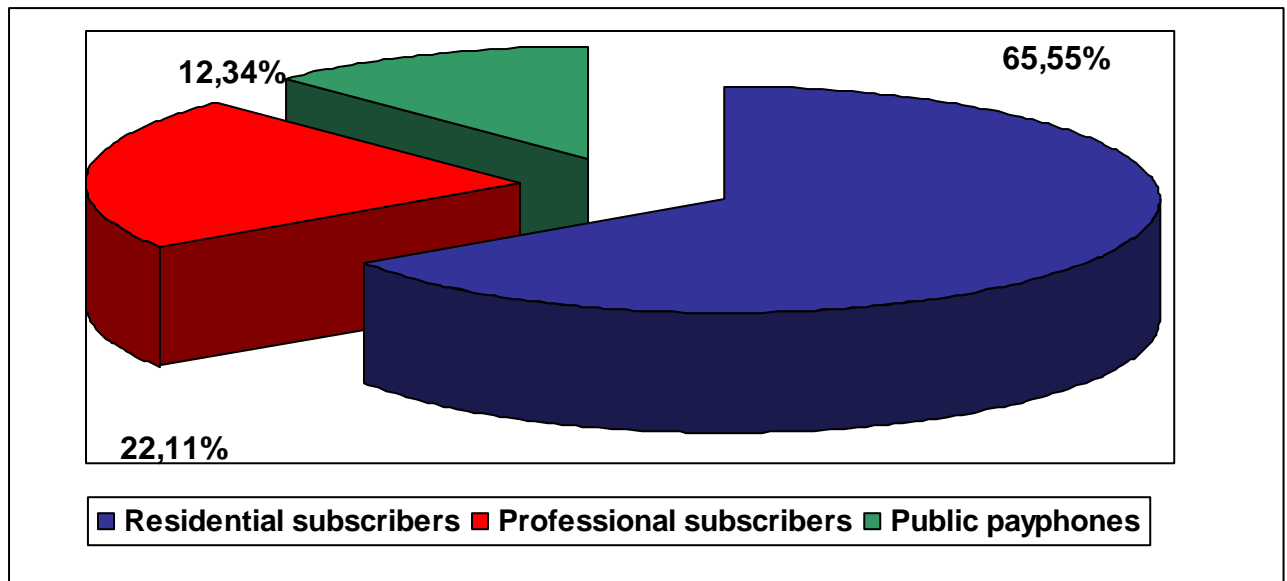
### Quarterly Evolution of Fixed telephony market size (in thousands)



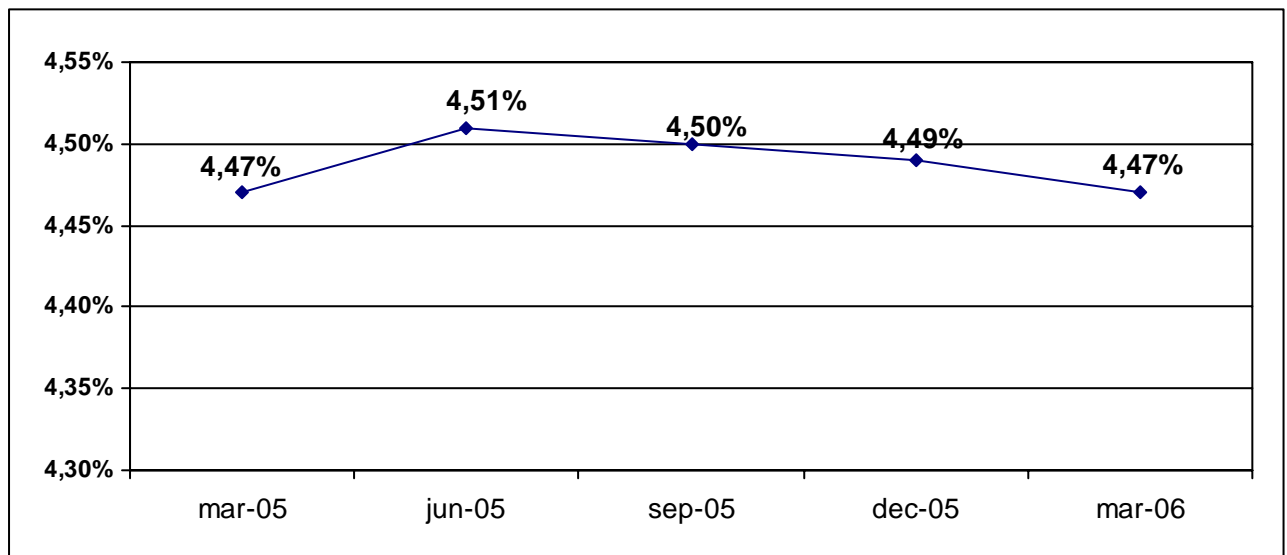
<sup>1</sup> The growth at the quarter N equals to the difference between the market size of N and N-1.

