

ROYAUME DU MAROC
LE PREMIER MINISTRE



MOBILE TELEPHONY IN MOROCCO

*Quarterly Observatory** *June 2009*

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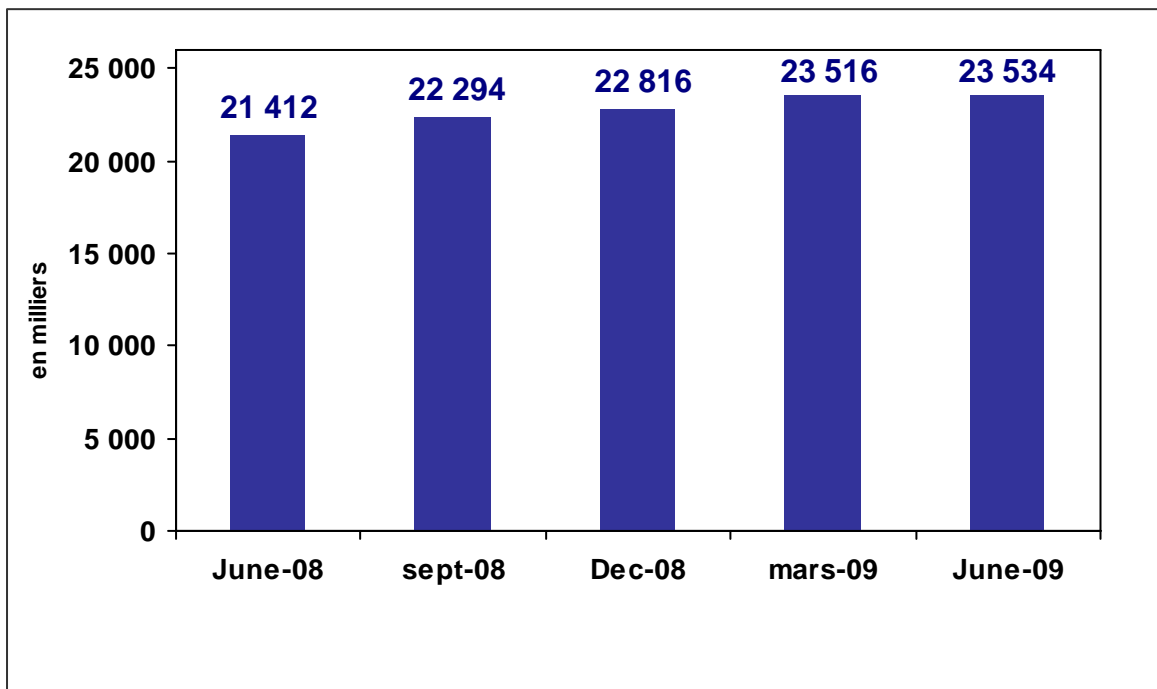
SUMMARY

