

ROYAUME DU MAROC
LE PREMIER MINISTRE



MOBILE TELEPHONY IN MOROCCO

*Quarterly Observatory** *June 2010*

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

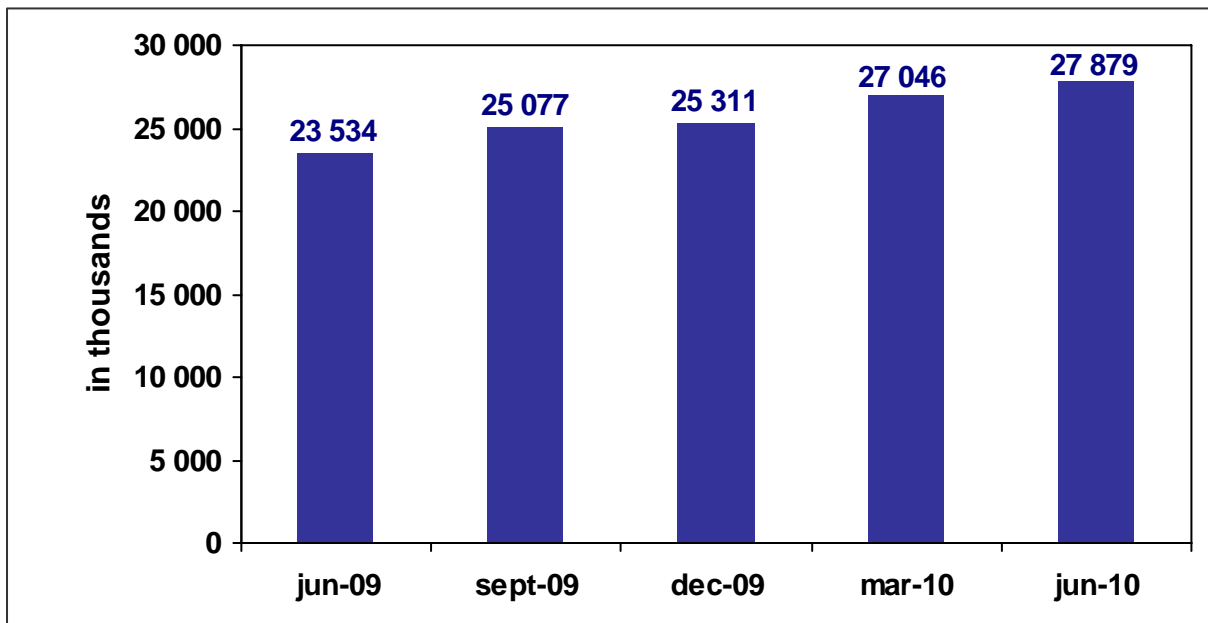
SUMMARY

Global mobile telephony market

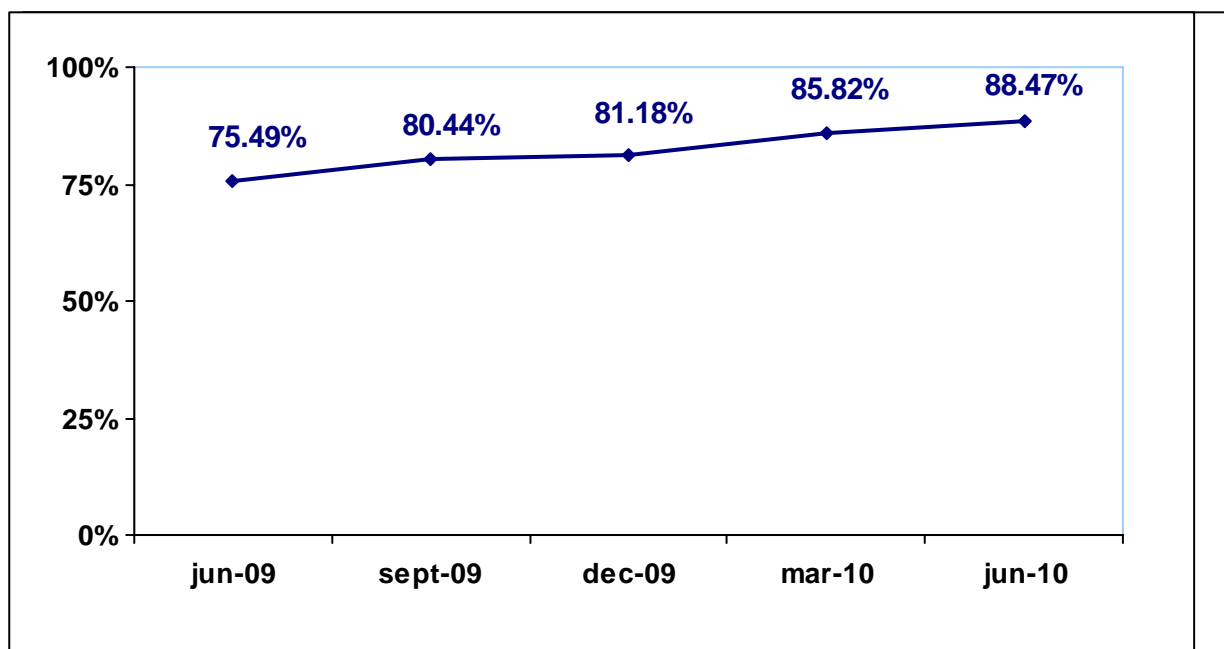
Post-paid market

Prepaid Market

Market size evolution



