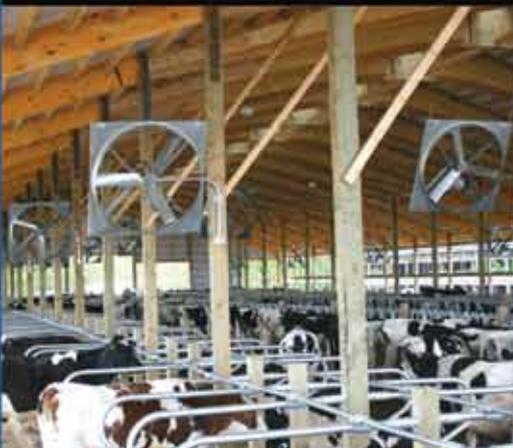


INVEST TO MOSUL INVEST TO FUTURE

MUSUL'A YATIRIM GELECEĐE YATIRIM DEMEKTİR

الاستثمار في نينوى يعني الاستثمار للمستقبل

CENTER FOR MIDDLE EASTERN STRATEGIC STUDIES
ORTADOĐU STRATEJİK ARAŐTIRMALAR MERKEZİ
مركز الشرق الأوسط للدراسات الاستراتيجية



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CENTER FOR MIDDLE EASTERN STRATEGIC STUDIES

History

In Turkey, the shortage of research on the Middle East grew more conspicuous than ever during the early 90's. Center for Middle Eastern Strategic Studies (ORSAM) was established in January 1, 2009 in order to provide relevant information to the general public and to the foreign policy community. The institute underwent an intensive structuring process, beginning to concentrate exclusively on Middle affairs.

Outlook on the Middle Eastern World

It is certain that the Middle East harbors a variety of interconnected problems. However, neither the Middle East nor its people ought to be stigmatized by images with negative connotations. Given the strength of their populations, Middle Eastern states possess the potential to activate their inner dynamics in order to begin peaceful mobilizations for development. Respect for people's willingness to live together, respect for the sovereign right of states and respect for basic human rights and individual freedoms are the prerequisites for assuring peace and tranquility, both domestically and internationally. In this context, Turkey must continue to make constructive contributions to the establishment of regional stability and prosperity in its vicinity.

ORSAM's Think-Tank Research

ORSAM, provides the general public and decision-making organizations with enlightening information about international politics in order to promote a healthier understanding of international policy issues and to help them to adopt appropriate positions. In order to present effective solutions, ORSAM supports high quality research by intellectuals and researchers that are competent in a variety of disciplines. ORSAM's strong publishing capacity transmits meticulous analyses of regional developments and trends to the interested parties. With its web site, its books, reports, and periodicals, ORSAM supports the development of Middle Eastern literature on a national and international scale. ORSAM supports the development of Middle Eastern literature on a national and international scale. ORSAM facilitates the sharing of knowledge and ideas with the Turkish and international communities by inviting statesmen, bureaucrats, academics, strategists, businessmen, journalists, and NGO representatives to Turkey.

* ORSAM is a member of the The Middle East Studies Association (MESA).



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Serhat Erkmen, who was born in 1975 in İstanbul, graduated from Ankara University Faculty of Political Science Department of International Relations. He completed his master's degree and doctoral study at Ankara University Institute of Social Sciences. Working as Middle East Researcher in Center for Eurasian Strategic Studies between the years 2000-2008, Erkmen has been working as ORSAM Middle East Advisor since 2009. Also, Erkmen has been Head of Department of International Relations at Kırşehir Ahi Evran University since 2009.

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PRESENTATION

Mosul, which is one of the most important provinces of Iraq, has been struggling to overcome the post-invasion problems. Mosul, which is the second largest and important Iraqi city after Baghdad in terms of population, economy, political impact, educational status and also in many other aspects, could not get the attention it deserved. The fact that security problem, which Mosul that is also one of the leading intellectual centers of the country since the establishment of Iraq drifted into, started to be overcome launched a new period for the city. Although security situation created a disadvantage for Mosul until recently, it can be suggested that the security problem in Mosul has currently been overcome to a large extent. In addition to this, the increasing political stability since 2009 and the settlement among the most powerful actors of Mosul Province makes the area convenient for investment. Its 3.5 million population, large agricultural lands, thousands of years of commercial experience, rich natural resources and its strategic geographical position would turn Mosul into one of the most important investment areas of Iraq. Mosul also takes its share from distrustful outlooks of foreign investors towards Iraq. While Mosul, or alias Nineveh Province, expects to receive foreign investors from other countries in order to overcome economic problems and unemployment which is its biggest problem; the sympathy of Mosul population towards Turkey increases the chance of success for the Turkish companies in this region. This short study was put down on paper to outline the general situation in Mosul, which is located right beside Turkey and could turn into a great investment center in the near future. In this context, ORSAM team went to Mosul, made observations in the field, and talked to leading economic circles of the city. As a result of these, this short study outlining the economic situation and investment opportunities in Mosul came out. Lastly, we believe that publishing this study before the Nineveh Investment Conference to be carried out in İstanbul between 2-3 May 2012 would be good.

