

Egypt *Country Profile*



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1. Introduction

Long known for its ancient civilization, Egypt is the most populated Arab country and has always played a central role in Middle Eastern politics in modern times.

Between 2010 and 2016, Egypt went through complicated times in terms of security, economy and social stability. In November 2016, the International Monetary Fund approved a three-year \$12bn loan to Egypt designed to help the country out of its deep economic crisis¹.

While the social cost of IMF's programme may be debatable², it surely drove policies and structural reforms resulting in a GDP growth of higher than 4% a year, and reaching 5.56% in 2019³.

Quick Facts ⁴		
	Population	97.0 millions
	GDP per capita	2,573 USD
	10-year average annual GDP growth	3.3 %
	Environmental footprint	0.9 gha/capita
	Renewable energy consumption share	5.7%
	Unemployment rate	11.4%
	Global Gender Gap Index 0-1 (gender parity)	0.6

2. Policy and regulatory framework

In 2015, Egypt launched its Sustainable Development Strategy: Vision 2030⁵. This strategy is a high-level roadmap aiming to improve Egyptians quality of lives and welfare through economic, social and environmental reforms and programmes. Vision 2030 set also indicators and targets for each of these dimensions for 2020 and 2030.

While Vision 2030's implementation and impact may be debatable, it remains one of the few strategy frameworks in Egypt with clear environmental targets setting the direction for the next decade.

¹ Egypt profile – Timeline. 2019. BBC. <https://www.bbc.com/news/world-africa-13315719>

² Egypt's IMF deal: a huge price tag for human rights. 2017. Center for Economic and Social Rights. <https://www.cesr.org/egypt-new-imf-deal-comes-huge-price-tag-human-rights>

³ World Bank Data. <https://data.worldbank.org/indicator/NY.GDP.MKTP.KD.ZG?locations=EG>

⁴ The Global Competitiveness Report 2019. World Economic Forum. http://www3.weforum.org/docs/WEF_TheGlobalCompetitivenessReport2019.pdf

⁵ Egypt Vision 2030. http://mcit.gov.eg/Upcont/Documents/Reports%20and%20Documents_492016000_English_Booklet_2030_compressed_4_9_16.pdf

Within Vision 2030, and in order to support Integrated Sustainable Communities, Egypt developed its own SCP National Action Plan in 2015 aiming to help Egypt achieve sustainable consumption and production practices in four key economic sectors: Energy, Agriculture, Water and Waste management⁶.

As for the policies, there isn't a proper regulatory framework exclusively focusing on circular economy. Nevertheless, different broader policies include sections that could impact or support circular economy initiatives, including:

Sector	Policy
Energy	<p>Egypt developed progressive policies and regulations in the electricity sector. The Law No. 203 of year 2014 regarding the incentives for generating electricity from renewable energy sources allows projects to produce electricity from clean sources. This law also embraces 4 implementation tools⁷:</p> <ul style="list-style-type: none"> - Government projects, through New and Renewable Energy Agency (NREA) - Project bided by Egyptian Electricity Distribution Company – EEDC (BOO systems) - Feed-in-Tariff - Bilateral agreements and conventions⁸ <p>From a geographic perspective, Egypt has a substantial potential for solar and wind energy as two-thirds of the country's geographic area has solar energy intensity 6.4 kWh/m²/day and above, some of the highest solar radiation in the world (up to 3,000 kWh/m²/year), and 96% of the country is considered as desert, making it a prime location for use of this resource⁹.</p> <p>As for energy efficiency, the Energy Efficiency Building Guideline (EEBG) was developed in cooperation with the New Urban Communities Authority (NUCA) and includes policies such as:</p> <ul style="list-style-type: none"> - Minimum Energy Performance Standards (EPS) with a mandatory labelling for some domestic appliances¹⁰ - Mandatory building codes have been set up with the aim to reduce the national electricity consumption
Construction	<p>Rapid growth in population and urban development significantly influences the construction sector.</p> <p>Such tendency is making the construction sector to lead other sectors and be one of the fastest growing sectors of Egypt's economy. The construction sector formed an average of 6.3% of the National GDP in 2015, 2015, and consequently causing the employment of around 9% of the local workforce¹¹.</p>

⁶ SCP National Plan. 2015. Switchmed. https://www.oneplanetnetwork.org/sites/default/files/national_action_plan_for_sustainable_consumption_and_production_scp_in_egypt_2015.pdf

