

ROYAUME DU MAROC  
LE PREMIER MINISTRE



## *MOBILE TELEPHONY IN MOROCCO*

### *Quarterly Observatory\** *March 2008*

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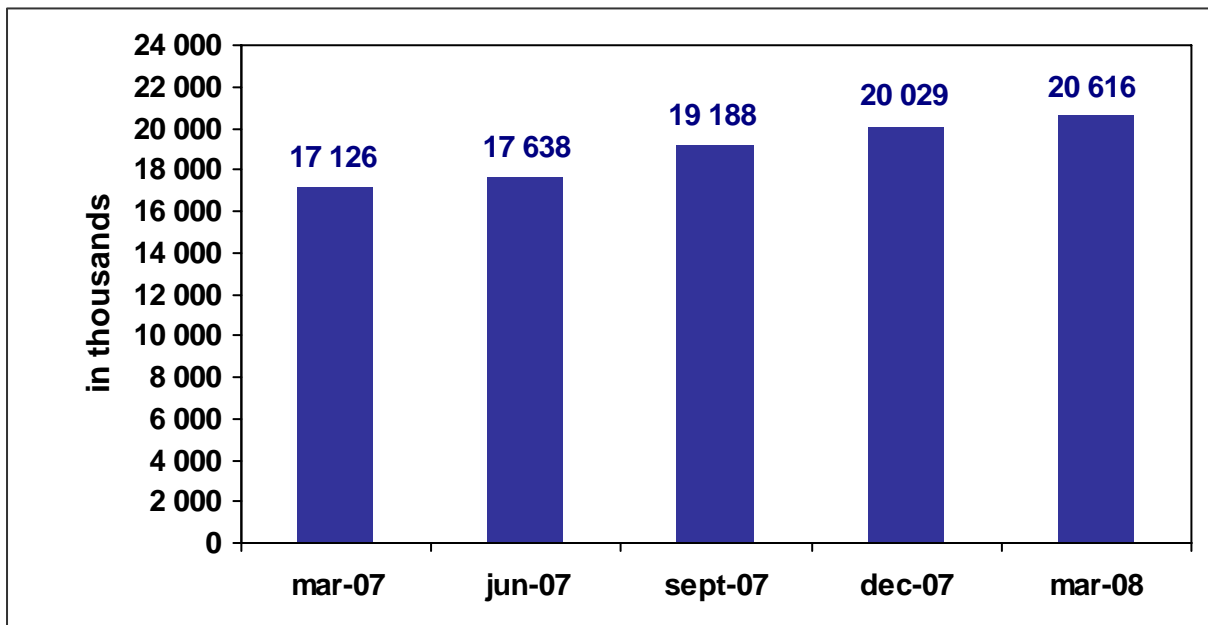
## **SUMMARY**