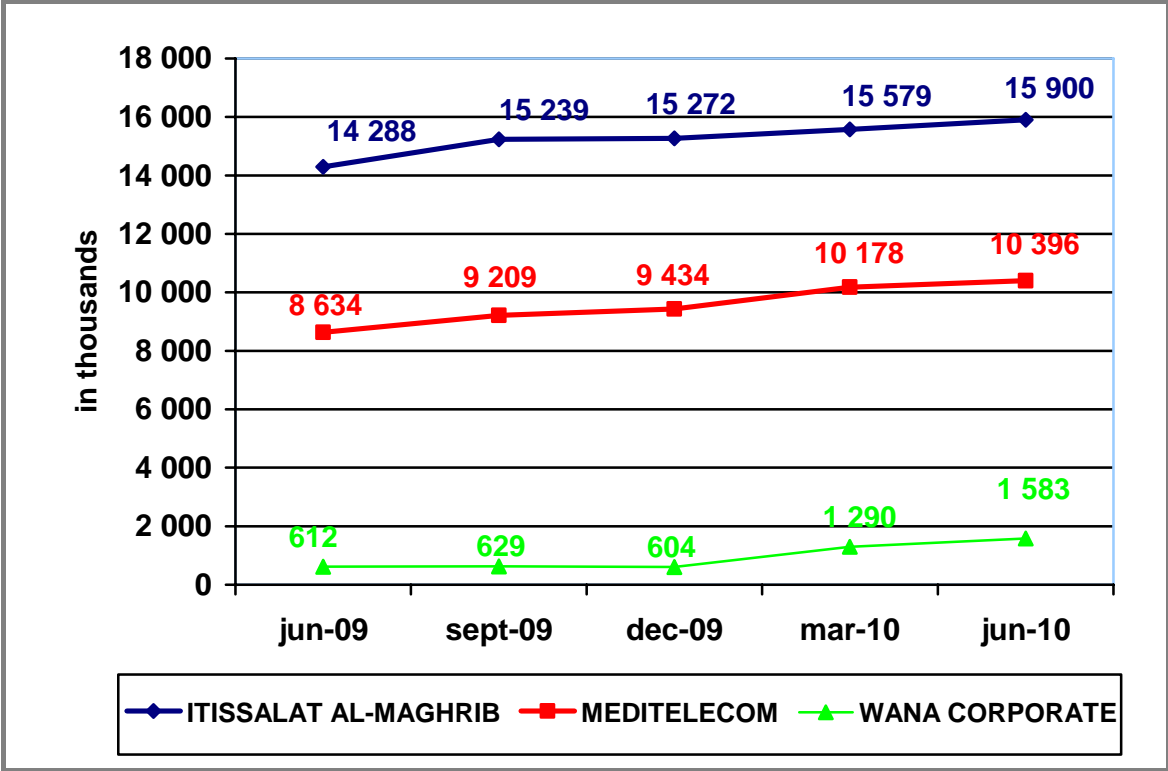
Penetration rate²



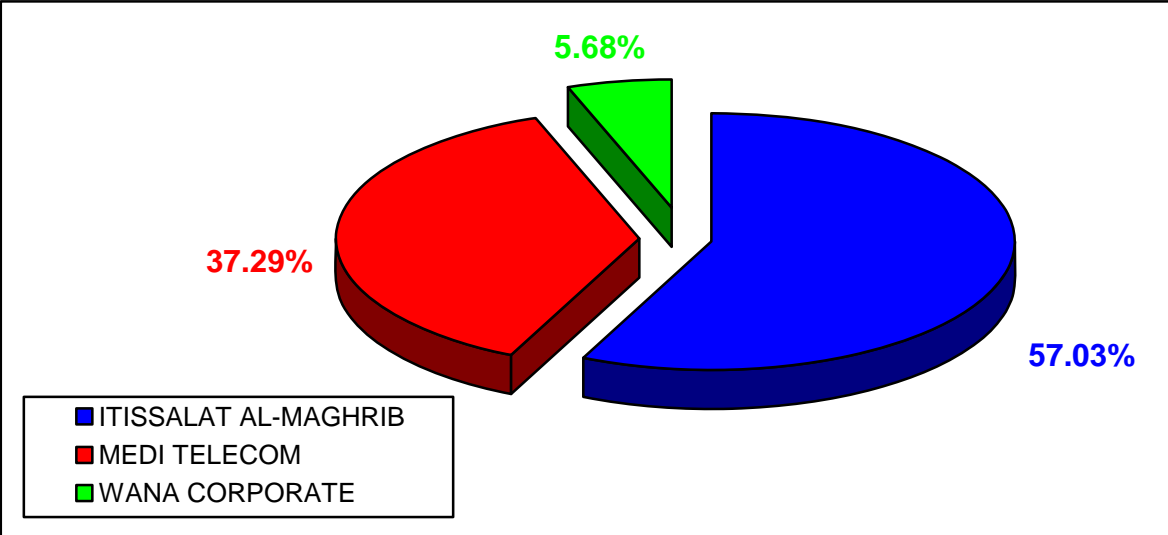
¹ This figure includes mobile subscribers to mobile telephony using the 2G and 3G networks.

