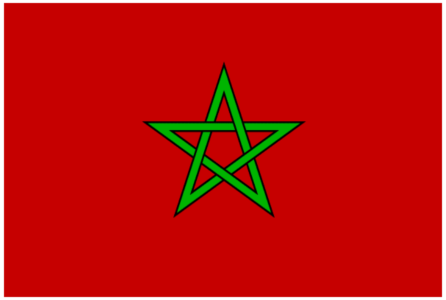
Morocco Case Study



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Shaping the Future Mobile
Information Society

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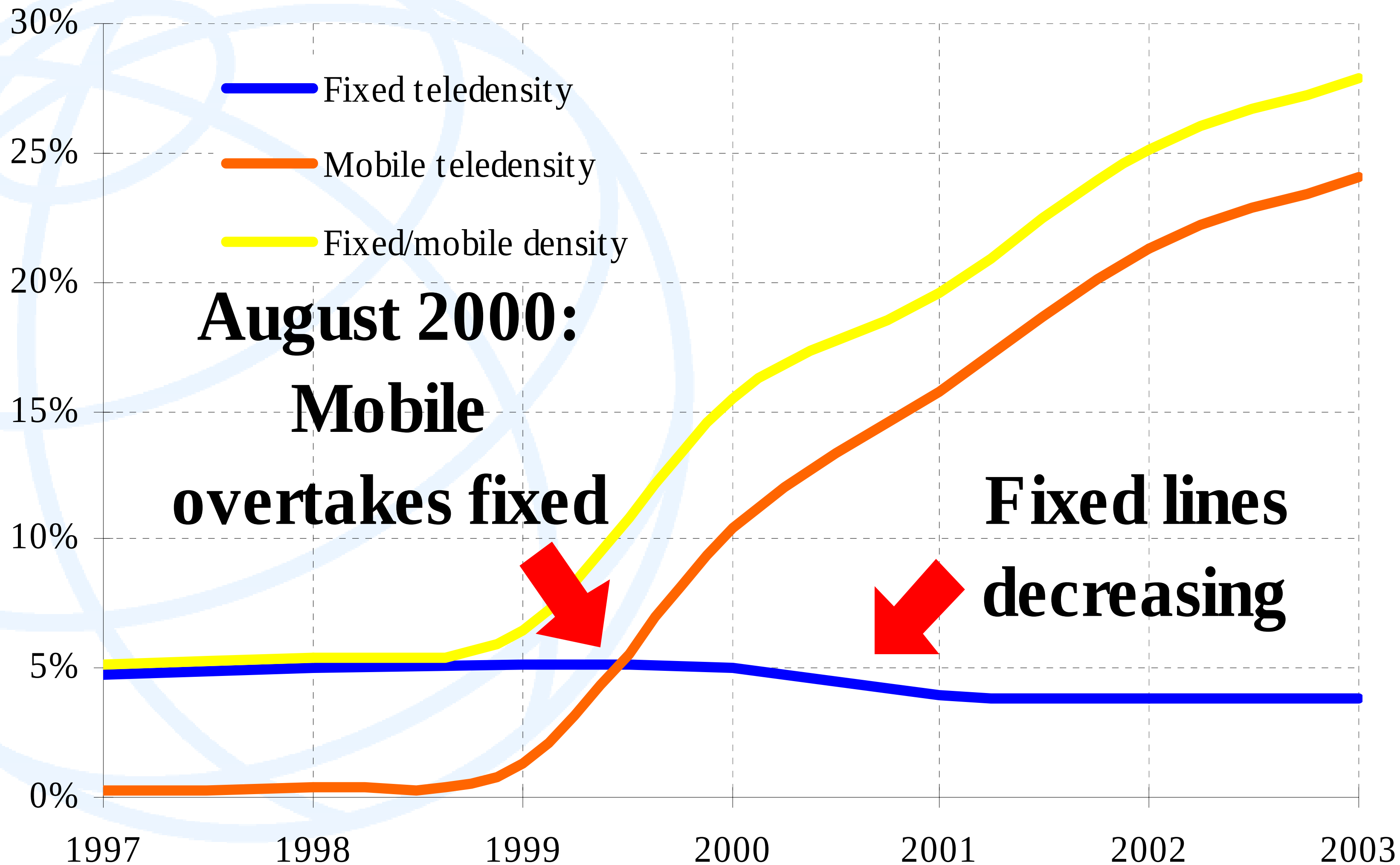
Morocco on the move



