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## 1- Mobile Telecommunications Market

The total number of mobile subscriptions has decreased to 48 million by the end of Q2 2016, with penetration rate of 152%. Prepaid subscriptions constitute the majority (over 84%) of all mobile subscriptions. The decrease in subscriptions is expected to continue in the upcoming period result of the fingerprint requirement for all subscriptions.

**48 Million**

The total number of mobile subscriptions has decreased to 48 million by the end of Q2 2016



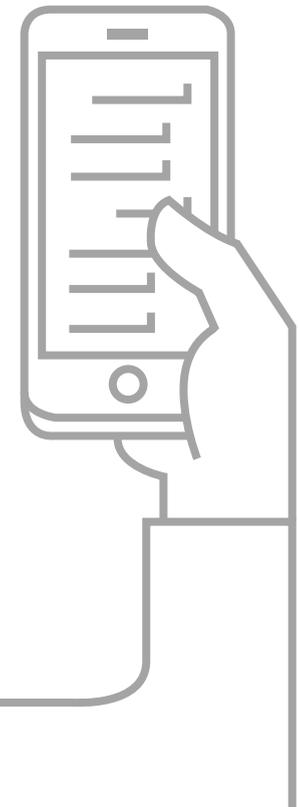
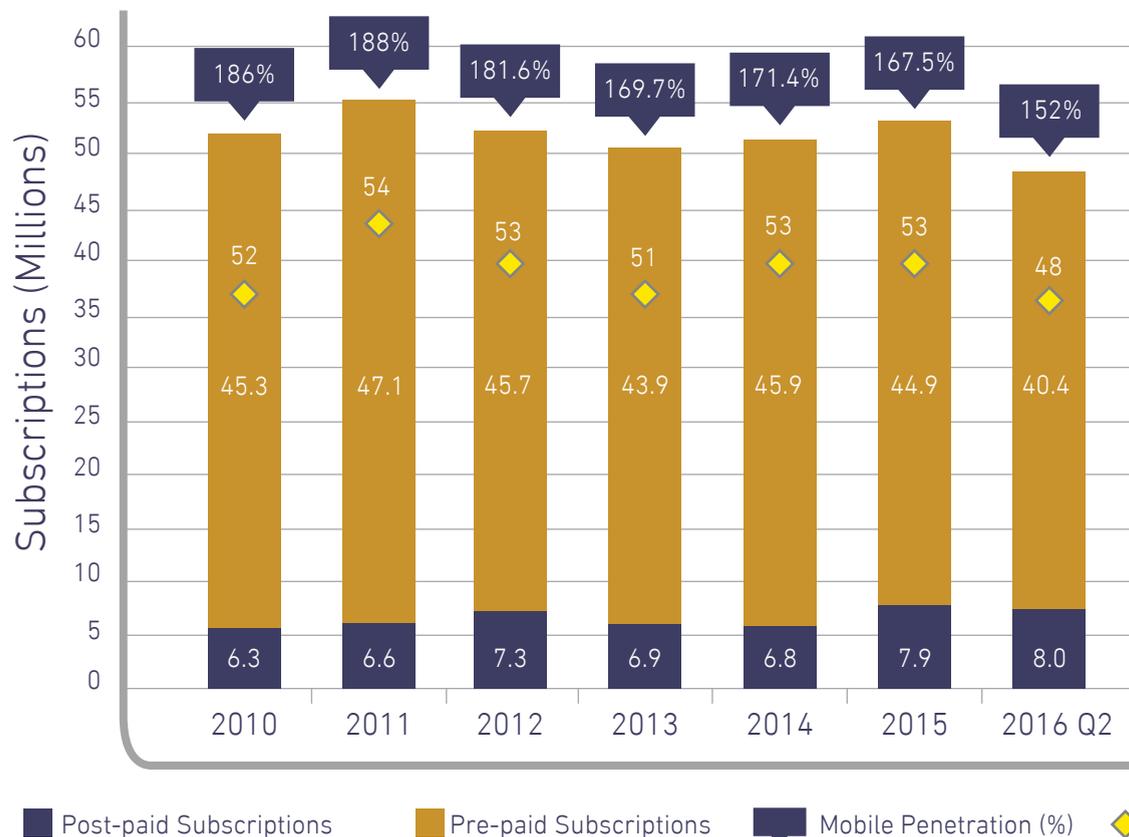
Prepaid subscriptions



