

ROYAUME DU MAROC
LE PREMIER MINISTRE



MOBILE TELEPHONY IN MOROCCO

*Quarterly Observatory** *March 2011*

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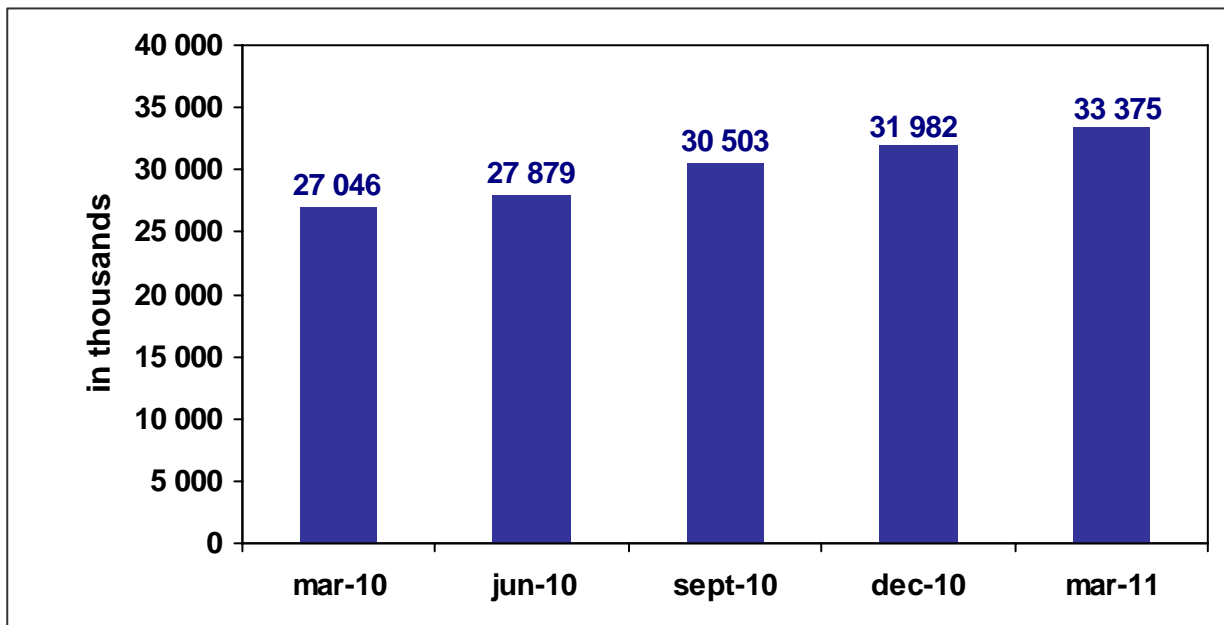
SUMMARY