“*Achkat’aoued*?” Social factors

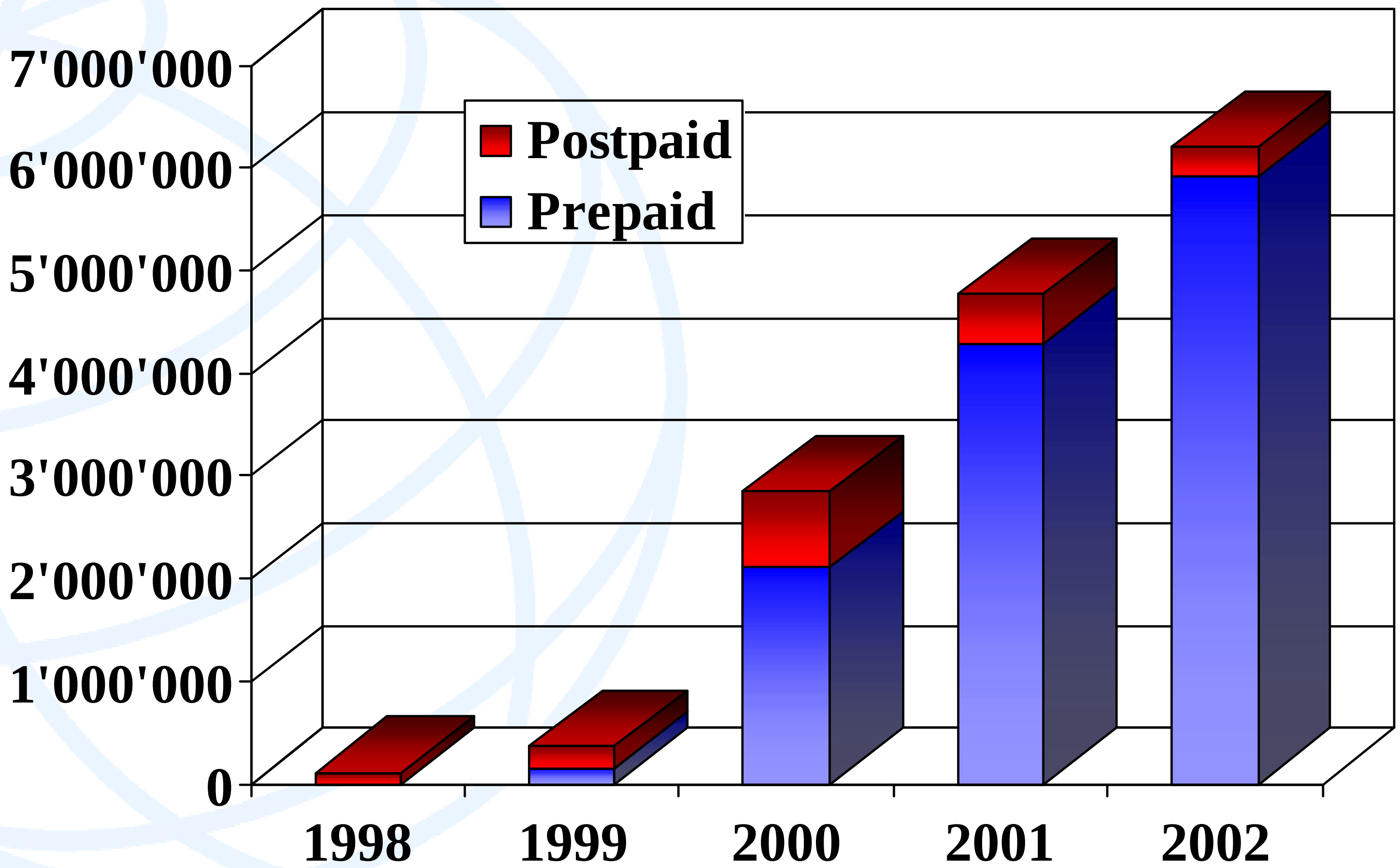
- Oral tradition, close social and family links
- Small number of fixed telephones
- Proliferation of phone shops - Using phone shops people can make calls, but they are not <u>reachable</u>