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INVEST TO MOSUL INVEST TO FUTURE

Executive Summary

- *Nineveh, whose provincial capital is Mosul that is the second largest province of Iraq, has been in search of opening up to the world again after a long period of recession. Mosul, which has a young, dynamic, intellectual population, has set off on a quest to develop.*
- *Nineveh Province, which is composed of 9 districts and 21 sub-districts, is also generally known as Mosul Province due to the name of Mosul, chief city of the province. In the province with some 3,5 million population in total, there is a young and dynamic population.*
- *Mosul, where security problem has been solved to a great extent, has become a significant center of trade besides becoming a cultural and historical center as well. In Nineveh, where more than 2000 industrial and trade organizations are found, a strong trade culture has been developed with the influence of thousands of years of experience and habitudes.*
- *Mosul is a sister city, which offers great investment opportunities and which has been undiscovered and waiting to sincerely receive Turkish businessmen with open arms*
- *Mosul provides major transportation facilities through its strategic geography. There are various means of transportation from Turkey to Mosul, which is situated on the intersection point of Iraq, Turkey and Syria.*
- *Mosul is one of the most important agricultural city of Iraq. With its extensive irrigation opportunities, fertile lands and traditions dating back to centuries, Mosul provides a major raw material resource for investments to be made in food industry.*
- *Mosul provides skilled and unskilled cheap labor opportunity. 8. Economic conditions in Iraq and lack of sufficient investment for years leads to a major unemployment in the country. According to the official figures, the unemployment rate reaching 30 % leads both skilled and unskilled labour to cost cheap.*

INVESTMENT OPPORTUNITIES IN MOSUL:



Nineveh, whose provincial capital is Mosul that is the second largest province of Iraq, has been in search of opening up to the world again after a long period of recession. Mosul, which has a young, dynamic, intellectual population, has set off on a quest to develop. People in Mosul believe that the best way to develop is to establish closer economic relations with Turkey. So that, Mosul turned towards Turkey and set off on a quest of cooperation opportunities with her. Therefore, the Nineveh Investment Conference to be held in İstanbul between the dates 2-3 May 2012 is considered to be the first step of relations that will last for many more years and that will serve as a permanent bridge between Mosul and the rest of the world.

BASIC INFORMATION ABOUT MOSUL

The Nineveh Province, which is located in the northwest of Iraq, is situated on the borders of Turkey and Syria. The center of Nineveh Province, which shares a long borderline with Syria, is approximately 100 km. away from the Turkish border. Nineveh Province, which is composed of 9 districts and 21 sub-districts, is also generally known as Mosul Province due to the name of Mosul, chief city of the province. In the province with some 3,5 million population in total, there is a young and dynamic population. In Mosul, about which a negative table was drawn in the world press because of the security problems between the years 2005-2009, a considerable amelioration has been made in the field of security for the past three years.

Mosul, where security problem has been solved to a great extent, has become a significant center of trade besides becoming a cultural and historical center as well. In Nineveh, where more than 2000 industrial and trade organizations are found, a strong trade culture has been developed with the influence of thousands of years of experience and habits. The Tigris River, which runs through Mosul that is a city where historical trade routes intersect for thousands of years, vitalize the city. Tigris River, which vitalizes and creates incredible natural beauties wherever it passes through, forms the basis of agricultural activities in the city. In addition to the water resource provided by the Tigris River, also thanks to big irrigation channels, there is an agricultural area of 19.000 km² in Nineveh Province with large agricultural areas.

WHY SHOULD INVEST IN MOSUL?

1- Mosul is a sister city, which offers great investment opportunities and which has been undiscovered and waiting to sincerely receive Turkish businessmen with open arms: As Mosul has not received investment



for a long time, it is need of being invested in every aspect. Being one of the most important cities of the Middle East, Mosul has just been opening up to the outside world. Going to Mosul, where foreign companies has not reached yet, before other companies would mean investing not only in today but also to the future.

