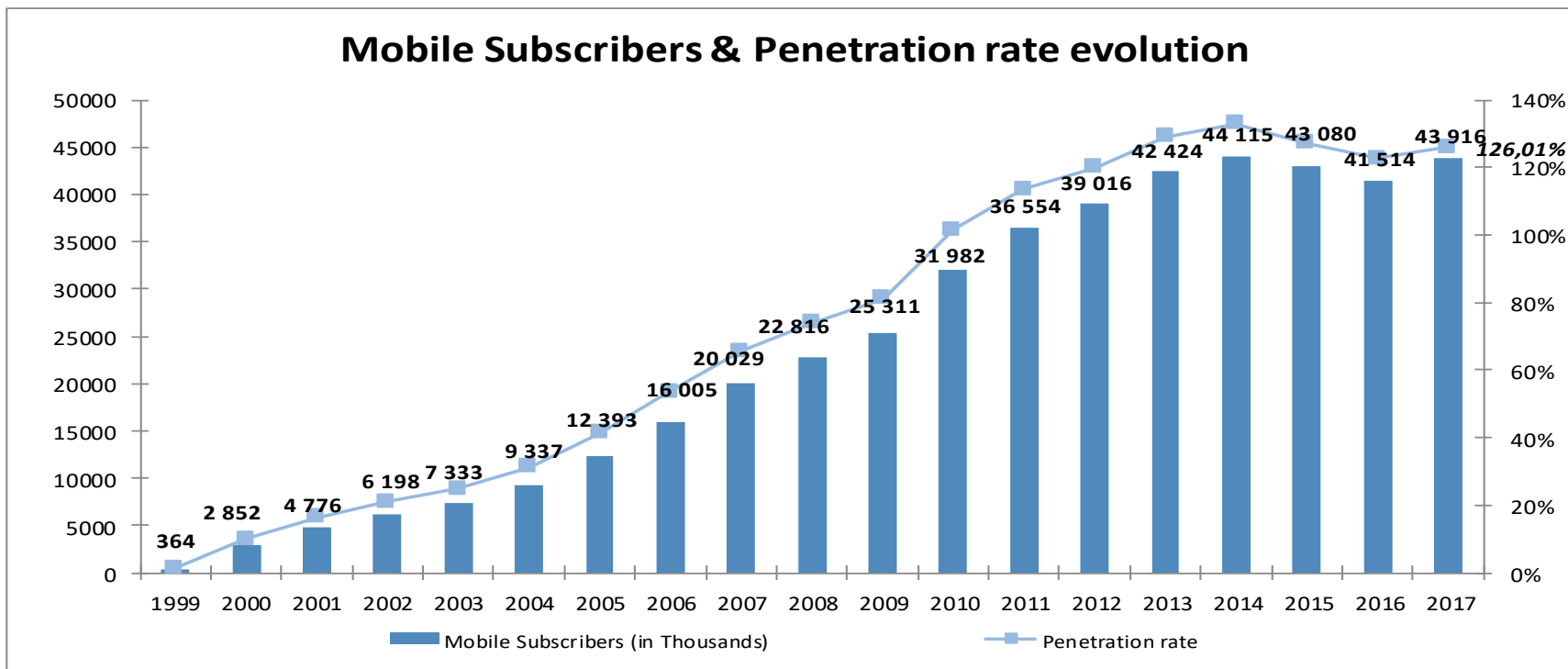
