



Telecom Equipment & Services Export Promotion Council

Gate No. 5, Khurshid Lal Bhavan, Janpath, New Delhi-110 001

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Dear Member(s),

Greetings from Telecom Equipment & Services Export Promotion Council (TEPC)!

TEPC has planned to organise India-Africa ICT Expo 2026 at Hotel Hyatt, Casablanca, Morocco on March 27-28, 2026. The event would bring together over 50+ ICT companies from India, Morocco and other nearby African & Middle-East countries. It is expected that the expo will attract over 1000+ business visitors.

2. TEPC has been organising India Africa ICT Expo & Conference since 2015. During the years 2015 & 2016 it was organised in Kenya, 2017 & 18 in Nigeria, 2019 & 20 in Rwanda, 2021 & 2022 in Ghana, in 2023 in Ethiopia and 2025 in Egypt. The details of the previous editions of India Africa ICT Expo are enclosed herewith as Annexure-1. During past years, Indian telecom companies received a good response from the African telecom industry and many Indian and African companies have started working together. The ensuing India-Africa ICT Expo will facilitate companies from India, Morocco and nearby African & Middle East countries to meet and discuss business.
3. India Africa ICT Expo & Conference will build and solidify partnership between India, Kingdom of Morocco and other nearby African & Middle East countries in ICT & related sectors. India can share vast experience in building telecommunication & IT infrastructure, fibre & wireless networks, broadband connectivity solutions, ICT software & applications, secured networks, green telecom solutions, disaster management, M2M, Smart city solutions, 4G & 5G network equipment, System Integration Services and much more.
4. **Participation Charges:** The event is proposed under financial assistance from the Department of Telecommunications, Government of India. The tentative participation charges (for per 9 Square Metres booth) will be:

9 Square Metre Stall

TEPC Members:	₹ 65,000/-
TEPC Non-Members:	₹ 70,000/-

6 Square Metre Stall

TEPC Members:	₹ 50,000/-
TEPC Non-Members:	₹ 55,000/-

4 Square Metre Stall

Startups:	₹ 25,000/-
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The standard 9/6 sqm stand includes basic furniture's like 2 chairs, 1 table, 1 reception desk, waste bin, spotlight. Further, the aforesaid fee doesn't include display material, any additional fixtures & furniture in the booth; the same are to be borne by the companies.

5. **Air-Fare Reimbursement:** The participating company with export less than Rs. 50 crores will be reimbursed airfare (one per exhibitor) with a ceiling of Rs. 70,000/- . The reimbursement is applicable only if the MD/ CEO/ Board of Directors/ Senior officials of the organisation travel.

- 6. Sponsorship to the Event:** The exhibitors are also invited for sponsoring the event as per various sponsorship packages enclosed herewith as Annexure-2. *Early bird discount of 10% will be applicable on confirmation of sponsorship till February 10, 2026.*
- 7. Telecom Sector of Morocco:** TEPC has conducted market research on Moroccan telecom sector. The report on telecom sector of Morocco is enclosed herewith, as Annexure-3, for your reference.
- 8. Kindly confirm your participation through email and pay the requisite amount within seven days of confirmation email and issue of invoice by TEPC, else, the booth reserved will be released.** In case of further query, please feel free to contact Ms. Sarbani Dasgupta, Director, TEPC @ +919818933121.

