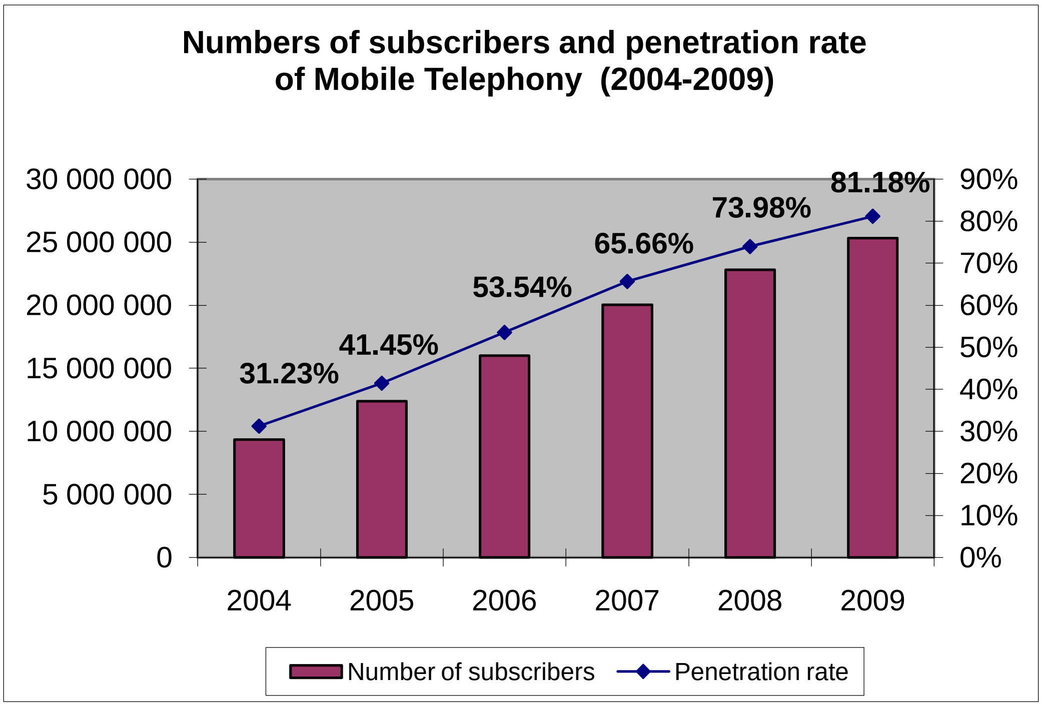
ROYAUME DU MAROC
LE PREMIER MINISTRE
ANRT
الوكالة الوطنية لتقنين المواصلات
Agence Nationale de Réglementation des Télécommunications

THE TELECOMMUNICATIONS SECTOR EVOLUTION IN 2009

Mobile Telephony Market

At the end of the year 2009, the number of mobile subscribers reached **25 310 761**, **an annual growth of 10.94%** (22 815 694 subscribers at December 31st, 2008). The quarterly growth rate of the mobile subscribers recorded different values throughout the year 2008. Indeed, the third quarter of the year 2008 has had the greatest rise with a rate of 6.56% follow-up of the first quarter with 3.07% of growth.

Consequently, this good performance of the mobile telephony segment was reflected positively on the rate of penetration **which gained 7 points in one year** by posting **81.18%** at the end of December 2009 against 73.98% a year before.