Regulatory and market factors

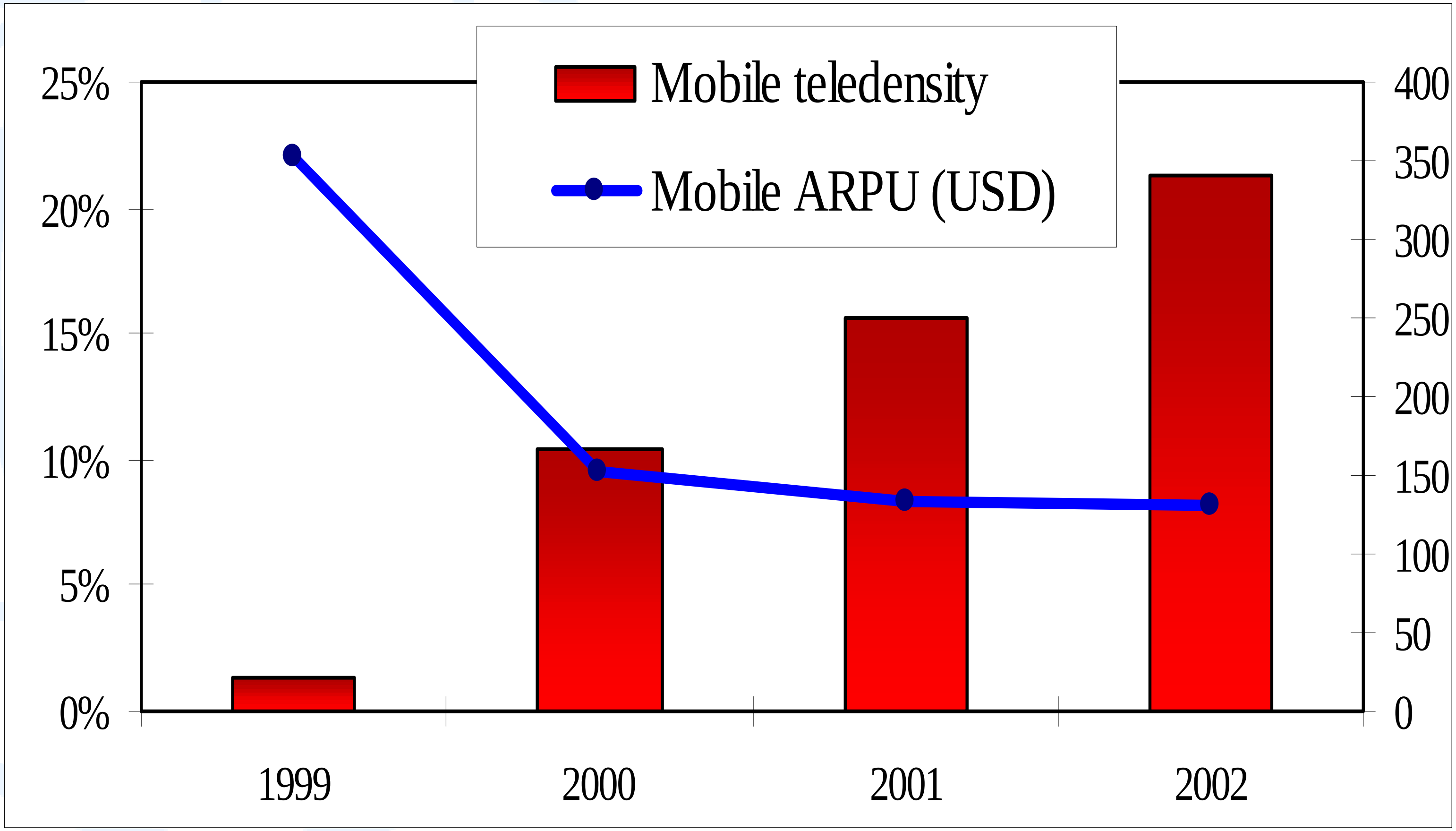
- independent regulator, clear regulatory framework
- Introduction of competition

- Entrance of the second mobile operator
- Proliferation of new offers, in particular PREPAID CARDS
- lower prices

Prepaid dominates



Prepaid drawbacks



Substitute or complement? A special usage pattern

- Mobile phones are mainly used to receive calls
- Teleboutiques are still used to make calls (their numbers grew in the past years)
- Most of the calls terminated on the mobile network are originating from the fixed network

And…

- Number of mobile phones is growing, while fixed-lines are decreasing
- Although the relating mobile/fixed is 5 to 1, about the 50% of traffic goes through fixed network
- Revenues from the fixed network still constitute about the 66% of Maroc Telecom revenues

Con’t: new services

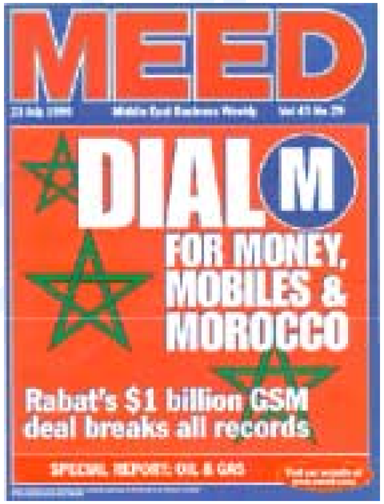
- **LO Box: gateway between GSM network and company’s PBX**
- **Fixed GSM (teleboutiques): Medi Telecom will install GSM phone shops**
- **Fixed packages (similar to mobile offers): They include a telephone (cordless) and a certain amount of communication minutes. Possiblity of voluntary spending caps and transparent billing**

Between tradition and innovation: Focus on society

- Populatization of mobile access: from workers to business men and women
- Services for families: special rates and discounts, single bill, short numbers…
- Services for the enterprise: expense control, special tariffs for intra-company communications, direct management of companies' mobile phone fleet

Mobile impact

- Total teledensity above 20% (Tunisia and Egypt slightly above 11%, Algeria 6%)
- Economic impact
  - Employment
  - Foreign direct investment
  - New business opportunities
  - New ways of working



Future: Internet, Enterprise and Mobility

- Next steps? New license to be issued by the end of 2004
- More content and applications
- Mobile Internet
  - GPRS – currently being deployed
  - UMTS – in three-four years

Thank you

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