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Annexure-1

India Africa ICT Expo Editions (2015-2025)

Sl. No.	Year	Date	Place	Co-Host of the Event
1.	2015	September 28-29, 2015	Nairobi, Kenya	<p>1. ICT Authority of Kenya 2. Commonwealth Telecommunications Organisations Hon'ble Minister Mr. Najib Balala, Cabinet Secretary, Government of Kenya inaugurated the event.</p>
2.	2016	September 01-03, 2016	Nairobi, Kenya	<p>1. ICT Authority of Kenya 2. Commonwealth Telecommunications Organisations</p>
3.	2017	September 06-07, 2017	Lagos, Nigeria	<p>1. The Nigerian IT association – ITAN, 2. Association of Telecom Companies of Nigeria (ATCON), 3. Association of Licensed Telephone Operators (ALTON), 4. Nigerian Communications 5. Commission, National Association of Chambers of Commerce, Industry, Mines and 6. Agriculture, (NACCIMA), Computers and Allied Products Association of Nigeria (CAPDAN) The Nigerian Minister of Communications, H.E Mr. Adebayo Shittu inaugurated the event</p>
4.	2018	May 22-23, 2018	Lagos, Nigeria	<p>1. Federal Ministry of Communications, Nigeria 2. Information Technology Association of Nigeria (ITAN) 3. Association of Licensed Telecom Operators of Nigeria (ALTON) 4. Association of Telecom Companies of Nigeria (ATCON) 5. Institute of Software Practitioners of Nigeria (ISPON), 6. Nigeria Computer Society (NCS) 7. Computer and Allied Products Dealers Association of Nigeria (CAPDAN) Hon'ble Minister of Communications of Nigeria, H.E. Barrister Abdur-Raheem Adebayo Shittu inaugurated the event</p>
5.	2019	August 05-06, 2019	Kigali, Rwanda	<p>1. Ministry of ICT & Innovation, Rwanda 2. Ministry of Trade & Industry, Rwanda 3. SMART AFRICA 4. Rwanda development Board (RDB) 5. Rwanda Utilities Regulatory Authority (RURA) 6. Rwanda Information Society Authority (RISA) 7. The National Industrial Research and Development Agency (NIRDA) Hon'ble Minister, Mrs. Paula Ingabire, Minister ICT & Innovation, Rwanda inaugurated the event</p>
6.	2020	December 01-02, 2020	Rwanda (Virtual)	<p>1. Ministry of ICT & Innovation, Rwanda 2. Ministry of Trade & Industry, Rwanda 3. Smart Africa 4. Rwanda development Board (RDB) 5. Rwanda Utilities Regulatory Authority (RURA) H. E. Minister, Mrs. Paula Ingabire, Minister ICT & Innovation, Rwanda inaugurated the event</p>

Sl. No.	Year	Date	Place	Co-Host of the Event
7.	2021	October 05-06, 2021	Ghana (Virtual)	1. Ministry of Communications, Government of Ghana 2. Smart Africa
8.	2022	September 14-15, 2022	Accra, Ghana	1. Ministry of Communications, Government of Ghana 2. Smart Africa H. E. Mrs. Ursula Owusu-Ekuful. Hon'ble Minister for Communication and Digitalisation, Government of Ghana inaugurated the event
9.	2023	August 9-10, 2023	Addis Ababa, Ethiopia	1. Ministry of Innovation, Government of Ethiopia 2. Addis Ababa Chamber of Commerce & Addis Ababa Chamber of Commerce and Sectoral Associations
10.	2025	April 6-7, 2025	Cairo, Egypt	1. Ministry of Communications and Information Technology (MCIT), Egypt 2. Information Technology Industry Development Agency (ITIDA), Egypt 3. Egyptian Businessmen's Association, Egypt

Annexure-2

India Africa ICT Expo-2026
March 27-28, 2026 at Casablanca, Morocco
Sponsorship Packages

