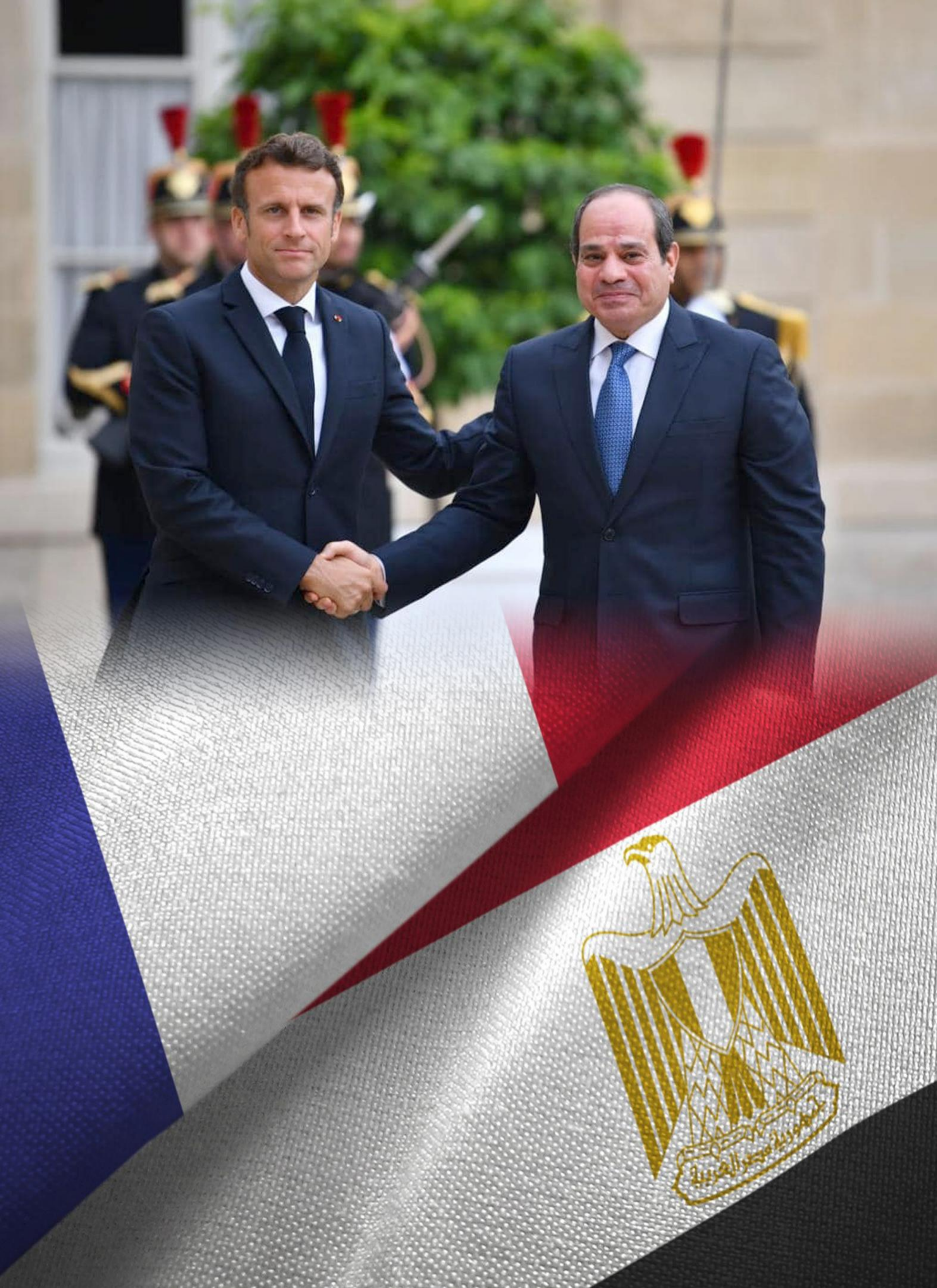
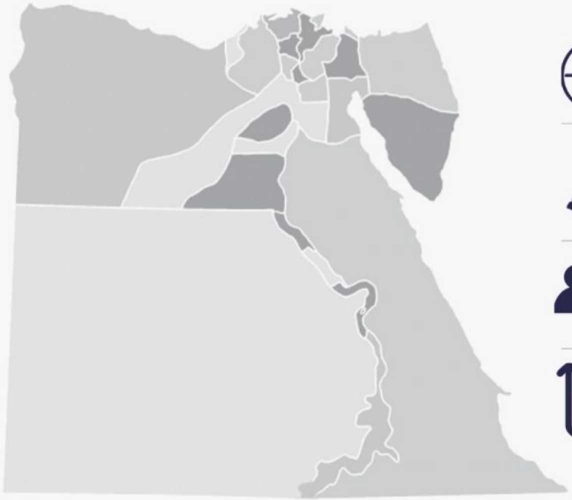
Ministry of Investment and Foreign Trade

General Authority for Investment & Free Zones

EGYPT - FRANCE BUSINESS FORUM


جمهورية مصر العربية

ARAB REPUBLIC OF EGYPT



Language: Arabic

GMT +2 hrs

Population: *106* million (Dec.2023)

Surface area: 1.002 million km^2

The distingued strategic location positions Egypt as an investment-trade hub in the global map. Egypt is deemed the best option to access global markets in Europe, the Middle East, Africa, and Asia. Moreover, Egypt has a world-class infrastructure and an international logistics network along with the Suez Canal, which is the most important maritime waterway that connects the East with the West of the world.

27 International & National airports

18 Commercial Ports

30000 km The developing road network (Expected)

705 stations
9570 km Railway network length (2022)

3 Metro lines
94 Metro stations

2 Monorail lines
35 Stations

19 Light electric railway stations

22 High speed electric railway stations

213182 *G.W/h* Generated and purchased energy (2021/2022)

27.8 *Million* tons Production of crude oil and condensate (2022)

50.6 *Million tons Natural oil* Production (2022)

1.1 *Million tons Butane gas* Production (2022)

46.1 $bn Net foreign direct investment 2023-2024

6.5% Unemployment rate Q2 2024

EGYPT FDI

- The **1st** investment destination in Africa for **2nd** year 2023.
- Egypt Claims 18.6% of Africa's Total FDI, amounting to $52.6 billion 2023.
- Ranked **32nd** Globally in FDI attraction 2023.
- FDI Surges by 113% since 2014.