<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

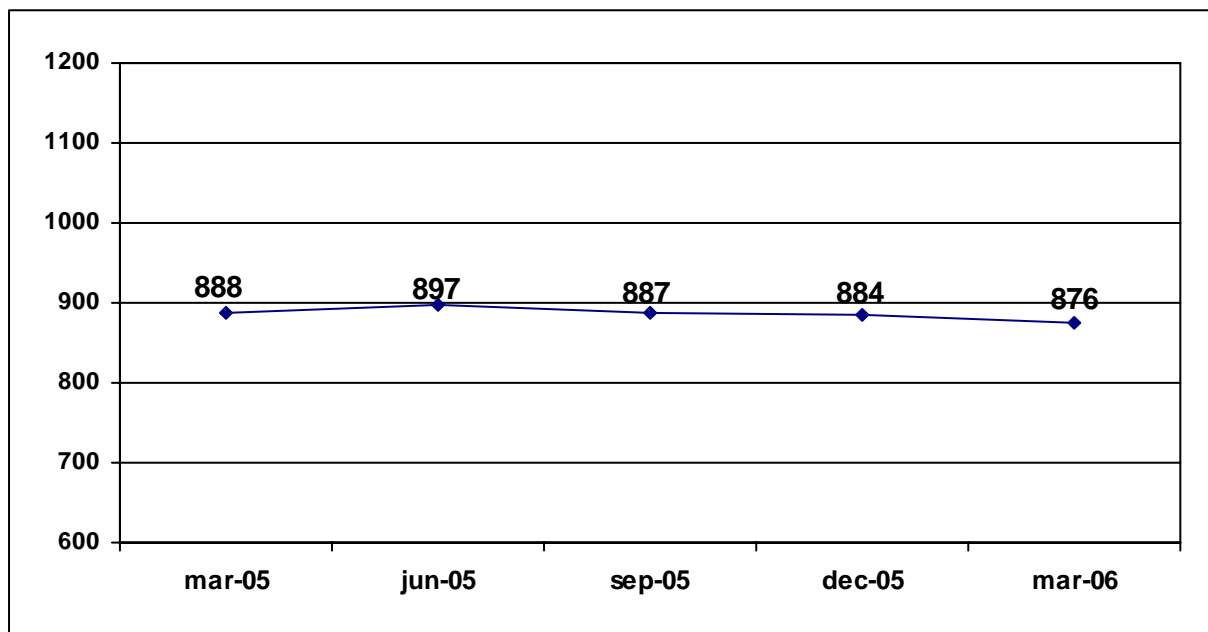


## RESIDENTIALS SEGMENT

Number of residential subscribers:

Residential subscribers	mar-05	jun-05	sep-05	dec-05	mar-06
Market size	888 678	896 583	887 337	884 546	875 725
quarterly growth	- 945	7 905	- 9 246	- 2 791	-8 821
Growth (%)	- 0,11%	0,89%	- 1,03%	- 0,31%	-1%

Quarterly Evolution of residential market size (in thousands)