Deliverable	Platinum	Gold	Silver	Conference session	Gala Dinner	Registration Counter & Badge	Tea Coffee Sponsor
Branding Awareness							
Website Branding	Yes	Yes	Yes	-	Yes	-	-
Registration portal	Yes	Yes	Yes	-	-	Yes	-
Event mailer Branding	Yes	Yes	-	-	-	-	-
Corporate video	In the beginning & end of the sessions	Corporate video during Networking Lunch	-	-	5 minutes corporate video during dinner	-	Corporate video during Networking Tea
Logo in the backdrop	Yes	Yes	Yes	Yes	Branding during Dinner	Branding in the registration counter & Badge	Branding during networking Tea/ Coffee
Banner in the Main lobby	Yes	-	-	-			
Banner in Conference Room	Yes	-	-	Yes			
E-invites & social media publicity	Yes	Yes	-	-	Yes & Exclusive logo on dinner invite to Ministry, Missions and other seniors ICT stakeholders	-	-
Booth	9 sqm stall complimentary	6 sqm stall complimentary	6 sqm stall complimentary	-	-	-	-
Lead General- speaking & Panel Session							
Panel Slot	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Charges in ₹ lakh	6,00,000	5,00,000	4,00,000	2,50,000	5,00,000	2,00,000	2,00,000

TELECOMMUNICATION SECTOR MOROCCO



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OUR VISION

To propel India to the forefront of the global telecom scenario with secure, reliable, state-of-the-art telecom solutions empowering digital connectivity and fostering sustainable growth in exports, innovation and technological leadership.

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A state's output growth rate is positively related to its rate of telecommunications investment. Telecommunications is a strong contributor to the performance of the economic system as a whole.

- José Luis Gómez-Barroso
- Raquel Marbán-Flores

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TELECOM SECTOR

MOROCCO

TELECOM SECTOR – IN GENERAL

Morocco's telecom equipment market is emerging as one of the most promising opportunity hubs in North Africa, driven by rapid digitalisation, expanding fibre networks and the ongoing transition to 5G. With mobile penetration exceeding 150% and strong momentum in FTTH and data-centre investments, the country is entering a fresh CAPEX cycle that demands advanced radio, transport and broadband infrastructure. Backed by an active regulator (ANRT) and government-led digital programmes under Digital Morocco, the ecosystem offers clear entry points for innovative and competitively priced solutions. For Indian telecom equipment manufacturers, Morocco presents a strategically positioned, high-growth market with strong potential for partnerships, technology supply and long-term expansion across the wider Francophone African region.

MARKET AT A GLANCE

MOROCCO TELECOM MARKET VALUE

Year	Market Value (USD Billion)	Growth
2024	3.64	-
2025	3.79	+0.15 billion / +4.12%
2025 (Projected)	4.59	+0.80 billion from 2025
Compound Annual Growth Rate (CAGR 2025-2030)	3.88%	-

INTERNET AND FIXED LINE SUBSCRIBER

SI. No.	Indicator	Subscriber
1	Cellular Mobile Connections (Million)	57.1
2	Internet user (Million)	35.5
3	Internet Penetration (%)	92.2
4	Internet subscriber (Million)	40.2
5	Fixed Line subscriber (Million)	3.03

MARKET SHARE

Telecom Service Provider	Share(%)
Maroc Telecom	36.1
Orange Maroc	32.9
Inwi	31

PESTEL ANALYSIS

Political	Strong government push for digital transformation and high-speed broadband through national ICT/digital strategies, with defined targets for 4G/5G and fibre coverage that support sustained operator capex on networks.
Economic	<ul style="list-style-type: none">Overall telecom market in Morocco projected to grow at roughly low single digit CAGR through 2030, with data services and enterprise solutions as main growth drivers, constraining but not blocking equipment budget expansion.Multi billion dollar investments committed for 5G and broadband infrastructure in the 2025–2030 window, supported by public programmes and operator capex, though operators remain very price sensitive and focused on total cost of ownership and financing terms.
Social	Policy emphasis on closing the rural digital divide via coverage of thousands of underserved communities, creating niche demand for low cost rural base stations, satellite linked sites, and other inclusive connectivity solutions.
Technological	<ul style="list-style-type: none">Large ongoing investments in fibre (backbone and FTTH), IP/MPLS, DWDM, and data center/cloud infrastructure, plus growth of SD-WAN and advanced enterprise networking via partnerships between Moroccan operators and global ICT players.Growing sustainability focus, including pressure to limit network energy consumption and emissions, favors vendors that offer low power radio, efficient cooling and integrated power management or hybrid/renewable friendly site solutions
Legal / Regulatory	Active competition regulation and past rulings on anti-competitive behavior affect operator strategies, which can open or close opportunities for particular suppliers.