2- Mosul has a fast growing, young and dynamic population structure: Mosul, whose 50% of the population is composed of youth under the age of 18, offers a major market potential.

3- Mosul is one of the biggest education centers of Iraq: University of Mosul, which the second largest university of Iraq, has graduated many well-known engineers, doctors and scientists for many years. Educated population offers a big resource in terms of skilled labour that investor might need. In addition to this, Research Centers, which were established within the University of Mosul, have the enough capacity to produce basis for research projects that can promote investments.

4- Mosul provides major transportation facilities through its strategic geography: There are various means of transportation from Turkey to Mosul, which is situated on the

intersection point of Iraq, Turkey and Syria. Turkish Airlines have direct flights between İstanbul and Mosul during 4 days (Tuesday, Thursday, Friday and Sunday) per week. In addition to this, there are flights between Mosul and Baghdad during 2 days (Wednesday-Sunday) per week. Besides, land transportation is extremely easy and safe. There is also opportunity to reach Mosul from our country through railway transportation.

5- Mosul is an industrial city: Mosul is the second largest industrial city of Iraq with its more than 1500 large and small companies. Mosul, which is in need of foreign investor's attention to be able to activate its capacity that has remained idle for a long time, is open up to investment in many fields such as cement, brick, textile in particular.

6- Mosul draws attention with its natural resources: Mosul, which has important and strategic resources such as oil, natural gas and sulphur, will become one of the most important cities of the whole Middle East within the next ten years.

7- Mosul is one of the most important agricultural city of Iraq: With its extensive irrigation opportunities, fertile lands and traditions dating back to centuries, Mosul provides a major raw material resource for investments to be made in food industry.

8- Mosul provides skilled and unskilled cheap labor opportunity: Economic conditions in Iraq and lack of sufficient investment for years leads to a major unemployment in the country. According to the official figures, the unemployment rate reaching 30 % leads both skilled and unskilled labour to cost cheap.

9- Mosul is an important tourism city: Mosul, which embodies many archaeological artifacts due to its thousands of years of history, grabs the attention through its natural beauties as well. Incredible sceneries brought



out through areas irrigated by Tigris provide an important tourism potential to the city. In addition to this, Mosul is also a religious tourism city. There are places and tombs of many prominent religious figures, the Tomb of Prophet Jonah in particular. The fact that tourism infrastructure of the city is not developed despite all these tourism opportunities causes to a major need and opportunity for investments to be made on tourism in Mosul.

WHERE TO INVEST IN MOSUL?

FOOD

Mosul offers a major potential in terms of viniculture and horticulture as well as cereal products in its agricultural lands. While cereal production, made in many areas of the province, provides investment opportunities in food sector and flour companies in particular; horticulture provides investment oppor-

tunities for other food products as well. On the other hand, besides the agricultural lands in the city, vast potential of livestock creates productive areas for sectors such as milk and milk products, leather and wool etc.

TOURISM

Despite having the potential of being one of the most important tourism cities of Iraq, insufficiency of facilities prevents this potential of Mosul from being put into practice. The most important deficiency of Mosul, where transportation problem does not exist in terms of geography, is the lack of sufficient number of safe, comfortable and modern facilities. Mosul, which is open to a substantial tourism investment, offers great opportunities for Turkey and Turkish businessmen due to their cultural intimacy and social relationship.



CONSTRUCTION

Mosul, which has been going through infrastructure deficiency for years, has not overcome the impacts of war yet. The city has a major infrastructure need; such as traffic, housing and sewage system in particular. The fast-growing population creates new housing requirements. In Mosul, which is one of the most populous cities in Iraq, safe, modern, comfortable settlement complexes. It is foreseen that Mosul will turn into a construction yard within a few years in parallel with the enrichment of Iraq. It might be suggested that pioneering companies in the sector will have substantial advantages.

It is observed that bridge crossing and road construction works are needed in lots of points; as the Tigris River, which passes through the city, causes to traffic congestion in many areas. Besides, there is a considerable deficiency of sewerage infrastructure in the city as well as throughout Iraq. In the forthcoming period, there will be great opportunities for Turkish companies in the process of eliminating infrastructure needs of the city.

INVESTMENT FACILITIES AND INCENTIVES

In accordance with the law, which entered in force in 2007 and constitutes the basis of Regional Investment Commissions that were created within the frame of National Investment Commission; certain facilities and incentives are provided for foreign investors

coming to Iraq. These facilities and incentives are listed as follows:

- * Transferring profit and capital abroad,
- * Right to carry out transactions (in security and stock market) in Iraqi exchange market,
- * Leasing or assigning lands, required for investment, to the investors for 50 years (extendable) under favorable conditions,
- * Right to ensure a project to a local or foreign insurance company,
- * Opening an account in foreign or local currency in Iraqi banks for the projects approved by the investment board.

