

Iraq Infrastructure Report Q3 2016

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Abstracts

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BMI View: The dire security situation and virtually non-existent public spending will deter investment in Iraq's construction sector in the near term. On a positive note, FDI is being promised for the future, especially in its hydrocarbons industry and gas pipeline infrastructure. Meanwhile, the project pipeline remains swollen with large residential developments, but the investment and operating environment make it exceptionally challenging to conduct business.

Latest Updates And Structural Trends

Security and macroeconomic headwinds facing the industry are still firmly in play. Our short-term view remains unchanged with growth in 2016 forecast of 3.3% after several years of contraction.

Long-term growth of a forecast 4.7% annually to 2025 is far below the country's potential, given the need for major reconstruction after years of war. In January 2016 Baghdad cancelled projects worth IQD10tn (USD9bn) and postponed another 2,169 projects worth IQD37tn that had been approved in the 2015 budget as the government faces a severe fiscal crisis brought about by a drastic fall in its oil revenues.

The Iraqi government also announced in January it would not approve projects in 2016.

Nevertheless, our core view is for oil prices to rise from H216, with Iraq making gains against Islamic State forces and the economy to begin slowly improving, which could set in motion a return of investment and activity in the construction

sector from 2017.

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