SOURCE: UNCTAD WIR 2024

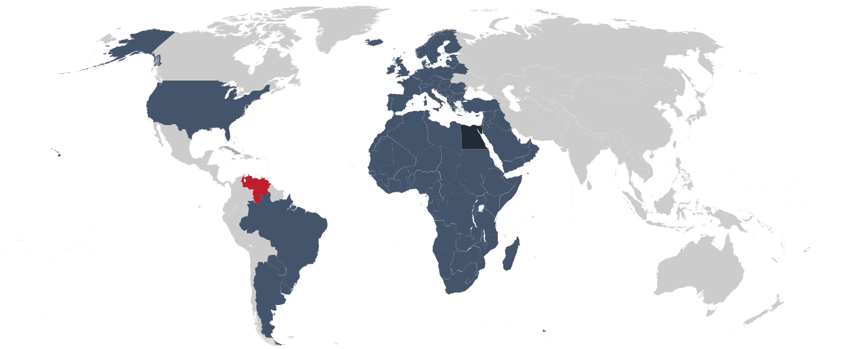
EGYPT:

- A hub for Automotive, Pharmaceuticals and Electronics.
- Streamlined investment procedures with one-stop shop.

SOURCE: UNCTAD WIR 2024

Access to Markets I Utilizing key trade agreements to access international markets with ~35% of global GDP

Coverage of Egypt's Trade Agreements



Covering ~35 % of global GDP and 3.3 Bn Consumers

Source: General Authority for Investment and Free Zones (GAFI)

Egypt's Trade Agreements

- Egypt-EU Association Agreement
- Egypt-EFTA Free Trade Agreement
- Pan-Arab FTA (PAFTA)
- Agadir Agreement
- Egypt–Turkey Free Trade Agreement
- Southern Common Market (MERCOSUR)
- Qualified Industrial Zones
- African Continental Free Trade Agreement (ACFTA)
- Common Markets for East and Southern Africa (COMESA)

GAFI as a Business Partner

34 Golden Licenses

OWNERSHIP

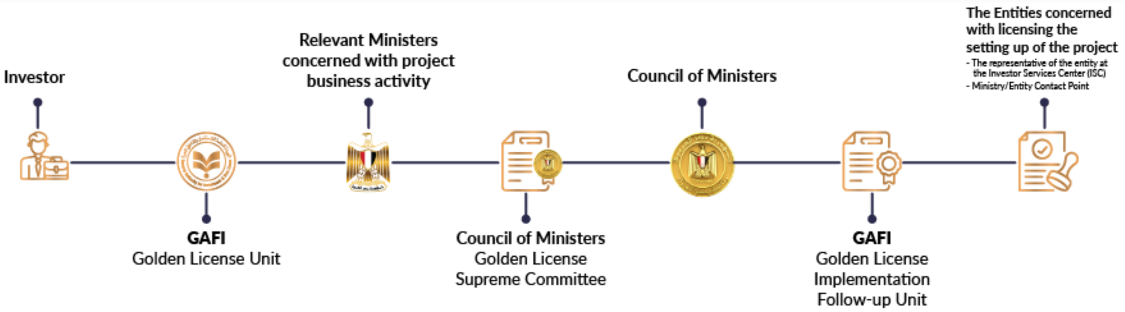
Foreign	13
Local	15
Mix	6

GOLDEN LICENSE

1- The GOLDEN LICENSE is a single license granted to national and strategic projects.

2- A comprehensive approval on the setup, operation and management of the project.

3- Approvals includes all needed licenses within **20 days** with no need to deal with any other entity.



Stable, predictable, and investor friendly regulatory framework

State Ownership Policy

Major reform that aims to increase private sector participation within the Egyptian economy

INVESTMENT JOURNEY

01

Meet with
GAFI Officials

Investment Map

Offer opportunity to the investor **1200+**

Public Opportunities

Private Opportunities

investinegypt.gov.eg

02

03

within **2hrs**
E-establishment of the company

14
Through Investor Service Centers (ISC)

www.gafi.gov.eg

04

21 days

Land Allocation

the land will be allocated through GAFI

05

Follow up

After care follow up through lifetime of the project

GAFI | E-services

Invest in Egypt: Faster, Easier, and More Secure with GAFI's Digital Revolution!
Unleash Your Business Potential in Egypt!

GAFI's innovative digital platforms streamline the investment journey.

Company Setup Made Easy:

Establish your company online in a few clicks! Submit requests, pay fees electronically, and use e-signatures on GAFI's official portal (www.gafi.gov.eg).

Golden License at Your Fingertips:

Apply and track your Golden License application with ease. Our bilingual platform (Arabic & English) simplifies the process with all relevant authorities on board (www.goldenlicense.gov.eg).

Effortless Licensing:

Track and manage licenses efficiently through our dedicated portal (https://tracklicence.gafi.gov.eg). Transparent and timely approvals from the relevant authorities.

Digital Investment Gazette:

Access your essential "Investment Gazette" electronically anytime, anywhere (https://publishonline.gafi.gov.eg). This document serves as your company's official history for banks and government interactions.

These digital advancements exemplify Egypt's commitment to a modern investment landscape, making it easier, faster, and more secure for your business to flourish.

Invest in Egypt today! Visit GAFI's website (www.gafi.gov.eg) to explore the digital platforms and unlock a world of opportunities.

INVESTMENT INCENTIVES IN EGYPT

General Incentives

2%

Unified Customs Duty

The same tax also applies to machinery and equipment imported by public utility projects

5 Years

Exemptions

For incorporation contracts, credit facilities and mortgage contracts related to corporate business. From the stamp tax and documentation fees, since the date of registration in the commercial register

Special Incentives

50%

Areas in Need of Development

30%

Rest of the country

Of the investment costs to be deducted from the Tax base (net profit) over **7 years** maximum

Exemptions from the stamp tax and documentation fees for land's registration contracts required for setting up companies and establishments

Additional incentives

- The state will bear the value of connecting the utilities for the project or part thereof, after operating.

- The state bears part of the technical training cost for workers.

- Half of the value of the land allocated for industrial projects shall be refunded in the event that production begins within two years from the date of handing over the land.

- Allocating pieces of land free of charge for some strategic activities in accordance with the regulations prescribed by law in this regard.

- Exemption from usufruct of the projects lands for a maximum period of 10 years, starting from the date of operation.

INVESTMENT INCENTIVES IN EGYPT

Cash Incentives

35%

If the fund that transferred from abroad is (%50 - %75) of the project's fund

45%

If the fund that transferred from abroad is (%75 - %90) of the project's fund

55%

If the fund that transferred from abroad is %90 of the project's fund

From the value paid of the project income tax or his expansions

Terms

- The project must be established in one of the areas of Sector (A), or one of the remote areas determined by a decision of the Council of Ministers. Or industrial zones, investment zones, new urban communities, or technological zones.
- The financing of the project or its expansion (until the start of practicing the activity) must be in foreign exchange from abroad by no less than %50. of project's funds.
- Conducting the activity within 6 years From the effective date of Law 160/2023 On 2023/25/7 - it may be extended for another 6 years by decision of the Council of Ministers. The date of starting the activity is determined in accordance with Article 13 of the Executive Regulations.
- The Council of Ministers issued a decision on 2023/28/12 that included the industries that enjoy the incentive and the duration of granting the incentive not to exceed 10 years, as well as the conditions, rules and categories of granting the incentive and disbursement mechanisms.