Global mobile telephony market

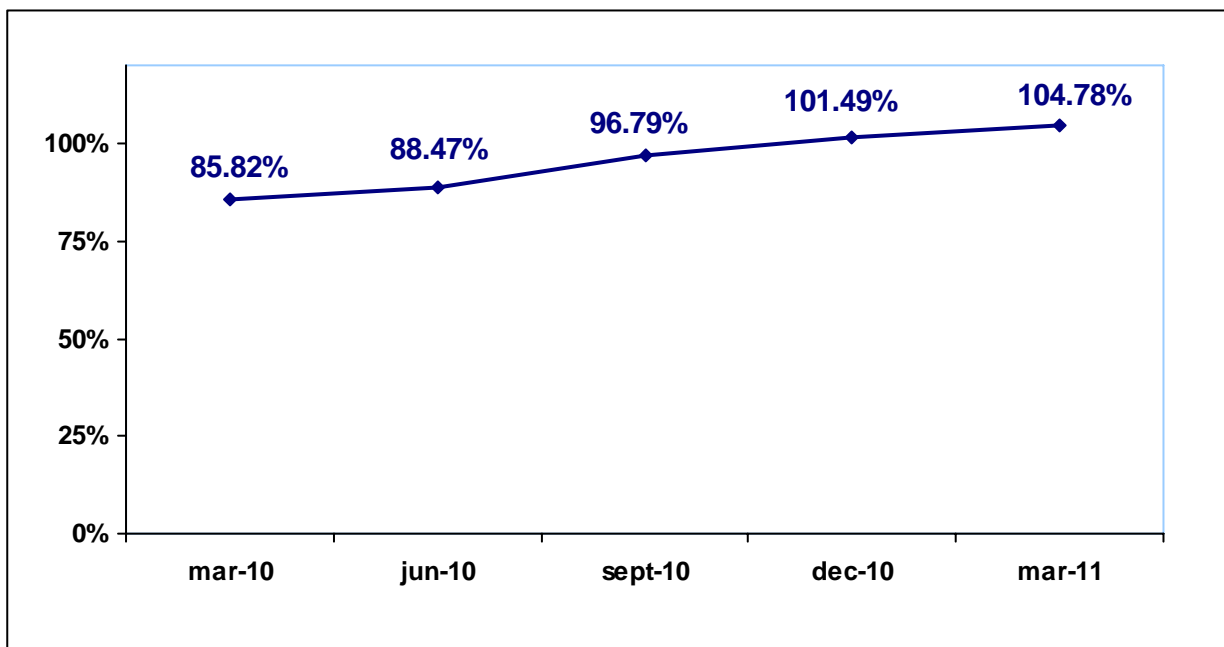
Post-paid market

Prepaid Market

Market size evolution



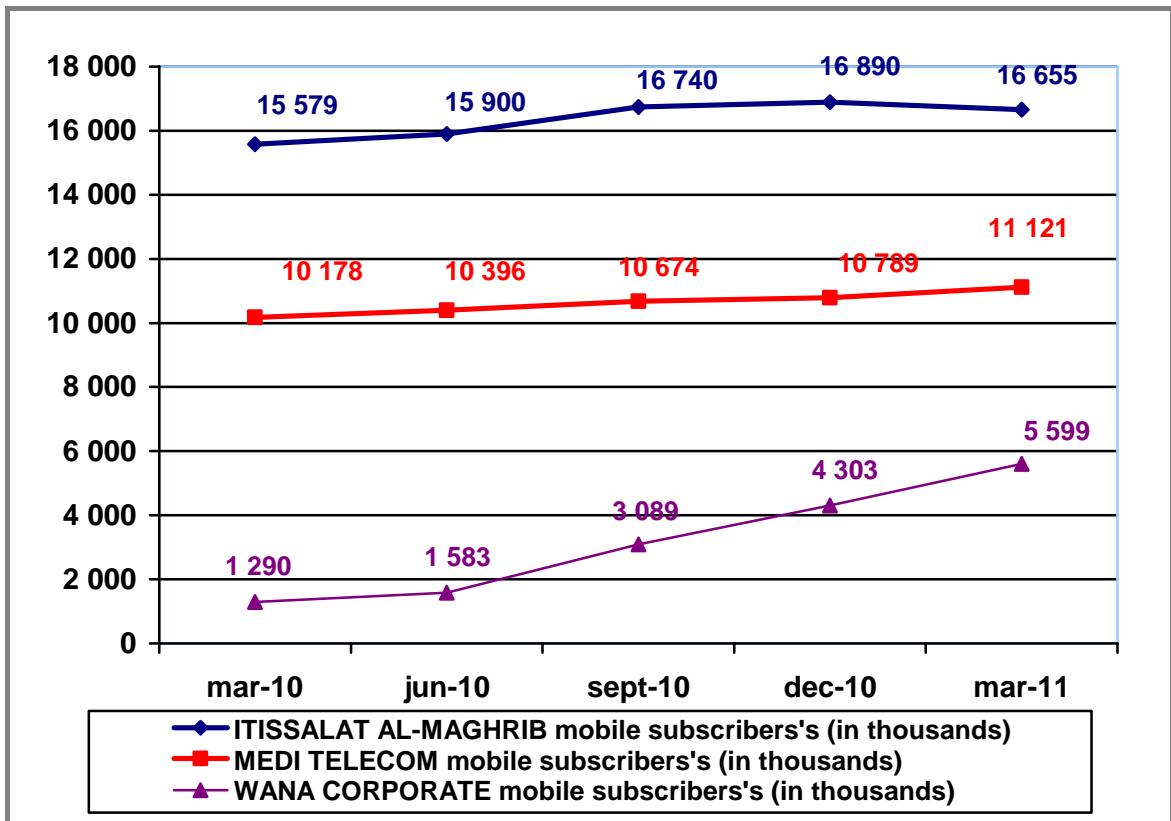
Penetration rate²



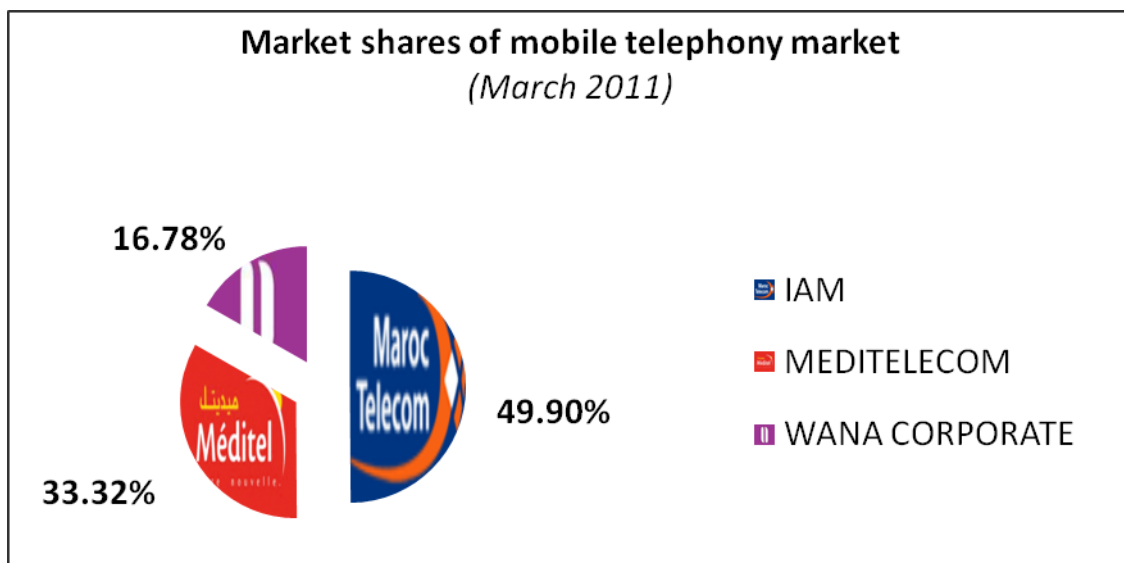
¹ This figure includes mobile subscribers to mobile telephony using the 2G and 3G networks.

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 June of the year N, the reference population for accounting this rate results from Statistics Department/HCP projections of this year.

