

ROYAUME DU MAROC
LE PREMIER MINISTRE



MOBILE TELEPHONY IN MOROCCO

Quarterly Observatory* **September 2008**

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

SUMMARY

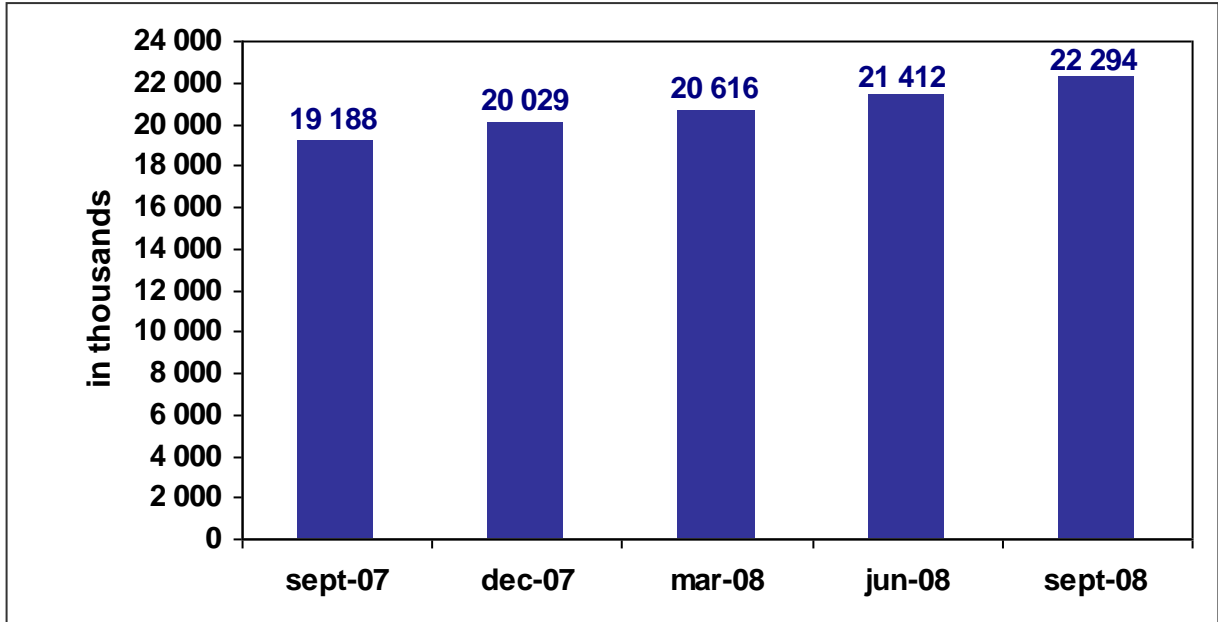
Global mobile telephony market

Post-paid market

