

ROYAUME DU MAROC
LE PREMIER MINISTRE



MOBILE TELEPHONY IN MOROCCO

*Quarterly Observatory** *March 2009*

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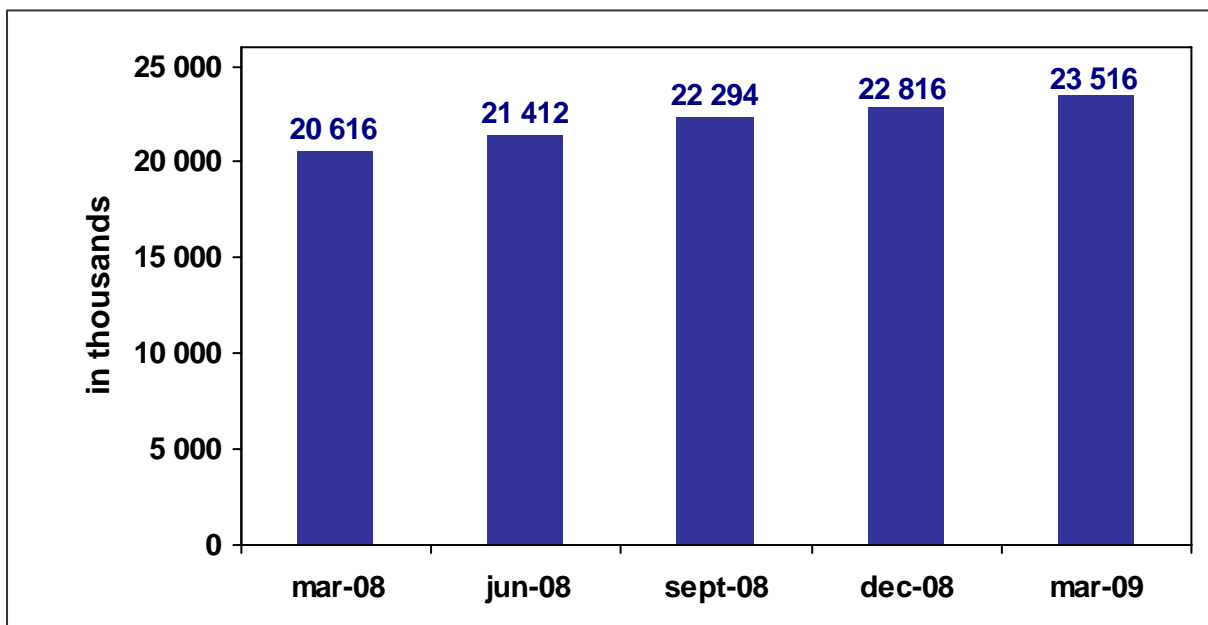
SUMMARY