Global mobile telephony market

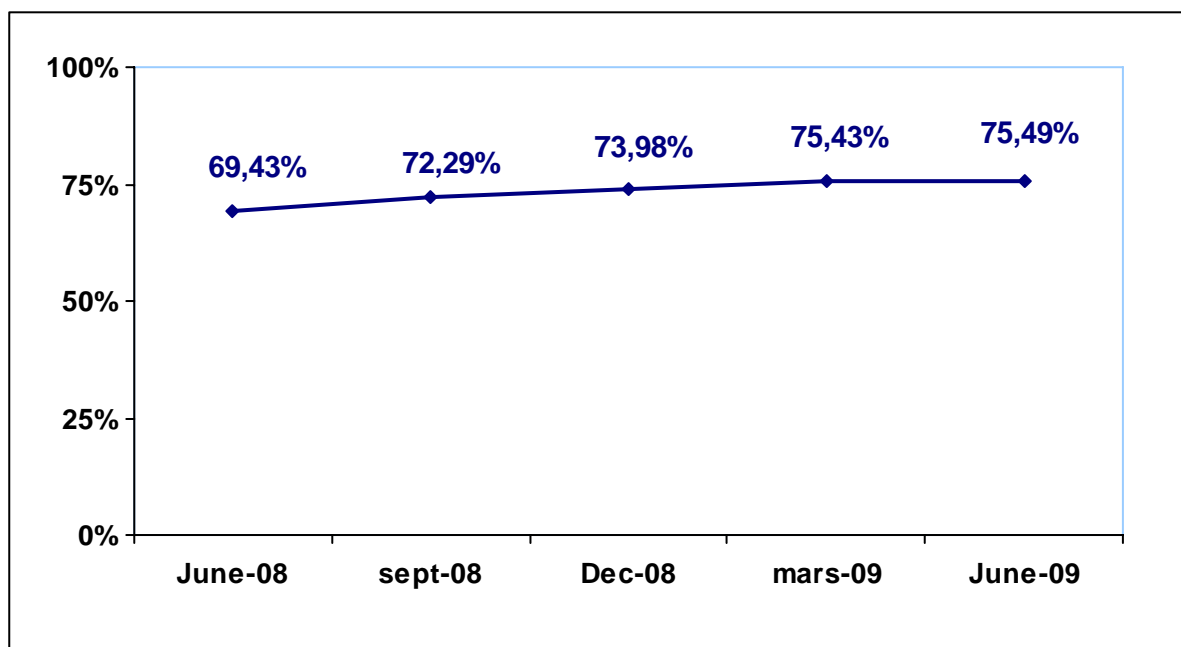
Post-paid market

Prepaid Market

Market size evolution

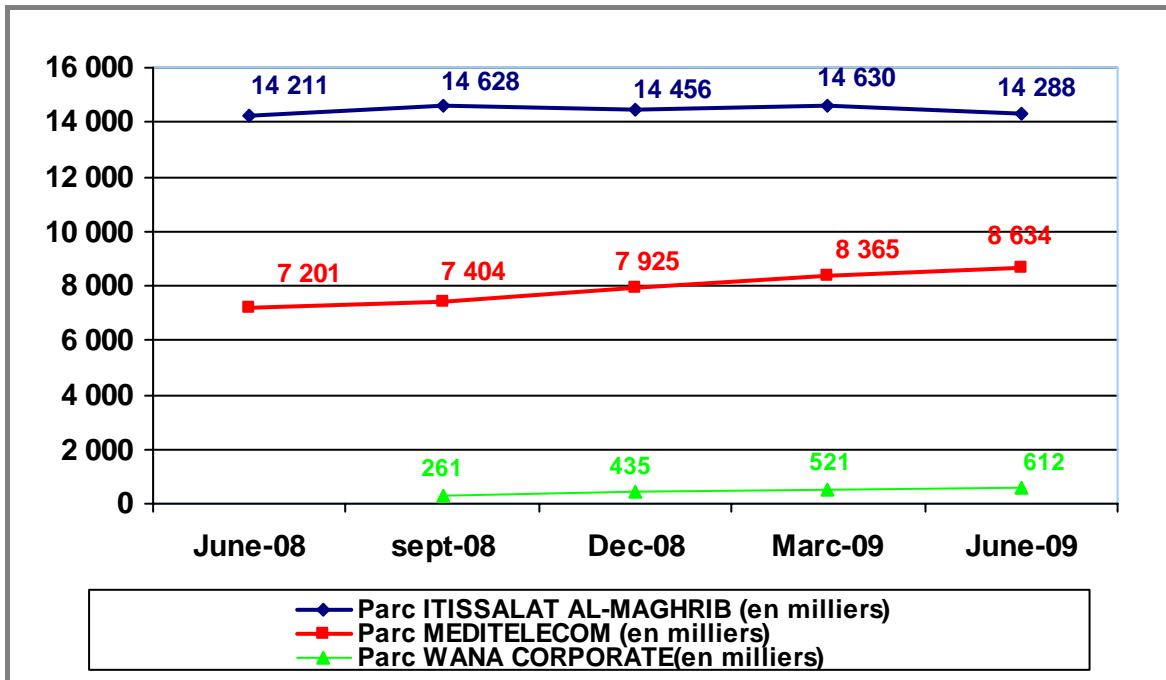


Penetration rate¹

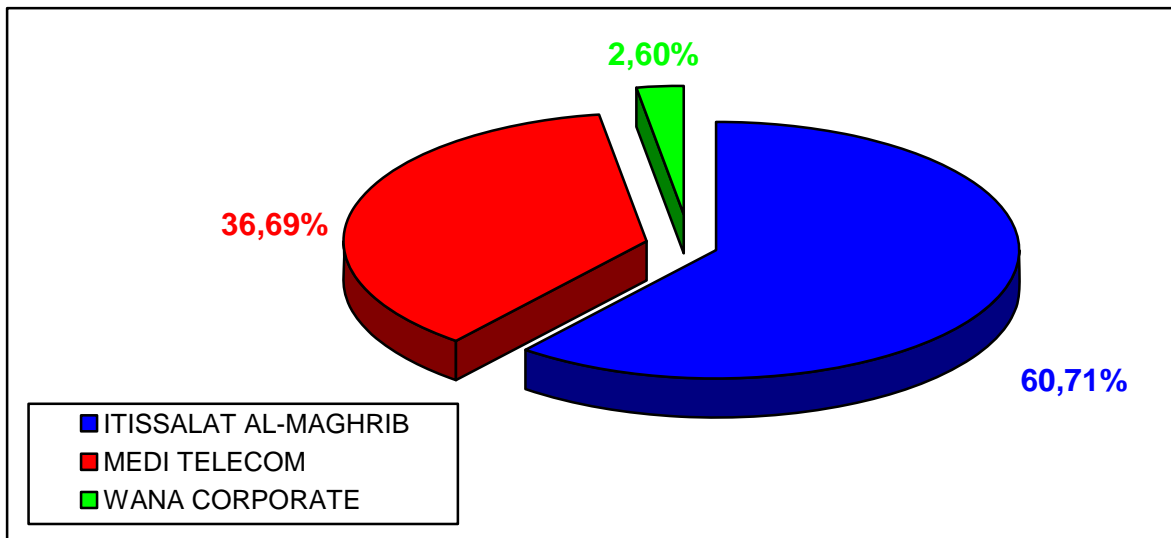


¹ The accounting of the penetration rate for fixed telephony by the ANRT Market Observatory is based on the population projections published by the Statistics Department/HCP based on the General census of population 2004. Starting from March of the year N, the reference population for accounting this rate results from Statistics Department/HCP projections of the year N-1.