In addition to the above-mentioned points, the following additional opportunities are given to companies that once receive investment license:

- * Assets imported for expansion, development and modernization of investment are exempted from customs duty,
- * Assets imported for expanding the investment capacity are exempted from customs duty and other fees,
- * The spare parts imported within the scope of project are exempt from tax on condition that their value does not pass 20 % of their asset value,
- * Certain additional customs duty exemptions are made in importation of furniture, furnishing and etc. for hotels, touristic buildings, hospitals, healthcare organizations, rehabilitation centers, educational and scientific institutions.

The Nineveh Province provides certain additional opportunities for investors in addition to the aforesaid points within the frame of general investment Law in Iraq. The most

outstanding points among those are listed as follows:

- * Exemption from income tax provided for 10 or more years for the companies that would like to make an investment
- * Leasing or assigning investment lands for 50 years,

In addition to this, the following assurances are given to foreign investors by the Iraqi government within the same law:

- * Foreign employees might be recruited in case Iraqi employees with required skills cannot be found,
- * Great convenience is provided for foreign employees working in Iraq in obtaining residence permit as well as in entry into and exit from the country,
- * As long as no opposite verdict is reached, it is guaranteed that investment shall not be nationalized partly or as a whole.
- * Non-Iraqi employees might transfer their earnings abroad.

Some Important Statistics on Mosul

EXPENSE INDEXES IN MANUFACTURING INDUSTRY BETWEEN 1999-2008 (100 =1988)									
Grup									
Years	General Index	Basic Metal Industry	Non-metal Industry	Petroleum Industry	Chemical Industry	Wood and Paper	Textile and Shoe	Beverage and Tobacco	Food Product Industry
Weight	1000	105	112	238	100	55	137	172	81
1999	72996	138431	69864	7355	107491	224098	82924	91292	156625
2000	80601	170362	83778	10499	119895	204468	83861	101092	153954
2001	81688	156321	94689	11397	94911	225751	105794	94327	160646
2002	86910	193616	97010	14666	95283	263438	103025	81633	158054
2003	*99979	85449	442068	16903	88924	86972	67470	*79541	144734
2004	175581.5	194606.2	486557.6	29648.9	209140.4	164937.1	120451.8	159824.5	242218.0
2005	216746.3	194841.8	560868.3	75643.6	290260.8	202174.1	171697.4	183541.5	249754.6
2006	247472.2	211082.7	630507.7	127549.8	321390.1	264173.9	157287.4	197384.9	273674.1
2007	268202.0	202618.8	682920.3	156071.3	337168.8	308080.2	153504.1	213877.7	306378.3
2008	282493.4	215015.1	730350.0	159171.2	361613.3	323230.7	159175.8	222137.4	324458.2

* General Index of the year 2003, and indexes for alcoholic beverages and tobacco groups

PRICE INDEX OF CONSTRUCTION PRODUCTS USED BY PRIVATE SECTOR BETWEEN 2000-2007								
General Index	Others	Sanitary Installation	Electrical Installation	Window	Doors	Iron	Faience	General Index
Weight	100.0	6.6	2.8	1.4	5.2	9.5	11.1	16.2
2000	83940.5	79124.0	105192.7	248044.5	84320.0	86062.9	179580.1	64163.1
2001	79892.2	78577.6	104658.4	261450.0	80980.3	83951.5	110591.6	64677.8
2002	80320.6	82847.9	97795.8	261450.0	84662.9	81451.9	106023.7	63215.4
2003	264174.8	418525.6	183778.0	612823.7	176269.8	146166.3	187566.3	140255.7
2004	264912.4	414928.3	183966.7	741900.7	167556.7	142175.9	182540.0	134283.6
2005	269070.1	438215.7	183727.3	931328.9	235849.1	146747.3	193799.0	138136.4
2006*	371825.6	441431.9	401254.6	452355.3	169724.5	163966.2	301323.4	191971.1
2007	387125.1	481154.7	359221.3	567978.4	271969.9	214367.4	360234.7	196481.5

