

ROYAUME DU MAROC  
LE PREMIER MINISTRE



## *MOBILE TELEPHONY IN MOROCCO*

### *Quarterly Observatory\** *September 2007*

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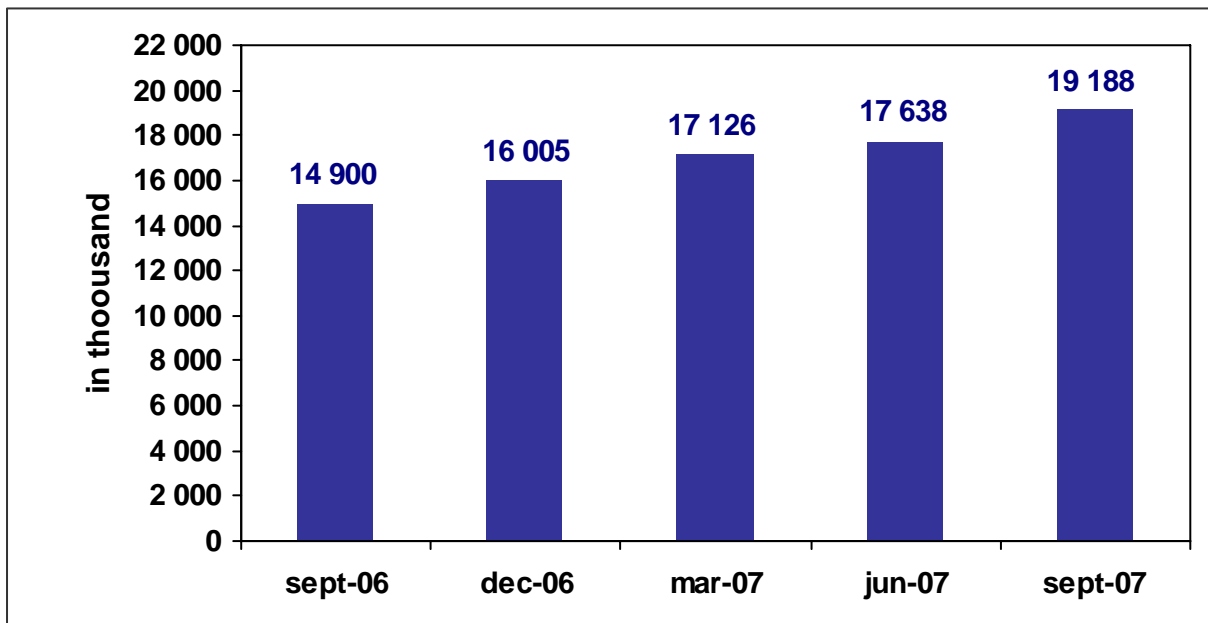
## **SUMMARY**