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



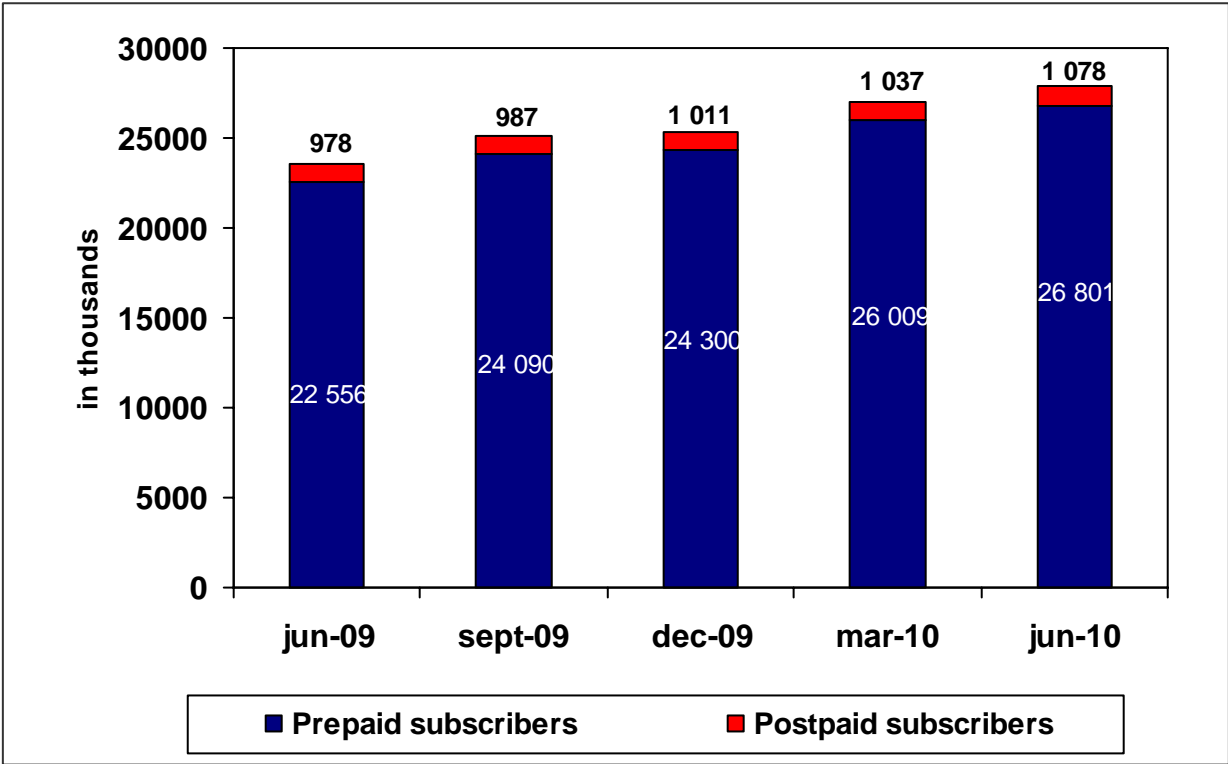
Market shares at June 30th 2010



Net ads in the Global mobile telephony market

Global Mobile subscribers (in thousands)	Jun-09	Sept-09	Dec-09	Mar-10	Jun-10
Net ads ³	18	1 543	233	1 735	833
% of growth ⁴	0.08%	6.56%	0.93%	6.86%	3.08%

