

ROYAUME DU MAROC  
LE PREMIER MINISTRE



## *MOBILE TELEPHONY IN MOROCCO*

### *Quarterly Observatory\** *September 2010*

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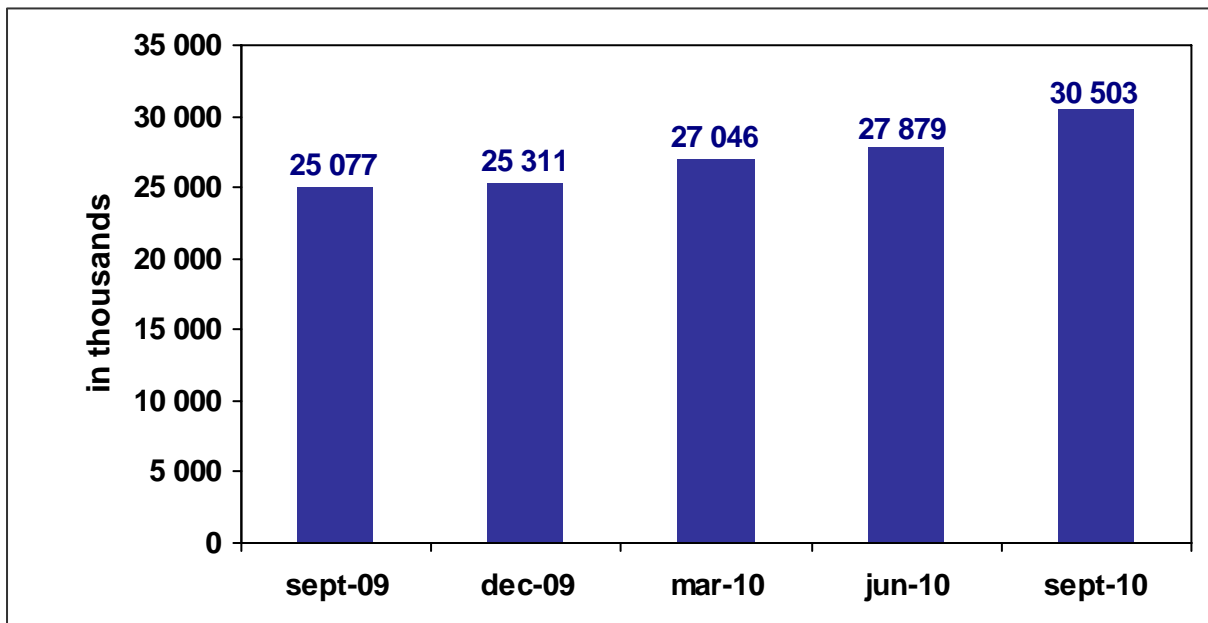
## **SUMMARY**

