

Individual Country Report: EGYPT

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Abstracts

Strategic Analysis (SA) at the Henry Jackson Society (HJS) has just released its MENA Oil and Gas Sector Risks and Forecasts Report as well as Individual Country Risk and Forecast Reports. The Egypt report utilises a high-profile network with a detailed knowledge of the region. This is something that will benefit individuals within the legal, financial services, energy, banking, consultancy and infrastructure sectors.

Strategic Analysis leverages the unique specialist capabilities of the Henry Jackson Society Research Division to provide clients with decision-ready, commercially relevant research, analysis and consulting services to assist them with mitigating risks and identifying opportunities for their business. Our highly skilled analysts frequently appear on the BBC, Sky, Al-Jazeera and often write for the New York Times and the Financial Times, amongst other papers. The Henry Jackson Society regularly deals with the House of Commons and organises high profile events with the likes of Mohammad Yunus and Jeffrey Sachs.

Executive Summary

Egypt's significance as an oil and gas exporter has been greatly constrained by rising domestic energy consumption since 2000 (oil consumption is up by 44%, and gas consumption by 177%). Primarily as a result of this growing domestic demand (encouraged by extensive fuel subsidies), Egypt has already become a net importer of oil, and is set to be a net importer of gas by the end of 2013. Egypt remains a keystone of energy security within the region as its control over two major maritime energy-transit routes (the Suez Canal and the Straits of Tiran), and its two key pipelines (the Suez-Mediterranean (SUMED) Pipeline from Suez to Alexandria, and the Arab Gas Pipeline to Jordan; Syria; Lebanon; and Israel). Risk of disruption to these key energy-transport routes will have powerful implications for energy security, and stability, throughout the entire region. Egypt is also facing a severe economic crisis, which feeds into escalating

political instability. Since the overthrow of Mubarak in Egypt, there have been frequent raids on oil and gas pipelines in the Sinai. Despite upgrades to security, we can expect Bedouin and Islamic groups to continue to infrequently attack these pipelines.

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