REFORMS

Monetary Policy

- Flexible exchange rate pricing system to ensure free flow of currency.
- Allowing investors to guarantee price levels through future contracts.

Fiscal Policy

Comprehensive Package of Tax Facilitations:

- VAT refund system.
- Due payment mechanisms.
- Rejuvenate customs structure to ensure ease of the process.

EASE OF
DOING BUSINESS

Digital Services | **Land Allocation** | Golden License

INCENTIVES FOR SMALL AND MEDIUM ENTERPRISES

Investment Incentives

1- Land for free or for a nominal fee.

2- The state bears part of the cost of training workers.

3- Exemption from providing guarantees until the start of the activity.

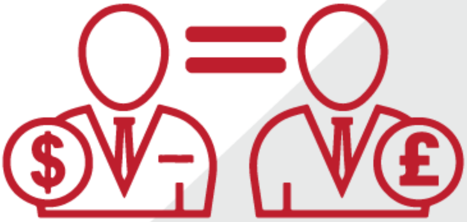
4- Exemption from patent registration fees.

Tax Incentives

1- SMEs Projects are exempted from capital gains tax for the purpose of purchasing assets or equipment.

2- The tax ranges between (%0.50) to (%1) of its turnover on an annual basis.

Main Guarantees



Equal Treatment Between Foreign and Local Investors

Repatriation of Dividends

INVESTMENT SCHEMES

Free Zones Scheme

0% Taxes Customs

80% Export

1162 Projct

Public Free Zones
9 Public free Zones
953 Project

Private Free Zones
209 Project

Technology Zones Scheme

0%
Customes Tax on Machinery
Fields of Technology

6 Zones

Investment Zones/Parks

Investment Zones
18
11 Existing
7 Under Construction

Project
10K

Developed Area
176 million m^2

Governorates
7

Direct& Indirect Jobs
300K

Obtaines all needed approvals and licenses, deals with all relevent entites on behalf of the investor.

Suez Canal Economic Zone

0%
Customs Taxes
VAT

50%
Tax Credit

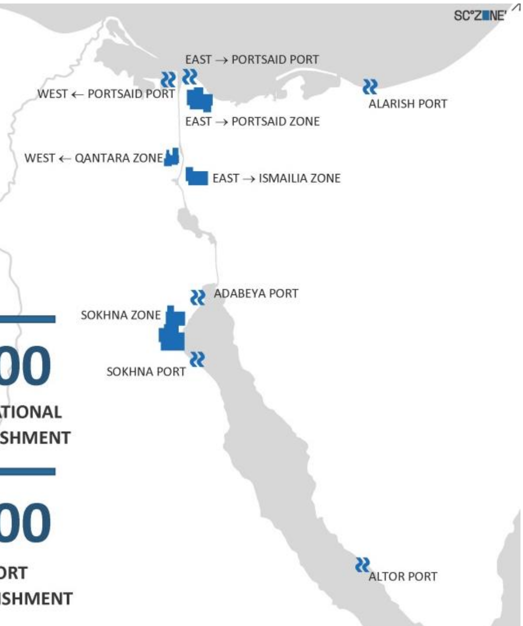
4 Industrial Zones
6 Ports

Premier Services and Trade hub with Investment opp. in different sectors at unique stratigic location.
www. SEZONE.eg

SUEZ CANAL ECONOMIC ZONE

SCZONE Facts

455 KM² TOTAL AREA	6 SEA MAIN PORTS	4 INDUSTRIAL ZONES	400 OPERATIONAL ESTABLISHMENT
100K DIRECT & INDIRECT JOBS	5 MAIN PORTS OPERATORS	14 INDUSTRIAL DEVELOPERS	100 PORT ESTABLISHMENT



Strategic Location

A promising investment destination comprising 4 industrial zones & 6 sea ports, around the main global maritime trade route (Suez Canal), passing through it:

12% INTERNATIONAL TRADE

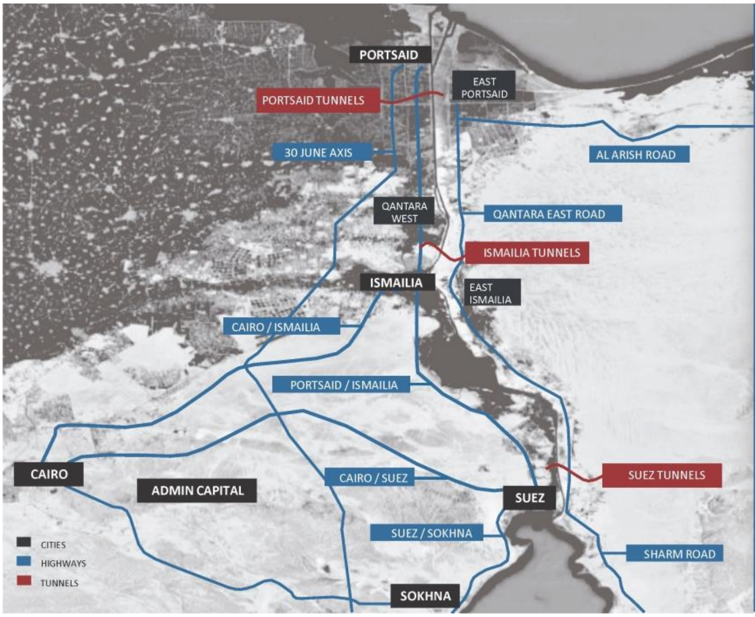
10% SEABORNE TRADE

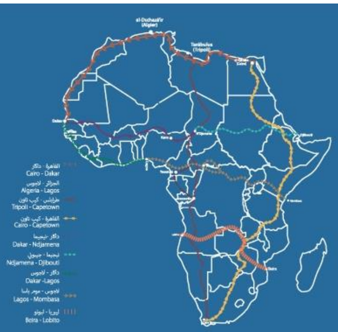
26K SHIPS PER YEAR

SCZONE

المنطقة الاقتصادية لقناة السويس

SUEZ CANAL ECONOMIC ZONE

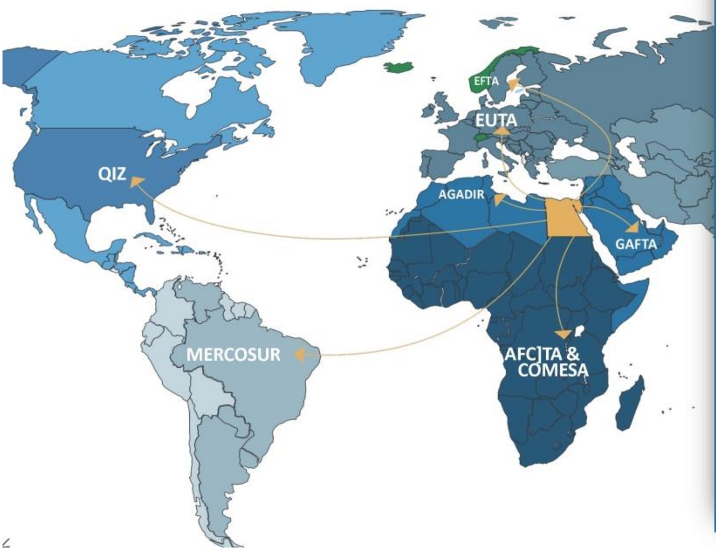




Regional Context

SCZONE is well connected to the new modern roads network of Egypt, and enjoys direct connection to the new Suez Canal tunnels facilitating transportation between its two banks.