**Global mobile telephony market**

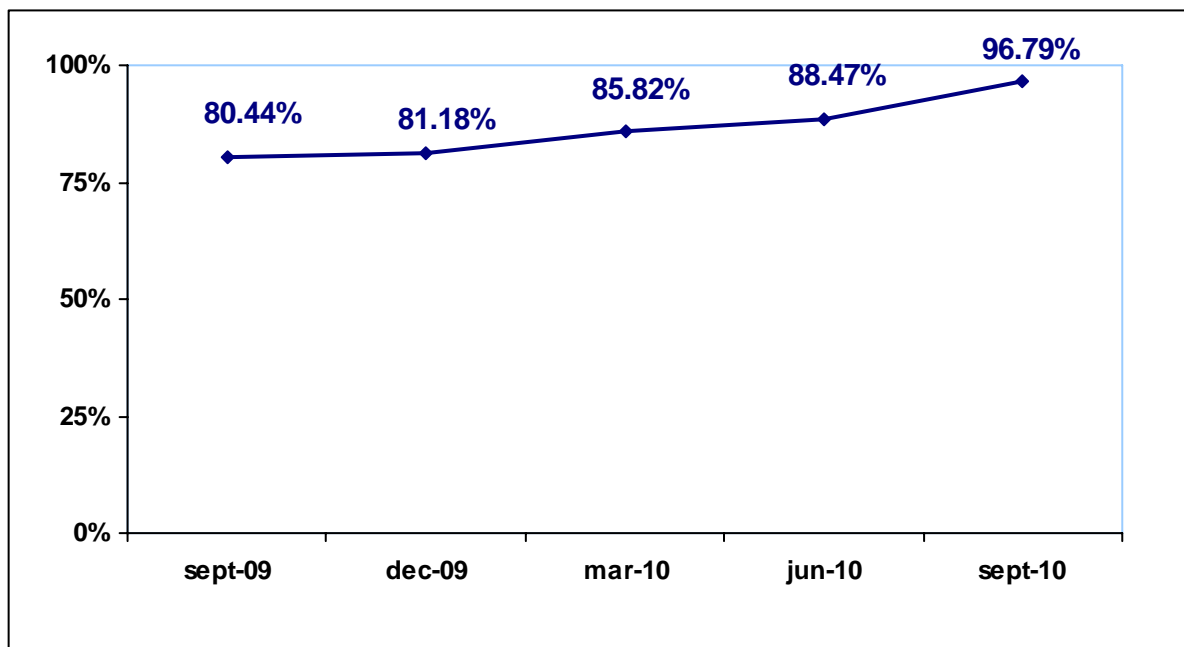
**Post-paid market**

**Prepaid Market**

## Market size evolution



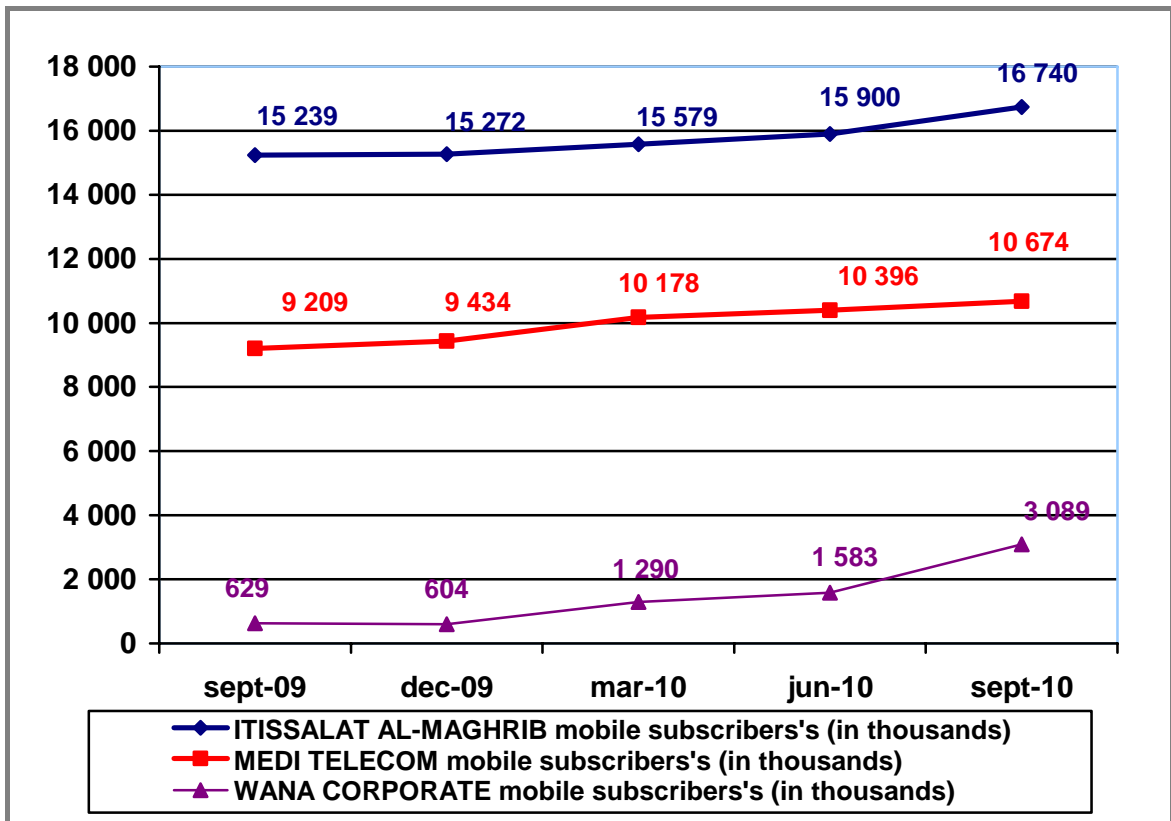
## Penetration rate<sup>2</sup>



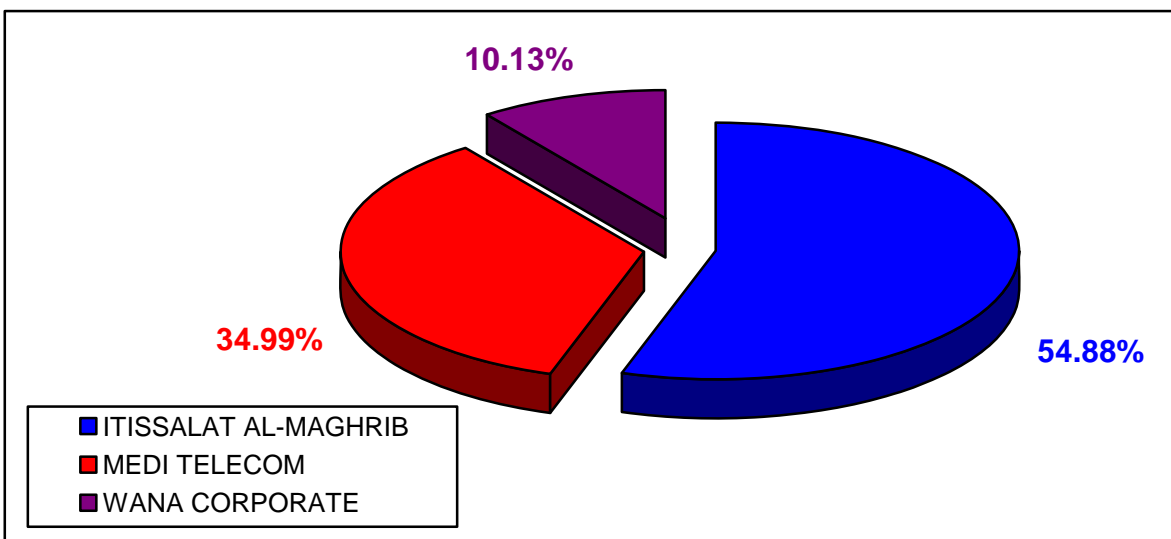