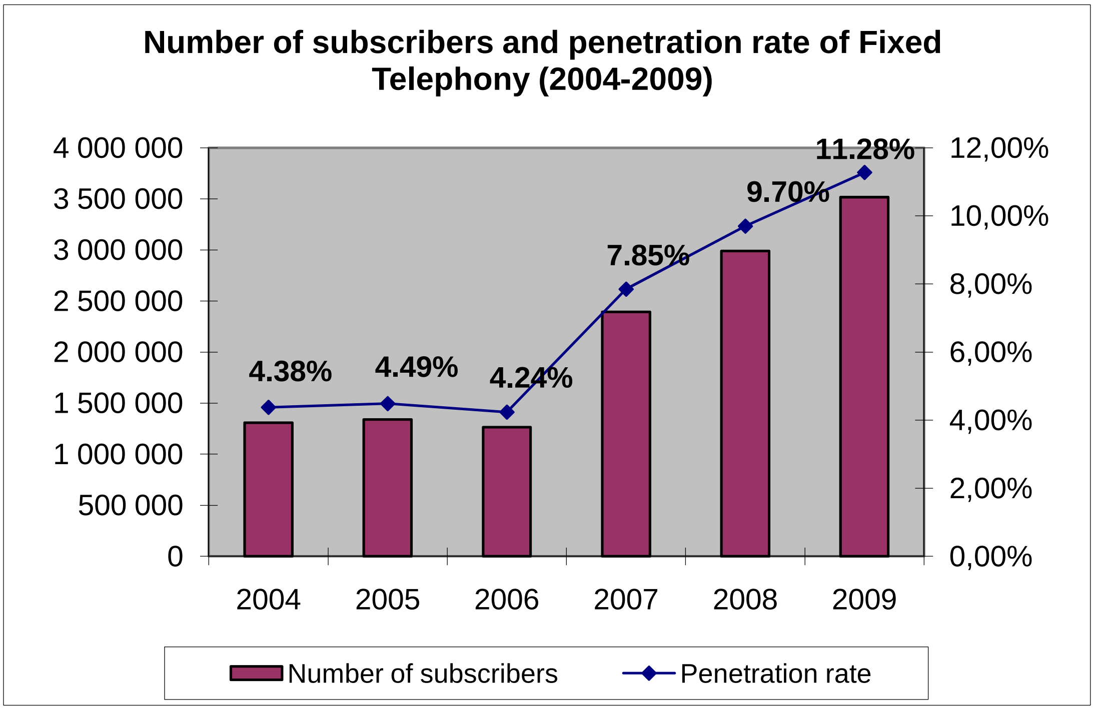
In terms of market share, the incumbent operator holds 60.34% of the mobile subscribers followed by Medi Telecom with 37.27% and Wana Corporate with 2.39%.

With regard to the distribution of mobile customers by type of subscription, we notes that there is no change in the structure of the market compared to last year and that prepaid always prevails with a share of 96% (95.96% at the end of December 2008) against 4% for postpaid. The two types of subscription finished the year with a rather remarkable rise by recording **a growth of 11% for prepaid** and **of 9.65% for postpaid** compared to 2008.

Fixed Telephony Market

The fixed telephony market has achieved **an annual growth of approximately 17.56%**. The total number of subscribers reached **3 516 281** at December 31st 2009 (against 2 991 158 at the end of 2008).

This situation was reflected positively on the rate of penetration which reached **11.28%** at the end of the year 2009 against 9.70% in 2008.

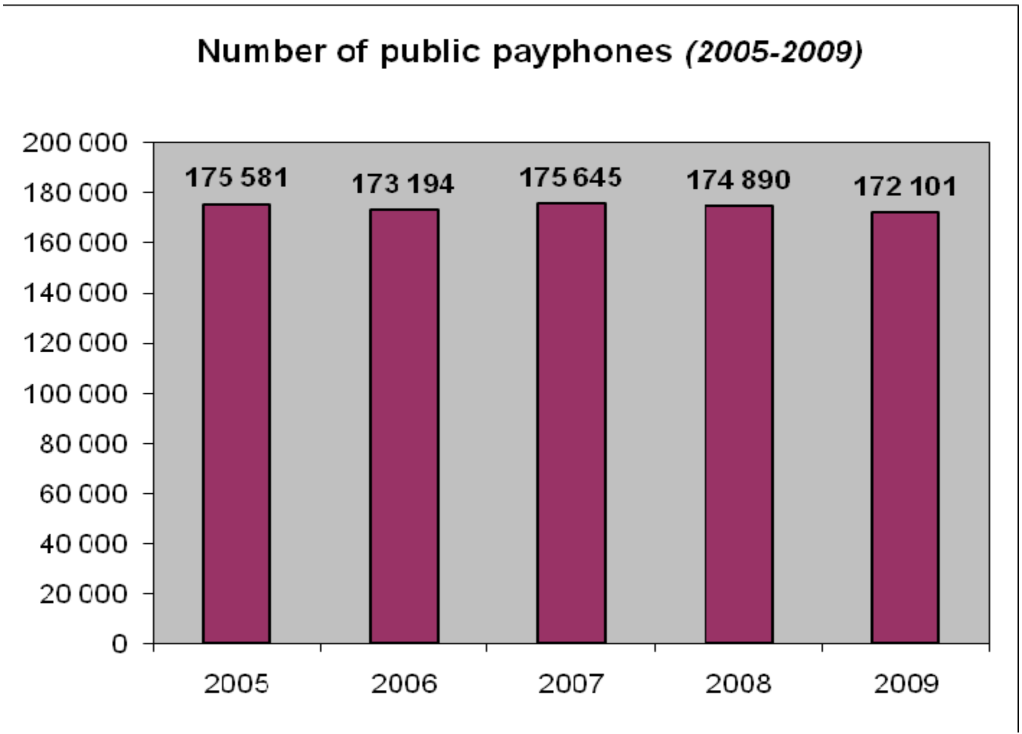


With regard to the shares of the various segments of the market, we notice that the residentials hold the first share with 84.49% at the end of 2009 (82.10% in 2008) followed by professionals with 11.01% and fixed telephony payphones with 4.51% (12.54% for professionals and 5.35% for payphones in 2008).