**152%**  
penetration rate  
constitute the majority

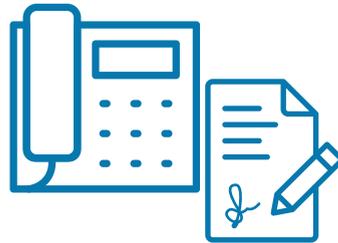


Mobile Service Market Growth-Total Subscriptions



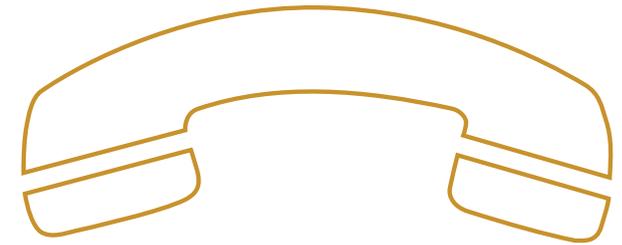
## 2 - Fixed Telephony Market

Fixed telephone lines reached 3.6 million by the end of Q2 2016, of which around 1.9 million or 52% were residential lines. This represents a household teledensity around 31.1 %, while the population teledensity is about 11%, it is noted that the number of subscriptions has continued decreasing due to the competition of the mobile services in prices and variety of offerings which make it a substitution of fixed services for some of the Users.