<sup>1</sup> This figure includes mobile subscribers to mobile telephony using the 2G and 3G networks.

<sup>2</sup> 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



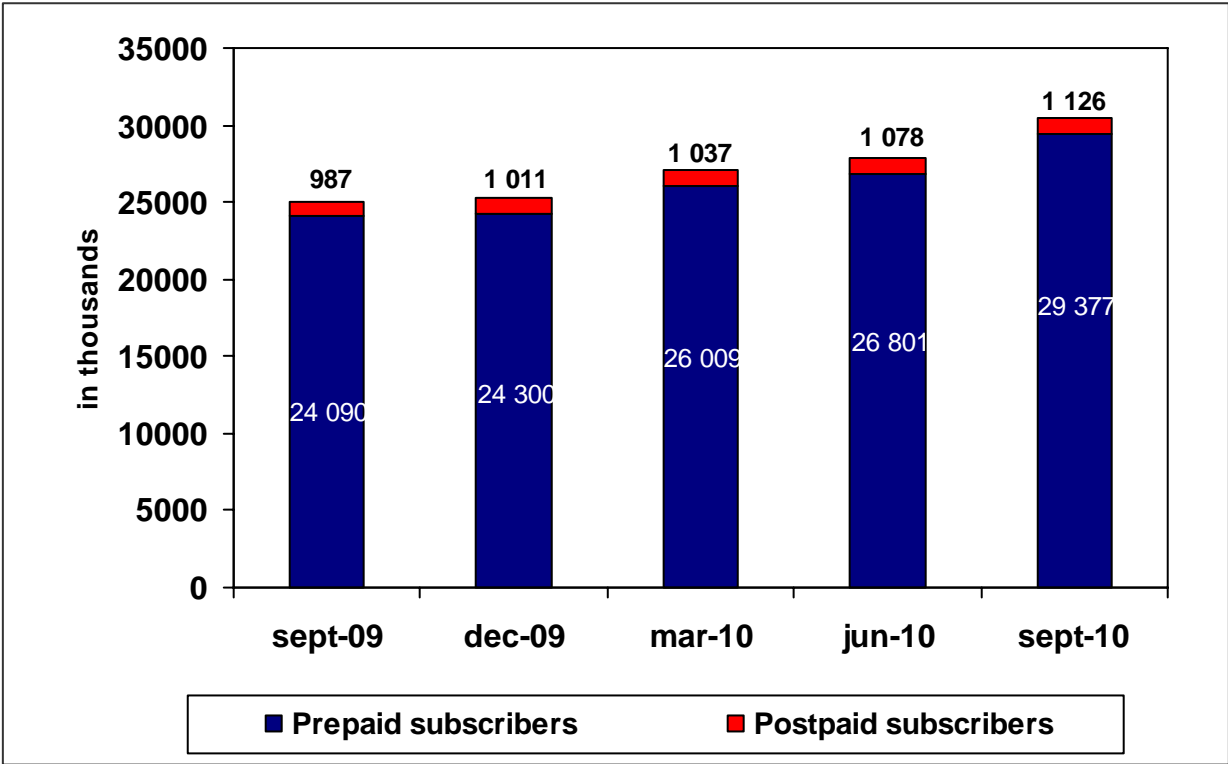
## Market shares at September 30<sup>th</sup> 2010