**Global mobile telephony market**

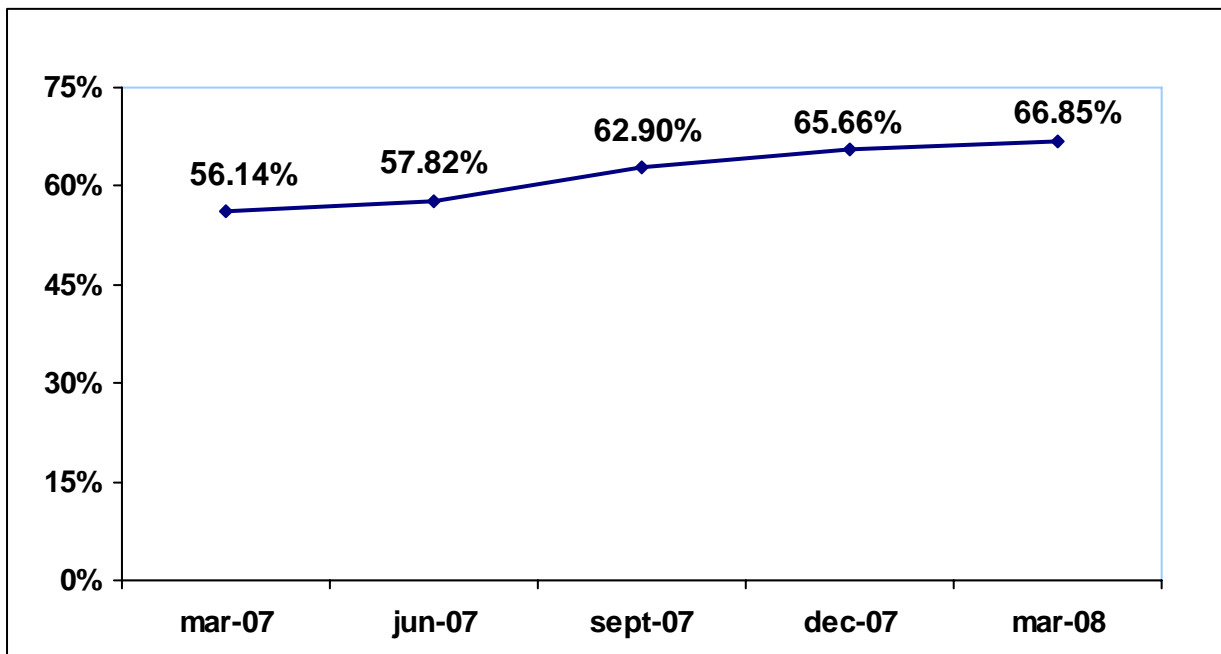
**Post-paid market**

**Prepaid Market**

Market size evolution

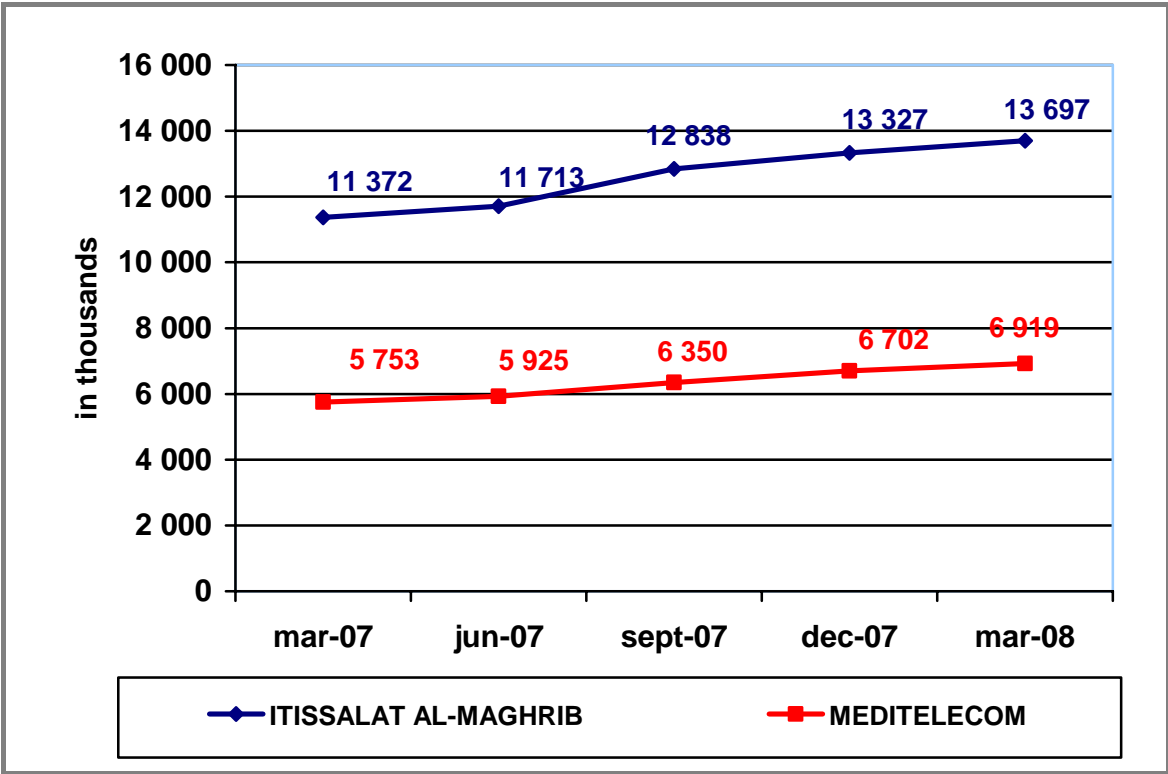


Penetration rate<sup>1</sup>

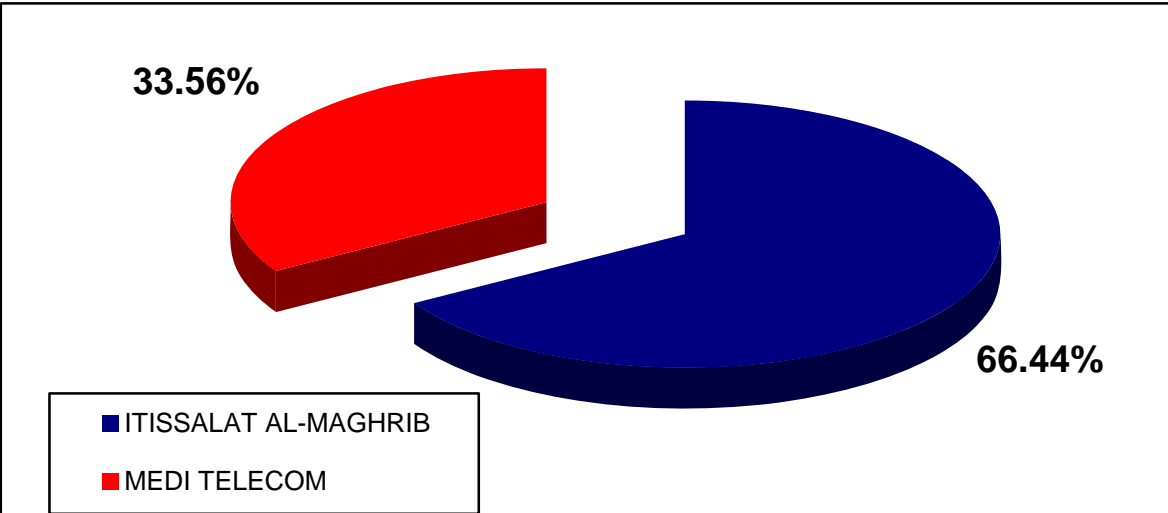


<sup>1</sup> The accounting of the penetration rate for fixed telephony by the ANRT Market Observatory is based on