

# Individual Country Report: ISRAEL

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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 Lebanon 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

The development of Israel's nascent oil and gas industry is a story of the past decade. After a number of attempts to uncover oil during the 1950s and 1960s which only produced around 17.2 million barrels of oil, in 1999 several natural gas deposits were discovered offshore in the south of the country.

Between 2009 and 2010 those fields were dwarfed by further offshore discoveries in the north of Israel at the Tamar and Leviathan field. Today Israel is estimated to have reserves of around 800 BCM of exploitable gas, with a government committee accepting estimates that a further 680 BCM could be discovered in the region. Of this, 150 BCM is believed to have a 90% chance of being commercially recoverable.

In 2010 the Israeli Energy Ministry claimed that 5.3bcm of gas had been consumed and that demand would increase in the coming years, reaching 12.5 BCM by 2020. With planned exports adding to this demand, the Israeli government is also currently seeking to ensure that 25 years' worth of domestic demand is set aside.

This individual country report provides updates on Israel's developing gas industry in the first quarter of 2013. On-going political, security, and operational risks are presented with a short and long term forecast of risks to investment.

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