

ROYAUME DU MAROC
LE PREMIER MINISTRE



MOBILE TELEPHONY IN MOROCCO

*Quarterly Observatory** *September 2009*

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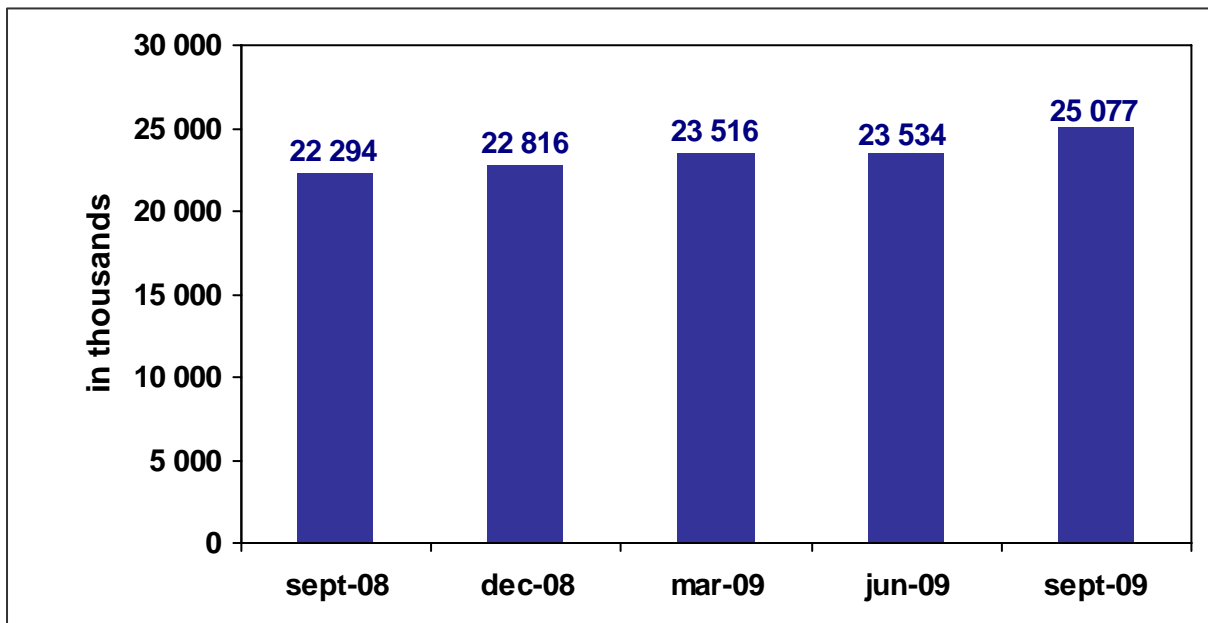
SUMMARY

