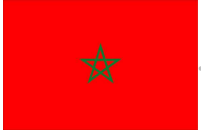


# ICT developments in Morocco

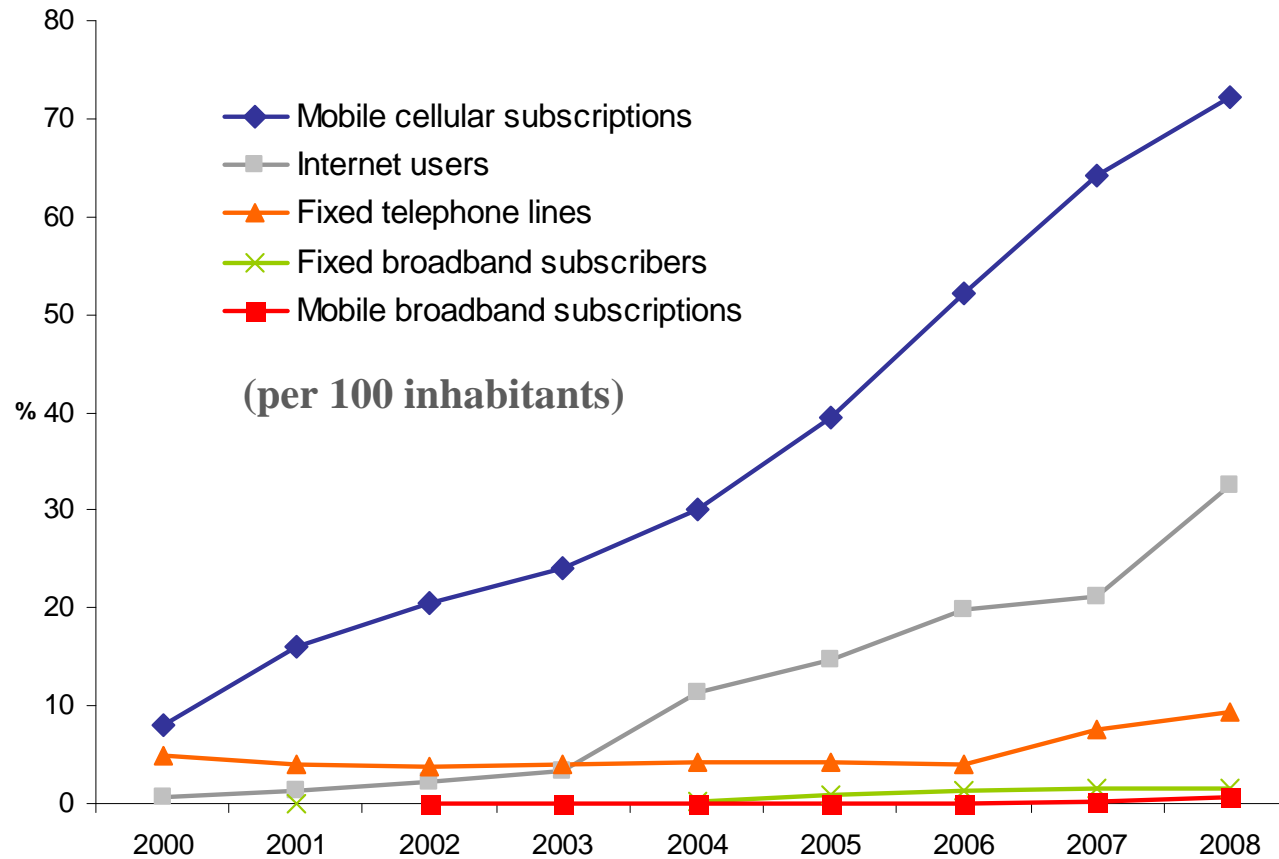
Atelier de travail pour la mise en oeuvre d'un  
Observatoire National des Technologies de  
l'Information et de la Communications  
(ONTIC)

15 July 2009  
Rabat, Morocco

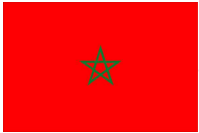
Vanessa Gray  
Market Information and Statistics Division (STAT)  
Telecommunication Development Bureau (BDT)