Markets Accessibility



100%

CUSTOMS EXEMPTION

With Free Trade Agreements

100Mn

CONSUMERS

Accessing a promising domestic market in Egypt

2Bn

CONSUMERS ACCESSIBILITY

In the international market benefiting from multiple free trade agreements

SUEZ CANAL ECONOMIC ZONE

Creation of Industrial Clusters
Ongoing efforts

Sokhna Zone

Chemicals,
Refined Petroleum,
Building Materials,
…

East Port Said

Automotive
Assembly & Feed
industry, logistics,
…

West Qantara

Agribusiness, Food
Processing &
Beverages, Textiles,
…

East Ismailia

Technology, Renewables
integrated industries, Comms
technology, …

GYPTO Pharma City

Specialized hub in manufacturing
various medicines and vaccines

SUEZ CANAL ECONOMIC ZONE

Targeted Sectors & Industries

- Logistics
- Vocational & Maintenance Centers
- Data Centers
- Bunkering Conventional/Green

4 SERVICES

17 INDUSTRIES

- Green Fuel
- Electrolyzers
- Wind Turbines
- Solar PV
- Petrochemicals
- Water Desal. Membranes
- Automotive
- Rolling Stock
- Electric Batteries
- Car Tires
- Casting & Foundry
- Building Materials
- Pharmaceutical
- Active Pharma Ingredients
- Medical Equipment
- Textiles
- Agribusiness

Utilities and Infrastructure

NATURAL GAS

1 PRESSURE REDUCTION UNIT & PIPELINE NETWORK

COMMUNICATION

3 COMM. CENTRAL & FIBER OPTICS CABLES

POWER SUPPLY

7 POWER SUB-STATION

13 POWER DISTRIBUTOR

SEWAGE TREATMENT

2 TREATMENT PLANT & PIPELINES

6 SEWAGE TREAT. COMPACT UNITS

WATER SUPPLY

2 SEA WATER DESALINATION PLANT

3 WATER LIFT PLANT & STORAGE

The Egyptian-French
Economic And Investment Relations:

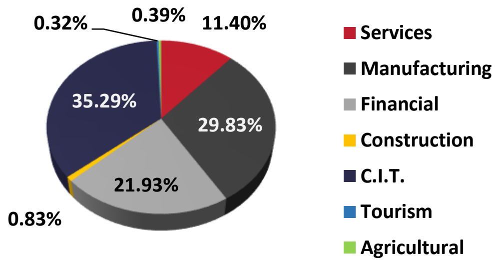
	2022	2023
France's share of the Egyptian exports	2.8%	2.25%
Egypt's non-petroleum exports to France	USD 1.007 billion	USD 805 million
France's share of the Egyptian imports	2.6%	2.2%
Imports from France to Egypt	USD 2,197 million	USD 1,663 million
Egypt-France trade balance is in favor of France	USD 3,204 million	USD 2,469 million

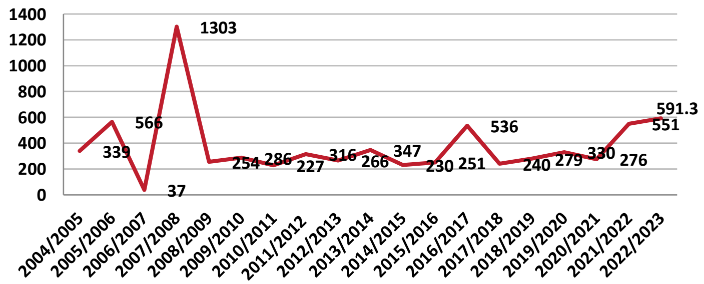
Source: General authority for export and imports control

- For the third year in a row, France ranked **8th** in terms of foreign direct investment (FDI) injected in Egypt as of June 2023.
- The total French FDI 2023in Egypt amounted to **USD 7.2 billion.**
- Number of French companies operating in Egypt reached **180** company.

Source: GAFI

French FDI stock in Investment Companies distributed by sectors





Egypt - France

Bilateral Agreements and Key Regional Trade and Investment Agreements

A. Bilateral Agreements

- Convention Between the Government of the French Republic and the Government of the Arab Republic of Egypt Concerning the Mutual Promotion and Protection of Investments signed on December 22, 1974.

B. Regional Agreements

- The Strategic and Comprehensive Partnership between the Arab Republic of Egypt and the European Union.

Success Stories

Air Liquide
Groupe SEB
Capgemini
Alstom
Lesaffre
Groupe Atlantic
Veolia
Accor
Naval Group
Decathlon
TotalEnergies
Poma
Géant Casino
Vicat Build together, live together
Thales
Degrémont Suez
Lafarge
Saint-Gobain
Consolis
Danone
Crédit Agricole
AXA
Valeo
Teleperformance each interaction matters
voltalia
EDF
Sanofi Pasteur
Sanofi
orange™
L'ORÉAL
bel for all for good
ENGIE
Servier
lactel
Schneider Electric

Economic Sectors In Egypt

Industry
(Industrial sector - Agribusiness - Textile - Engineering - Pharmaceutical - Automotive & feeding industries)

ICT
Growth rate reached 16.3% FY 2022/2023
3rd rank globally in the "Cross-Border Outsourcing Services" Trust Index 2023,

Green Energy
Target of 42% renewable energy by 2035

Agriculture
Contributing 11.5% of GDP, provides jobs for 28% of the total workforce

Logistics
18 Main commercial ports
27 Main airports
65,050 km Total road network

Tourism
$13.6 billion tourism revenues
14.9 million tourists FY2022/2023

Education
738K Graduates in 2022
10 Technological universities
National strategy for higher education

Health
2,700 hospitals - 15,356 intensive care beds - 3,452 operation rooms

Industry Sector

Egypt’s Industrial Sector Stands as a Pillar of its Economy

~29%

Industrial labor force
Representing (7.9mn) of total labor force (27,9 Mn)

41%

of Egypt's net FDIs
>20% from EU

~30%

of Egypt's GDP
Which is projected to grow by 4.7%[1]

~55%

of Egypt's USD 22Bn[2] exports
Up from 50% in 2020

1. Non-oil 2. In next fiscal year

Source: Government of Egypt, Fitch, World Bank

Note: All data is from 2022/2023 reports

Industrial Inputs

Competitive offering

Egypt possess a set of competitive industrial inputs for investors

Raw Materials

Incl. iron ore, steel, aluminum, silica sand, phosphate, chemicals and petrochemicals, food products, cottons, etc.