⁷ RCREEE 2015, Renewable Energy and Energy Efficiency Guideline, Secretariat of the Arab Ministerial Council of Electricity, <http://www.lasportal.org/ar/councils/ministerialcouncil/Documents/%D8%A7%D9%84%D8%AF%D9%84%D9%8A%D9%84%202015%20.pdf> (Accessed: 26.06.2016)

⁸ Recommended National Sustainable Urban and Energy Savings Actions for Egypt. 2016. Human Dynamics. https://www.ces-med.eu/sites/default/files/180917_CES-MED_National_Report_Egypt_FINAL2rev.pdf

⁹ Recommended National Sustainable Urban and Energy Savings Actions for Egypt. 2016. Human Dynamics. https://www.ces-med.eu/sites/default/files/180917_CES-MED_National_Report_Egypt_FINAL2rev.pdf

¹⁰ The Environment status report of Egypt. 2014. Ministry of Environment. <http://www.eeaa.gov.eg/portals/0/eeaaReports/SoE2015AR/%D8%AA%D9%82%D8%B1%D9%8A%D8%B1%20%D8%AD%D8%A7%D9%84%D8%A9%20%D8%A7%D9%84%D8%A8%D9%8A%D8%A6%D8%A9%20%D9%81%D9%89%20%D9%85%D8%B5%D8%B1%20%D9%84%D8%B9%D8%A7%D9%85%202014.pdf>

¹¹ Central Agency for Public Mobilization and Statistics (CAPMAS), Egypt. <http://www.capmas.gov.eg>

	<p>The Unified Building Law (UBL) No. 119 of year 2008 and its executive regulations & appendix ministerial Decree No. 144 of year 2009 regulates the process of building across Egypt by addressing 2 main issues: Urban Planning (UP) and Planning & Urban Development.</p> <p>Nonetheless, the urban planning law was endorsed with no reference to energy efficiency or green building, and lacks the incentives for adopting or applying green concepts. However, a new simplified general building law is now under development in order to provide a new motivation in constructing more energy efficient buildings¹².</p>
Tourism	<p>Tourism contributes to around 12% of Egypt's GDP¹³.</p> <p>The ministry of tourism established the Environmental Monitoring Unit (EMU) to monitor practices of hotels, restaurants and other actors in the tourism sector. But the EMU may need more support to be more effective and achieve a bigger impact.</p>
Waste Management	<p>Lack of proper management is a serious health and environmental issue in Egypt. Waste is mainly managed by local authorities (governorates, markaz, districts, and local / village levels), but only 30 to 60 % of waste is collected. The remaining 40 to 70% are scattering throughout towns and streets without being treated¹⁴.</p> <p>In the last decade, the government, the private sector and civil society actors took initiatives to resolve this issue. But waste management remains a pain point in Egypt. Informal waste management initiatives (in garbage cities) is relatively large in major cities and is informally organized. It provides livelihoods for various vulnerable communities but lacks efficiency and environmental standards.</p>
Agriculture	<p>While agriculture “only” contributes to 11.2% of Egypt’s GDP, it provides livelihoods for about 55% of the population, most of it being rural¹⁵ and located on the Nile River, its valley and northern Delta. Cotton, rice, wheat and clover cover around 80% of the cultivated area of the country¹⁶.</p> <p>In 2009 the Ministry of Agriculture and Land Reclamation issued the “Sustainable Agricultural Development Strategy Towards 2030”, an ambitious plan with a comprehensive view on addressing chronic problems of the sector through the introduction of organic agriculture, reducing the use of chemical fertilizers, enhancing sustainable management of natural resources and enhancing efficiency in the use of water. So far, the strategy has not been implemented through an actionable framework or pilot projects and activities¹⁷.</p> <p>On another level, the strategy lacked coordination with the Ministry of Water Resources and Irrigation to align water distribution priorities to different economic activities, given Egypt’s limited traditional water resources¹⁸.</p>
Water	<p>Currently, the 2017 National Water Resources Plan (NWRP) addresses water scarcity and takes into account the efficient use and conservation of water resources. NWRP is currently being updated and a national wastewater strategy has recently been developed</p>

¹² Recommended National Sustainable Urban and Energy Savings Actions for Egypt. 2016. Human Dynamics. https://www.ces-med.eu/sites/default/files/180917_CES-MED_National_Report_Egypt_FINAL2rev.pdf

¹³ Travel, tourism contribute to Egypt's GDP by 11.9%. 2019. Egypt Today. <https://www.egypttoday.com/Article/3/67255/Travel-tourism-contribute-to-Egypt%E2%80%99s-GDP-by-11-9>