**3.6 million**

Fixed telephone lines reached 3.6 million by the end of Q2 2016



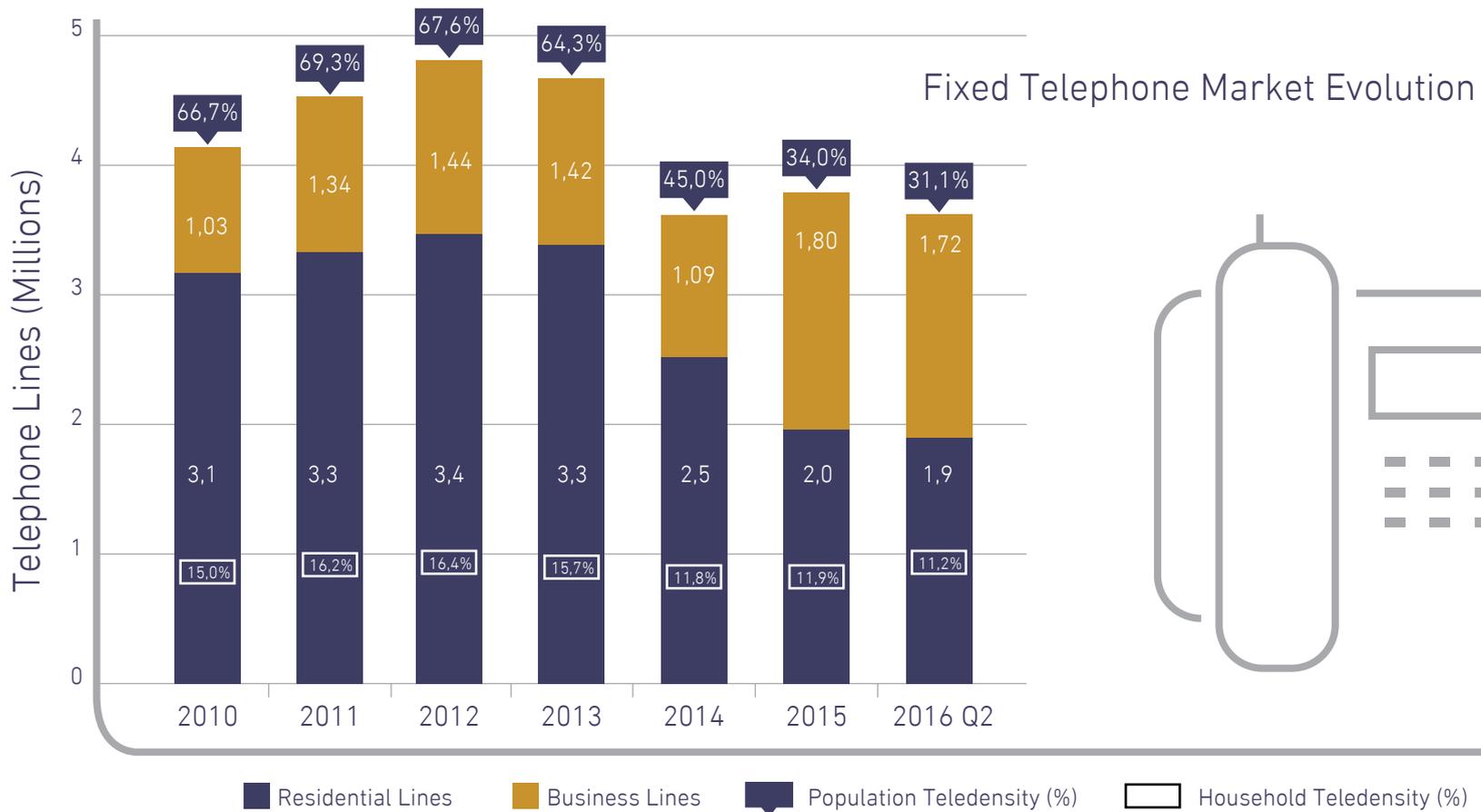
**31.1%**

This represents a household teledensity around 31.1 %



**11%**

the population teledensity is about 11%



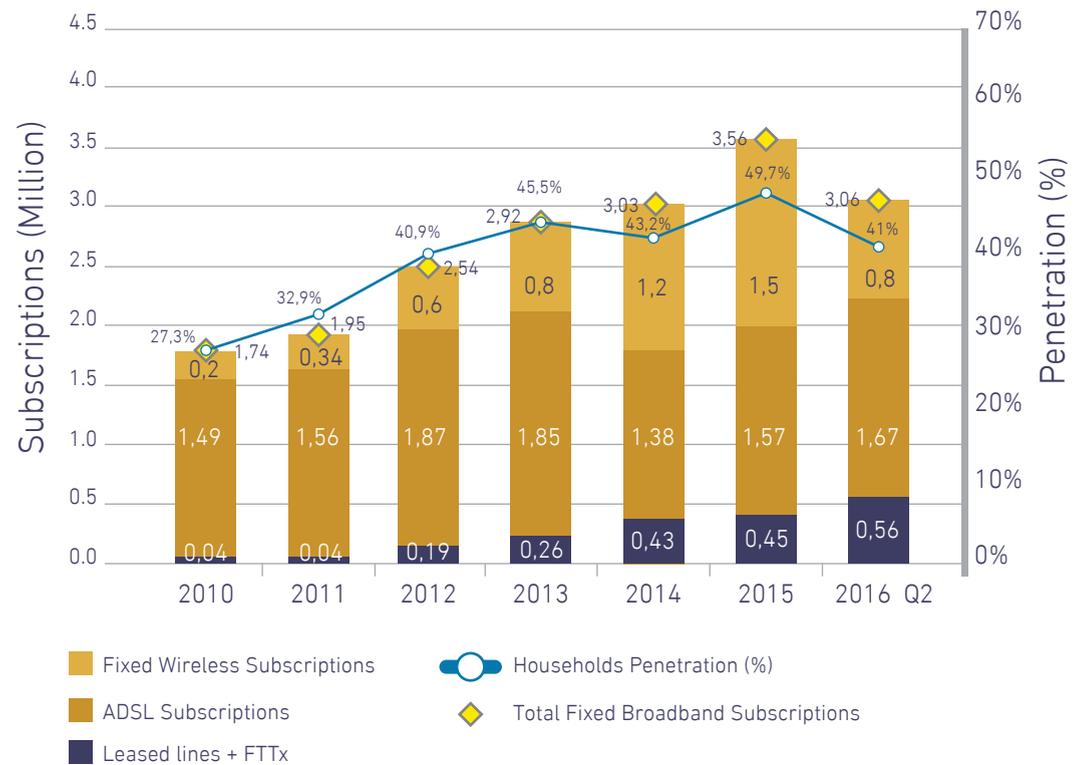
Note: Population teledensity is calculated by dividing the total number of fixed lines by the total population, and household teledensity is calculated by dividing the total number of residential fixed lines by the total number of households.