HS CODE-WISE IMPORT OF TELECOM EQUIPMENT BY MOROCCO DURING THE PERIOD 2020-24

The HS code-wise import of telecom equipment by Morocco, during the period 2020-24, is given in the table as under:

SI. No.	HS Code	Import of Telecom Equipment (In US\$ Thousand)				
		2020	2021	2022	2023	2024
1	851711	1589	3122	1630	2227	751
2	851718	6355	3693	4098	3362	3377
3	851761	1055	4217	340	3802	4327
4	851762	219783	227037	327157	299977	313785
5	851769	14007	31592	41936	14928	24348
6	851770	75487	82231	1387	0	0
7	851771	0	0	9008	13712	7389
8	851779	0	0	78573	97532	106982
9	851950	43	60	0	0	0
10	851981	122	387	1261	859	622
11	852352	35782	26980	45560	48497	34598
12	852550	2680	1321	568	2228	1240
13	852560	580	609	693	345	707
14	852799	297	307	657	944	2187
15	852910	13591	15221	10327	11640	10686
16	852990	5675	6581	6527	47582	4443
17	853400	7712	13925	13090	19222	40462
18	853670	4730	9361	7942	8069	5876
98	854420	19902	86032	181855	250476	258480
20	854442	310631	345679	356739	443357	419261
21	854449	344671	394894	543339	666684	700271
22	854470	15444	20747	32925	33576	24762
23	900110	14475	24718	51960	55045	35358
Total		1094611	1298714	1717572	2024064	1999912

Morocco's import of telecom equipment has grown steadily from 2020 to 2024, rising from about USD1.09 billion to nearly USD 2 billion. This overall increase reflects the country's continued investment in strengthening its digital infrastructure, expanding broadband and fibre networks, and upgrading mobile communication systems. While annual figures fluctuate slightly, the general trend shows consistent demand for advanced telecom technologies to support Morocco's growing connectivity needs, digital transformation efforts, and rising consumer and enterprise usage.

HS CODE-WISE TOTAL IMPORT BY MOROCCO AND EXPORT FROM INDIA, OF TELECOM EQUIPMENT, DURING THE YEAR 2024 (IN US\$ THOUSAND):

HS Code-wise total import by Morocco and Export from India, of Telecom Equipment, for the Year 2024 were as under:

SI. No.	HS Code	Total Import by Morocco	Export to Morocco from India	% age of Export Vis-à-vis total Import
1	851711	751	2	0.27%
2	851718	3377	4	0.12%
3	851761	4327	0	0.00%
4	851762	313785	135	0.04%
5	851769	24348	3	0.01%
6	851770	0	0	0.00%
7	851771	7389	1	0.01%
8	851779	106982	16	0.01%
9	851950	0	0	0.00%
10	851981	622	0	0.00%
11	852352	34598	296	0.86%
12	852550	1240	0	0.00%
13	852560	707	0	0.00%
14	852799	2187	0	0.00%
15	852910	10686	6	0.06%
16	852990	4443	0	0.00%
17	853400	40462	3	0.01%
18	853670	5876	0	0.00%
19	854420	258480	14	0.01%
20	854442	419261	2	0.00%
21	854449	700271	23	0.00%
22	854470	24762	1	0.04%
23	900110	35358	2343	6.63%
Total		1999912	2849	0.14%



In 2024, Morocco imported nearly USD 2 billion worth of telecom equipment, while India's exports to Morocco in this sector remained very small at just USD 2.85 million, accounting for only 0.14% of Morocco's total imports. India's export share was minimal across almost all product categories, with only a few segments particularly photographic/optical components, showing a slightly higher share of around 6.6%. Overall, the data indicates that despite Morocco's large and growing demand for telecom equipment, India currently has a very limited presence in this market, highlighting a significant opportunity to expand its export footprint.