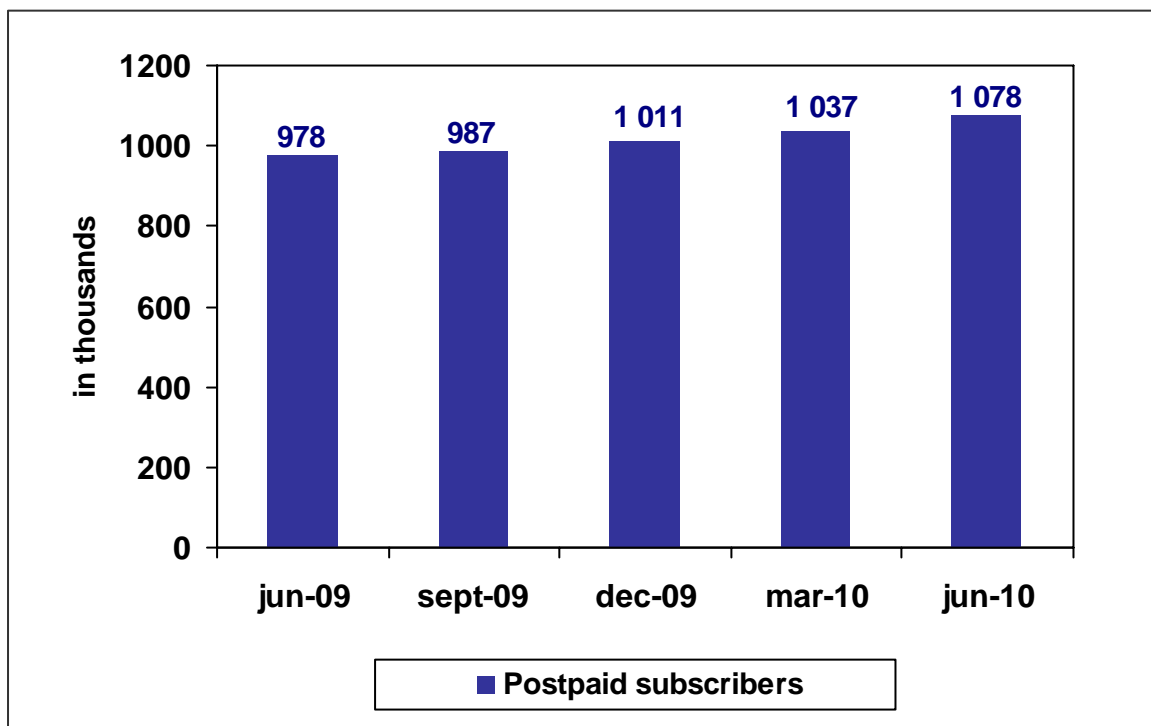
Post-paid/ Prepaid market repartition



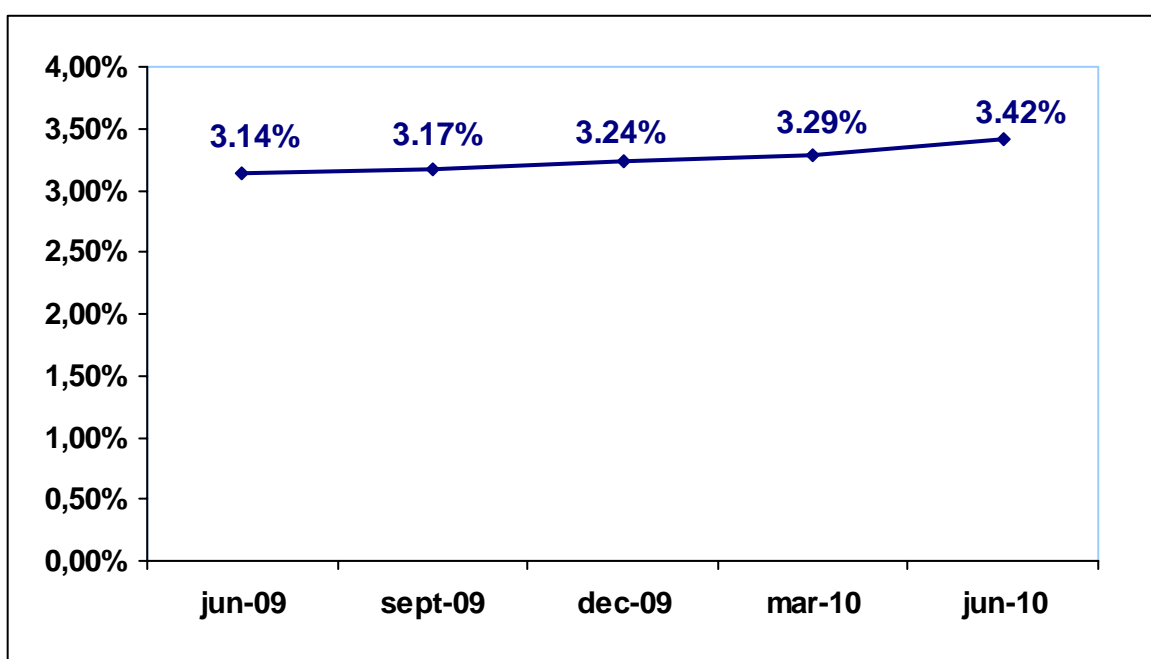
³ Net ads in the month M equals to the difference between the subscribers number of the months M and M-3

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 size evolution



Post-paid penetration rate⁵



⁵ See note 1.