Market growth by operator



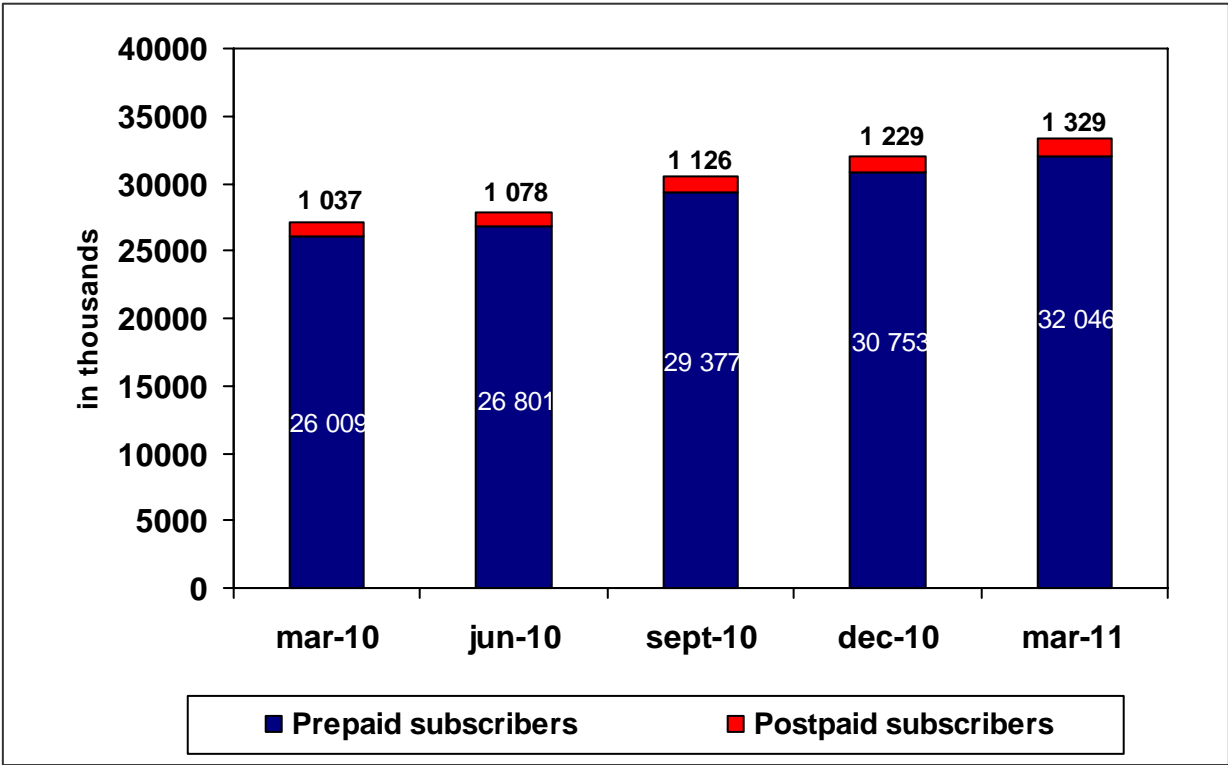
Market shares at March 31st 2011



Net ads in the Global mobile telephony market

Global Mobile subscribers (in thousands)	Mar-10	Jun-10	Sept-10	Dec-10	Mar-11
Net ads ³	1 735	833	2 624	1 479	1 393
% of growth ⁴	6.86%	3.08%	9.41%	4.85%	4.36%

Post-paid/ Prepaid market repartition

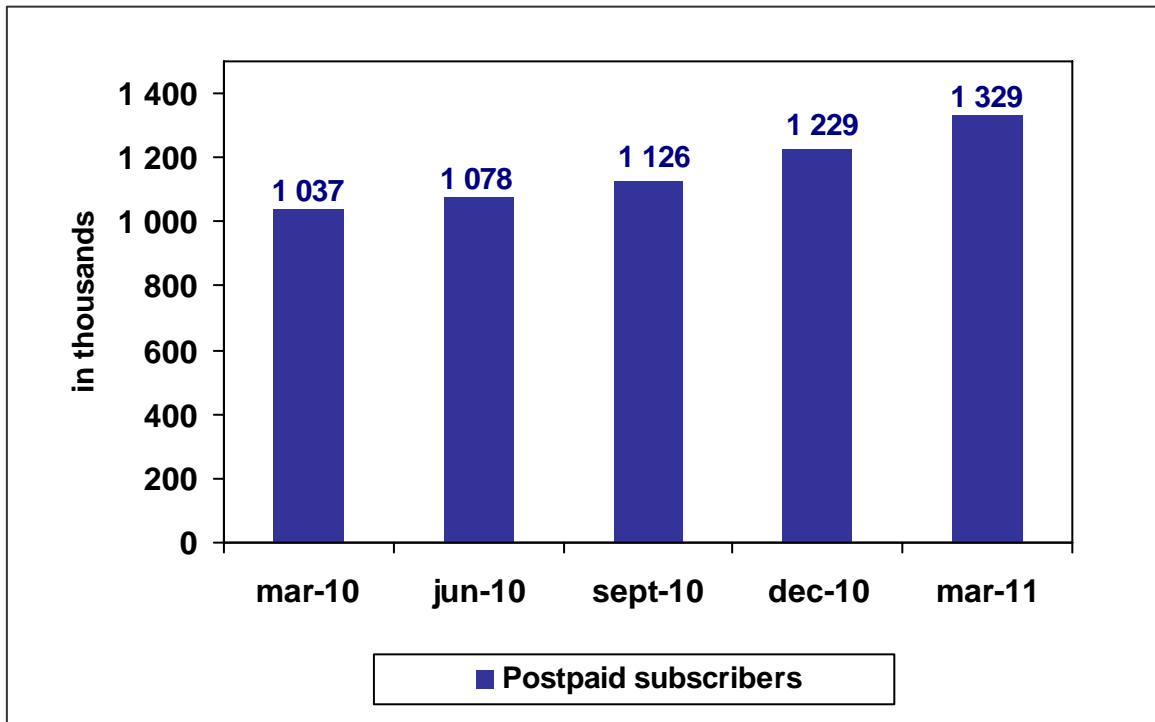


³ Net ads in the month M equals to the difference between the subscribers number of the months M and M-3