the population projections published by the Statistics Department/HCP based on the General census of population 2004. Starting from March of the year N, the reference population for accounting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

**Market growth by operator**



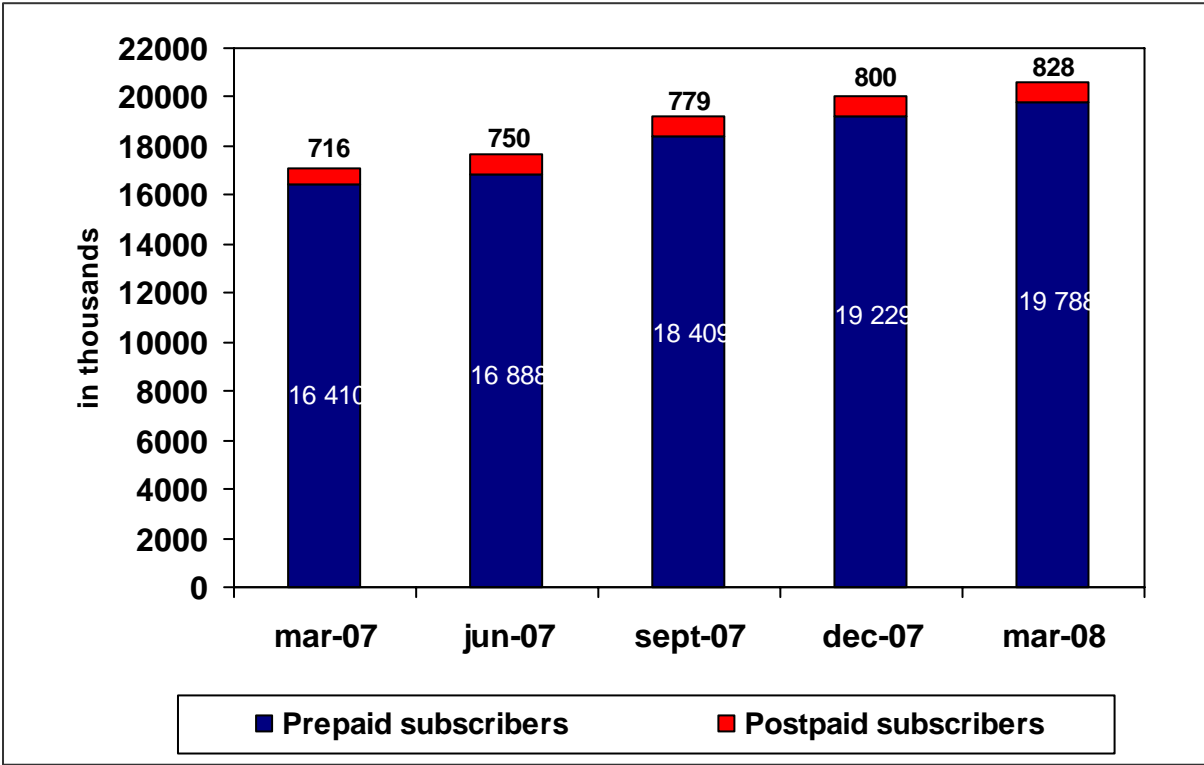
**Market shares at March 31<sup>st</sup> 2008**