¹⁴ Egypt report. Japan's ministry of environment. https://www.env.go.jp/earth/coop/coop/c_report/egypt_h16/english/pdf/021.pdf

¹⁵ Mohamed A. El Hawary and R. Rizk, “Egypt: Country Pasture/Forage Resources Profiles,” United Nations Food and Agriculture Organization (2011), accessed August 15, 2017, www.fao.org/ag/agp/agpc/doc/counprof/PDF%20files/Egypt.pdf

¹⁶ Majdi Madcour and Abdul Munim Abouzeid, Egypt: Country Report to the FAO International Technical Conference on the Plant Genetic Resources, Leipzig 1996 (Giza, May 1995)

¹⁷ Sustainable Agricultural Development Strategy Towards 2030. FAO. <http://extwprlegs1.fao.org/docs/pdf/egy141040E.pdf>

¹⁸ SCP National Plan. 2015. Switchmed. https://www.oneplanetnetwork.org/sites/default/files/national_action_plan_for_sustainable_consumption_and_production_scp_in_egypt_2015.pdf

	<p>to extend wastewater treatment and sanitation projects. This strategy aims to promote the construction of desalination plants for the supply of municipal water for coastal cities.</p> <p>The State Ministry of the Environment has also proposed new changes in the executive regulations of law 9/2009 for the environment to allow for the discharge of brine water into the sea. This is allowed under specific regulations in areas that do not have sensitive marine ecosystems to allow for the expansion of water desalination. A Public private partnership (PPP) concessional law issued in 2010 has encouraged increased private sector involvement in the water sector. As a result, the construction stage of the New Cairo Wastewater Treatment plant, the first PPP in the water sector, was launched in February 2010. Also, a recent strategy for wastewater reuse in Egypt 2030 has been prepared¹⁹.</p>
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Other initiatives and projects in line with Vision 2030 and the SCP National Action Plan were also taken by public authorities, including:

Sector	Initiative / project / target
Energy	The Ministry of Electricity and Renewable Energy plans to reach 20% of renewable energy in the total amount of energy generated by 2022 and 42% by 2035 ²⁰
	Egypt is massively investing in solar power projects in the Western Desert. Once completed, Benban Solar Park for instance will be one of the biggest solar installation in the world ²¹ .
Transportation	The Ministry of Environment, in cooperation with the Ministry of Finance and Nasser Social Bank, implemented the Vehicle Scrapping and Recycling Program in Greater Cairo, which aimed to reduce 350,000 tons of carbon dioxide emissions by 2018 through turning 45,000 taxi drivers' vehicles for scrapping and recycling, in return for new upgraded vehicles ²² .
	The Ministry of Environment is implementing a program to convert government cars to natural gas. The program converted 14,000 cars in 2017 and 33,000 in 2018 ²³ .
Industry	The Ministry of Environment launched the Egyptian Pollution Abatement Programme to improve the industry's performance and comply with the environmental regulations. Eligible industries in Greater Cairo and Alexandria can take advantage of funds available through the Egyptian Pollution Abatement Project (EPAP II) while those in Upper and Lower Egypt can apply for funding through the Private Public Sector Industry Project (PPSI) ²⁴ .
Agriculture	The ministry of agriculture implemented several programs including a training on irrigation and drainage systems, crop selection, picking...

¹⁹ Green Economy Scoping Study: Egypt. 2014. UNEP, CEDARE. https://www.greengrowthknowledge.org/sites/default/files/download/resource/Green_Economy_Scoping_Study_Egypt_UNEP.pdf

²⁰ Renewable Energy Outlook: Egypt. International Renewable Energy Agency. https://www.irena.org/-/media/Files/IRENA/Agency/Publication/2018/Oct/IRENA_Outlook_Egypt_2018_En.pdf

²¹ Giant solar park in the desert jump starts Egypt's renewables push. 2019. Reuters. <https://www.reuters.com/article/us-egypt-solar/giant-solar-park-in-the-desert-jump-starts-egypts-renewables-push-idUSKBN1YL1WS>

²² Egypt: Scrapping and Recycling Old Vehicles to Lower Pollution and Improve Livelihoods. 2018. The World Bank. <https://www.worldbank.org/en/news/feature/2018/10/25/egypt-scrapping-and-recycling-old-vehicles-to-lower-pollution-and-improve-livelihoods>

²³ Egypt plans to convert 50,000 vehicles to natural gas in a year. 2019. Egypt Independent. <https://egyptindependent.com/egypt-plans-to-convert-50000-vehicles-to-natural-gas-in-a-year/>

²⁴ Egyptian Pollution Abatement Programme. Ministry of Environment. <http://industry.eeaa.gov.eg/>

3. Market conditions

Consumer awareness around circular economy in Egypt is low, but is rapidly growing driven by an eco-conscious young generation and (social) media. Demand for green products and services may still be low and may represent less than 5% of the total market share, but youth are more and more attracted to these products and services and initiatives are flourishing in different parts of the country.