Market growth by operator



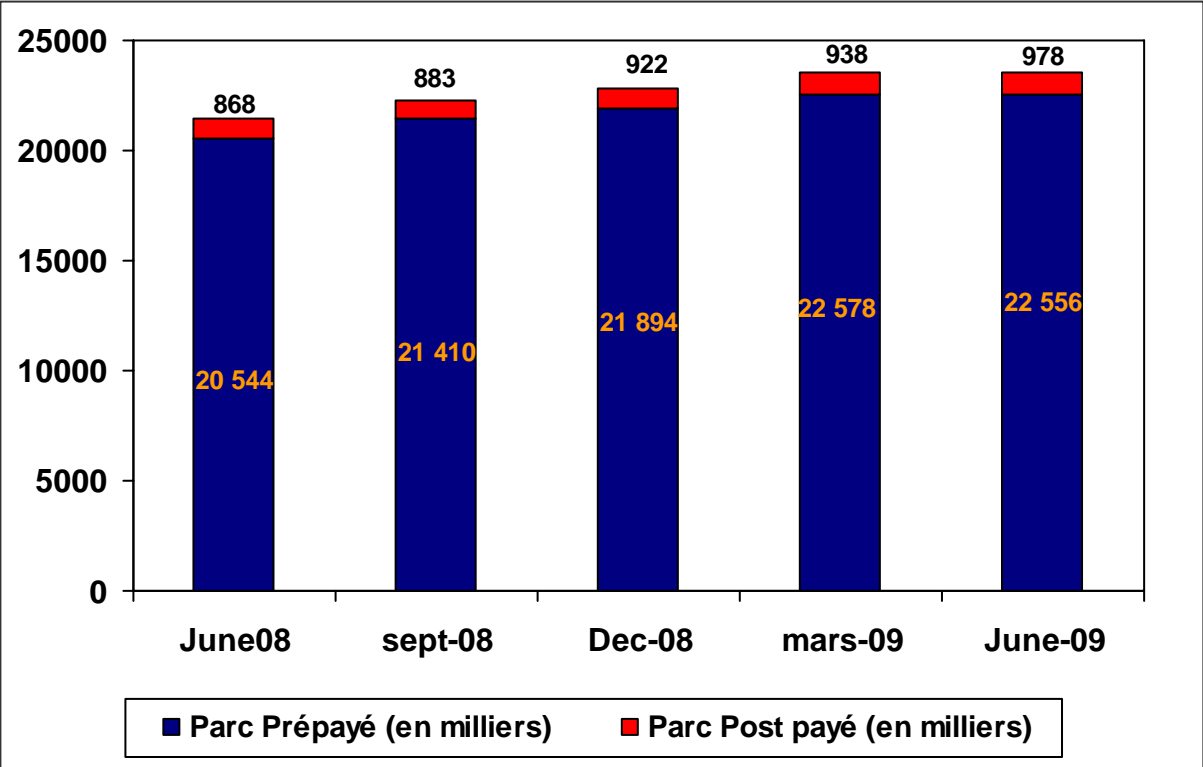
Market shares at June 30th 2008



Net ads in the Global mobile telephony market

Global Mobile subscribers (in thousands)	Jun-08	Sept-08	Dec-08	Mar-09	Jun-09
Net ads ²	796	882	522	700	18
% of growth ³	3,86%	4,12%	2,34%	3,07%	0,08%

Post-paid/ Prepaid market repartition

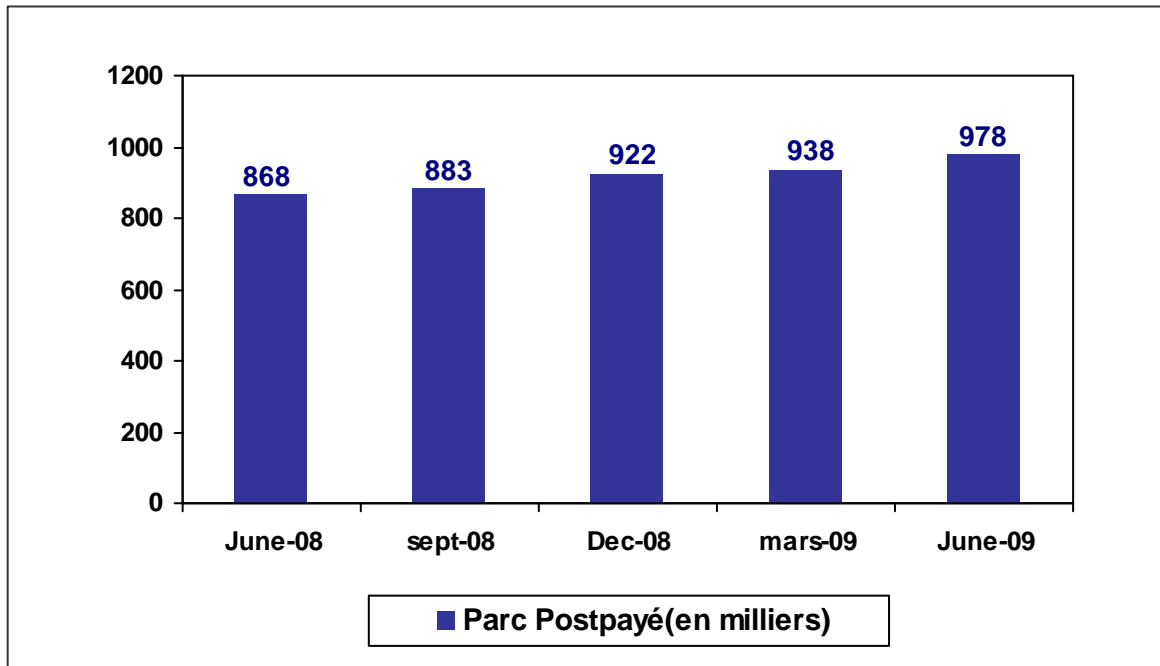


² Net ads in the month M equals to the difference between the subscribers number of the months M and M-3

