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**Iraq Telecommunications Market Opportunities,
Strategies, and Forecasts, 2005 to 2011**

Iraq Telecom



Picture by Susie Eustis

MOUNTAINS OF OPPORTUNITY

**WinterGreen Research, Inc.
Lexington, Massachusetts**

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42 TABLES AND FIGURES

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CHECK OUT THESE KEY TOPICS

INFRASTRUCTURE EQUIPMENT MARKET SHARES
WIRELESS INFRASTRUCTURE EQUIPMENT MARKET FORECASTS
Iraq Telecommunications Market Driving Forces

Iraq Communications Market Description

Iraq Program Management Office
Communications Networking Industry

COMMUNICATIONS INDUSTRY COMPETITIVE FACTORS

ENTERPRISE MARKET CHARACTERISTICS

IRAQ MOBILE LICENSES

IRAQ FIXED LINE TELECOMMUNICATIONS

IP TELEPHONY

WORLDWIDE TELECOMMUNICATIONS MARKETS

COMPETITIVE STRUCTURE OF THE CARRIER MARKET

VOICE INFRASTRUCTURE MARKET

CONVERGED NETWORK REVOLUTION

IRAQ TELECOM TECHNOLOGY PARTNERS

OPPORTUNITY ABOUND

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Iraq Telecommunications Market Opportunities, Market Forecasts, and Market Strategies, 2005-2011

Democracy in combination with an oil rich land has the opportunity to drive a market economy in Iraq. A modern wireless communication system will give citizens the ability to communicate with each other. Where communication is undertaken freely, economies thrive.

Iraq Communications Reconstruction By U.S. has been significant. The U.S. companies Lucent, Bechtel, and Motorola are among those that have significant contracts to rebuild the Iraq telecommunications infrastructure.

Enterprise system is the PSTN/LAN/WAN. The task is to engineer, furnish, install and test all requirements defined in task orders to make the existing and new systems fully operational. The types of technologies may include ISDN switching systems, ATM backbone, Gigabit Ethernet, packet switching, DSLAM services and cellular networks. Japan pledged to help rebuild Iraq's telecommunications system

Iraq requires the full range of telecom equipment, infrastructure and mobile GSM products. The Iraqi authorities have already issued GSM mobile licenses, creating significant demand for phones and other mobile network technology, telecom equipment such as infrastructure products (including cables and connections, masts and antennae), public phone networks, repair equipment and PABX systems, as well as communication software, software consultants and engineers.

Iraq telecommunications market-driving forces relate to the benefits that new infrastructure provides. The benefit of completely rebuilding infrastructure that had been destroyed is that it is new and has the latest features.

Iraq has 26 million people. There are 1.1 million subscriber lines in Iraq, although some of these are not operable. Three licensed GSM networks are in existence, each with a third of the country as its initial area of operations.

Iraq telecommunications and communications fixed wireline and wireless equipment shipment forecast by segment, dollars indicates that markets at \$354.8 million in 2004 are anticipated to continue growing through 2011 when they reach \$515.3 million. Growth continues as penetration of wireless services reach 14% with a significant percentage of the users have prepaid plans.

Companies Profiled

Market Leader

Nokia
Motorola
Siemens

Market Participants

Alcatel
Bechtel
Cisco Systems
Ericsson
Huawei Technologies
Lockheed Martin
NEC
Samsung
UT Starcom

Atheer Telecommunications
CH2M Hill
DynCorp International
Fujitsu
Intel
Lucent Technologies
Nortel
Technology Partners
Veritas Capital