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

Global Mobile subscribers (in thousands)	Mar-07	Jun-07	Sept-07	Dec-07	Mar-08
Net ads <sup>2</sup>	1 121	512	1 550	841	587
% of growth <sup>3</sup>	7%	2.69%	8.79%	4.38%	2.93%

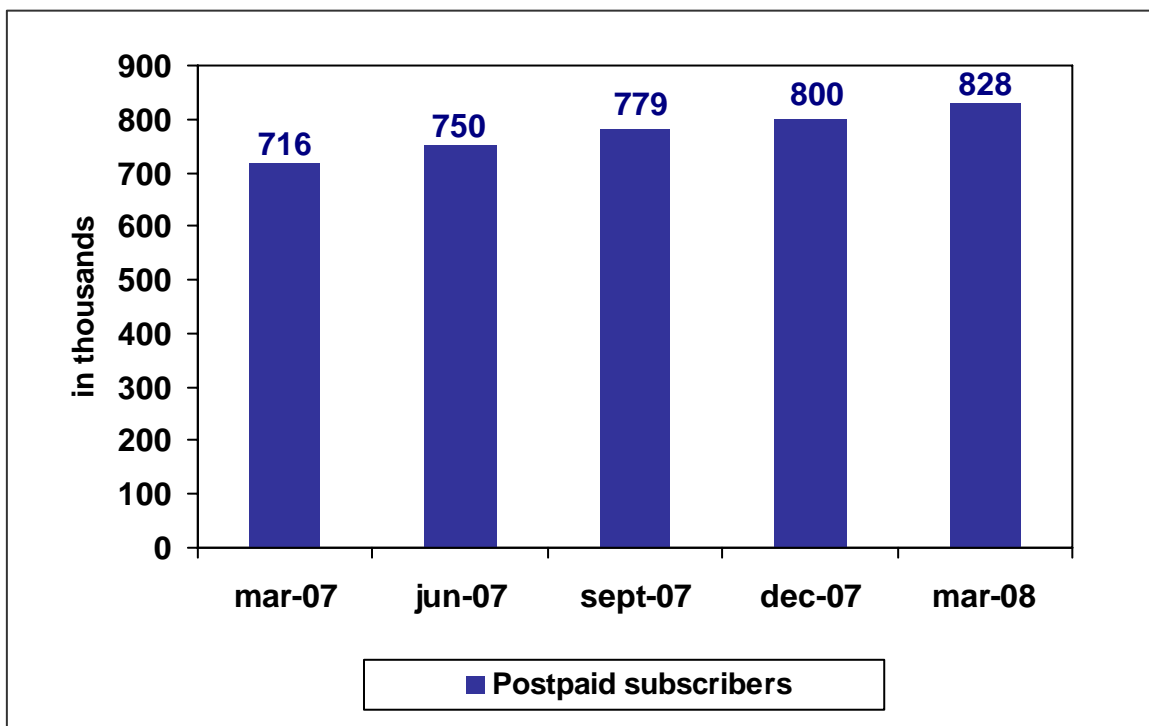
**Post-paid/ Prepaid market repartition**