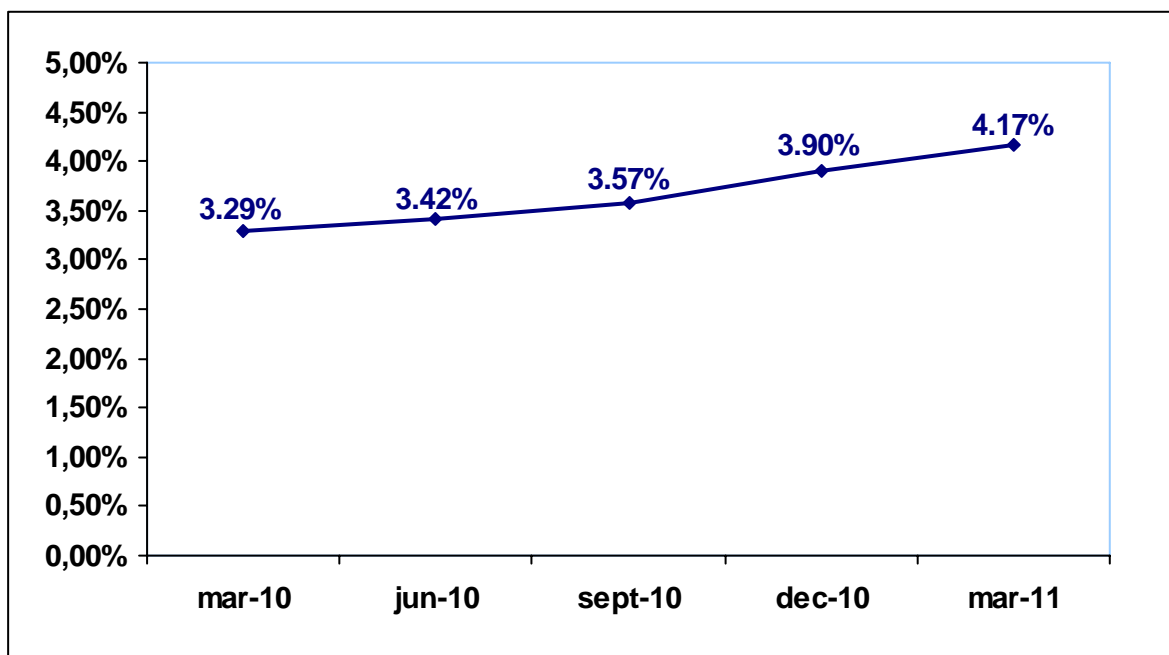
⁴ % of growth at the month M equals to the difference between the subscribers number of the months M and M-3 divided by the subscribers number of the month M-3

POST-PAID MARKET

Post-paid market size evolution



Post-paid penetration rate⁵



⁵ See note 1.