Global mobile telephony market

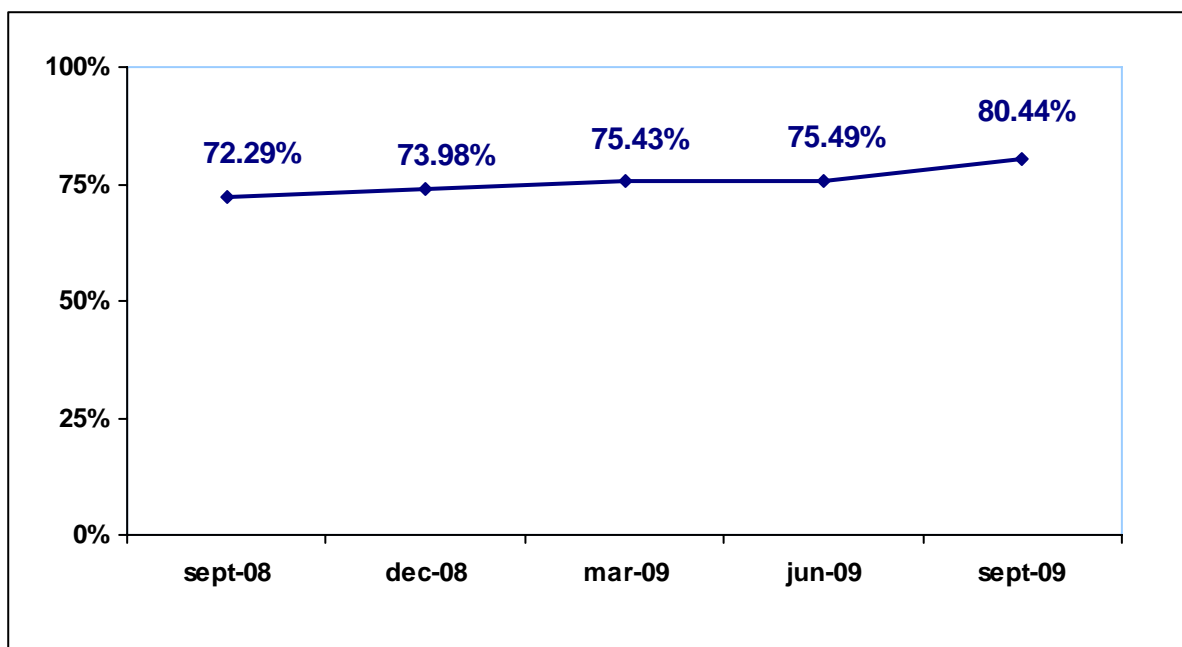
Post-paid market

Prepaid Market

Market size evolution



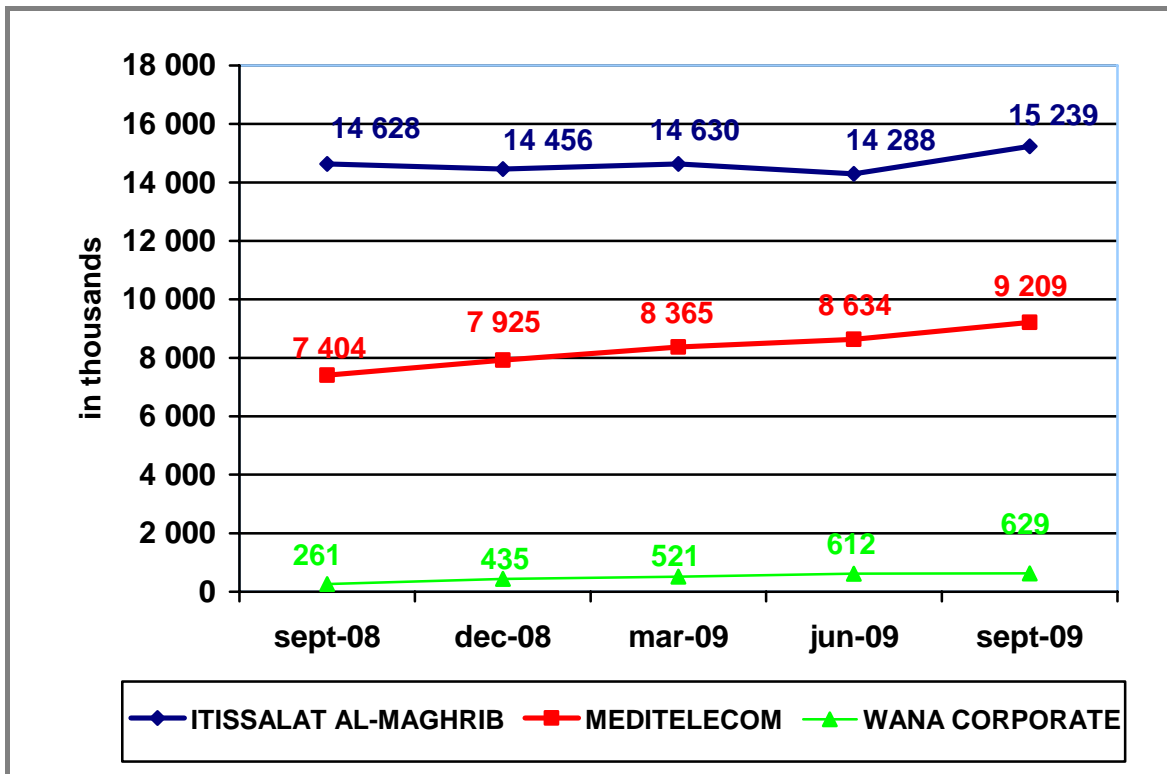