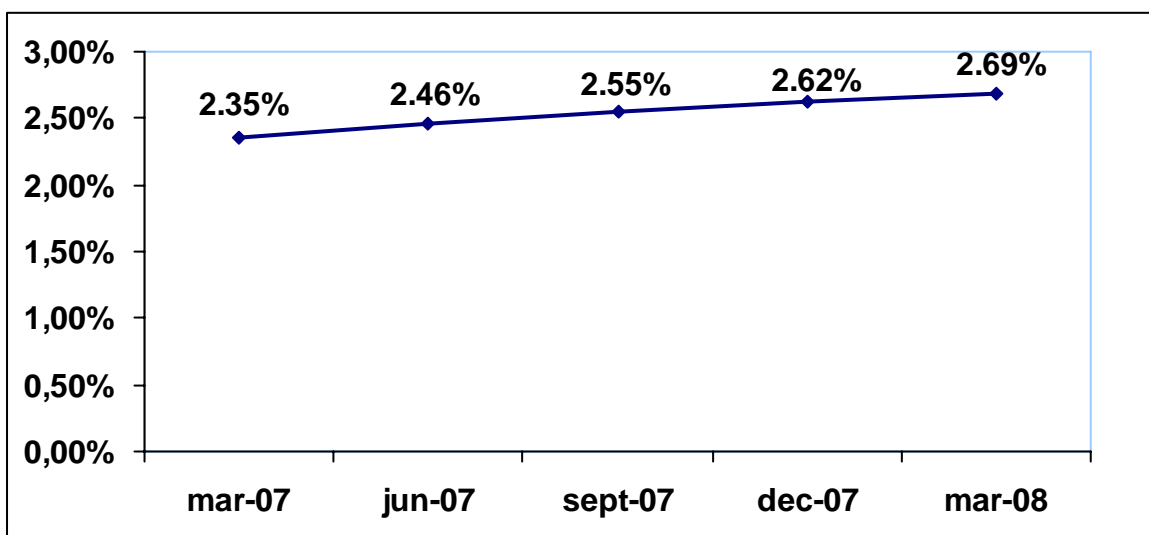
<sup>2</sup> Net ads in the month M equals to the difference between the subscribers number of the months M and M-3

<sup>3</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>4</sup>



<sup>4</sup> See note 1.