Global mobile telephony market

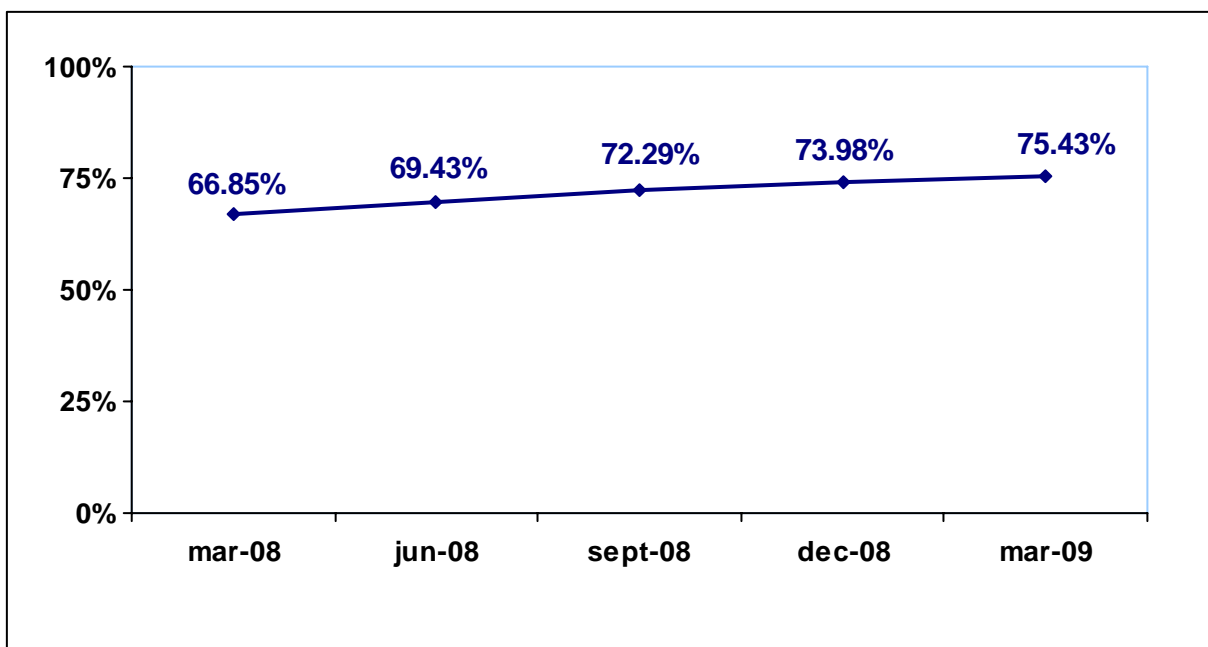
Post-paid market

Prepaid Market

Market size evolution



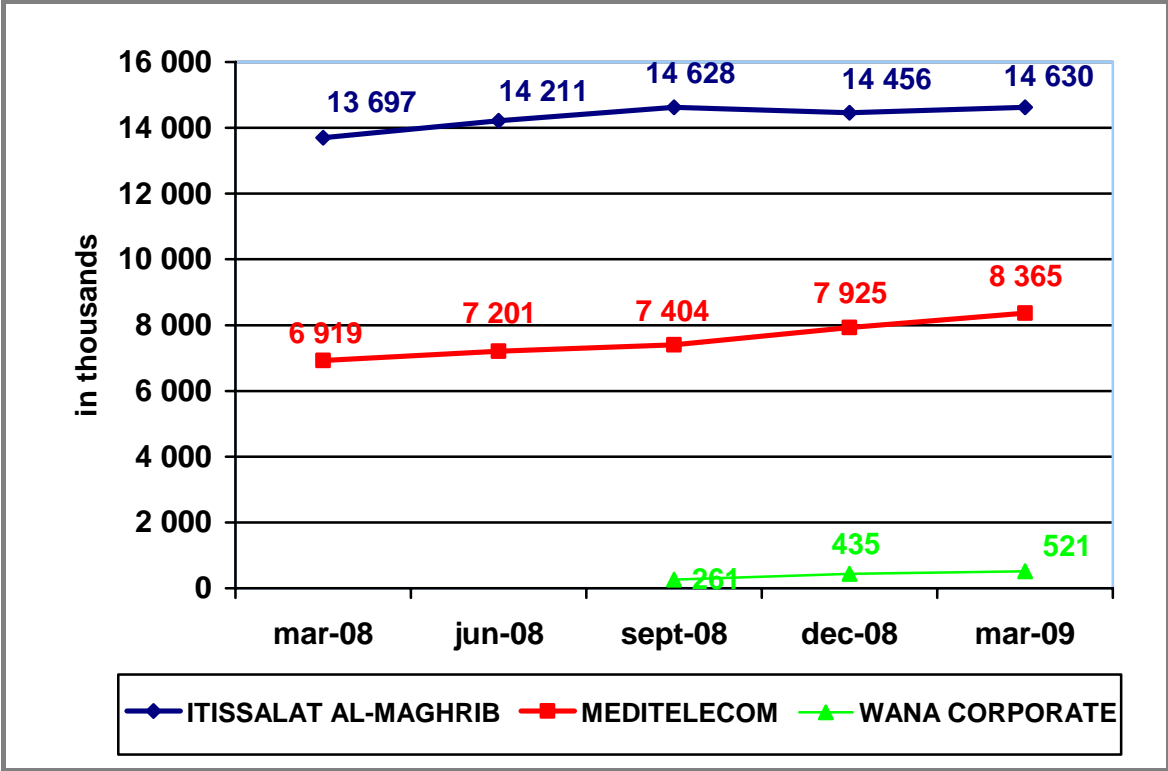