**Global mobile telephony market**

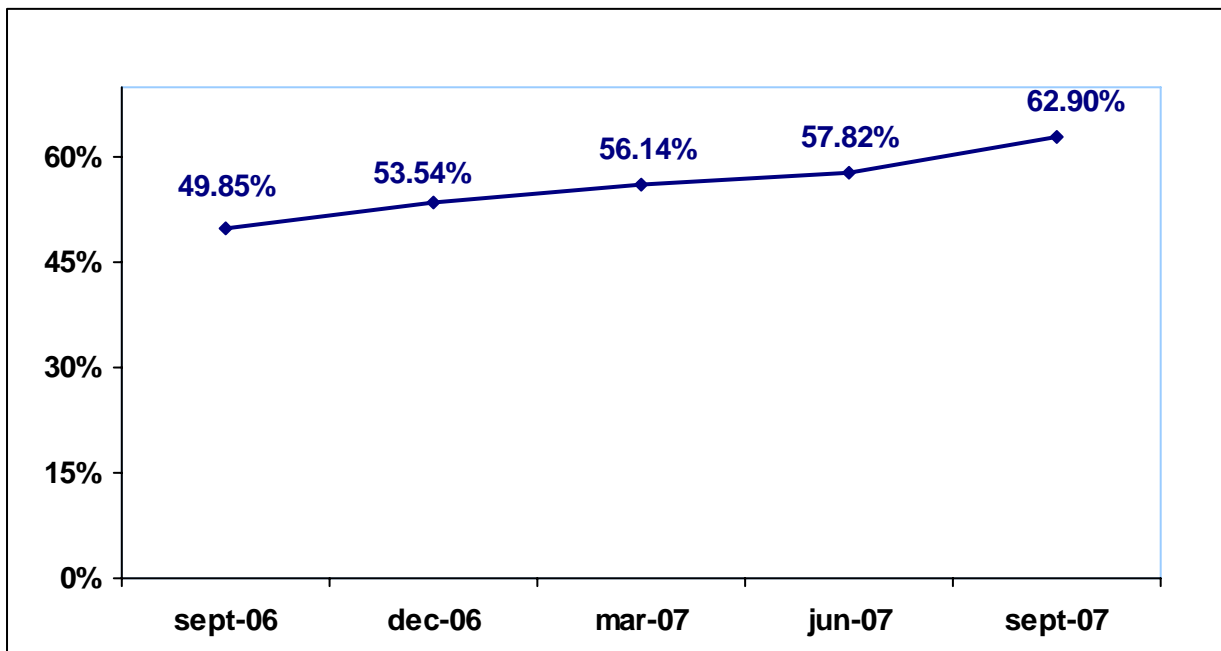
**Post-paid market**

**Prepaid Market**

**Market size evolution**

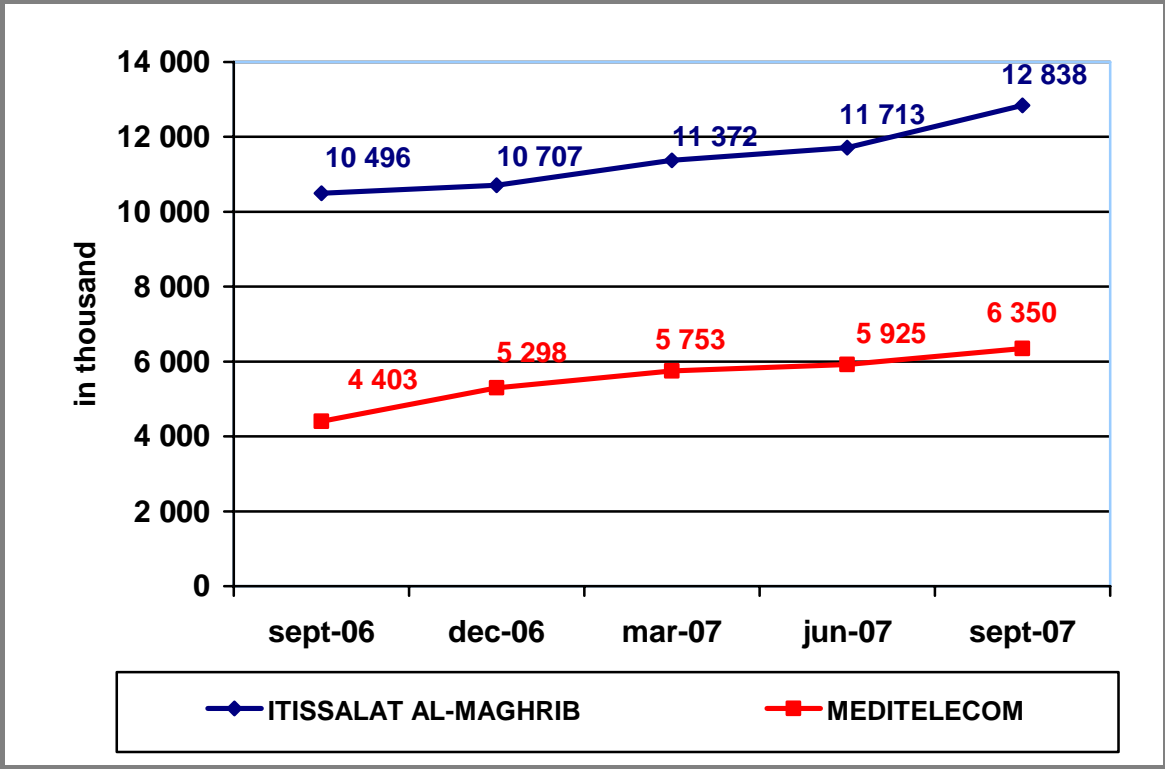


**Penetration rate<sup>1</sup>**

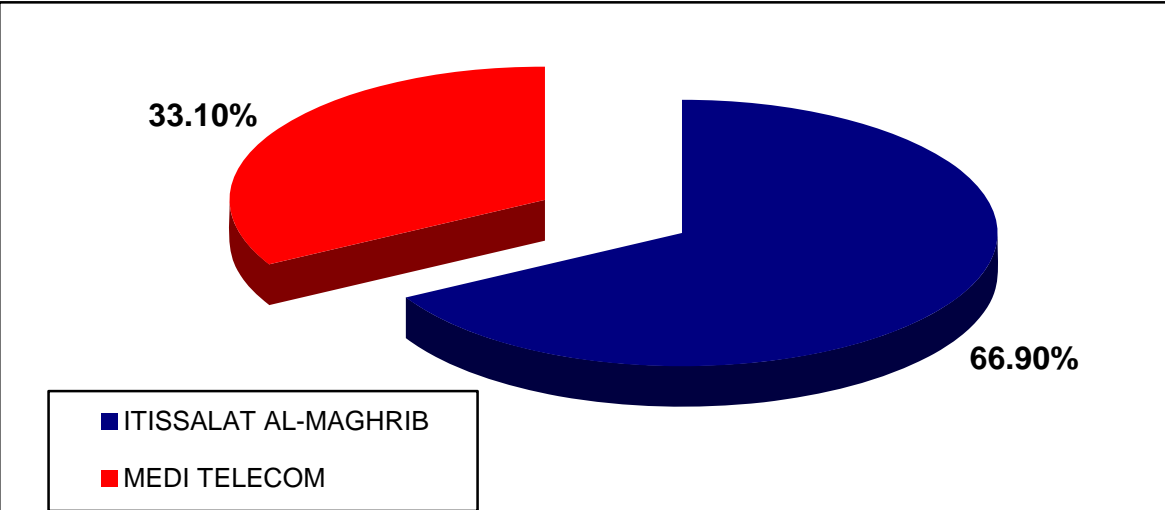


<sup>1</sup> The accounting of the penetration rate for fixed telephony by the ANRT Market Observatory is based, till December 