### 3 - Broadband Market:

#### 3.1. Fixed Broadband Services:

Fixed broadband subscriptions including DSL, fixed wireless (WiMax), FTTx and other fixed lines decreased to reach around 3.06 million subscriptions at the end of Q2 2016. The Fixed broadband penetration rate stands at about 41% of households.

Fixed Broadband Market Evolution



# 3,06

## Million

million subscriptions at the end of Q2 2016

# 41%

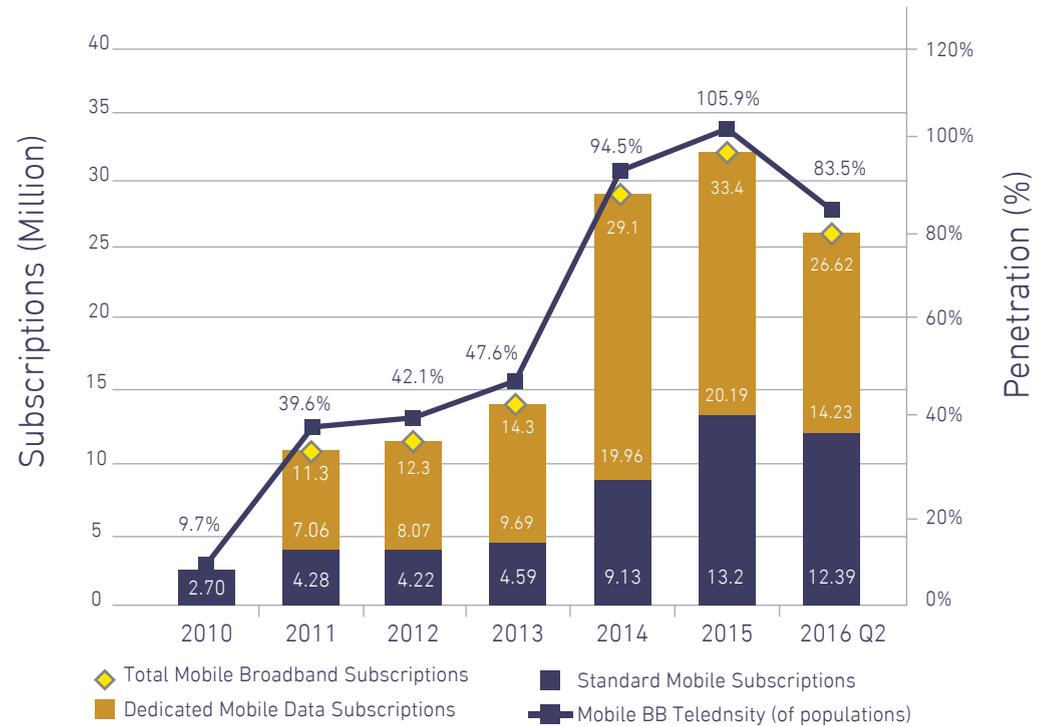
penetration rate stands at about 41% of households

### 3 - Broadband Market:

#### 3.2. Mobile Broadband Services:

The total number of mobile broadband subscriptions decreased to reach around 26.6 million by the end Q2 2016, for all subscriptions representing a population penetration rate of 83.5%. The decreasing is due to the new fingerprint requirement for all subscriptions, and it is expected to continue to decreasing in the upcoming period.