Penetration rate²



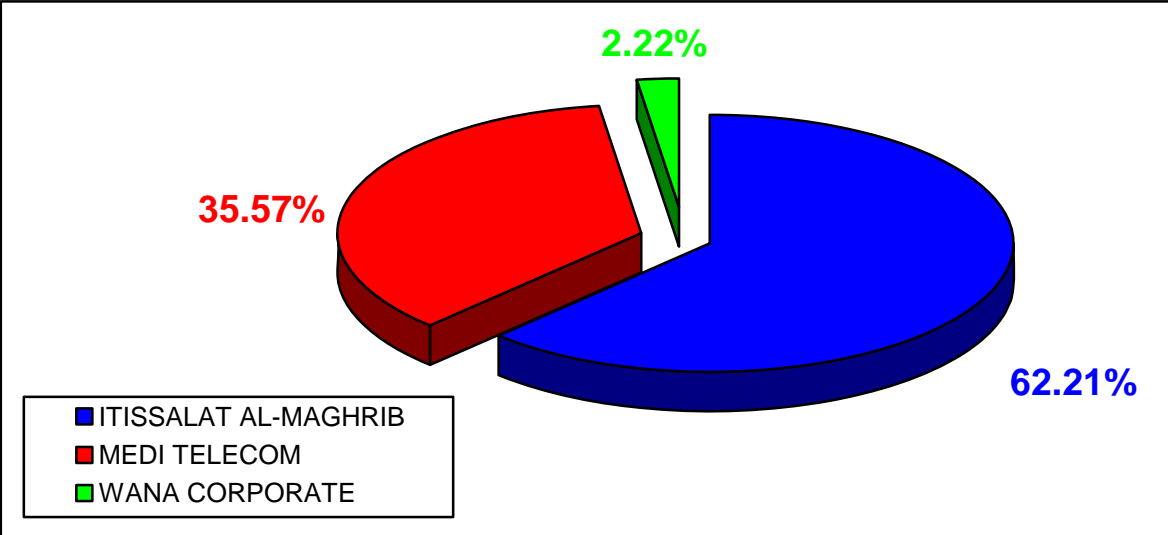
¹ This figure includes mobile subscribers to mobile telephony using the 2G and 3G networks.