2006, on the population projections published by the Statistics Department/HCP based on the General census of population 2004. Starting from March 2007, the reference population for accounting this rate results from 2006 projections of the Statistics Department/HCP.

**Market growth by operator**



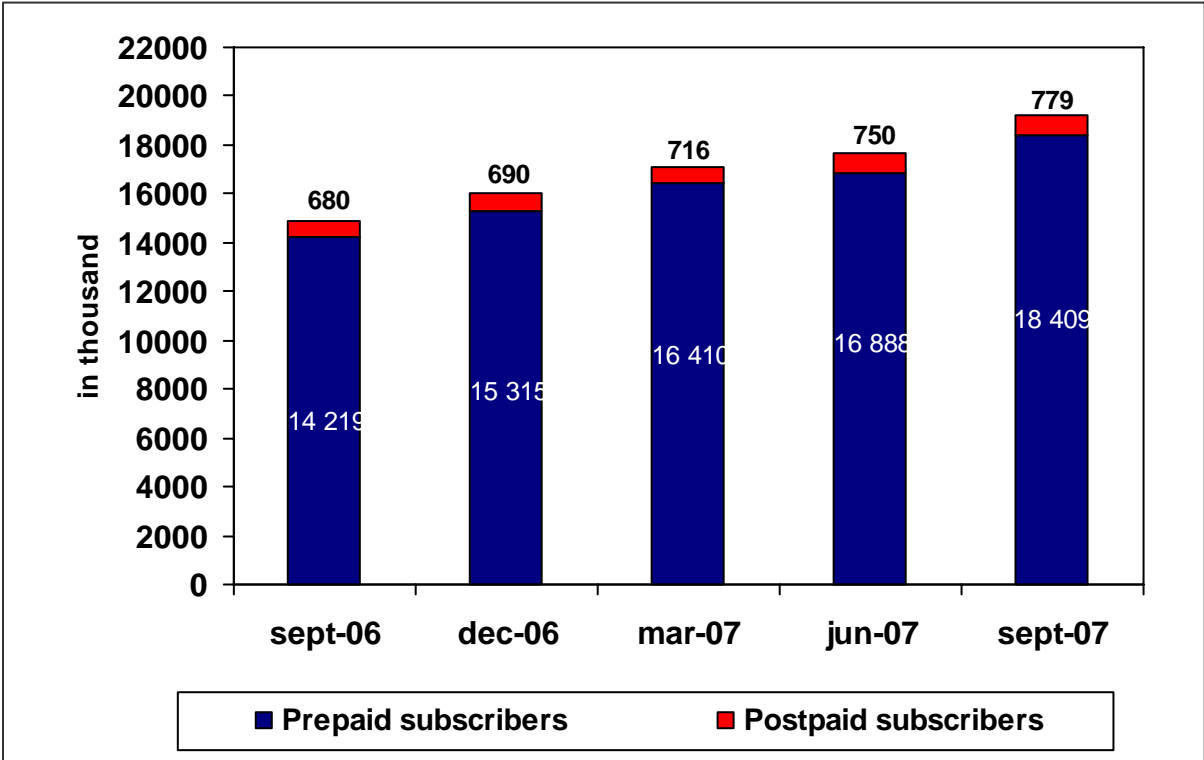
**Market shares at September 30<sup>th</sup> 2007**