Energy

Incl. competitive energy prices, access to renewable energy, P2P availability on renewable energy sources, etc.

Skilled Labor

2.3 Mn in Technical Vocational Education and Training programs and 670k annual university graduates (30% in practical faculties).

high potential areas for investment in Industry

Pharmaceuticals

- Largest MENA market (110+ Mn)
- Established industry base
- Skilled labor availability for production and R&D
- High export potential to GCC and Africa

Automotive

- Existing assembly operations in Egypt
- Strong governmental support
- Geographic proximity to key markets
- Raw material production available

Logistics *As an enabler to industry*

Value proposition

- Governmental investments in logistic overhaul
- Strategic trade routes
- Customs modernization
- Multimodal transport connectivity


2 pillars of the Governmental industrial vision

Government Asset Monetization Program

- Access to established attractive enterprises with existing client base and high export potential
- Increased opportunities for private sector participation in the Egyptian economy

Backward Value Chain Development Opportunities

- Existing local demand for the prioritized industries to be developed locally worth more than 12 Bn USD annually
- Access to EU, Africa and Middle Eastern markets as a raw material and intermediate goods nearshoring partner

Industry Sectors In Egypt

Textile Industries

11,58%	Sector contribution to total exports 2023
4,57%	Sector contribution to total imports 2023
6%	Sector growth rate
15,022 Establish	Number of industrial establishments
1,453 million	Workforce size

Competitive advantages:

- Ample low-wage workforce.
- Outstanding industrial infrastructure.
- Many international brands are manufactured locally.

Pharmaceuticals and Medical Industries

1,72%	Sector contribution to total exports 2023
6,04%	Sector contribution to total imports 2023
11,4%	Sector growth rate
1,489 Establish	Number of industrial establishments
75,200	Number of pharmacies
160 thousand	Workforce size

Competitive advantages:

- Large market size.
- Export base to the Middle East and Africa.

Engineering, Automotive, and Supplementary Industries

12,27%	Sector contribution to total exports 2023
28,93%	Sector contribution to total imports 2023
10%	Sector growth rate
11,764 Establish	Number of industrial establishments
582 thousand	Workforce size

Competitive advantages:

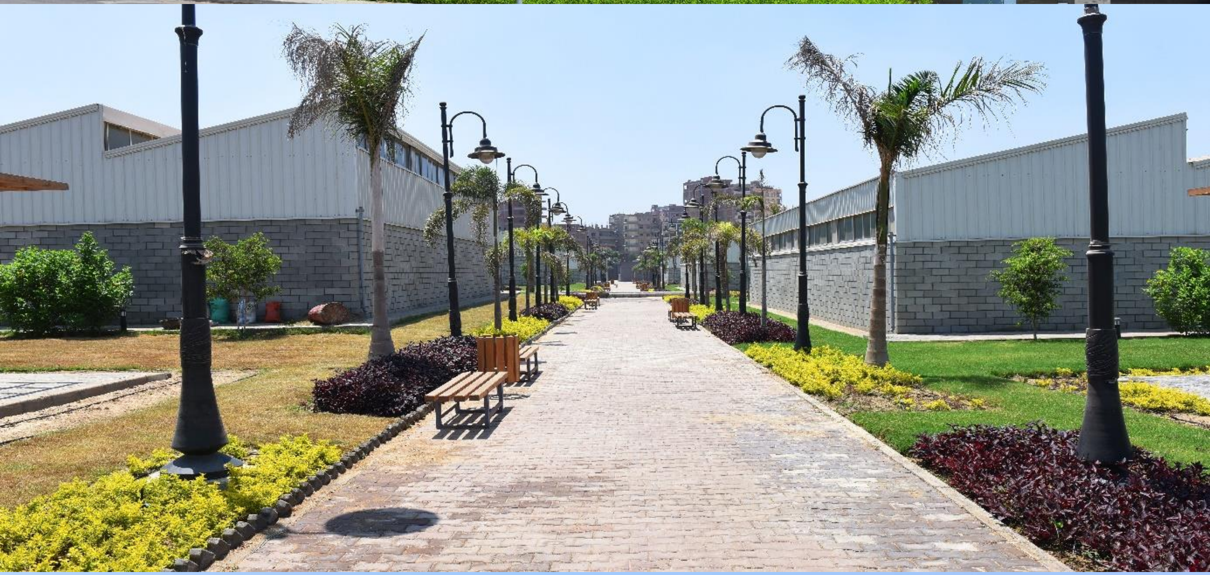
- Ample low-wage workforce.
- Ample highly-trained technicians.
- Ample specialized engineers.
- Many opportunities to localize engineering industries and attract investments.

Chemical and Petrochemical Industries

26,83%	Sector contribution to total exports 2023
8,84%	Sector contribution to total imports 2023
22,118%	Sector growth rate
11,764 Establish	Number of industrial establishments
1,106 million	Workforce size

Competitive advantages:

- High demand by the local market.
- A strong export base to the EU countries.
- Strict compliance with the international standards and specifications.


	Opportunity	Description	Location
1	*Ownership / Usufruct Agreements in Engineering Industries*	Manufacturing of home refrigerators and air conditioners compressors - air or gas compressor pumps and vacuum pumps - plastic and rubber molds - industrial valves - electric motors - solar Panels and photosensitive semiconductors - fiber-optic cables - Electric Batteries – Wind Turbines and Blades – Electrolyzers	**Suez** Ain Sokhna surface areas 115,757 m2 (10 opportunities) **Beheira** Various surface areas ranging from 1000 m^2 to 4,700 m^2 (206 opportunities) **Fayyoum** Various surface areas ranging from 950 m^2 to 1,500 m^2 (27 opportunities) **SCZONE** East Ismailia Industrial Zone
2	*Usufruct/ Ownership Agreements in Chemical Industries*	Production of soda ash - phosphate fertilizers or fertilizers containing phosphorus - dyes and colors for textile industries - polypropylene sheets and films - rubber tires for passenger cars - rubber tires for buses and trucks	**Suez** Ain Sokhna with surface areas 115,757 m2 (10 opportunities) **Beheira** Various surface areas ranging from 500 m^2 to 4000 m^2 (274 opportunities) **Fayyoum** Various surface areas ranging from 950 m^2 to 1,500 m^2 (27 opportunities) **SCZONE** Sokhna industrial zone East Port Said industrial zone **New Alamin** industrial city Petrochemical Complex with surface area 890 feddan