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



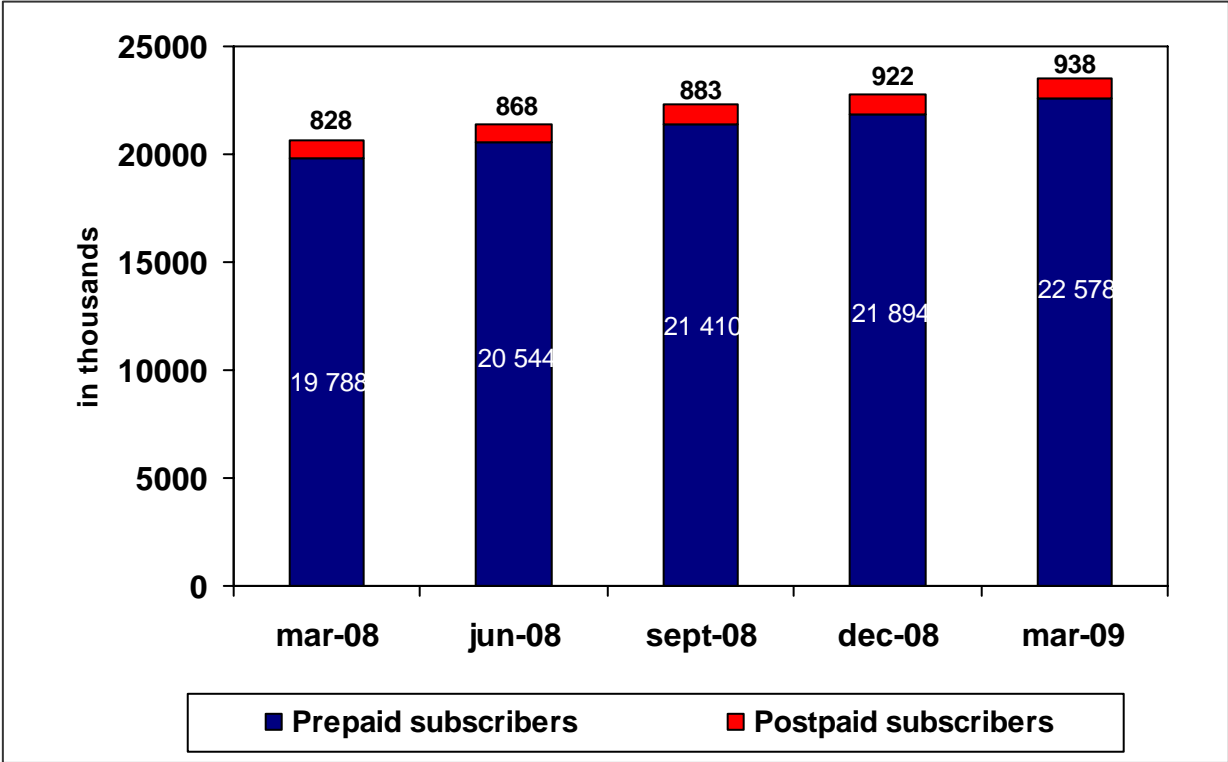
Market shares at March 31st 2009



Net ads in the Global mobile telephony market

Global Mobile subscribers (in thousands)	Mar-08	Jun-08	Sept-08	Dec-08	Mar-09
Net ads ³	587	796	882	522	700
% of growth ⁴	2.93%	3.86%	4.12%	2.34%	3.07%