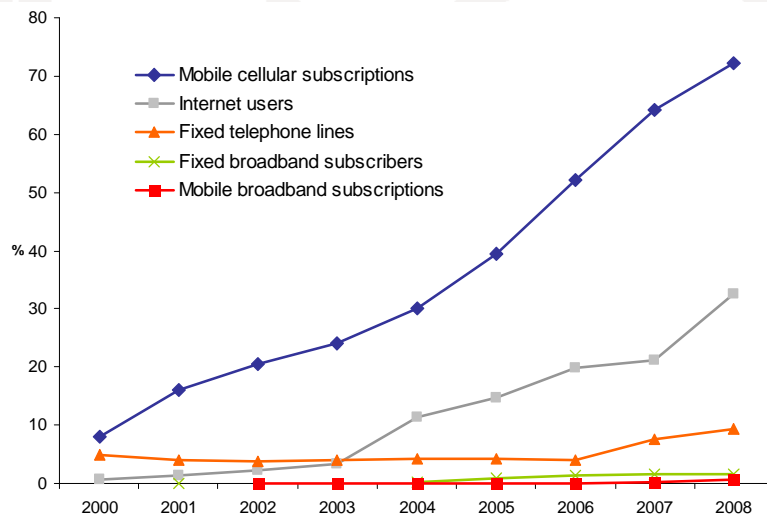
# ICT developments in Morocco



Source ITU World Telecommunication/ICT Indicators database.

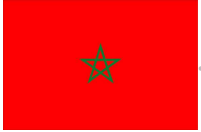


# ICT developments in Morocco



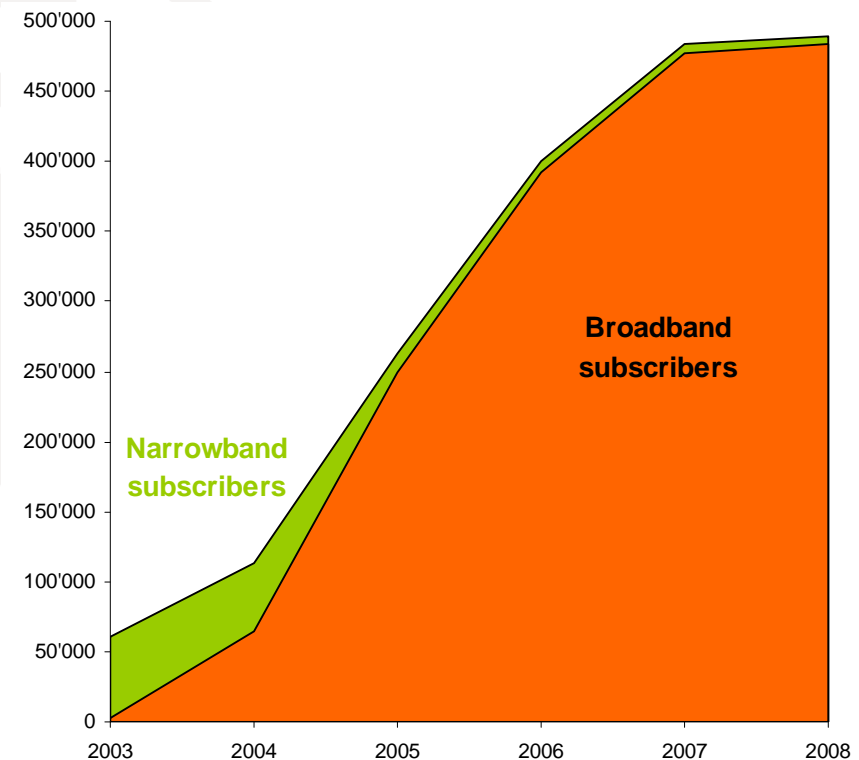
- Strong growth in mobile
  - Competition/ Mobile Number Portability
- New growth in fixed lines
  - Fixed-wireless
  - Wana holds close to 60% of fixed market
- Relatively low fixed and mobile broadband penetration rates
  - Strong growth in mobile broadband subscriptions (number almost quadrupled in one year, to 339'000 by 1Q 2009)
  - Slow(er) growth in fixed broadband (where Maroc Telecom holds close to 100% of market)
  - At current growth rates, mobile broadband expected to overtake fixed broadband

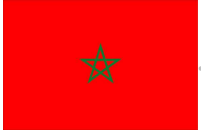
Source ITU World Telecommunication/ICT Indicators database.