	Opportunity	Description	Location
3	*Ownership /Usufruct Agreements in Textile & Garments Industries*	Manufacturing of cotton yarn - denim jeans fabric - polyester yarn - woven yarn from synthetic yarn - woven fabrics from synthetic fibers - non-woven fabric - knitted or crocheted fabrics -	**Sharqia** 10th Ramadan Industrial zone with surface area 11,000 m2 **Suez** Various surface areas ranging from 5000 m^2 to 40,000 m^2 by Free zone scheme **Ismailia** Various surface areas by Free zone scheme **Beheira** surface area 1,025 m^2 **SCZONE** West Qantara Industrial Zone
4	*Usufruct/ Ownership Agreements in Mining Industries*	Production of kaolin - black sand derivates (i.e., garnet, ilmenite and monazite) - non-alloy cold-rolled iron or stainless-steel surfaces - non-alloy iron or steel surfaces that are rolled, clad, coated or laminated - of non-coated, non-plated electrical sheets used in the manufacture of food containers - Metallurgical Casting	**Fayyoum** surface area 22,6 Feddans **SCZONE** Sokhna industrial zone East Port Said industrial zone East Ismailia Industrial Zone West Qantara Industrial zone
5	*Usufruct Agreements in Food Industries*	Production of fruit pulp, jams and tomato sauce - factory for freezing, salting, drying and smoking of fish, and the production of fish oil and fishmeal- Fish preservation and other food industry activities	**Beheira** surface area 8,997 m2. Surface area 2,700 m2. Various surface areas ranging from 500 m^2 to 5000 m^2 (47 opportunities). **Damietta** surface area 6,040 m^2 **Fayyoum** surface areas 1000 m^2 (12 opportunities). **SCZONE** Sokhna industrial zone East Port Said industrial zone East Ismailia Industrial Zone West Qantara Industrial zone

	Opportunity	Description	Location
6	*Usufruct Agreements in different Industrial development activities*	Manufacturing of Desalination Plant Membranes - Rolling Stock- Building Materials – leather- engineering paper- electrical plastic - Recycling industrial waste to produce ethanol and convert it into organic fertilizer	**Sharqia** 10th Ramadan Industrial **Beheira** with total surface area 6 Feddans, 23 Quirats, and 20 Sahms **SCZONE** Sokhna industrial zone East Port Said industrial zone East Ismailia Industrial Zone West Qantara Industrial zone

Egypt's automotive sector provides unique value proposition to investors

Access to Local and Regional Markets

Egypt has a large and growing local market as well as multiple FTAs allowing access to European, African and GCC markets

Competitive CAPEX and Operating Cost

Up to

30%

Lower CAPEX

Egypt has a large and growing local market as well as multiple FTAs allowing access to European, African and GCC markets

Incentives and Automotive Clusters

Egypt's Supreme Council for Automotive Industry created the Automotive Industry Development Program (AIDP) and East Port Said Automotive Zone to develop the sector

EPAZ

EAST PORT SAID AUTOMOTIVE ZONE

Source: SWJ, EBRD, EPAZ, SCZONE

Automotive

	Opportunity	Description	Location
1	*Usufruct Agreements in Vehicle Manufacturing*	East Port Said Automotive Zone is envisioned as a fully integrated automotive manufacturing facility that will attract 2 to 4 original equipment manufacturers (OEMs) to share the Common Production Divisions (painting and stamping), while establishing their own Bodyshop and Assembly Lines. EPAZ's value proposition extends beyond collaboration, it offers a unique asset-light investment opportunity with high access to key raw materials.	**SCZONE** East Port Said Industrial Zone Ain Sokhna Industrial Zone
		Establishing and operating an automotive factory for manufacturing of traditional cars, electric cars and the supplementary industries. Manufacturing and production of electric vehicles for assembly, painting, programming and production of internal components - metal structures and parts for electric vehicles - Manufacturing of EV batteries for electric vehicles lithium ion and lithium polymer batteries; In addition to the nickel-cadmium battery and the nickel-metal hydride battery.	**Suez** Ain Sokhna with total surface areas 571,550 m2

WHY EGYPT

The Egyptian Pharma market is one of the largest in Africa and represents a gate to other African markets

EU GMP

12
Factories

> 170
Pharmaceutical Factories

with

800
Production Lines

13% CAGR growth over the past 5 years

Home > Egypt

Fitch: Egypt continues to boost its position as biggest medicine producer in ME, N. Africa

by Gazette Staff – February 20, 2023 in Egypt, Health

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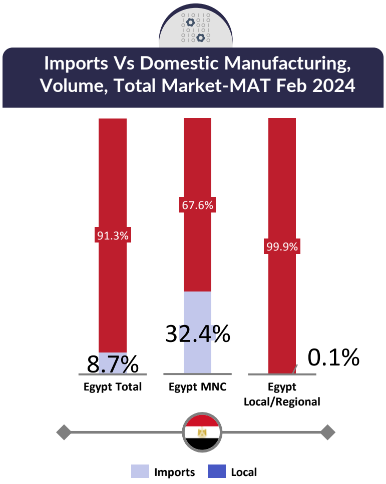
FitchRatings

Egyptian Market in Numbers



EDA is an Independent Public Service Authority Directly Affiliated to the Egyptian Prime Minister

EDA overseas a wide range of products

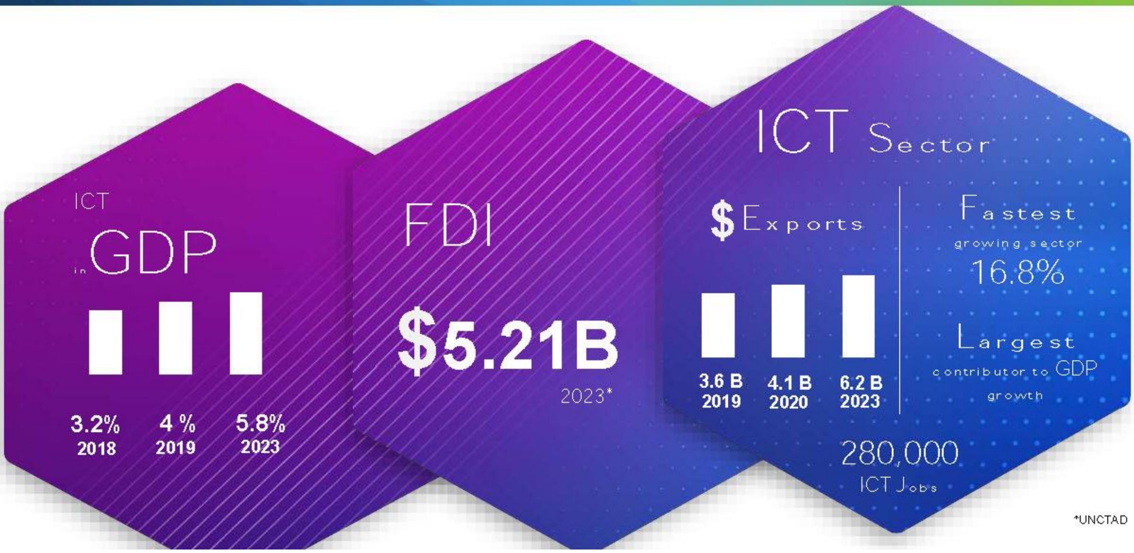
- Medical Devices
- Plasma Derivatives-Raw Materials
- Insecticides & Disinfectants
- Cosmetics
- Medical Products
- Veterinary Medicines
- Medicinal Plants Extracts
- Biologicals & Innovative Products