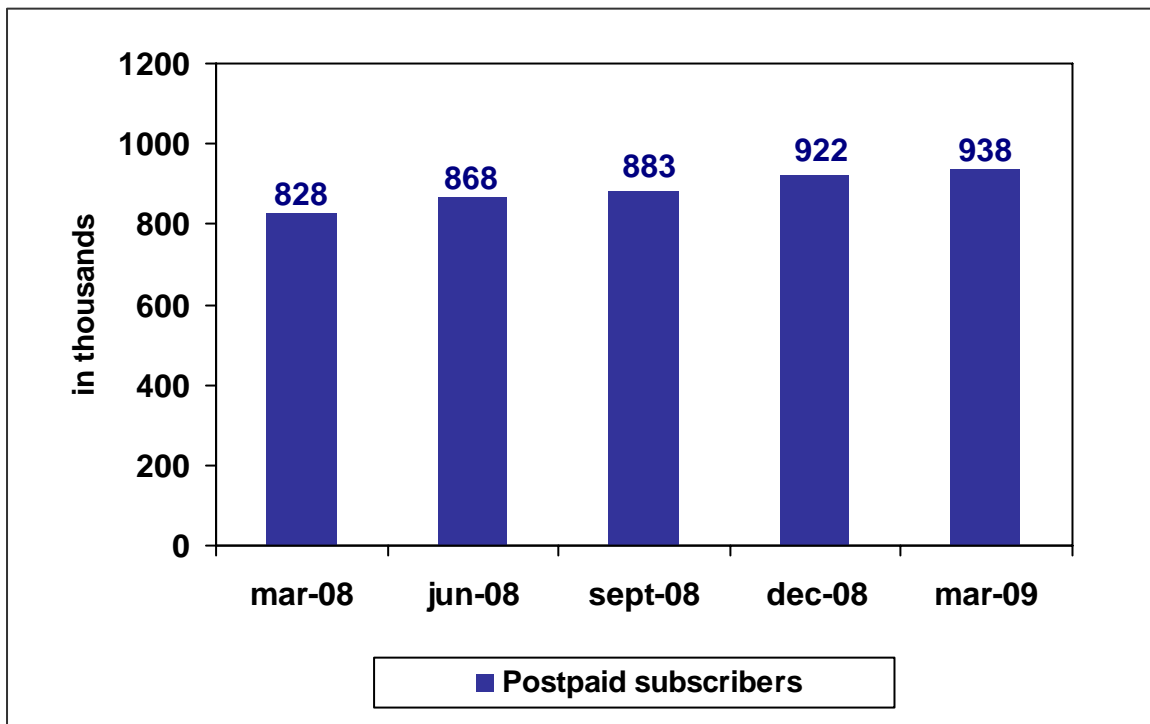
Post-paid/ Prepaid market repartition



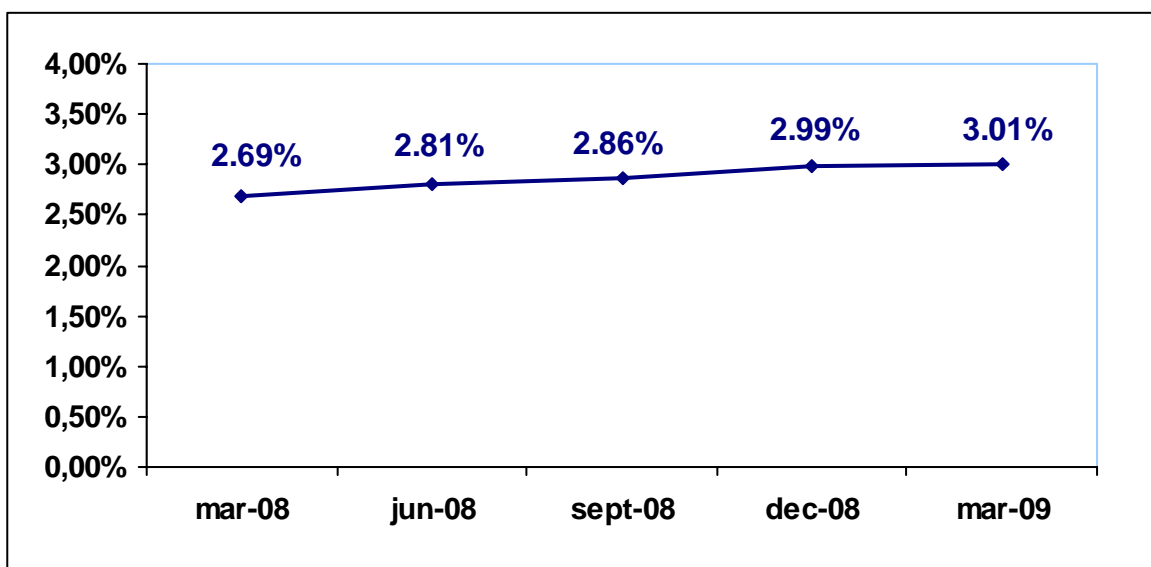
³ Net ads in the month M equals to the difference between the subscribers number of the months M and M-3

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.