Iraq Telecommunications Strategies and Forecasts, 2005-2011

REPORT METHODOLOGY

THIS IS THE *TWO-HUNDRED AND FORTY FOURTH* REPORT IN A SERIES OF MARKET RESEARCH REPORTS THAT PROVIDE FORECASTS IN COMMUNICATIONS, TELECOMMUNICATIONS, THE INTERNET, COMPUTER, SOFTWARE, TELEPHONE EQUIPMENT, HEALTH EQUIPMENT, AND ENERGY. THE PROJECT LEADERS TAKE DIRECT RESPONSIBILITY FOR WRITING AND PREPARING EACH REPORT. THEY HAVE SIGNIFICANT EXPERIENCE PREPARING INDUSTRY STUDIES. FORECASTS ARE BASED ON PRIMARY RESEARCH AND PROPRIETARY DATA BASES. FORECASTS REFLECT ANALYSIS OF THE MARKET TRENDS IN THE SEGMENT AND RELATED SEGMENTS. UNIT AND DOLLAR SHIPMENTS ARE ANALYZED THROUGH CONSIDERATION OF DOLLAR VOLUME OF EACH MARKET PARTICIPATION IN THE SEGMENT. INSTALLED BASE ANALYSIS AND UNIT ANALYSIS IS BASED ON INTERVIEWS AND AN INFORMATION SEARCH. MARKET SHARE ANALYSIS INCLUDES CONVERSATIONS WITH KEY CUSTOMERS OF PRODUCTS, INDUSTRY SEGMENT LEADERS, MARKETING DIRECTORS, DISTRIBUTORS, LEADING MARKET PARTICIPANTS, OPINION LEADERS, AND COMPANIES SEEKING TO DEVELOP MEASURABLE MARKET SHARE. OVER 200 IN DEPTH INTERVIEWS ARE CONDUCTED FOR EACH REPORT WITH A BROAD RANGE OF KEY PARTICIPANTS AND INDUSTRY LEADERS IN THE MARKET SEGMENT. WE ESTABLISH ACCURATE MARKET FORECASTS BASED ON ECONOMIC AND MARKET CONDITIONS AS A BASE. USE INPUT/OUTPUT RATIOS, FLOW CHARTS, AND OTHER ECONOMIC METHODS TO QUANTIFY DATA. USE IN-HOUSE ANALYSTS WHO MEET STRINGENT QUALITY STANDARDS. INTERVIEWING KEY INDUSTRY PARTICIPANTS, EXPERTS AND END-USERS. OUR RESEARCH INCLUDES ACCESS TO LARGE PROPRIETARY DATABASES. LITERATURE SEARCH INCLUDES ANALYSIS OF TRADE PUBLICATIONS, GOVERNMENT REPORTS, AND CORPORATE LITERATURE.

YOU MUST HAVE THIS STUDY

Iraq Telecommunications Market Opportunities, Strategies, and Forecasts, 2005 to 2011

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ABOUT THE COMPANY

WINTERGREEN RESEARCH, HAS A UNIQUE RESEARCH STRATEGY THAT RELATES TO IDENTIFYING MARKET TRENDS THROUGH READING AND INTERVIEWING OPINION LEADERS. BY READING THE ELECTRONIC EQUIVALENT OF 40 FEET OF PAPER, WINTERGREEN RESEARCH SENIOR ANALYSTS CAN LEARN A LOT MORE ABOUT MARKETS, A LOT FASTER THAN CAN BE LEARNED THROUGH EXPENSIVE SURVEYS AND FOCUS GROUPS. THINKING ABOUT MARKET TRENDS IS A HIGH PRIORITY AT WINTERGREEN RESEARCH. AS WITH ALL RESEARCH, THE VALUE PROPOSITION FOR COMPETITIVE ANALYSIS COMES FROM INTELLECTUAL INPUT.

IT IS A LUXURY REALLY, AVAILABLE TO ONLY A VERY FEW PEOPLE, TO BE ABLE TO GATHER INFORMATION, LOTS OF INFORMATION FROM READING MASSIVE AMOUNTS OF CONTENT, AND THEN TRYING TO MAKE SENSE OF THAT CONTENT. THE ABILITY TO THINK ABOUT MARKET TRENDS IS ENHANCED BY DOING IT OVER AND OVER FOR MANY DIFFERENT MARKETS. THAT IS WHAT WINTERGREEN RESEARCH IS ALL ABOUT: READING AND THINKING IS AN ESSENTIAL ASPECT OF COMPETITIVE ANALYSIS. TALKING TO OPINION LEADERS IS THE THIRD ESSENTIAL ASPECT OF PRODUCING GOOD, RELIABLE DATA.