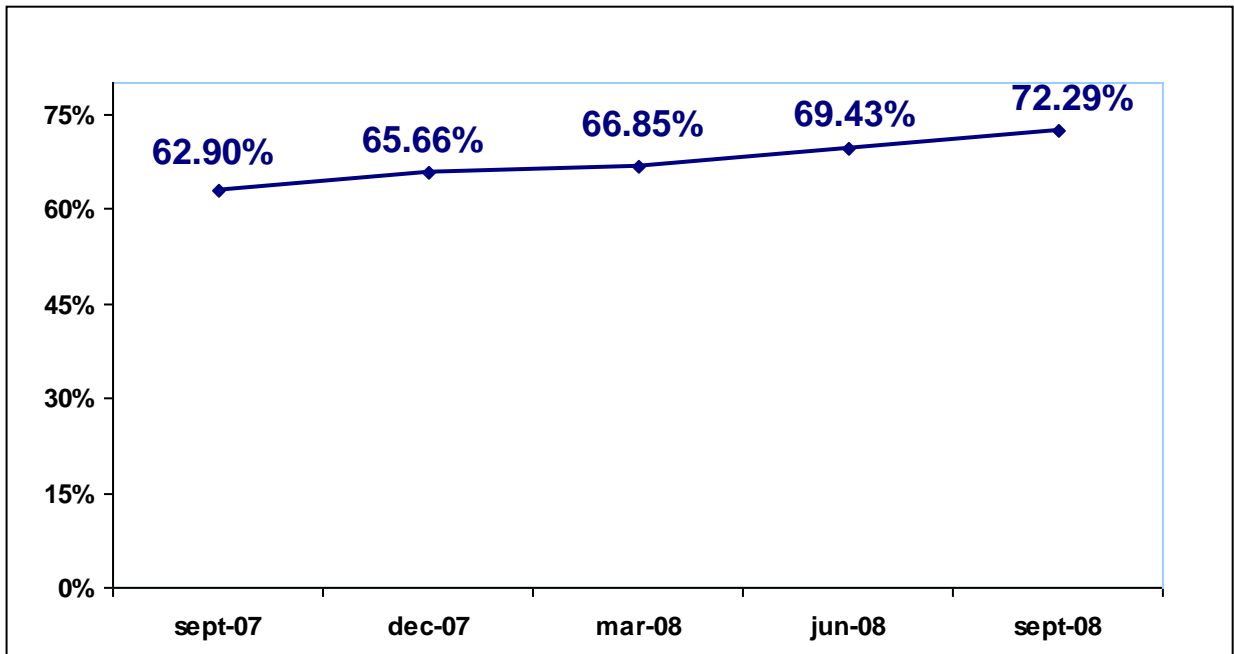
Prepaid Market

GLOBAL MOBILE TELEPHONY MARKET¹

Market size evolution



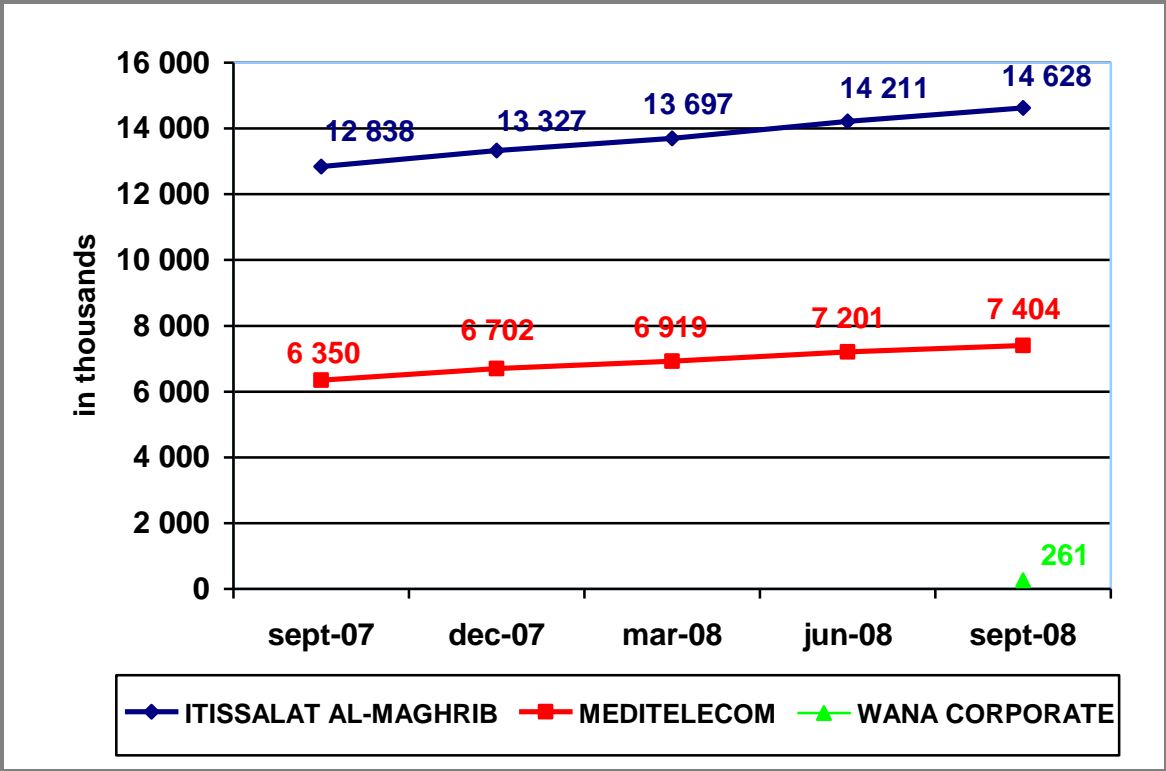
Penetration rate²



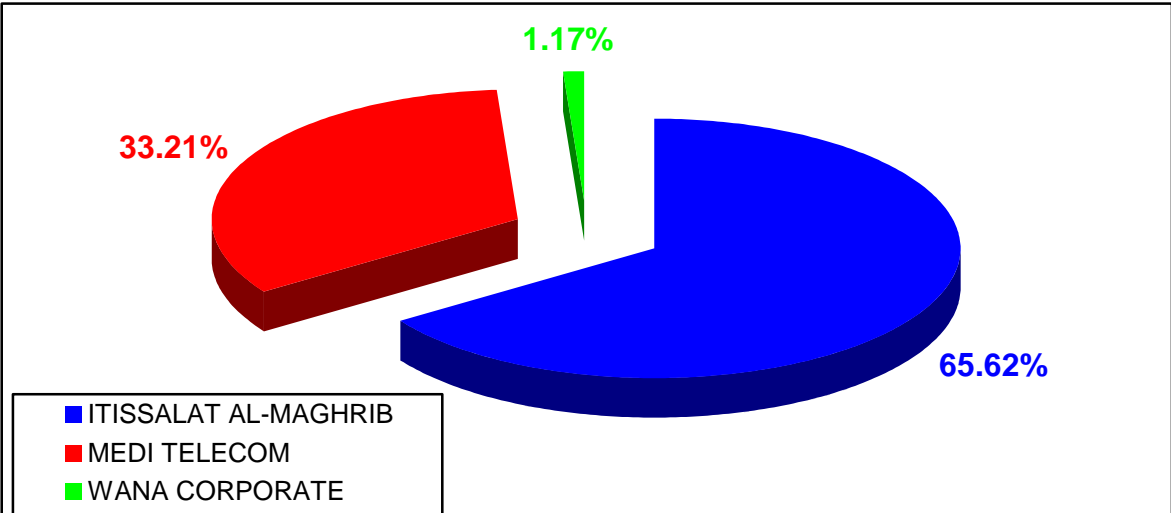
¹ This figure includes mobile subscribers to mobile telephony using the 2G and 3G networks.

² 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. Starting from March of the year N, the reference population for accounting this rate results from Statistics Department/HCP projections of the year N-1.