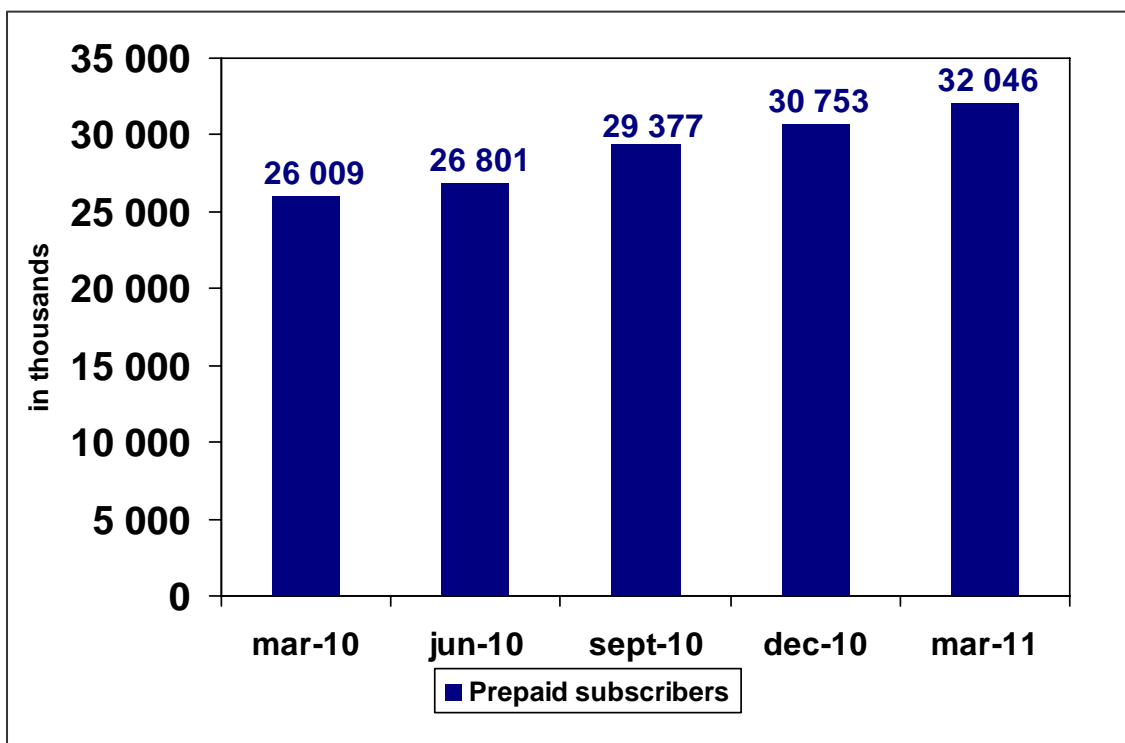
Net ads in the post-paid market

Post-paid Mobile subscribers (in thousands)	Mar-10	Jun-10	Sept-10	Dec-10	Mar-11
Net ads⁶	25	41	48	103	100
% of growth⁷	2.51%	3.99%	4.48%	9.16%	8.16%

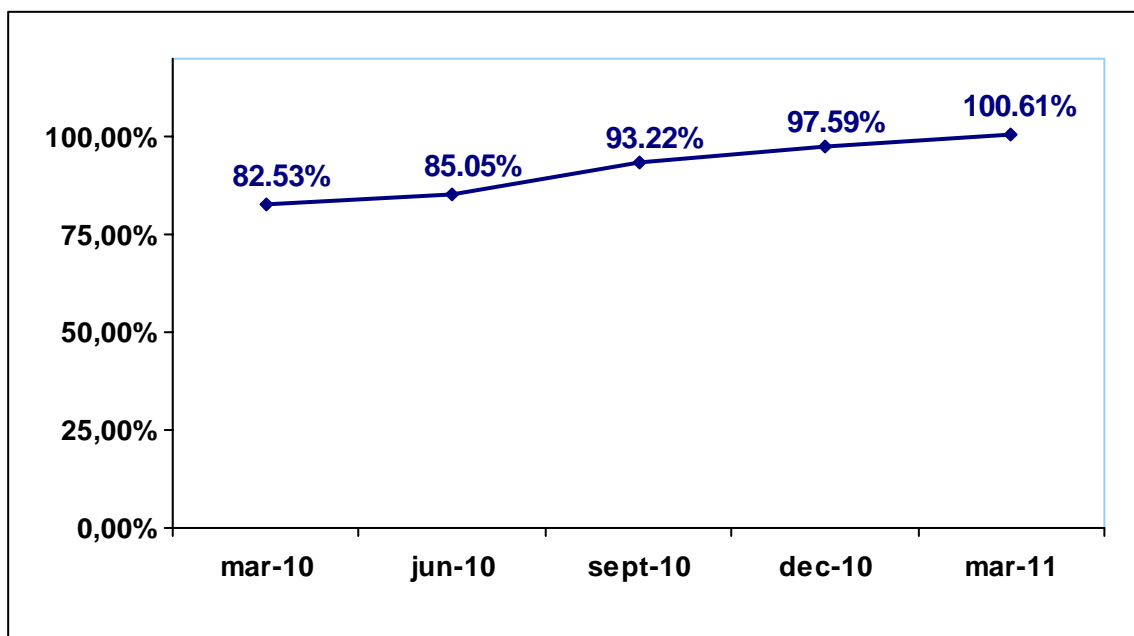
⁶ Net ads in the month M equals to the difference between the subscribers number of the months M and M-3

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-10	Jun-10	Sept-10	Dec-10	Mar-11
Net ads⁹	1 710	792	2 576	1 376	1 293
% of growth¹⁰	7.04%	3.04%	9.61%	4.68%	4.20%

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