In terms of market share, Wana Corporate holds 64.60% of the market followed by IAM with 35.10% and Médi Télécom with 0.30%.

Public Payphones[1] Market

At December 31st 2009, the number of public payphones recorded a decrease of 1.59% compared to the end 2008. The total number of public payphones reached **172 101** (against 174 890 at the end of December 2008).



In terms of market share, IAM holds 92.05% of the payphones market and 7.95% for its competitor Medi Télécom at the end of 2009. This figure is slightly different from the previous year in favor of IAM (91.53% for IAM and 8.47% for Medi Telecom).

Internet Market

At the end of 2009, the total Internet subscribers[2] reached **1 186 923** by carrying out an increase of **56.70%** compared to 2008 (757 453 subscribers).

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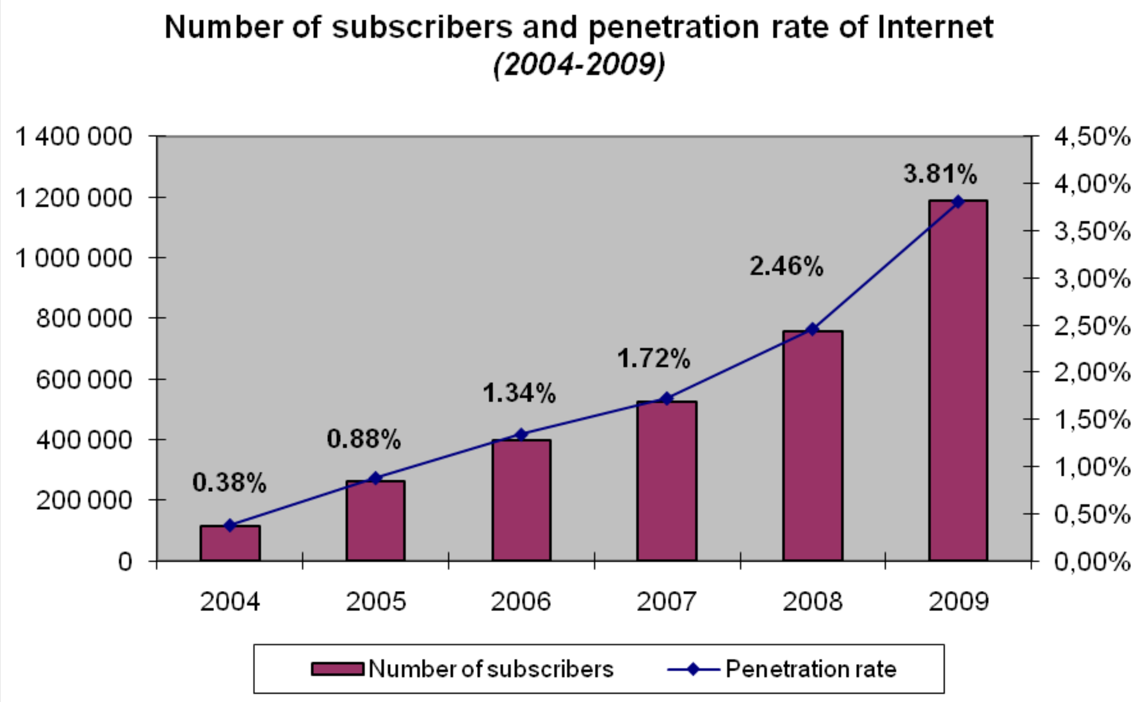
[1] The public payphones includes fixed and GSM phone shops, coin and card public telephones.
[2] The data used for the 'Internet without subscribers' of IAM is provided in September 2009.



In terms of market share, IAM holds 53.96% of the Internet subscribers market followed by Wana Corporate with 32.87% and Medi Telecom with 12.94%.

The number of the narrowband subscribers, by including the users of "Internet access without subscription" option, moved from 5 454 in December 2008 to **4 019** in December 2009, making state of a decrease of **26.32**% during one year.

The number of the broadband subscribers (ADSL) decreases with **an annual rate of -1.70%**, (1.34% of growth in 2008 and 21.9% in 2007), passing from 482 791 subscribers in December 2008 to **474 561** subscribers in December 2009.

At the end of December 2009, the number of 3G Internet subscriber's reached **707 137** by recording an **increase of 163.73%** since December 2008.

The distribution of the subscribers by access mode gives the advantage to the 3G Internet with a market share of **59.58%** at the end of December 2009 and the ADSL access with 39.98%.