Market growth by operator



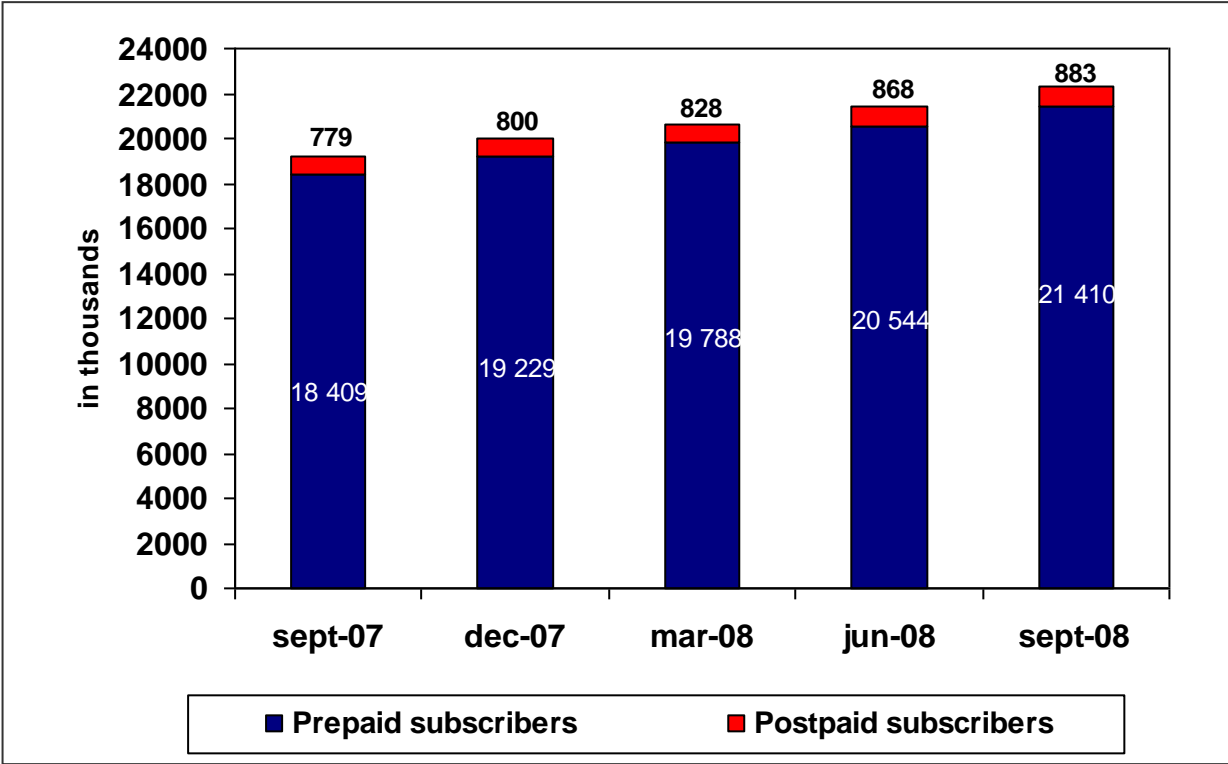
Market shares at September 30th 2008



Net ads in the Global mobile telephony market

Global Mobile subscribers (in thousands)	Sept-07	Dec-07	Mar-08	Jun-08	Sept-08
Net ads ³	1 550	841	587	796	882
% of growth ⁴	8.79%	4.38%	2.93%	3.86%	4.12%

Post-paid/ Prepaid market repartition

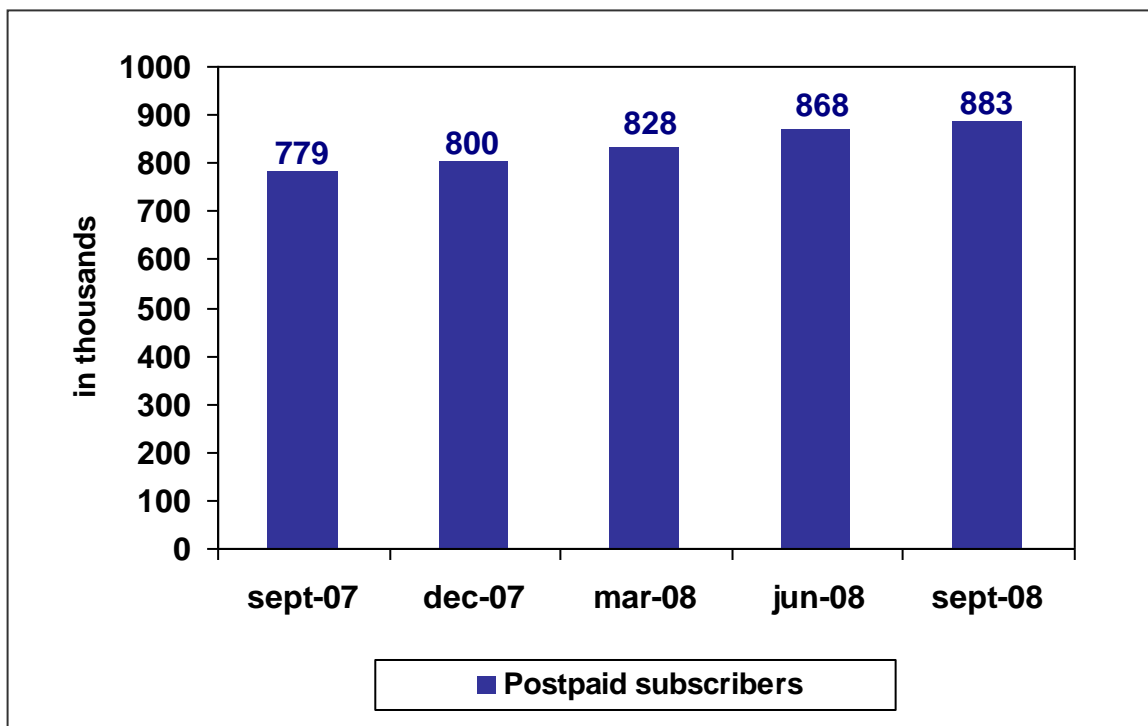


³ Net ads in the month M equals to the difference between the subscribers number of the months M and M-3