**Net ads in the Global mobile telephony market**

Global Mobile subscribers (in thousands)	Sept-09	Dec-09	Mar-10	Jun-10	Sept-10
Net ads <sup>3</sup>	1 543	233	1 735	833	2 624
% of growth <sup>4</sup>	6.56%	0.93%	6.86%	3.08%	9.41%

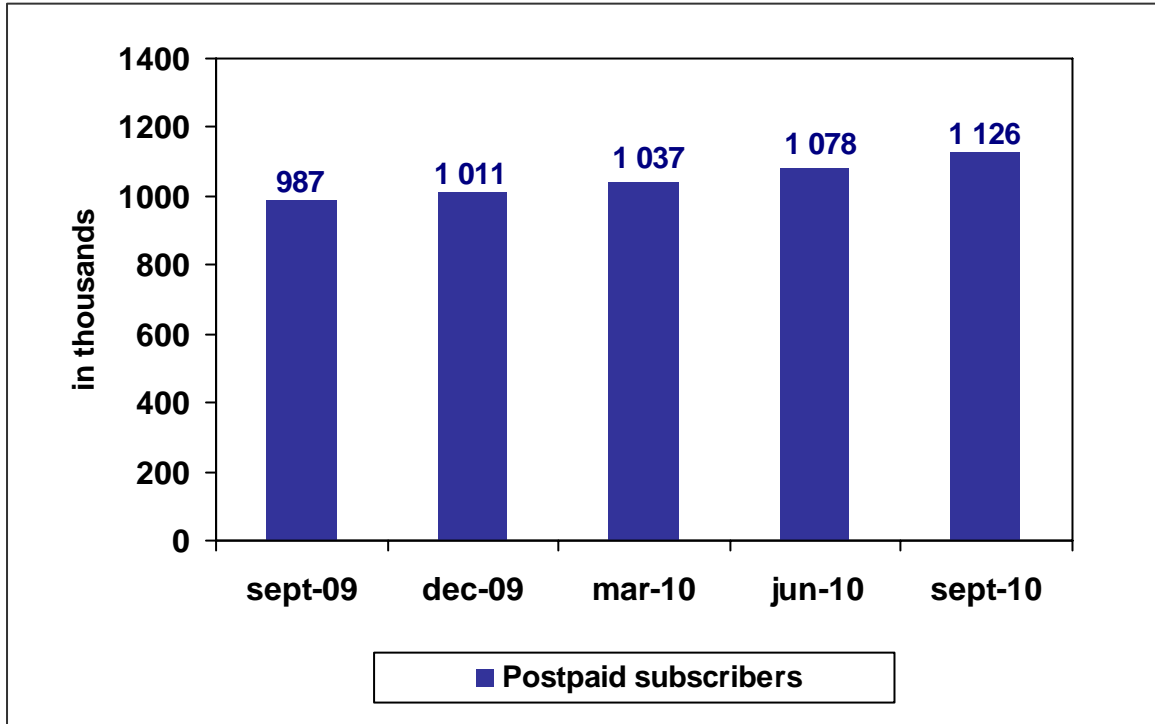
**Post-paid/ Prepaid market repartition**