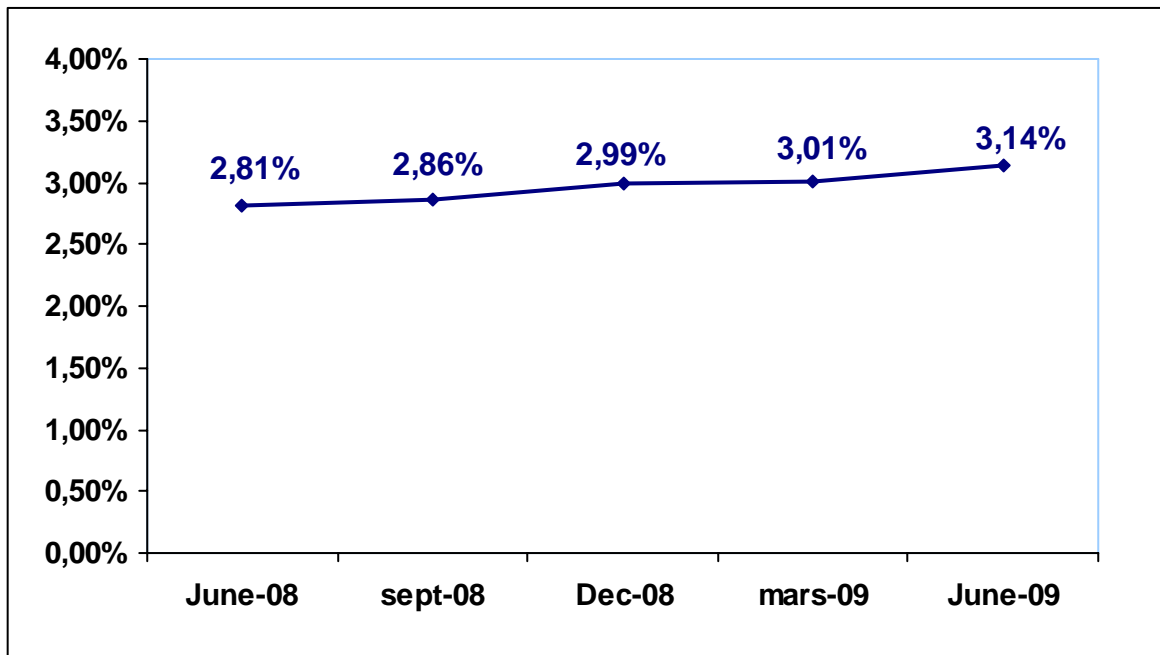
³ % of growth at the month M equals to the difference between the subscribers number of the months M and M-3 divided by the subscribers number of the month M-3

POST-PAID MARKET

Post-paid market size evolution



Post-paid penetration rate⁴



⁴ See note 1.

Net ads in the post-paid market

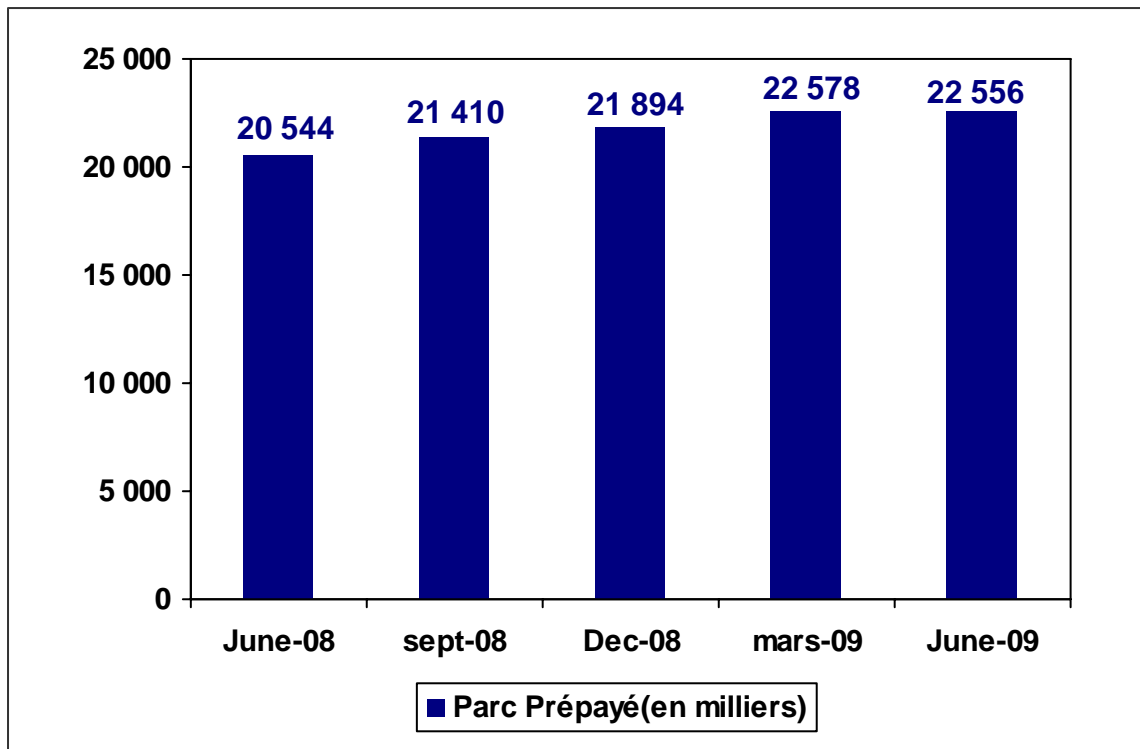
Post-paid Mobile subscribers (in thousands)	Jun-07	Sept-07	Dec-07	Mar-08	Jun-08
Net ads⁵	39	16	39	16	40
% of growth⁶	4,76%	1,83%	4,39%	1,70%	4,28%