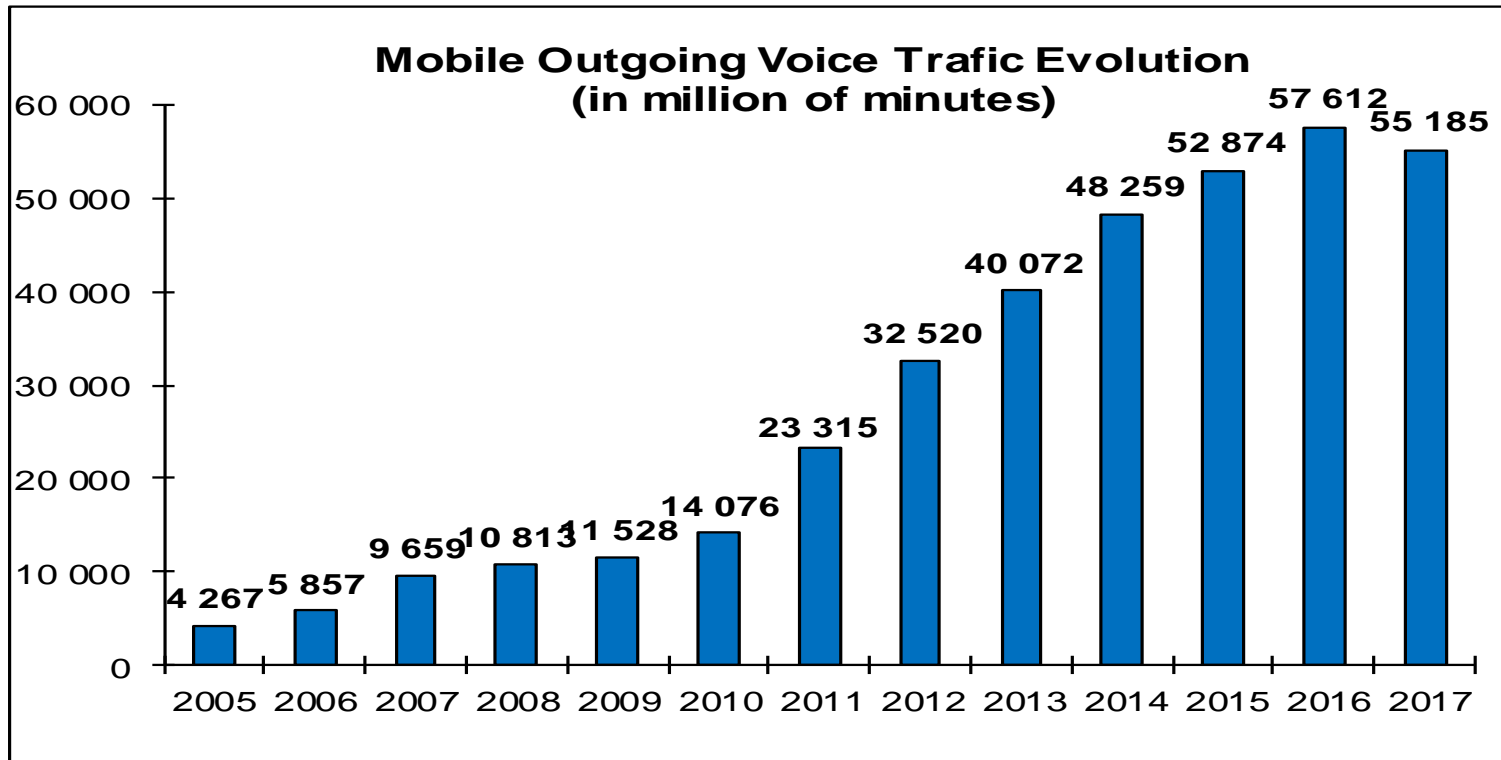