The entrepreneurship ecosystem in Egypt is vibrant and dynamic. Egyptian society's perception of entrepreneurship is particularly high and continues to grow: more than 73% of Egyptians think of entrepreneurship as a good career choice²⁵.

The availability of pre-incubation programs (YIA, INJAZ, GESR...), incubators and accelerators (V-Lab, Flat 6...), community supporters and ecosystem developers (Rise Up Egypt), the size of local and regional market access, the good infrastructure in major cities and the number of inspiring successful entrepreneurship stories foster and encourage entrepreneurship in Egypt, but with a focus on ICT²⁶.

Support for green entrepreneurs exist, but is still weak and small compared to what's being offered to ICT initiatives. Nahdat al Mahrousa, Falax startup, Masr el Kheir, Ice Cairo and INJAZ provide punctual support for entrepreneurs, but this support is strongly dependent on international organizations' funding.

On another hand, Egypt's entrepreneurship ecosystem still lacks:

- An adequate number of angel investors, VC and IPO fund opportunities
- A national / market support for science based hi-tech endeavours (beyond ICT)
- Government regulations and laws: Bureaucracy and the lack of an intelligent holistic policy vision including education, import tariffs, taxation and a stable judiciary to support entrepreneurs complicates entrepreneurs' journeys
- Digitalization: Bureaucracy, unnecessary redundancy and inefficiency in legal work with the government discourages entrepreneurs
- National coverage: the entrepreneurial ecosystem outside Cairo and Alexandria is still very weak²⁷.

As for business registration, the government launched a 1-stop-shop initiative to accelerate the process and simplify administrative procedures. But the system is still not efficient, and is therefore currently being reviewed. Nevertheless, registering an LLC can be done in around 1 week with the support of an incubator or a lawyer.

On July 15th, the Official Gazette published the MSME Development Law No. 152 of 2020, replacing the previous Small Enterprises Law No. 141 of 2004 and widening its scope. This new law classified SMEs based on their annual turnover, number of years of activity and capital and designed new types incentives for each category²⁸ in the form of:

- Free, discounted or partial cost reimbursement for allocation of land
- Full or partial reimbursement or postponed payment of infrastructure cost
- Cost-sharing of workers' technical training

²⁵ Global Report: Entrepreneurship in Egypt Growing in Popularity. The American University of Cairo. <https://www.aucegypt.edu/new/stories/global-report-entrepreneurship-egypt-growing-popularity>

²⁶ Egypt National Report 2017 - 2018. Global Entrepreneurship Monitor. <https://www.gemconsortium.org/economy-profiles/egypt>

²⁷ Egypt National Report 2017 - 2018. Global Entrepreneurship Monitor. <https://www.gemconsortium.org/economy-profiles/egypt>

²⁸ Egypt's MSME Development Law No. 152 of 2020. DCODE. [https://img1.wsimg.com/blobby/go/2cdd937c-6619-4712-8b7c-e0cc3b5ce6a5/Dcode%20EFC_New%20SME%20Law%20\(Infographic\).pdf](https://img1.wsimg.com/blobby/go/2cdd937c-6619-4712-8b7c-e0cc3b5ce6a5/Dcode%20EFC_New%20SME%20Law%20(Infographic).pdf)

- Financial incentives from the State Budget
- Facilitation of social security procedures, costs and commercial registration
- Exemption of patent registration fees
- Facilitated financing against allocated property
- Conditional financial incentives to NBFIs investing in entrepreneurial enterprises
- Partial or total reimbursement of the cost of participation in exhibitions
- Tax incentives, including:
 - o Simplified income tax regime and bookkeeping rules
 - o Unified custom duty rate of 2% on imported machinery required for establishment
 - o Dividends distribution in one-person companies is not subject to income tax
 - o Possible partial or full exemption of property tax on buildings

But many entrepreneurs / SMEs did not benefit from Law No. 141 of 2004's benefits and will probably not benefit from Law No. 152 of 2020 due to the lack of awareness around these policies, the unavailability of information and the non-clarity of the procedure.