MARKET CHALLENGES

- a. **Legacy network complexity** : Coexistence of 2G/3G/4G and upcoming 5G plus fragmented fixed networks increases integration complexity and lengthens testing/acceptance cycles for new vendors.
- b. **Rising cyber threats** : Increasing digitisation and cloud dependence expose operators to higher cybersecurity and service continuity risks, raising demand for proven, secure solutions and stricter vendor due diligence.

MARKET OPPORTUNITIES

- a. **Equipment Demand** : Rollout of 5G, fibre optic networks and LTE-Advanced technology demands substantial telecom equipment, including base stations, antennas, fibre cables, network management solutions and IoT devices.
- b. **Service Expansion** : Indian telecom service providers can explore opportunities in infrastructure deployment, network operations, managed services and software solutions for network optimisation.
- c. **Partnership Potential** : Collaboration with major Moroccan operators and global equipment suppliers offers avenues to enter the market via joint ventures or as technology partners.
- d. **Growing Consumer Base** : Morocco, with nearly 50 million subscribers, presents a growing user

KEY DEVELOPMENTS IN MOROCCO TELECOM IN 2025

- a. Morocco's telecom sector entered a new investment cycle following the ANRT's award of 5G licences to Maroc Telecom, Inwi and Orange Morocco, generating MAD 2.1 billion (USD 210 million) for the state. Under the spectrum allocations, MAD 900 million for Maroc Telecom (120 MHz) and MAD 600 million each for Medi Telecom and Wana (70 MHz), the operators have committed to significant infrastructure expansion, service-quality obligations and ambitious coverage milestones. Collectively, they will invest an estimated MAD 80 billion (USD 8 billion) over the next decade to support nationwide rollout, with mandated 5G coverage of 45% of the population by end-2026 and 85% by 2030, positioning Morocco firmly on track with its national digital transformation agenda.
- b. The Moroccan government formalised its 'Digital Morocco 2030' ambitions by signing two strategic MoUs, one with Nokia and the other with Ericsson. Under these agreements, both vendors committed not only to support infrastructure development, but also to invest in digital talent development across the country. This collaboration underscores Morocco's determination to rapidly upscale its digital ecosystem and build local capacity while accelerating modern telecom deployment.

- c. The ANRT has approved the establishment of two new joint ventures by Maroc Telecom and Inwi to strengthen Morocco's digital infrastructure. The first entity, FibreCo, will focus on deploying passive fibre-optic (FTTH) networks nationwide, while TowerCo will be responsible for rolling out new telecom towers and mobile sites, providing passive infrastructure access to all licensed operators. Both companies will function as fully autonomous wholesale-only entities, with independent resources and decision-making structures and will maintain strict functional separation from their parent operators to ensure neutrality and fair access across the sector.
- d. Vodafone Business and Maroc Telecom have signed a Memorandum of Understanding (MoU) to strengthen Morocco's digital landscape. The partnership aims to expand Vodafone's footprint in Africa while delivering advanced connectivity and digital solutions to enterprise customers. The collaboration will focus on developing smart city initiatives, energy-efficient technologies and innovative digital services to support Morocco's growing digital economy.