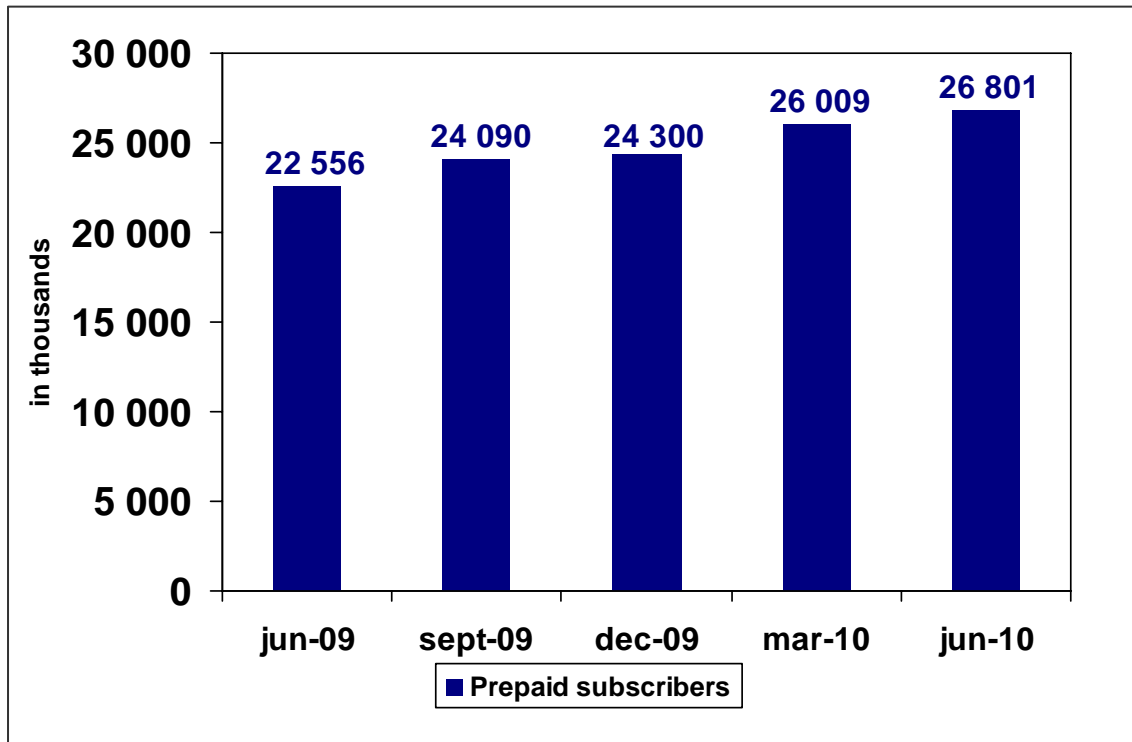
Net ads in the post-paid market

Post-paid Mobile subscribers (in thousands)	Jun-09	Sept-09	Dec-09	Mar-10	Jun-10
Net ads⁶	40	9	24	25	41
% of growth⁷	4.28%	0.92%	2.44%	2.51%	3.99%

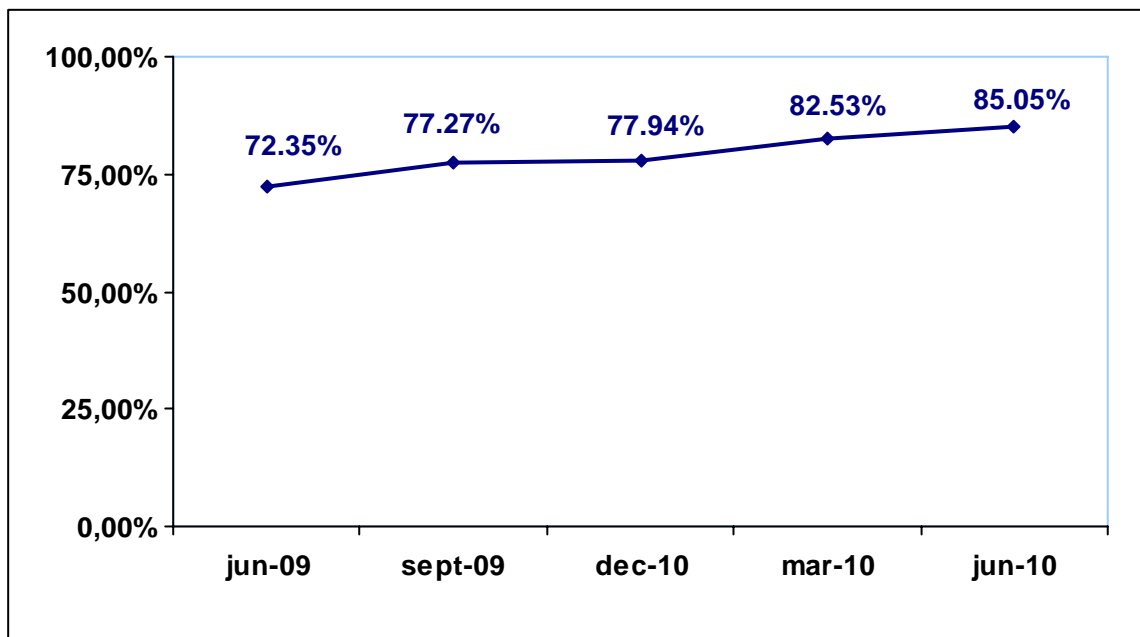
⁶ Net ads in the month M equals to the difference between the subscribers number of the months M and M-3

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)	Jun-09	Sept-09	Dec-09	Mar-10	Jun-10
Net ads⁹	- 22	1 534	209	1 710	792
% of growth¹⁰	- 0.10%	6.80%	0.87%	7.04%	3.04%

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