WINTERGREEN RESEARCH, FOUNDED IN 1985, PROVIDES STRATEGIC MARKET ASSESSMENTS IN TELECOMMUNICATIONS, COMMUNICATIONS EQUIPMENT, HEALTH CARE, INTERNET AND ADVANCED COMPUTER TECHNOLOGY. INDUSTRY REPORTS FOCUS ON OPPORTUNITIES THAT EXPAND EXISTING MARKETS OR DEVELOP MAJOR NEW MARKETS. THE REPORTS ASSESS NEW PRODUCT AND SERVICE POSITIONING STRATEGIES, NEW AND EVOLVING TECHNOLOGIES, AND TECHNOLOGICAL IMPACT ON PRODUCTS, SERVICES, AND MARKETS. MARKET SHARES ARE PROVIDED. LEADING MARKET PARTICIPANTS ARE PROFILED, AND THEIR MARKETING STRATEGIES, ACQUISITIONS, AND STRATEGIC ALLIANCES ARE DISCUSSED. THE PRINCIPALS OF WINTERGREEN RESEARCH HAVE BEEN INVOLVED IN ANALYSIS AND FORECASTING OF INTERNATIONAL BUSINESS OPPORTUNITIES IN TELECOMMUNICATIONS AND ADVANCED COMPUTER TECHNOLOGY MARKETS FOR OVER 30 YEARS.

ABOUT THE PRINCIPAL AUTHORS

ELLEN T. CURTISS, TECHNICAL DIRECTOR, CO-FOUNDER OF WINTERGREEN RESEARCH, CONDUCTS STRATEGIC AND MARKET ASSESSMENTS IN TECHNOLOGY-BASED INDUSTRIES. PREVIOUSLY SHE WAS A MEMBER OF THE STAFF OF ARTHUR D. LITTLE, INC., FOR 23 YEARS, MOST RECENTLY AS VICE PRESIDENT OF ARTHUR D. LITTLE DECISION RESOURCES, SPECIALIZING IN STRATEGIC PLANNING AND MARKET DEVELOPMENT SERVICES. SHE IS A GRADUATE OF BOSTON UNIVERSITY AND THE PROGRAM FOR MANAGEMENT DEVELOPMENT AT HARVARD GRADUATE SCHOOL OF BUSINESS ADMINISTRATION. SHE IS THE AUTHOR OF RECENT STUDIES ON WORLDWIDE TELECOMMUNICATIONS MARKETS, THE TOP TEN INTERNET EQUIPMENT COMPANIES, THE TOP TEN CONTRACT MANUFACTURING COMPANIES, AND THE TOP TEN TELECOMMUNICATIONS MARKET ANALYSIS AND FORECASTS.

SUSAN EUSTIS, PRESIDENT, CO-FOUNDER OF WINTERGREEN RESEARCH, HAS DONE RESEARCH IN COMMUNICATIONS AND COMPUTER MARKETS AND APPLICATIONS. SHE HOLDS SEVERAL PATENTS IN MICROCOMPUTING AND PARALLEL PROCESSING. SHE HAS THE ORIGINAL PATENTS IN ELECTRONIC VOTING MACHINES. SHE HAS NEW PATENT APPLICATIONS IN FORMAT VARYING, MULTIPROCESSING, AND ELECTRONIC VOTING. SHE IS THE AUTHOR OF RECENT STUDIES OF THE REGIONAL BELL OPERATING COMPANIES' MARKETING STRATEGIES, INTERNET EQUIPMENT, BIOMETRICS, A STUDY OF INTERNET EQUIPMENT, WORLDWIDE TELECOMMUNICATIONS EQUIPMENT, TOP TEN TELECOMMUNICATIONS, DIGITAL LOOP CARRIER, WEB HOSTING, WEB SERVICES, AND APPLICATION INTEGRATION MARKETS. MS. EUSTIS IS A GRADUATE OF BARNARD COLLEGE.

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SUBSCRIBERS OUTSIDE THE UNITED STATES MUST PROVIDE PREPAYMENT IN U.S. FUNDS

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