Penetration rate²



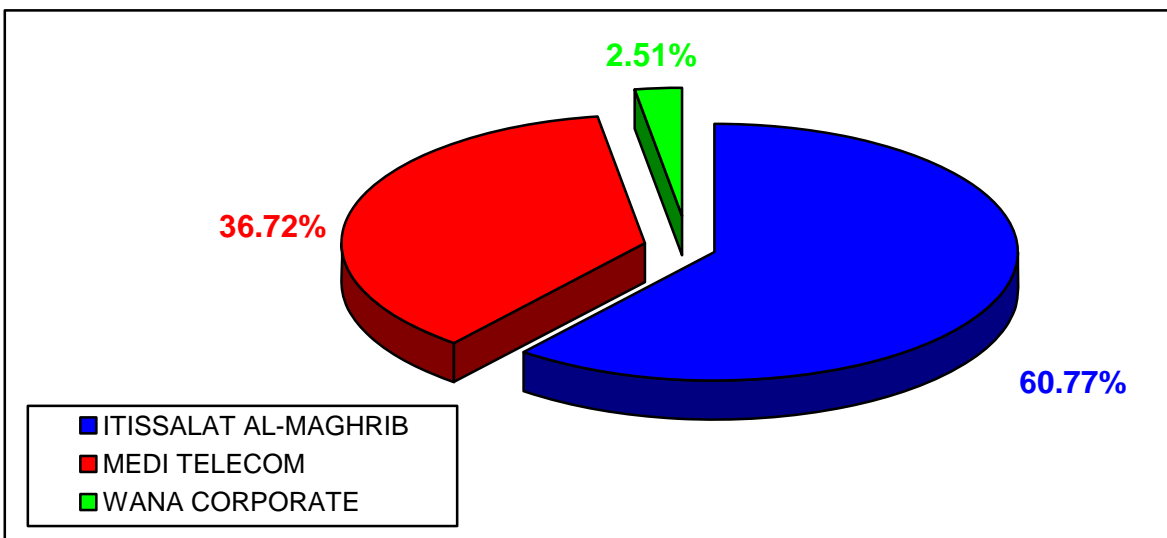
¹ This figure includes mobile subscribers to mobile telephony using the 2G and 3G networks.