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

Global Mobile subscribers	Sept-06	Dec-06	Mar-07	Jun-07	Sept-07
Net ads <sup>2</sup>	1 656	1 105	1 121	512	1 550
% of growth <sup>3</sup>	12.50%	7.42%	7%	2.69%	8.79%

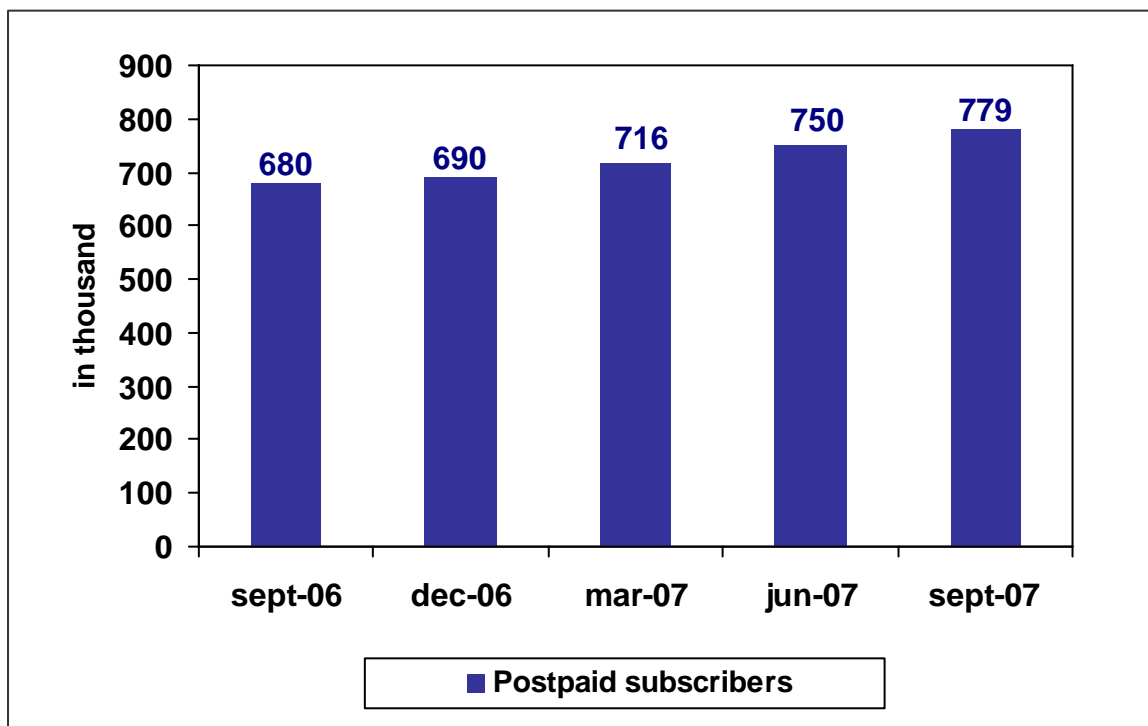
**Post-paid/ Prepaid market repartition**