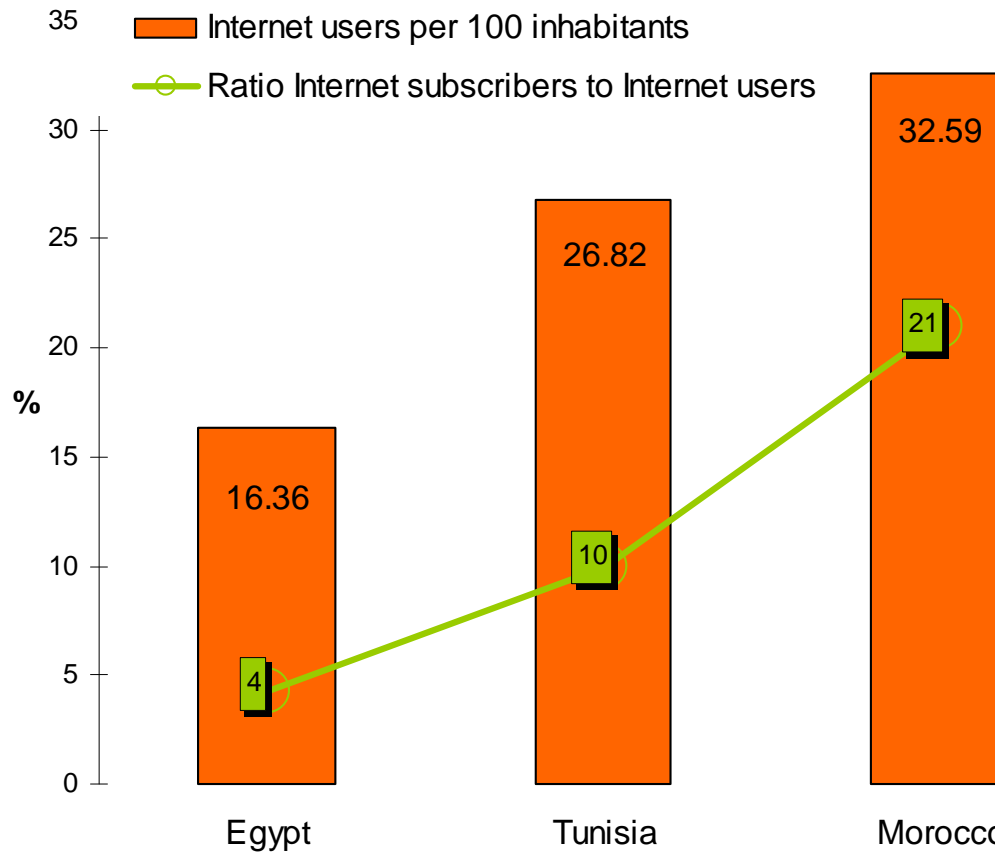
# Broadband in Morocco

- Inter-modal competition between ADSL and 3G
- Practically all fixed Internet access through broadband
- Relatively cheap broadband prices (US\$ 20 per month for a 256 kbps package) and relatively high broadband speeds available (20Mbps)
- Early launch of IPTV
- Increasing amounts of international connectivity (Africa Coast to Europe)



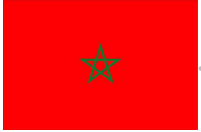


# Internet users versus subscribers, 2008



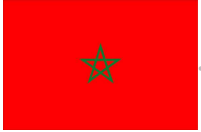
A data problem?

Source ITU World Telecommunication/ICT Indicators database.



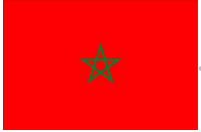
# ICT Development Index (IDI)

- 154 countries ranked according to 2002 and 2007 data
- ICT ACCESS (40%)
  - Fixed telephone lines per 100 inhabitants
  - Mobile cellular telephone subscriptions per 100 inhabitants
  - International Internet bandwidth per Internet users
  - Proportion of households with a computer
  - Proportion of households with Internet access at home
- ICT USE (40%)
  - Internet users per 100 inhabitants
  - Fixed broadband subscribers per 100 inhabitants
  - Mobile broadband subscribers per 100 inhabitants
- ICT skills (20%)
  - Adult literacy rate
  - Secondary gross enrolment ratio
  - Tertiary gross enrolment ratio



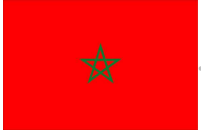
## IDI Results

- 2007 IDI values range from a low 0.82 to a high 7.5 (\* the higher the value, the better the level of ICT development)
- Morocco's 2007 value of 2.34 ranks it 101, up ten positions from rank 111 in 2002
- While Morocco is slightly ahead of Egypt and Tunisia in terms of ICT access and use, its ICT skills rankings are below those of its neighbors



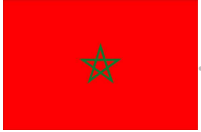
# ICT Price Basket 2008

- The ICT Price Basket, first launched in 2008, compares ICT prices (relative to income levels) in 150 countries:
- A composite price basket based on the cost for three sub-baskets as a percentage of monthly GNI per capita
  1. Fixed telephone services (monthly subscription + 30 local calls)
  2. Mobile cellular services (25 outgoing calls + 30 SMS)
  3. Fixed broadband Internet services (monthly subscription to an entry plan)



## Morocco's ICT Price Basket

- Global ICT Price Basket values rank from a low 0.4, to a high 72.4 (\* the higher the value, the higher the relative cost of ICT services)
- Morocco's ICT Price Basket value is 12.4, which ranks the country 104<sup>th</sup> globally
- ICT Prices are relatively high, compared to its neighbors Tunisia (ICT Price Basket Value of 2.9) and Egypt (ICT Price Basket Value of 4.1)



# Thank you

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