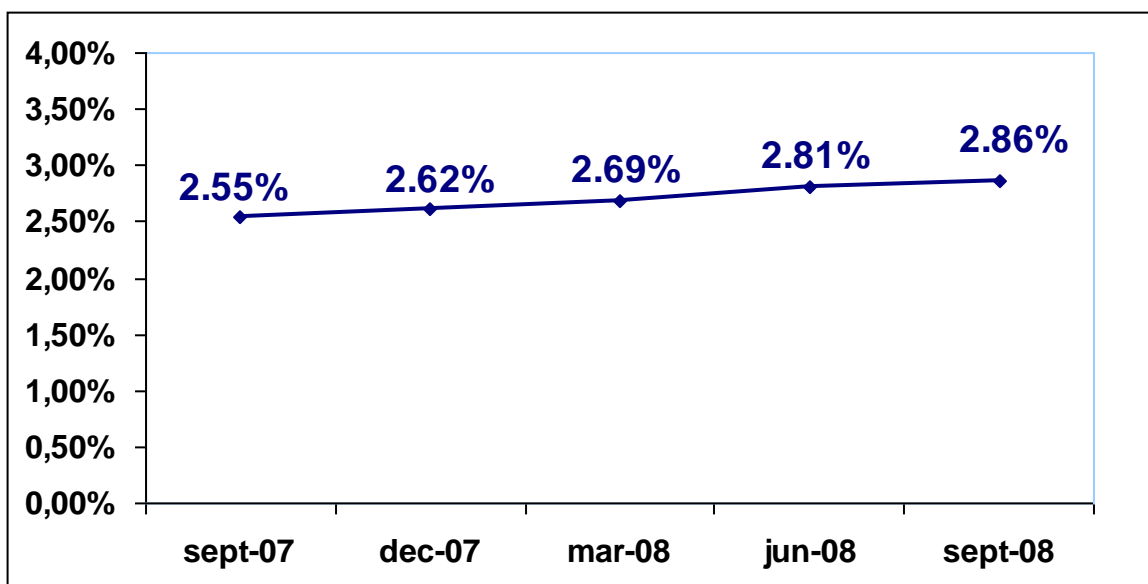
⁴ % of growth at the month M equals to the difference between the subscribers number of the months M and M-3 divided by the subscribers number of the month M-3

POST-PAID MARKET

Post-paid market size evolution



Post-paid penetration rate⁵



⁵ See note 1.