⁵ Net ads in the month M equals to the difference between the subscribers number of the months M and M-3

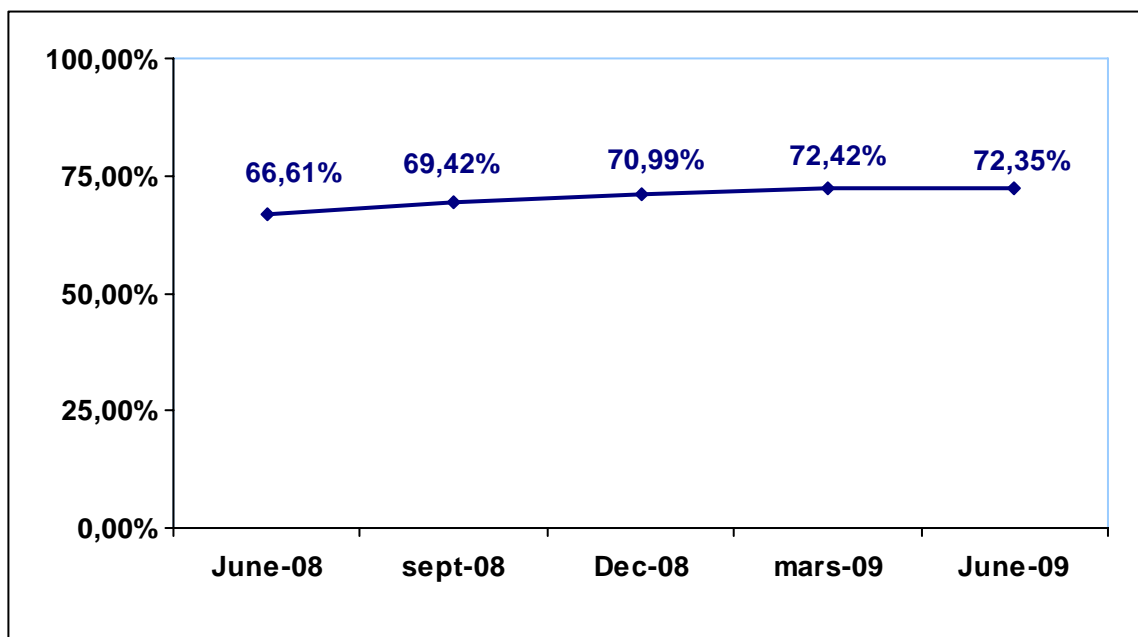
⁶ % of growth at the month M equals to the difference between the subscribers number of the months M and M-3 divided by the subscribers number of the month M-3

PREPAID MARKET

Prepaid market size



Prepaid penetration rate⁷



⁷ See Note 1.

Prepaid Net ads in the prepaid market

Prepaid Mobile subscribers (in thousands)	Jun-08	Sept-08	Dec-08	Mars-09	Jun-09
Net ads	756	866	483	685	- 22
% of growth	3,82%	4,22%	2,26%	3,13%	- 0,10%