

# Iraq Telecommunications Report Q3 2016

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## Abstracts

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**BMI View:** We have made some forecast revisions in our Q316 report update to account for some major changes in the Iraqi telecommunications landscape. The mobile market contracted by over 10% in 2015, largely driven by IS activity and assaults in various parts of the country. However, we believe that as the government forces ramp up their attacks and look to drive IS out of its controlled zones, there will be a period of further mobile and telecom sector losses in 2016 and 2017. We are forecasting the market to return to growth from 2018 onwards as our new forecast is predicated on the fact that the government liberation of Tikrit, Fallujah and neighbouring villages around Mosul will eventually lead to stronger mobile uptake. We note that in liberated cities such as Tikrit operators are beginning to report an improvement in ARPU and relatively better operating conditions. Political instability, compounded with lower oil prices, is also straining the consumer's ability to spend. Despite these challenges, we are positive on the long-term growth potential of mobile and 3G services, but remain sceptical on the substantial uptake of Mobile Financial Services, given regional trends in the Middle East and North Africa.

### Latest Updates & Industry Developments

The mobile market contracted by 10.2% y-o-y in Q415 as the security situation continues to take its toll. The operators lost 3.29mn subscribers in 2015 and another 122,000 in Q116.

Both Zain and Asiacell's revenues show some signs of recovery in Q116 with the rate of losses slowing down. Take up of 3G services throughout 2016 may help to further stabilise ARPUs over the coming quarters. The take-up of Mobile Financial Services, launched by both Zain and Asiacell may however experience

challenges.

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