The ICT Sector in Morocco Overview



- The mobile penetration rate reaches 126% at the end of 2017.

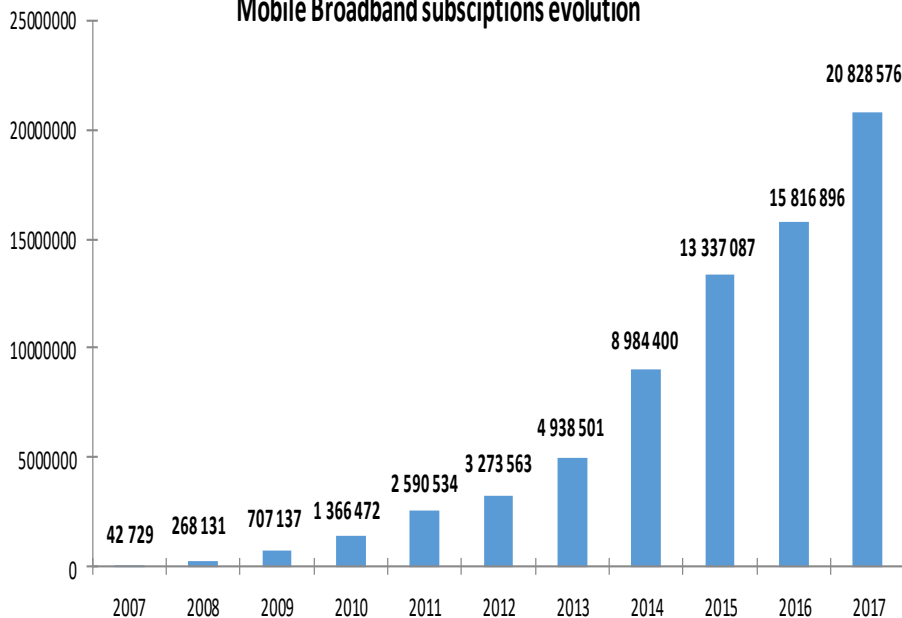
Mobile Telephony: Voice Traffic



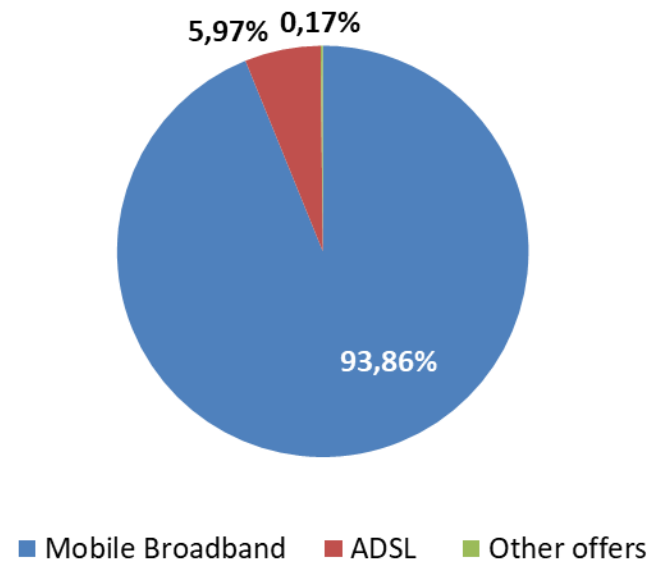
- The Mobile outgoing voice traffic exceeded 55 billions of minutes in 2017.

Internet : Subscribers, Penetration, Type of Access

Mobile Broadband subscriptions evolution

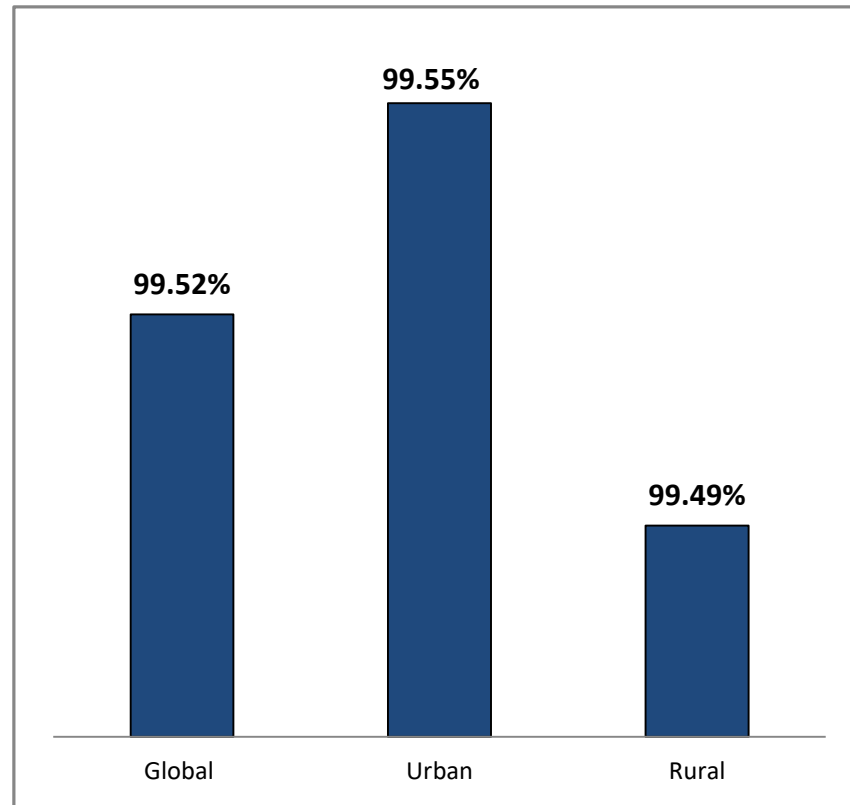


Split of Internet subscriptions by access type
(December 2018)



- Progressive evolution of the Internet market in Morocco with subscribers consisting mainly of mobile broadband (94%).