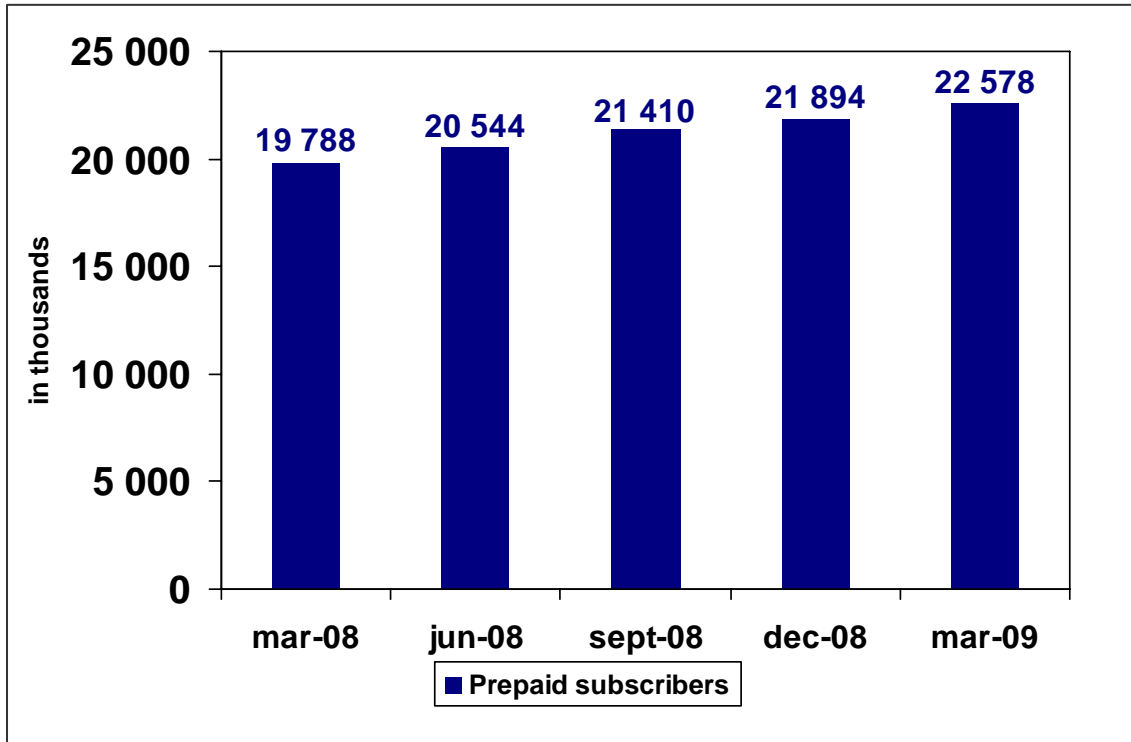
Net ads in the post-paid market

Post-paid Mobile subscribers (in thousands)	Mar-08	Jun-08	Sept-08	Dec-08	Mar-09
Net ads⁶	28	39	16	39	16
% of growth⁷	3.50%	4.76%	1.83%	4.39%	1.70%

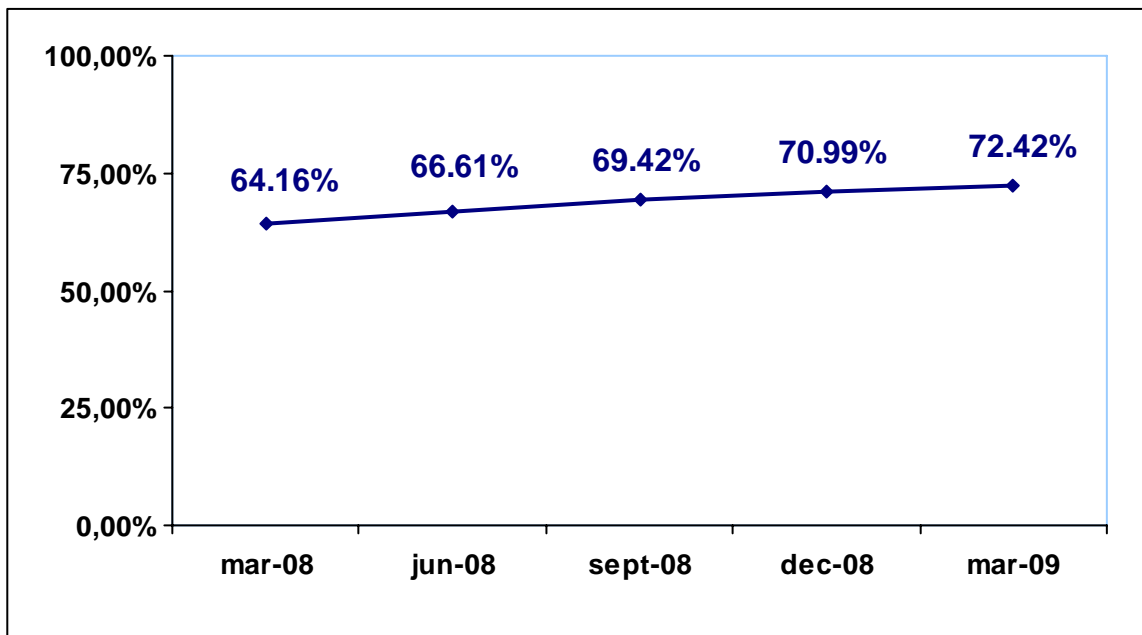
⁶ Net ads in the month M equals to the difference between the subscribers number of the months M and M-3

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)	Mar-08	Jun-08	Sept-08	Dec-08	Mar-09
Net ads	559	756	866	483	685
% of growth	2.90%	3.82%	4.22%	2.26%	3.13%