Total Mobile Broadband Subscriptions



**26,6**  
**Million**

The total number of mobile broadband subscriptions decreased to reach around 26.6 million by the end Q2 2016

**83,5%**

subscriptions representing a population penetration rate of 83.5%





## 4 - Internet Services :

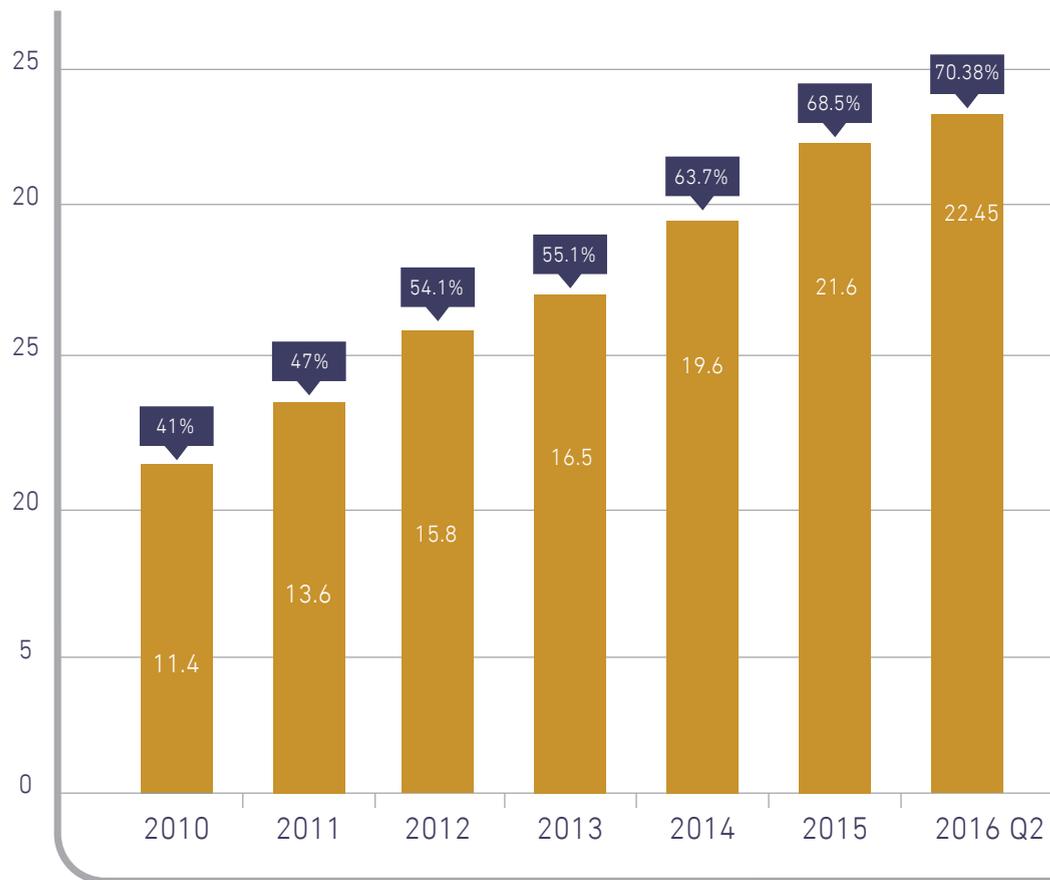
The number of Internet users has increased rapidly in the last years whereas it increased from 41% in 2010 to reach 70.4% by the end of Q2 2016, the number of internet users is about 22.4 million, it's noted that the Increase in the demand for Internet services and broadband was observed due to high use of social networking applications, video on demand (YouTube, snapchat) and gaming. Subscribers are seeking higher speeds and larger packages resulting in heavy data traffic in the past few years.



The number of Internet users has increased rapidly in the last years whereas it increased from

**41%** in 2010 to reach

**70.4%** by the end of Q2 2016



**22.4  
Million**

the number of internet users is about 22.4 million

Internet Penetration (%) Internet Users (Million)

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