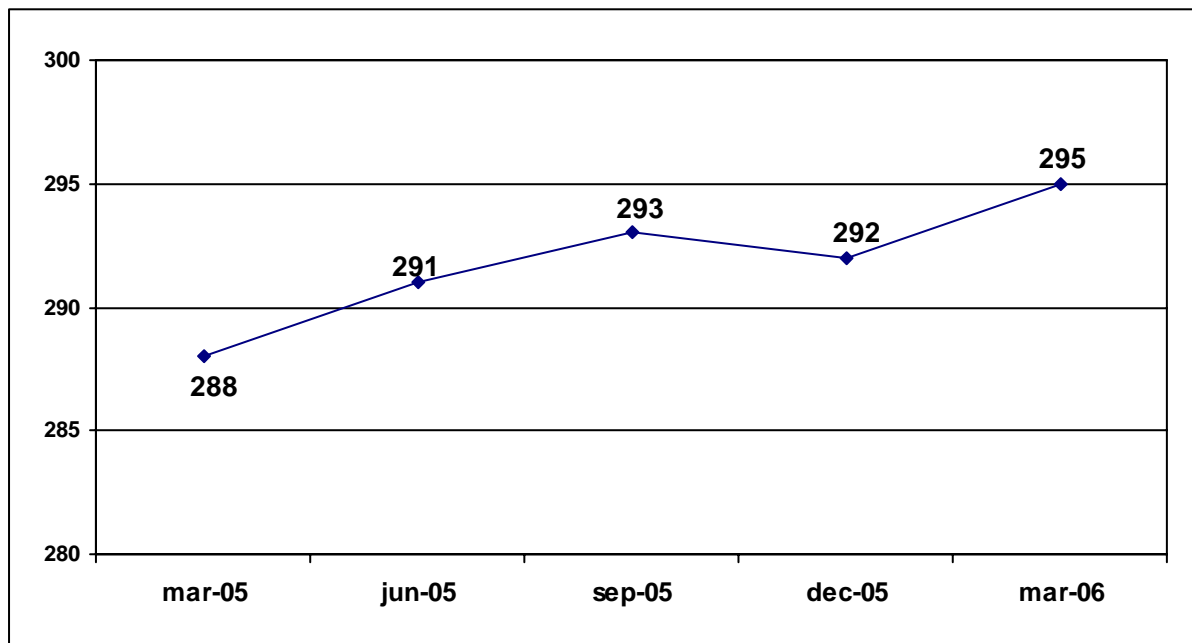


## PROFESSIONALS SEGMENT

### Number of Professional subscribers

Professional subscribers	mar-05	jun-05	sep-05	dec-05	mar-06
Market size	287 992	291 347	293 182	292 519	295 408
quarterly growth	4 806	3 355	1 835	- 663	2 889
Growth (%)	1,70%	1,16%	0,63%	- 0,23%	0,99%

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

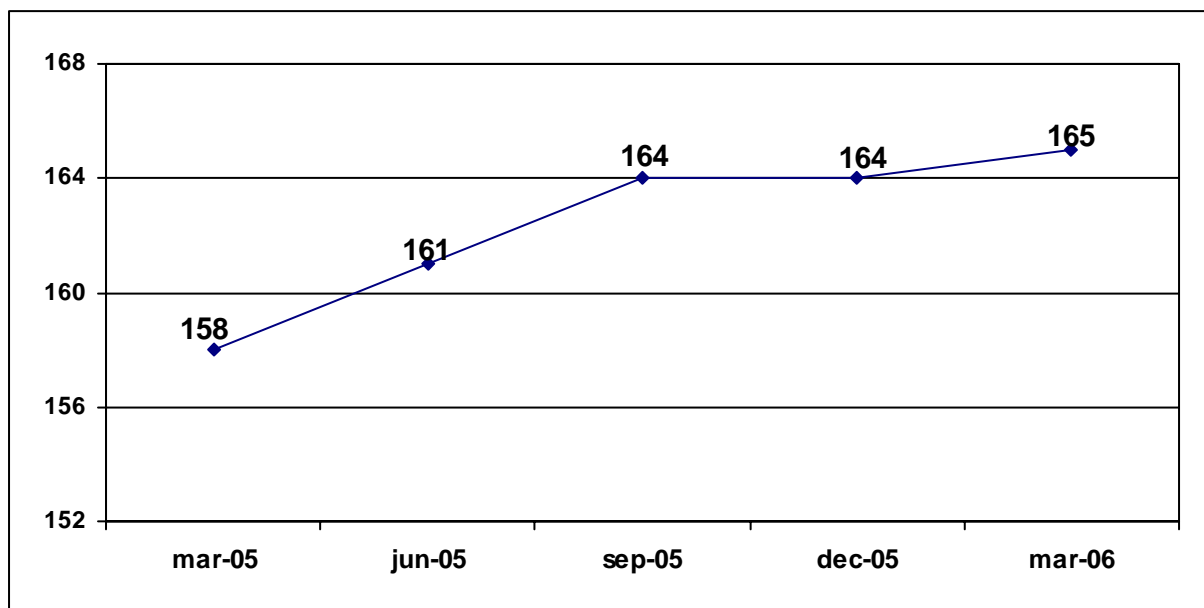


## PUBLIC PAYPHONES

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

Public payphones	mar-05	jun-05	sep-05	dec-05	mar-06
Market size	158 658	161 168	164 206	164 091	164 892
quarterly growth	22 898	2 510	3 038	- 115	801
Growth (%)	16,87%	1,58%	1,88%	- 0,07%	0,49%

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



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