TOP TEN TELECOM EXPORTING COUNTRIES TO MOROCCO (US DOLLAR THOUSAND)

The details of the top ten telecom exporting countries to Morocco are as under:

Exporting Country	2020		2021		2022		2023		2024	
	Telecom Import During the Year	%age of Import During the Year	Telecom Import During the Year	%age of Import During the Year	Telecom Import During the Year	%age of Import During the Year	Telecom Import During the Year	%age of Import During the Year	Telecom Import During the Year	%age of Import During the Year
Total Telecom Import by Morocco	1094611	100.0%	1298714	100.0%	1717572	100.0%	2024064	100.0%	1999912	100.0%
China	304184	27%	370231	29%	504571	29%	506290	25%	525271	26%
Germany	91794	8%	129989	10%	198059	12%	316595	16%	301971	15%
Spain	141674	12%	170677	13%	212918	12%	257093	13%	270602	14%
Portugal	83112	7%	87524	7%	103120	6%	157081	7%	195228	10%
France	112443	10%	130705	10%	233754	14%	147430	7%	147250	7%
Italy	61100	5%	68492	5%	43371	3%	83312	4%	77913	4%
Czech Republic	31247	2%	37125	3%	56754	3%	62418	3%	55851	3%
Hungary	29137	2%	30399	2%	37930	2%	48875	2%	54477	3%
Japan	29185	2%	40185	3%	39583	2%	54207	3%	47784	2%
United States of America	42437	3%	44754	3%	58930	3%	56489	3%	35766	2%
Total Telecom Import by Morocco from the Top Ten Countries	926313	84.62%	1110081	85.48%	1488990	86.69%	1689790	83.49%	1712113	85.61%

Morocco's telecom imports from 2020 to 2024 were dominated by ten major supplying countries, consistently accounting for over 83%–86% of its total annual imports. China remained the largest exporter throughout the period, supplying about 25–29% of Morocco's telecom equipment each year. Germany, Spain, Portugal and France also held significant shares, reflecting strong European presence in Morocco's telecom supply chain. While countries like Italy, the Czech Republic, Hungary, Japan and the United States contributed smaller but stable shares, the overall trend shows Morocco's heavy reliance on a concentrated group of technologically advanced countries for telecom equipment needs.

PROJECTIONS FOR MOBILE AND SMARTPHONE CONNECTION

Description	Projections					
	2025	2026	2027	2028	2029	2030
Percentage 4G connections	66.16%	63.40%	56.63%	45.07%	32.43%	20.68%
Percentage 5G connections	5.63%	13.33%	23.63%	38.28%	54.24%	69.61%
Total mobile connections (million)	56.08	58.22	60.65	63.05	65.02	66.66
4G connections (million)	37.11	36.91	34.35	28.42	21.08	13.78
5G connections (million)	3.16	7.76	14.33	24.13	35.27	46.40
Smartphone connections (million)	49.14	51.66	54.22	56.63	58.58	60.18

From 2025 to 2030, Morocco's mobile market is expected to shift rapidly from 4G to 5G. While the total number of mobile connections will steadily increase from 56 million to nearly 67 million, the share of 4G users will keep falling from 66% in 2025 to just 21% in 2030 as people upgrade to faster 5G networks. Meanwhile, 5G connections will grow sharply, rising from 3.16 million in 2025 to 46.4 million by 2030, making 5G the dominant mobile technology. Smartphone usage will also continue to expand, reaching over 60 million users by 2030, supporting Morocco's transition to high-speed digital services and advanced connectivity.

CONCLUSION

Overall, Morocco's telecom sector is entering a high-growth, investment-intensive phase driven by rapid digital transformation, large-scale fibre and 5G expansion and strong government support. Import trends, operator commitments and technology projections all point toward a sustained demand for advanced telecom infrastructure over the coming decade. While Morocco continues to rely heavily on leading global suppliers, the extremely low share of India in its equipment imports highlights a substantial untapped opportunity for Indian manufacturers and service providers. With rising smartphone penetration, accelerating 5G adoption and major infrastructure rollouts underway, Morocco presents a strategically attractive market for long-term engagement, technology partnerships, and export expansion.

REFERENCE

All information in this document is derived from secondary sources. While the export and import data are obtained from credible sources, TEPC has not authenticated the rest of the data.



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