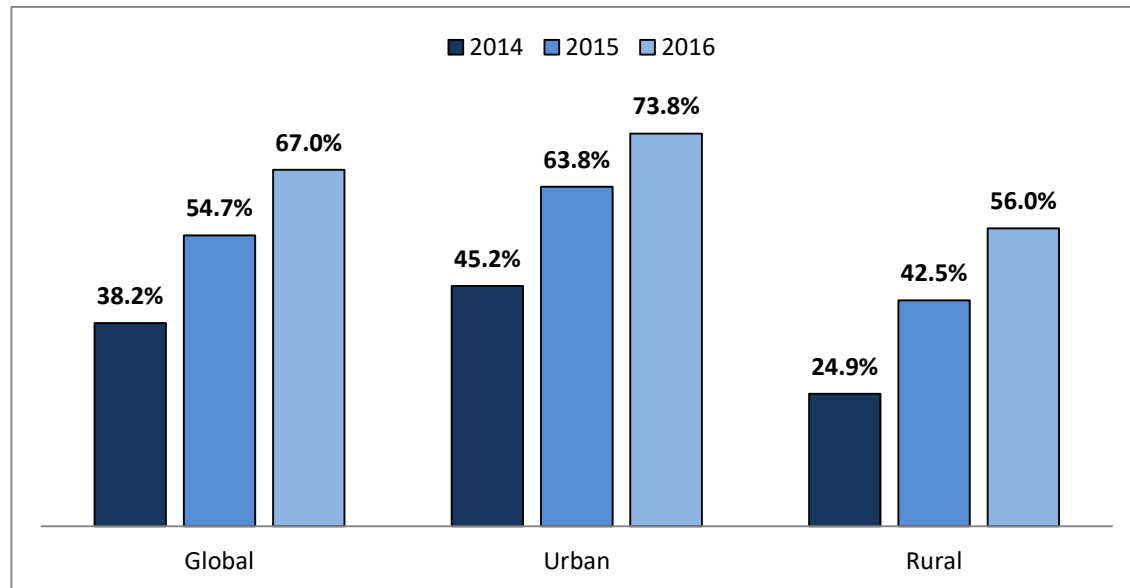
Mobile telephony is widespread in almost all the households in both urban and rural areas.



- **67% of individuals (12-65 years) equipped with mobile phone own at least one smartphone in 2016, showing a significant growth compared to previous years.**
- **In rural area, the Smartphone equipment shows a significant increase moving from 24.9% in 2014 to 56% in 2016.**

INDIVIDUALS EQUIPPED WITH SMARTPHONE

(% of individuals aged 12 to 65 years equipped with mobile phone in e.a.)



UHF Band

- ✓ **4G licenses were attributed, in 2015, to 3 existing mobiles operators.**
- ✓ **At the end of the refarming process of the 800 MHz band, ANRT will allocate 2x10 MHz in 800 MHz band to each operator.**
- ✓ **In the end of 2017, each 4G operator was allowed to use 2x5 MHz in the 800 MHz band.**
- ✓ **Actually, the 800 MHz band are operated by the LTE technologies, CDMA network and some specific mobile use.**
- ✓ **In December 2017, Morocco adopt, after a coordination process with different Departments, including the Broadcasting Authority, a new National Frequency Plan which allocate, for a short term (starting from 2019), part of UHF band to mobile services. The new Plan was published this week.**
- ✓ **The refarming process is now ongoing.**
- ✓ **The replanification of the DVB-T is ongoing in coordination with the concerned Authority.**
- ✓ **Morocco is actually studying and preparing a specific allotment plan for 700 MHz band to respond to the national specific use.**

Thank you