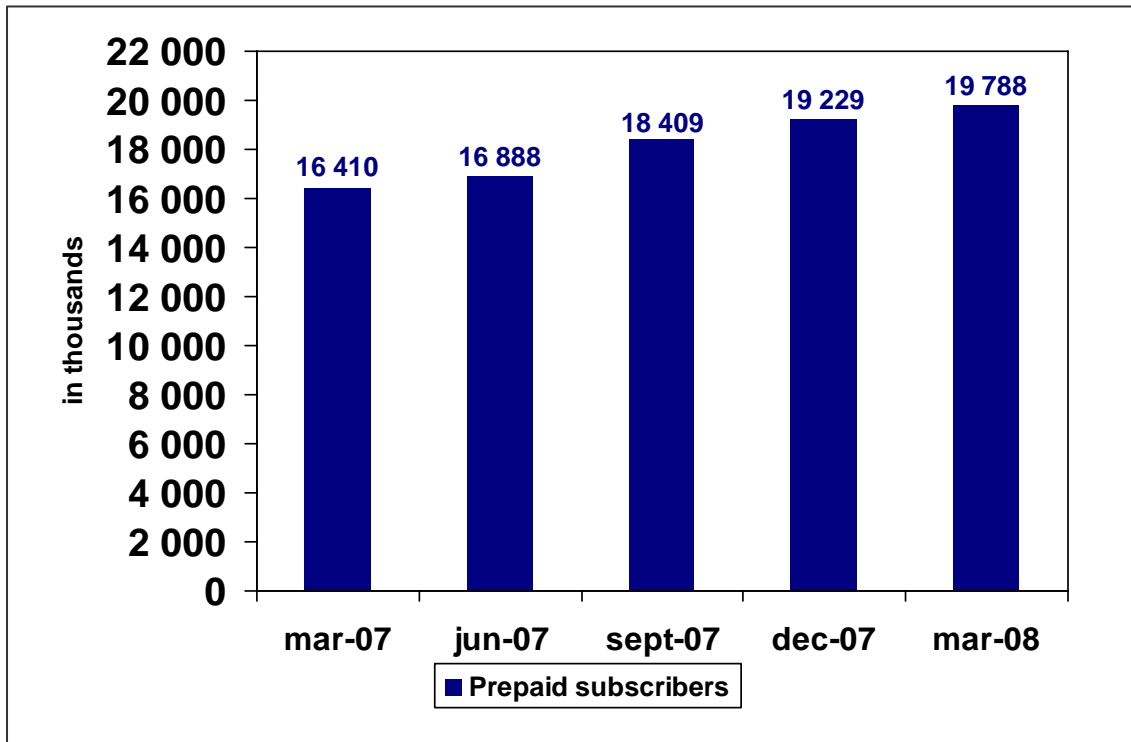
**Net ads in the post-paid market**

<b>Post-paid Mobile subscribers (in thousands)</b>	<b>Mar-07</b>	<b>Jun-07</b>	<b>Sept-07</b>	<b>Dec-07</b>	<b>Mar-08</b>
<b>Net ads<sup>5</sup></b>	<b>26</b>	<b>34</b>	<b>29</b>	<b>21</b>	<b>28</b>
<b>% of growth<sup>6</sup></b>	<b>3.82%</b>	<b>4.73%</b>	<b>3.90%</b>	<b>2.70%</b>	<b>3.50%</b>

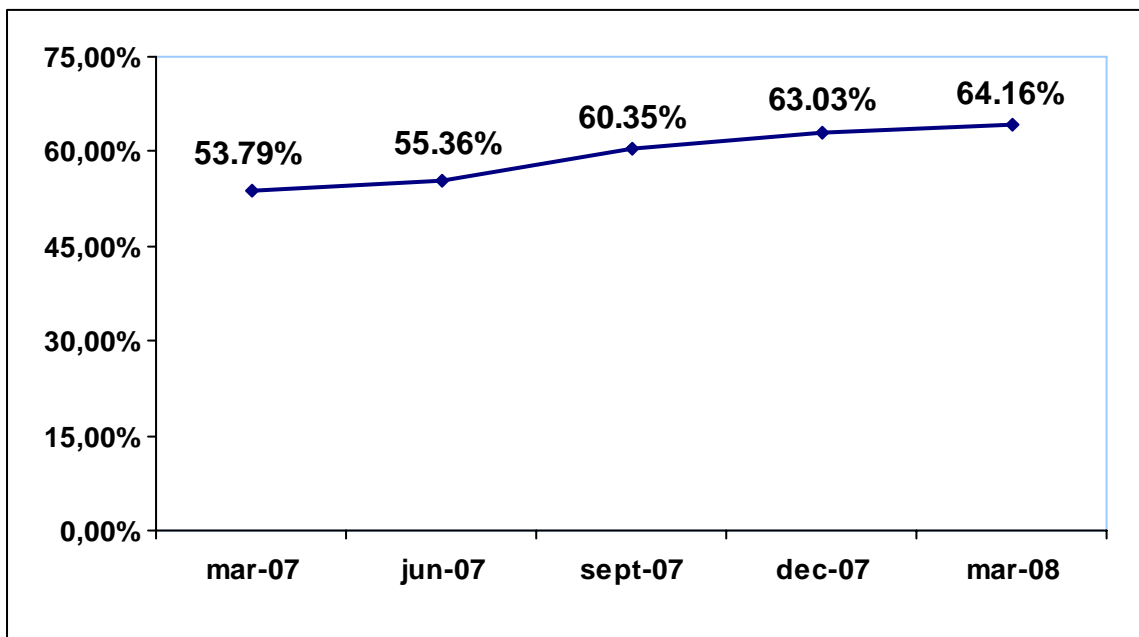
<sup>5</sup> Net ads in the month M equals to the difference between the subscribers number of the months M and M-3

<sup>6</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>7</sup>



<sup>7</sup> See Note 1.



**Prepaid Net ads in the prepaid market**

<b>Prepaid Mobile subscribers (in thousands)</b>	<b>Mar-07</b>	<b>Jun-07</b>	<b>Sept-07</b>	<b>Dec-07</b>	<b>Mars-08</b>
<b>Net ads</b>	<b>1 095</b>	<b>478</b>	<b>1 521</b>	<b>820</b>	<b>559</b>
<b>% of growth</b>	<b>7.15%</b>	<b>2.92%</b>	<b>9%</b>	<b>4.46%</b>	<b>2.90%</b>