* Indexes based on bulding and construction industry reports

PRICE INDEX OF CONSTRUCTION PRODUCTS USED BY PRIVATE SECTOR BETWEEN 2000-2007 (CONTINUATION)							
Years	Gypsum	Cement	Gravel	Sand	Stone	Block	Brick
Weight	2.5	7.6	4.6	6.1	2.6	8.2	15.9
2000	136997.4	106147.5	61103.4	55414.2	51892.7	43454.3	43348.1
2001	177405.3	124887.8	56124.8	62864.4	75981.2	40550.8	48290.9
2002	198058.3	133609.8	60494.1	58465.2	68936.0	36386.4	51809.4
2003	1552275.8	689960.5	126255.4	150662.6	69552.0	226004.9	252940.7
2004	1133513.9	734183.0	108459.6	143558.5	67952.1	231751.0	246857.9
2005	1147599.5	644935.2	120968.8	143013.9	67982.2	220612.6	251573.6
2006*	1047899.0	870274.8	321975.1	374450.4	359517.3	310403.5	491327.0
2007	1017705.9	847274.2	189392.3	284890.2	321450.2	343843.7	544905.4

STATUS OF TOURISM FACILITIES BY PROVINCES IN 2007						
PROVINCE	Total Tourism Facility	Number of Rooms		Number of Beds	Number of Occupied Beds	Number of Customers
		For Customers	Others			
MOSUL	36	1.268	101	2.479	401.194	53.626
KIRKUK	38	882	120	1.825	250.142	163.440
DIYALA	2	23	3	83	4.584	4.584
ANBAR	-	-	-	-	-	-
BAGHDAD	123	6.129	244	11.476	536.913	383.004
BABEL	9	168	30	367	39.019	20.723
KARBALA	59	2.127	18	5.707	480.667	988.628
WASIT	8	192	34	428	133.402	4.396
SALAHADDIN	19	482	50	1.210	161.112	11.568
NAJAF	94	3.293	288	8.173	1.398.194	581.075
QADISIYAH	4	87	11	248	19.988	18.359
MUSANNA	14	459	61	1.114	45.485	45.485
ZIQAR	16	242	64	481	40.185	18.786
MISAN	9	128	18	302	23.063	21.318
BASRA	61	1.613	138	3.441	542.217	175.281

NUMBER OF BUILDING LICENCE AND ESTIMATED COSTS FOR PRIVATE SECTOR BY PROVINCES AND BUILDING TYPES IN 2008								
	MAINTENANCE		REMODEL		OUTBUILDING	NEW BUILDING		
VİLAYET	COST (000 IRAQI D.)	NUMBER OF BUILDING	COST (000 IRAQI D.)	NUMBER OF BUILDING	COST (000 IRAQI D.)	NUMBER OF BUILDING	COST (000 IRAQI D.)	NUMBER OF BUILDING
MUSUL	41500	4	279650	9	11010085	397	60242072	1239
KERKÜK	439000	58	25000	1	8755400	329	90146350	1963
DİYALA	29950	5	12500	1	13923950	435	103836747	2170
ANBAR	18250	2	0	0	6408340	164	143588124	2106
BAĞDAT	226400	23	674600	19	24420800	795	124658020	2026
BABİL	32040	4	84400	3	9820375	269	106672286	1780
KERBELA	252415	31	37600	2	11597490	324	54864830	1156
VASİT	2000	1	0	0	4749739	186	72563960	1671
SELAHADDİN	0	0	0	0	3732650	112	62509460	1407
NECEF	235700	24	40000	2	12009095	387	85385150	1505
KADISİYE	0	0	20000	1	2091120	95	60208491	2108
MUSENNA	8000	2	108450	2	16545875	345	72874256	1041
ZİKAR	27000	6	0	0	13867100	296	85154400	1445
MEYSAN	21000	3	118750	6	3015025	114	35908233	907
BASRA	49500	6	0	0	7382930	238	63428920	1164
KÜRT BÖLGESİ:								
DUHOK	-	-	-	-	-	-	-	-
ERBİL	-	-	-	-	-	-	-	-
SÜLEYMANIYE	-	-	-	-	-	-	-	-
Toplam	1382755	169	1400950	46	149329974	4486	1222041299	23688

FACTORS DISTURBING DWELLERS IN THE AREA (%)

City Puddles	Waste and Pollution	Fly and Insect	Noise	Stink	Dust	Smoke and Gas
44,4	19,7	36,6	10,4	13,5	26	9,5

Food Strategy Statistics of Mosul

Rate of Households Eating Three Meals or More Meals a Day	Rate of Households Preferring To Pay Cash	Rate of Portion of Food Preferred in Household	Rate of Non-iodized Salt Used in Household	Strategy Index
% 99.2	%12.7	%87.3	%36.7	%23.06

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