pharmaceutical

1	*Usufruct Agreements in Pharmaceutical and Medical Industries*	Manufacturing of pharmaceutical raw materials- human vaccines and serums - veterinary vaccines and serums -human medicines - diagnostic or laboratory reagents - medical devices and equipment - hearing-aid devices - ultrasound scanners - magnetic resonance imaging (MRI) machines - gamma scanners - electrical medical tools and devices - artificial joints and prosthetics.	**SCZONE** Ain Sokhna Industrial Zone **Beheira** Various surface areas ranging from 500 m2 to 1000 m2 (24 opportunities)

Telecommunication Sector

Fast-Paced Economy



*UNCTAD

Progressive Sector

Acknowledgment & Global confidence

GSA — Global Semiconductor Alliance launches a new chapter: **GSA Egypt** 2023

KEARNEY — **#23 Top** Global Services Location **#1 Africa** 2023

Gartner — **Primary Location** in EMEA for Global Delivery of IT &BPO since 2019

RYAN STRATEGIC ADVISORY — **3rd Global Confidence rating** the Offshore BPO Confidence Index 2023

GBS WORLD — **2nd Globally** Technical & Helpdesk support **5th Globally** General IT Outsourcing

Institute for Economics & Peace — **+5 spots** World's Safest Country Index 2023

Roland Berger — **Top 10 Improvers** Digital Inclusion Index 2018 -2021

Startup Genome — **Top 20 Locations** Affordable Talent 2022

International Monetary Fund — **+ 42 spots** GovTech Maturity Index High Category Country(A) 2022

OOKLA Speedtest — **1st in Africa** Fixed Broadband internet speed 2022

106+ M Population

51% Males — **49%** Females

75.5% Below 40 years old

738+ K Annual Graduates

50+ K ICT Grads

- Electronics
- Computer engineering
- Computer systems & IT
- Communications
- Computer Science
- Information Systems
- Software Engineering
- **Mechatronics & Robotics**
- Digital Arts & Design
- Management Information Systems

"Source: C.A.P.M.A.S Egypt. www.capmas.gov.eg"

108 Universities

28% STEM Graduates

42K Languages Grads

*Egyptian Arabic dialect is the most widely spoken and most understood across the Middle East region

Digital Skills Development

No. of Graduates

400 K

Total investment

1.7 + Billion EGP

4. Digital Egypt Pioneers Initiative
3. Digital Egypt Builders initiative
2. Digital Egypt Cubs Initiative
1. Digital Egypt Marvels Initiative

MCIT Affiliates

we — NTI National Telecommunication Institute — iti — itida IT INDUSTRY DEVELOPMENT AGENCY — جامعة مصر للمعلوماتية EGYPT UNIVERSITY OF INFORMATICS

Building Capacities in
Advanced and Intermediate Capacities

140K
Trainees

15K
Web
Development
Professional
Advanced

2.8K
Cloud
Technologies
DevOps - Architect
Native –Site Engineering
AI Cross Skilling – Machine Learning

3.4K
Autonomous Systems
Self Driving – Sensor Fusion
S/W Testing
Foundation– Front End Back End
Embedded Software
Professional - Advanced

20K
Data
Architect
DevOps Engineering

38K
Digital Marketing
Professional
Advanced
Analytics

itida egypt fwd UDACITY

World Class Training (Microelectronics / Embedded)

eme | capacity building program

+3000/ yr	+300/ yr	+1500/ yr	+200/ yr
Embedded Systems	**Hardware**	**VLSI Design**	**Applied Master Degree**
C/C++ AVR/ARM Processors RTOS Embedded M. Learning/AI Embedded Cybersecurity Embedded Linux Testing ISTQP Functional Safety FUSA/CySec	Electrification Battery Management High Speed PCB Design Power Management ADAS/AD AutoSAR Crypto Stack PMSM/BLDS	Analog / Mixed RF IC Physical Layout/Post Simulation FPGA Tool Kit (VHDL/Verilog) Digital IC ASIC Design Digital Testing / Verification Digital ASIC Layout / IC tape out IC Chip Measurement & Characterization	Data Science and Analytics AI / Robotics Cybersecurity Digital Arts

Our Partners

ITI · NTI · The American University in Cairo · Ain Shams University · UDACITY · Sprints · SWIFT ACT · iPT School

Egypt's Savings C&B

Vs

In Design/R&D

Embedded Engineer

Senior / Junior Team Leader

Up to **50%** Savings

Among **Top10** least expensive cities

Philippines | Hungary | Poland

Turkey | India | Morocco

Startup Genome

Top 20 Locations
Affordable Talent
2023

EY
2021

Rental Office Cost

Inside Cairo			Outside Cairo
Central Cairo	West Cairo	East Cairo	
1 Maadi Technology	2 SMART VILLAGE®	3 TRIVIUM / MIVIDA BUSINESS PARK	4 SILICON WAHA
Maadi Technology Park	Smart Village	New Cairo	Beni Suef , Sadat, Borg El Arab & Assuit
17/m2 USD	19 – 25 USD	25 – 35 USD	8-9 USD and can get subsidized up to 50%