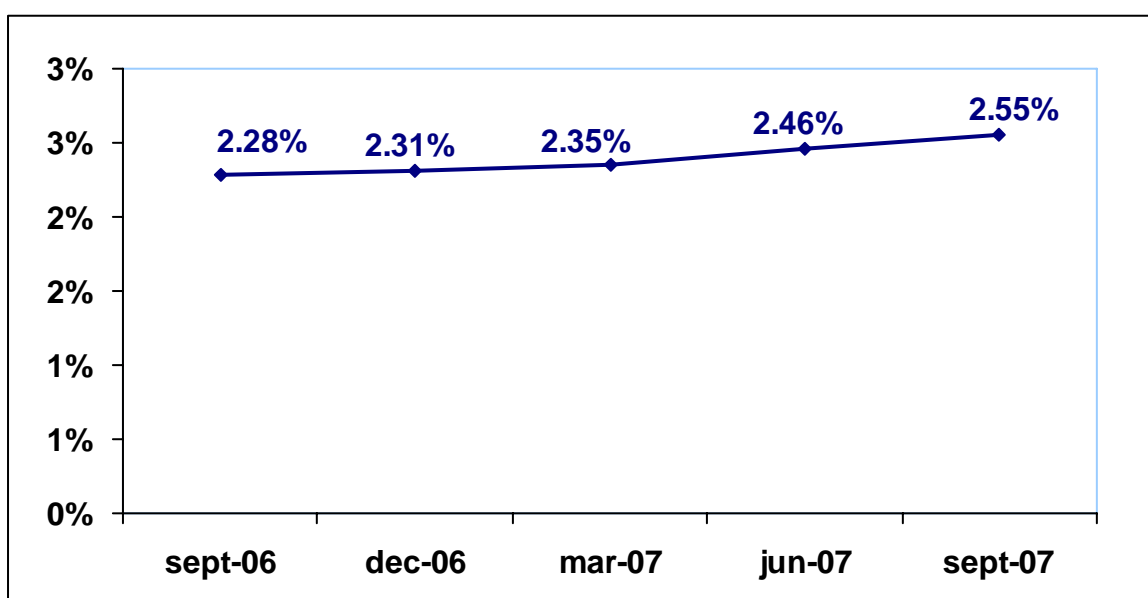
<sup>2</sup> Net ads in the month M equals to the difference between the subscribers number of the months M and M-3

<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> The accounting of the penetration rate for fixed telephony by the ANRT Market Observatory is based, till December 2006, on the population projections published by the Statistics Department/HCP based on the General census of population 2004. Starting from March 2007, the reference population for accounting this rate results from 2006 projections of the Statistics Department/HCP.