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



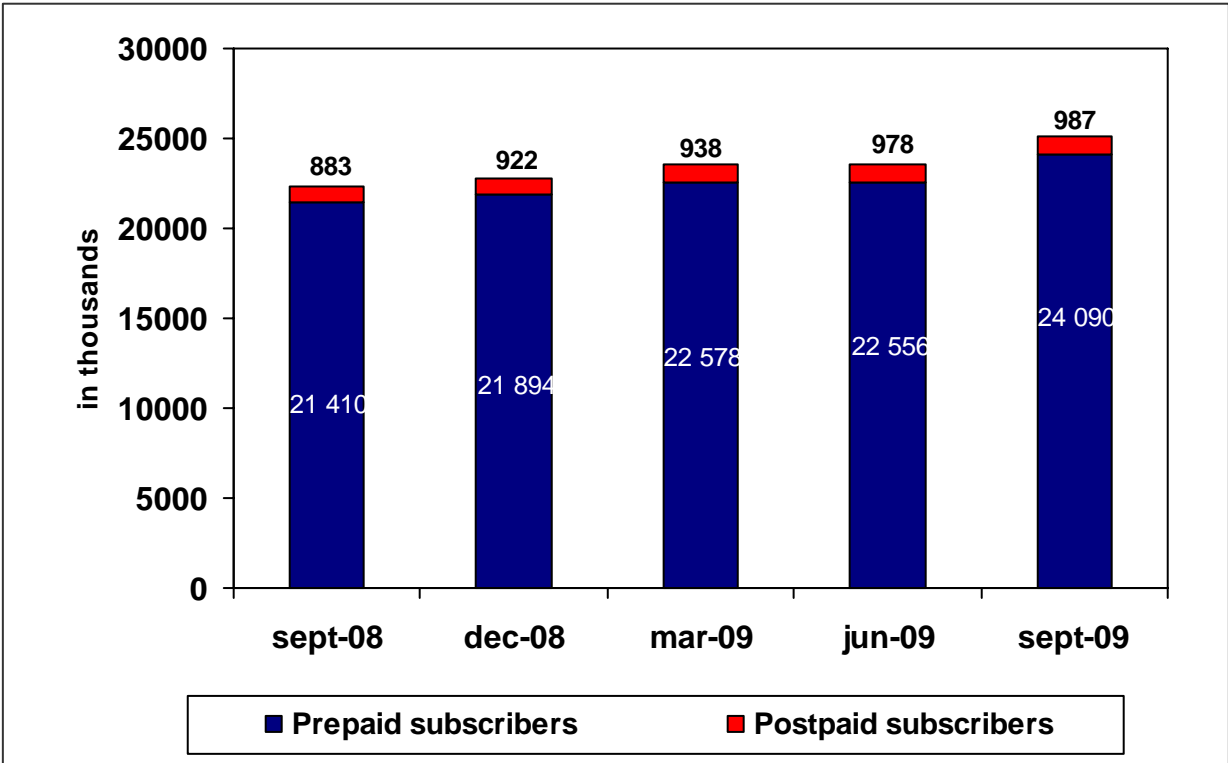
Market shares at September 30th 2009



Net ads in the Global mobile telephony market

Global Mobile subscribers (in thousands)	Jun-08	Sept-08	Dec-08	Mar-09	Jun-09	Sept-09
Net ads ³	796	882	522	700	18	1 543
% of growth ⁴	3.86%	4.12%	2.34%	3.07%	0.08%	6.56%

Post-paid/ Prepaid market repartition

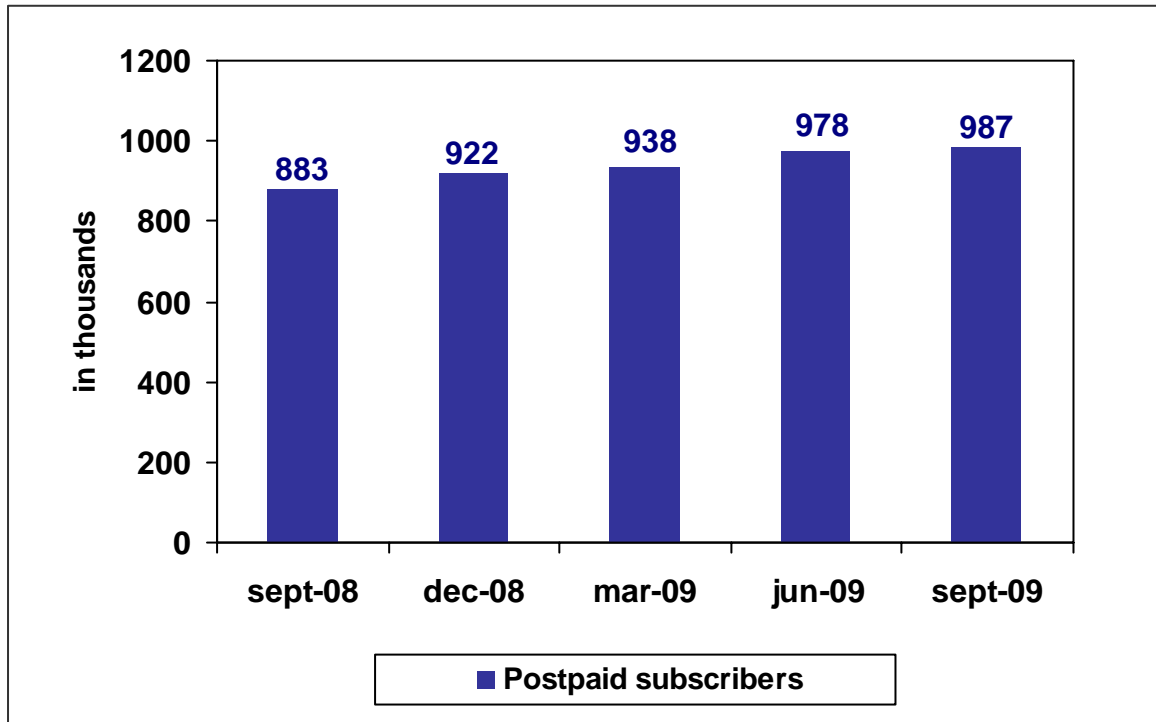


³ Net ads in the month M equals to the difference between the subscribers number of the months M and M-3