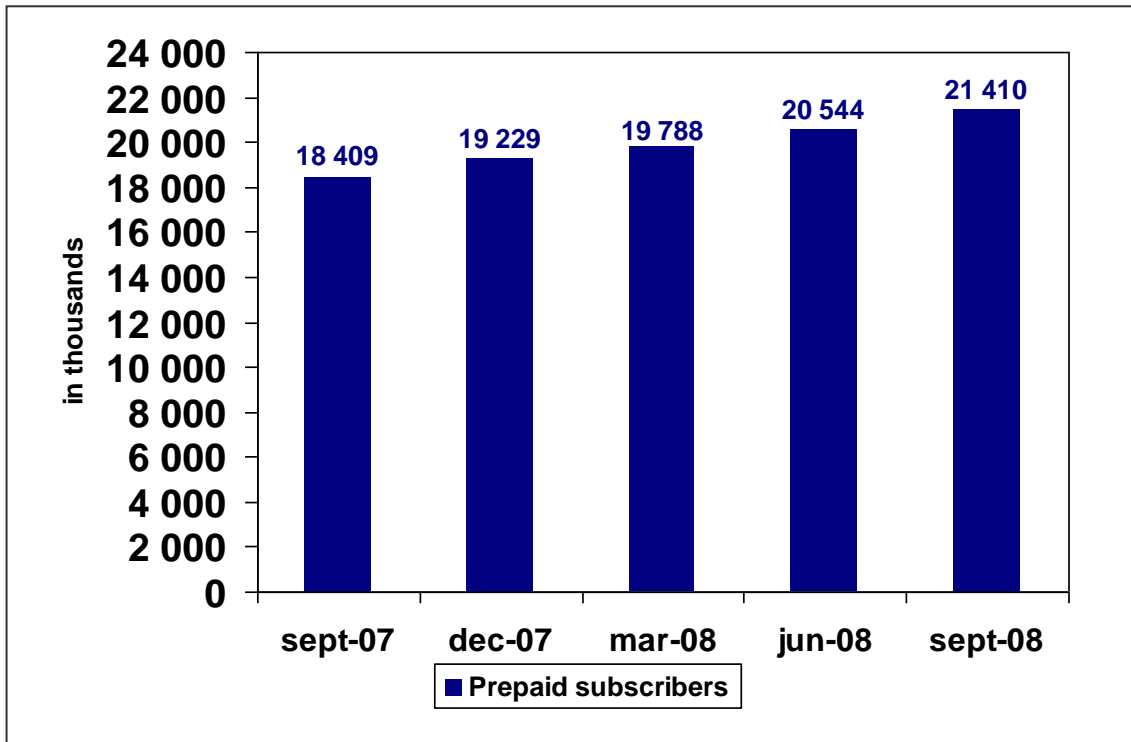
Net ads in the post-paid market

Post-paid Mobile subscribers (in thousands)	Sept-07	Dec-07	Mar-08	Jun-08	Sept-08
Net ads⁶	29	21	28	39	16
% of growth⁷	3.90%	2.70%	3.50%	4.76%	1.83%

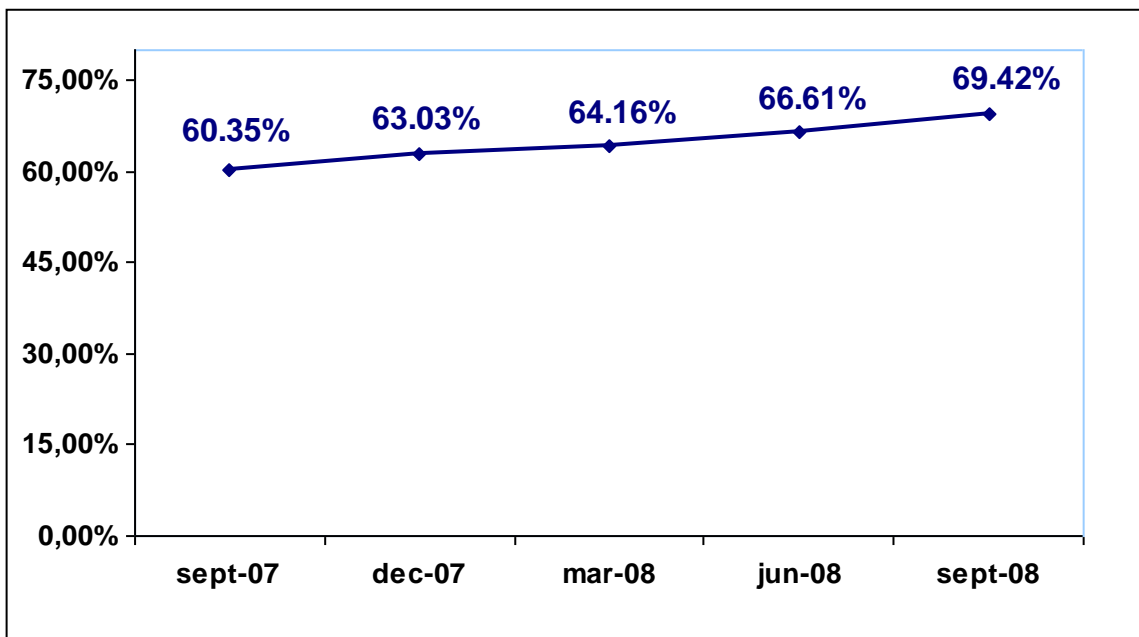
⁶ Net ads in the month M equals to the difference between the subscribers number of the months M and M-3

⁷ % of growth at the month M equals to the difference between the subscribers number of the months M and M-3 divided by the subscribers number of the month M-3

Prepaid market size



Prepaid penetration rate⁸



⁸ See Note 1.

Prepaid Net ads in the prepaid market

Prepaid Mobile subscribers (in thousands)	Sept-07	Dec-07	Mars-08	Jun-08	Sept-08
Net ads	1 521	820	559	756	866
% of growth	9%	4.46%	2.90%	3.82%	4.22%