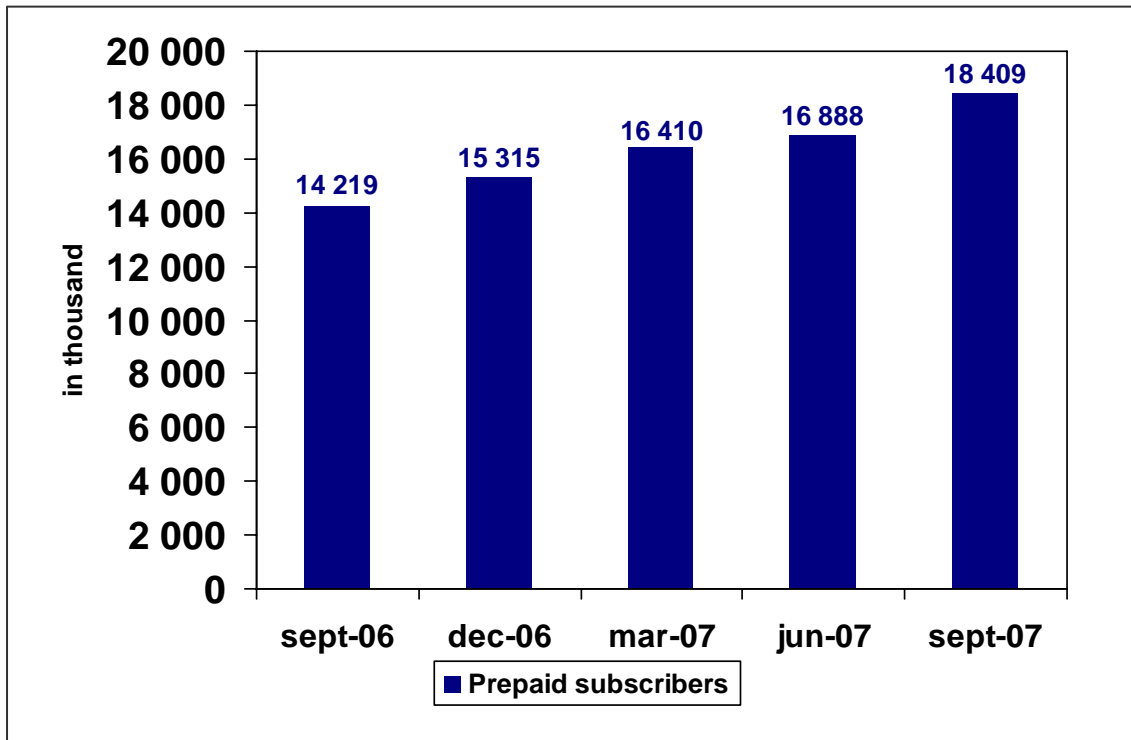
**Net ads in the post-paid market**

<b>Post-paid Mobile subscribers</b>	<b>Sept-06</b>	<b>Dec-06</b>	<b>Mar-07</b>	<b>Jun-07</b>	<b>Sept-07</b>
<b>Net ads<sup>5</sup></b>	<b>20</b>	<b>9</b>	<b>26</b>	<b>34</b>	<b>29</b>
<b>% of growth<sup>6</sup></b>	<b>2.95%</b>	<b>1.34%</b>	<b>3.82%</b>	<b>4.73%</b>	<b>3.90%</b>

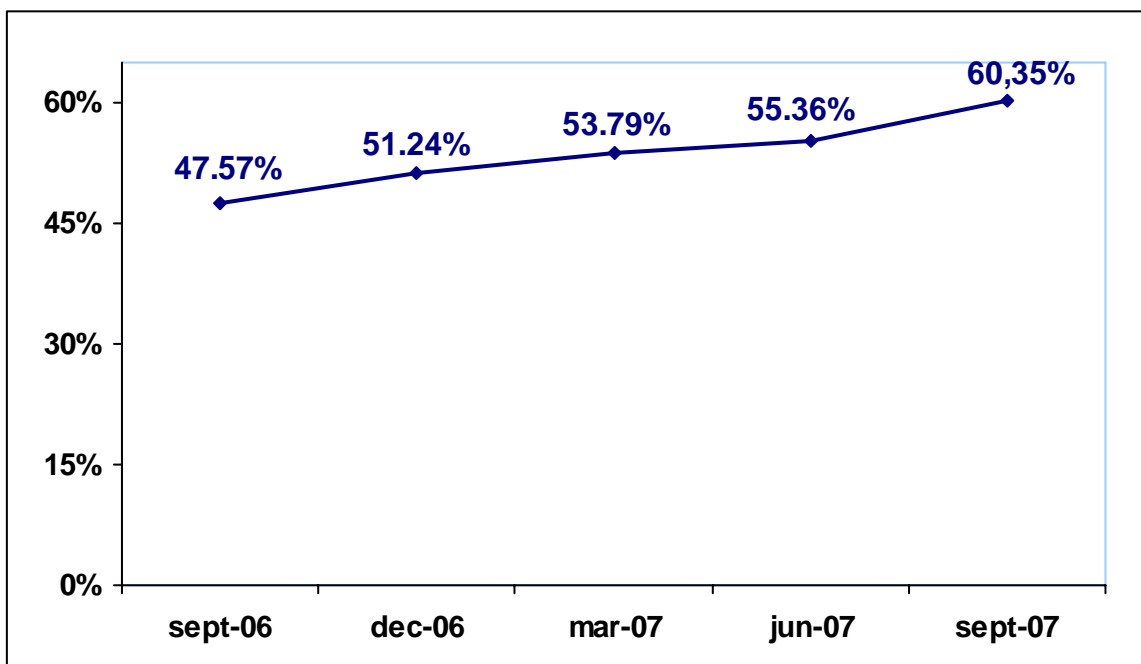
<sup>5</sup> Net ads in the month M equals to the difference between the subscribers number of the months M and M-3

<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>Sept-06</b>	<b>Dec-06</b>	<b>Mar-07</b>	<b>Jun-07</b>	<b>Sept-07</b>
<b>Net ads</b>	<b>1 637</b>	<b>1 096</b>	<b>1 095</b>	<b>478</b>	<b>1 521</b>
<b>% of growth</b>	<b>13%</b>	<b>7.71%</b>	<b>7.15%</b>	<b>2.92%</b>	<b>9%</b>