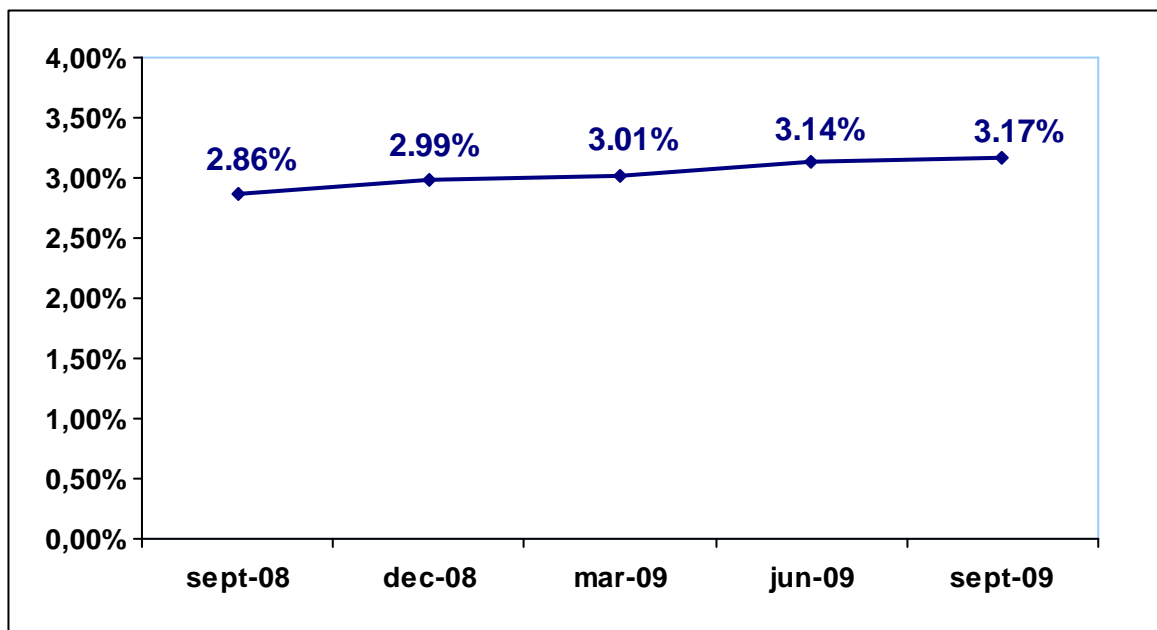
⁴ % of growth at the month M equals to the difference between the subscribers number of the months M and M-3 divided by the subscribers number of the month M-3

POST-PAID MARKET

Post-paid market size evolution



Post-paid penetration rate⁵



⁵ See note 1.