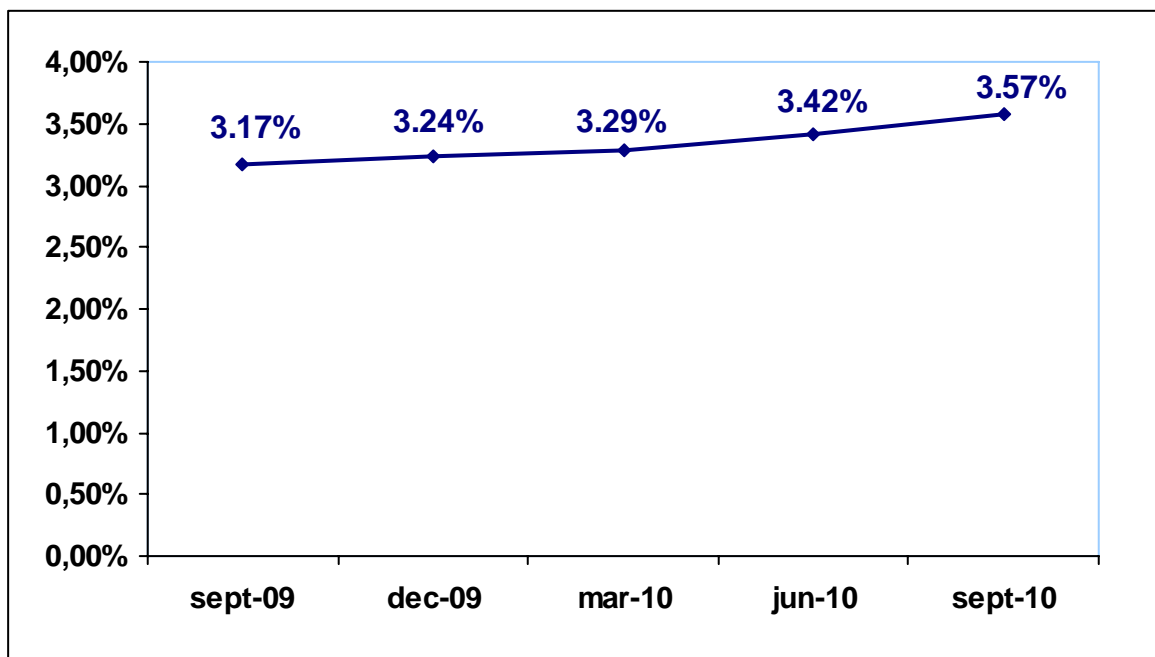
<sup>3</sup> Net ads in the month M equals to the difference between the subscribers number of the months M and M-3

<sup>4</sup> % 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 rate<sup>5</sup>



<sup>5</sup> See note 1.