4. Socio-cultural context

Egyptians lack awareness around circular economy and often limit circular economy to clean energy production, clean water and solid waste management.

Egypt has a long history of lifetime employment in the public sector. But with the 2016 economic crisis, the IMF loan's conditions and all the reforms since, employment opportunities in the public sector became scarce. In parallel, some Egyptian entrepreneurs had inspiring success stories in the last decade ([SWVL](#), [Vezeeta](#), [Wuzzuf](#), [Eventus](#)...) which created an appetite for entrepreneurship among youth.

But this appetite is still focused on information and technology sector. While some green initiatives like [BioEnergy](#) were able to create a sustainable model, access support and funding and grow, the government and most incubators / accelerators / VCs still focus their support on ICT entrepreneurs.

As for the workforce, Egypt unemployment rate was 13.05% in 2015, and has been decreasing ever since to reach 10.76% in 2019²⁹. Egypt's literacy rate is 75%³⁰ (65.7% among women³¹ and 82.6% among men³²). Scientists and engineers are generally available (Egypt ranks among the top 40% countries in terms of the "Availability of scientists and engineers"³³), but this skilled workforce is concentrated in big cities like Cairo and Alexandria.

Finally, one of the pain points of Egypt's entrepreneurship ecosystem is also the lack of creative and novel ideas: most entrepreneurs are just recycling ideas that were implemented in other part of the country (or in other countries in the middle-east) and trying to adapt them to their region.

²⁹ World bank data. <https://data.worldbank.org/indicator/SL.UEM.TOTL.ZS?end=2019&locations=EG&start=2008>

³⁰ World bank data. <https://data.worldbank.org/indicator/SE.ADT.LITR.ZS?end=2017&locations=EG&start=2011>

³¹ World bank data. <https://data.worldbank.org/indicator/SE.ADT.LITR.FE.ZS?end=2017&locations=EG&start=2011>

³² World bank data. <https://data.worldbank.org/indicator/SE.ADT.LITR.MA.ZS?end=2017&locations=EG&start=2011>

³³ World bank data. https://todata360.worldbank.org/indicators/hd0e189de?country=EGY&indicator=607&viz=bar_chart&years=2017&indicators=944

5. SWOT

For the purpose of creating a synthesis for Egypt, a SWOT analyses has been conducted to explicate Strengths, Weaknesses, Opportunities, and Threats.

Strengths are defined as factors currently enabling green and circular businesses to develop. Weaknesses are defined as factors currently preventing the development of green and circular economy businesses. Opportunities are defined as future developments that could enable green and circular economy businesses to flourish. Threats are defined as potential future developments that could threaten green and circular economy business development.

Strengths	Weaknesses
<ul style="list-style-type: none"> - The dynamic start-up ecosystem in Egypt creates an appealing environment for start-ups. Incubators, accelerators and VCs are available and ready to provide support (but more for ICT start-ups). - Labor force is massively present in Egypt. Skilled labor force is concentrated in major cities. - The government has been undertaking policies and structural reforms in the last 5 years, and Egypt's GDP has been constantly growing, creating a more attractive environment for investors. - Youth are particularly aware of environmental problems. Green initiatives started emerging but are still small compared to initiatives in other sectors. 	<ul style="list-style-type: none"> - Egypt is a wide country. Big cities like Cairo and Alexandria are particularly different than other regions on all levels, more specifically in terms of population, literacy rates, infrastructure, culture, purchasing power and technology. Thus same solutions can't be applied in big cities and regions. - Policies and regulations need to be enforced. While some green policies exist, applying them remains a cultural and organizational challenge. - Administrative procedures and bureaucracy can slow down any collaboration or initiative involving the public sector. - Lack of a clear legal framework and incentives to support or promote green and circular economy business can slow down and demotivate green business owners. - Lack of coordination between stakeholders and players in the circular economy sector at the national level resulting in a loss of opportunities and reduced impact.

Opportunities	Threats
<ul style="list-style-type: none"> - Egypt is a wide country with different challenges in each region. Massive investments will be required to make a significant impact in the circular economy. Therefore, a focus on specific sectors like Energy, Agriculture, Waste Management and Water and supporting the whole value chain may result in a better impact. - Involving different government institutions on the national and local levels may also improve the chances of success as local institutions like municipalities play a major role in people's daily lives. 	<ul style="list-style-type: none"> - Lack of monitoring, evaluation and reporting scheme for circular economy programs and other green initiatives could reduce these programmes impact. - Lack of awareness around circular economy may limit projects to clean energy production, water treatment and solid waste management initiatives

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