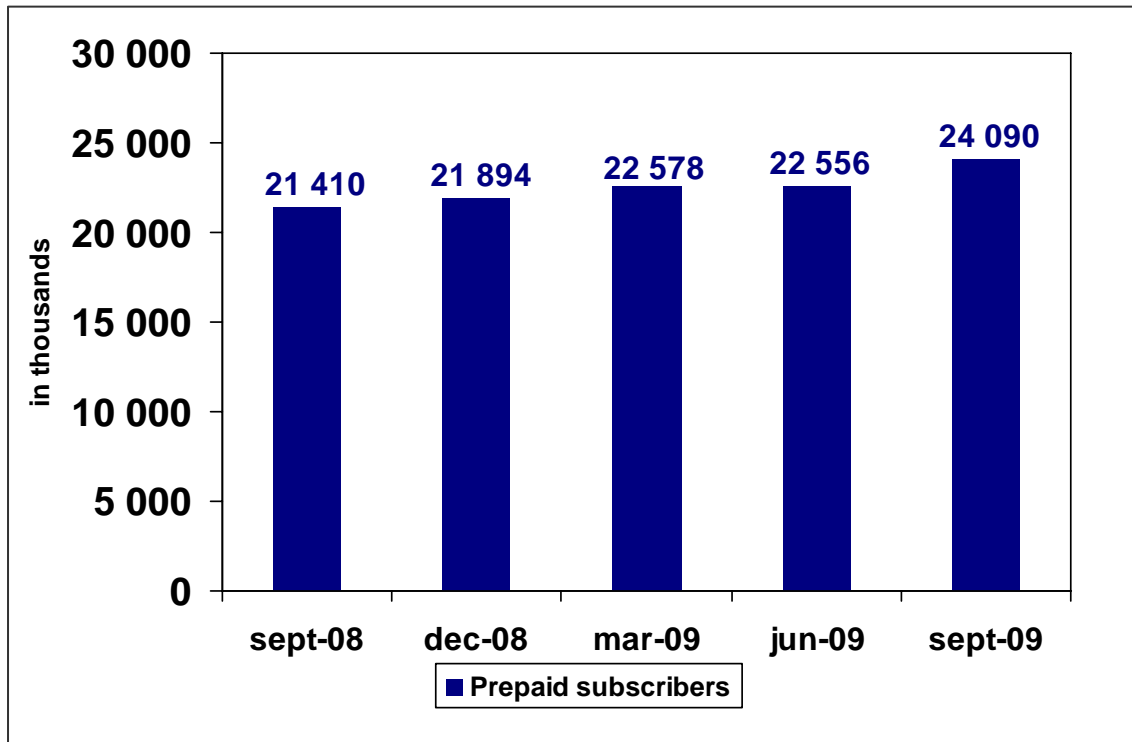
Net ads in the post-paid market

Post-paid Mobile subscribers (in thousands)	Sept-08	Dec-08	Mar-09	Jun-09	Sept-09
Net ads⁶	16	39	16	40	9
% of growth⁷	1.83%	4.39%	1.70%	4.28%	0.92%

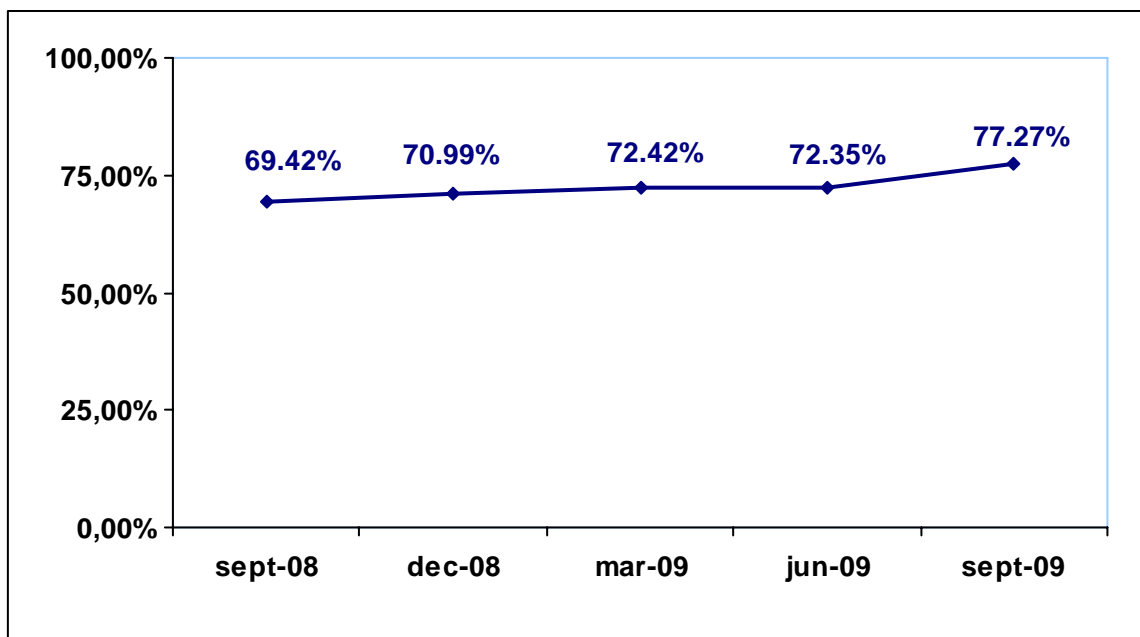
⁶ Net ads in the month M equals to the difference between the subscribers number of the months M and M-3

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-08	Dec-08	Mar-09	Jun-09	Sept-09
Net ads⁹	866	483	685	- 22	1 534
% of growth¹⁰	4.22%	2.26%	3.13%	- 0.10%	6.80%

⁹ Net ads in the month M equals to the difference between the subscribers number of the months M and M-3

¹⁰ % 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