

Iraq Telecommunications Report Q2 2015

<https://marketpublishers.com/r/IA17203715AEN.html>

Date: April 2015

Pages: 87

Price: US\$ 1,295.00 (Single User License)

ID: IA17203715AEN

Abstracts

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BMI View: Iraq's telecoms market offers a mix of great opportunity and heavy risks. The country's large population and a penetration rate still below 100% underpin our generally positive growth outlook for the country's telecoms sector between 2015 and 2019. Meanwhile, we expect Zain and Asiacell's launch of 3G services at the start of 2015 to be met with strong demand from businesses and consumers alike, and to offset the negative impact of the volatile security situation on their businesses. The arrival of 3G will also drive growth in Iraq's underserved and stagnating broadband market. However, Islamic State continues to occupy a large area of the country, which will keep operational costs high and prevent operators from reaching national coverage with their 3G networks, at least over the next year or two.

Key Data

The mobile market grew 2.0% quarter-on-quarter (q-o-q) in Q414, only partially offsetting losses in Q314, bringing the penetration rate to 93.1%.

ARPU's continued their downward trajectory, reaching a market average of USD9.8 in Q414. The launch of 3G services at the start of 2015 may help to offset the negative impact conflict in the country is having on ARPU.

Iraq's fixed-line and broadband penetration rates remained low at 5.6% and 1.6% respectively at the end of 2014. 3G will improve penetration rates over the coming years.

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