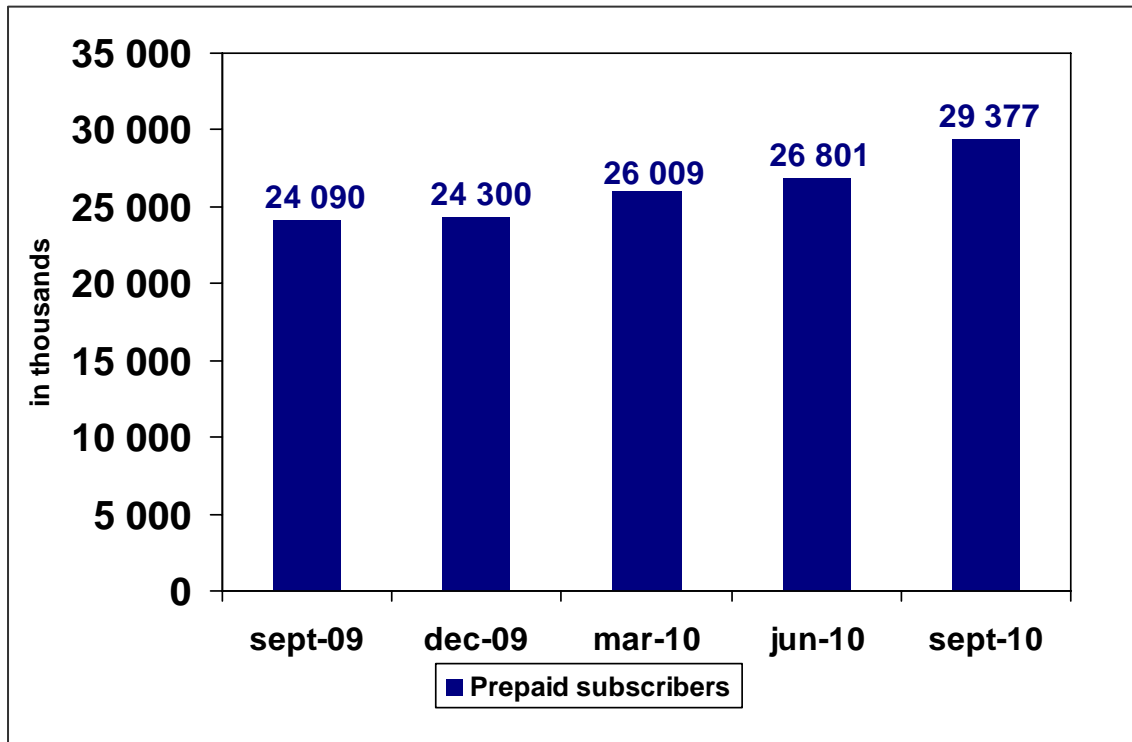
**Net ads in the post-paid market**

<b>Post-paid Mobile subscribers (in thousands)</b>	<b>Sept-09</b>	<b>Dec-09</b>	<b>Mar-10</b>	<b>Jun-10</b>	<b>Sept-10</b>
<b>Net ads<sup>6</sup></b>	<b>9</b>	<b>24</b>	<b>25</b>	<b>41</b>	<b>48</b>
<b>% of growth<sup>7</sup></b>	<b>0.92%</b>	<b>2.44%</b>	<b>2.51%</b>	<b>3.99%</b>	<b>4.48%</b>

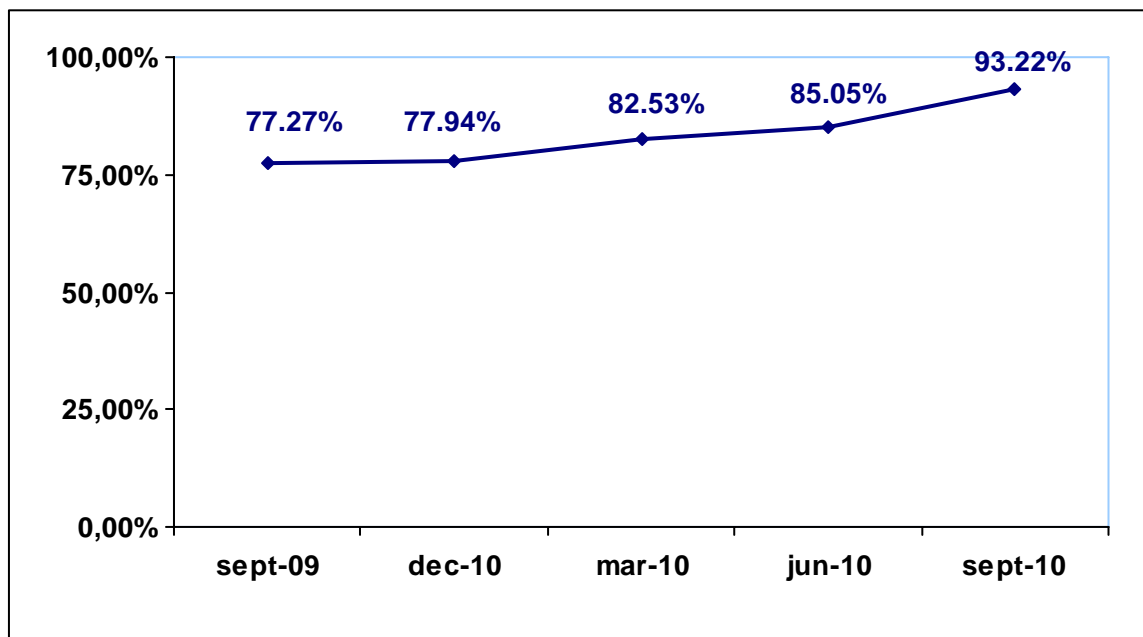
<sup>6</sup> Net ads in the month M equals to the difference between the subscribers number of the months M and M-3

<sup>7</sup> % 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 rate<sup>8</sup>



<sup>8</sup> See Note 1.



**Prepaid Net ads in the prepaid market**

<b>Prepaid Mobile subscribers (in thousands)</b>	<b>Sept-09</b>	<b>Dec-09</b>	<b>Mar-10</b>	<b>Jun-10</b>	<b>Sept-10</b>
<b>Net ads<sup>9</sup></b>	<b>1 534</b>	<b>209</b>	<b>1 710</b>	<b>792</b>	<b>2 576</b>
<b>% of growth<sup>10</sup></b>	<b>6.80%</b>	<b>0.87%</b>	<b>7.04%</b>	<b>3.04%</b>	<b>9.61%</b>

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

<sup>10</sup> % 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