Cost/m2/month

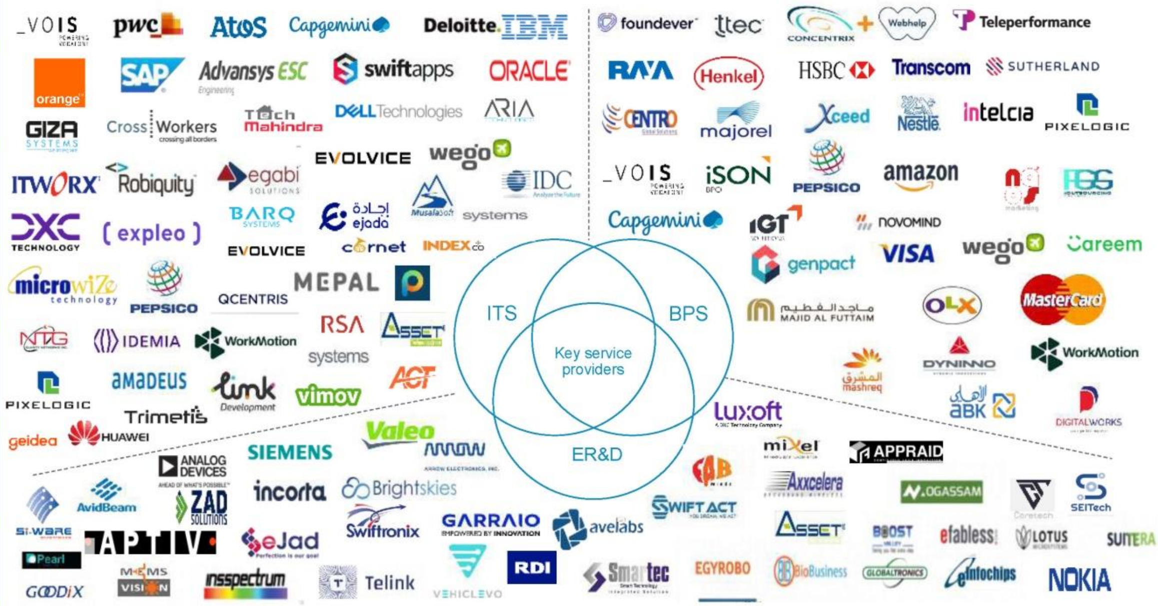
Utilities & Maintenance Costs: 5 USD on average

Internet Backbone connecting **60+ Countries** through **13 Routes**	**Free Trade agreements** covering 70+ countries across **Africa, Asia, and Europe**	**$1.6bn investments** in developing the **infrastructure in the ICT sector**

Egypt's Offshoring Industry

Egypt has emerged as a premier offshoring destination in the region due to its highly skilled and deep talent pool, strategic location for European markets, workforce adept at remote work, and cost-efficient business environment. Egypt today can boast that it is home to over 400 of the biggest offshoring companies.

Home to Multiple Offshoring Players



IN **2023**, the visit of **Egypt's Prime Minister** to the leading companies in Egypt's diverse tech sectors spotlights the nation's ascension as a global tech powerhouse, showcasing consistent Government support.

"Global industry giants and high-tech companies from all over the world are reaping the benefits of working with Egyptian talents, from entry-level CX agents to advanced engineers and programmers. All the business leaders that I have met have confirmed that Egypt's human resources are among the best in the world. The technology and technology-enabled sectors are Egypt's future, and the opportunities for growth continue to present themselves"

H.E. DR. MOSTAFA MADBOULY
EGYPT'S PRIME MINISTER

_VOIS: With more than **9,500 professionals** in Egypt to help create a digital society that advances the future. They target 12,000 over 3 years, illustrating Egypt's key role in digital development and service export.

SIEMENS: Siemens Digital Industries Software employs 1,000 experienced employees, with an annual growth rate of 20% with featuring **47 patents and 560 research** papers.

pwc: By investing **$25M investment** in their ETIC hub, it drives digital innovation and talent development, targeting $300M in exports over 3 years.

geidea: Industry leader with **1,200+ professionals,** emphasizing diversity with women being 67% of the workforce.

PIXELOGIC: Expanding from a small team to **500+professionals,** showcasing rapid growth and investment in Egypt's digital arts sector.

Capgemini: By offering services to diverse international markets, the center is targeted to achieve digital exports worth **$300 million** over the course of 3 years and aims to provide 5,000 job opportunities by 2026.

Valeo: Leading Valeo's global software production, with a team of **3,200+** software engineers, nothing that Valeo Egypt has filed nearly 100 patents.

PEPSICO: By **employing 407 professionals,** with plans to double in 7 different specialties at its center in Egypt.

Concentrix + Webhelp: By offering multilingual support and serving global clients in **12 languages,** through 9 centers in 4 governorates.

SEITECH: Targeting 1,000 employees and **1.8 billion EGP** investment in 3-4 years, aiming to double current figures.

amazon.eg: By serving diverse markets with **1,600+ professionals,** from which 65% catering to international.

IC Design Ecosystem

RF/Analog IC/ MEMS

Digital/Mixed Signal

Electronics CAD Tools Dev.

Power Electronics

Microelectronics & MEMS Labs Characterization

Microelectronics Universities/ Institutes

Educational Clean Rooms

Prototype Innovation Labs

Automotive Ecosystem

Automotive Developers

Valeo, Brightskies, APPRAID, SEITech, SIEMENS, AvidBeam, avelabs, Luxoft, Smartec, VEHICLEVO, SWIFT ACT, Swiftronix, eJad, Coretech, GARRAIO, CrewTeq, METHODE ELECTRONICS, ARROW Five Years Out, CyTwin LAB

Automotive Parts Suppliers

LEONI, Sumitomo, YAZAKI, APTIV 2025, METHODE ELECTRONICS

Multinational OEM Producers

BMW, Mercedes-Benz, NISSAN, HYUNDAI, BYD, ISUZU, GEELY, CHEVROLET

DEVELOPED
INDUSTRY

SIEMENS Mentor A Siemens Business

In Egypt Since 1995

Largest R&D office outside the US

+1100 Employees

"Our Strategy is to establish Mentor Graphics as the trusted advisor high technology reference in the MENA region. Where is the talent we have to be."

Dr. Walden Rhines

Chairman of Board & x-CEO

synopsys® Silicon to Software™

Si-VISION INNOVATIVE IC SOLUTIONS

In Egypt Since 2010

R&D CoE + 2 SSCs

660 Engineers

"Synopsys is making significant investments in both of these areas to provide designers with the hardware & software solutions required to accelerate the development of their IoT applications with the acquisition of Bluetooth Smart IP from Silicon Vision.

Joachim Kunkel,

Executive Vice President Synopsys

DEVELOPED
INDUSTRY

Brightskies

In Egypt since **2016**

R&D and Regional Engineering Center

440 Employees

" We have been blessed to have been here with the Egyptian talents so we have been able to grow from 2 engineers in 2012 to around 400 engineers today. Mostly working in sophisticated technologies and developing even products in autonomous driving and in-car electrification and power batteries. "

Hicham Arafa
COO
Brightskies

Valeo

In Egypt since **2006**

R&D CoE + 2 SSCs

3500 Engineers

"Our software house in Egypt is the main software house for Valeo, serving the entire group in 30 different countries"

Tamer Ali,
Former GM
Valeo Egypt

DEVELOPED
INDUSTRY

IBM

In Egypt Since **1954**
Regional Tech Centers

"IBM has always realized the attractiveness of Egypt as a competitive sourcing destination."

Wael Abdoush, Former General Manager, IBM Egypt

DELL Technologies

In Egypt Since **2009**
Center of Excellence
1500 + Employees

"Selected by DELL Senior Executives as one of the "Best" locations for investment and growth."

Magued Mahmoud, VP & GM, Dell CoE

and more..

Focus Industry Products (Investment Opportunities)

Promising Products with Quick Impact and Highly Demand of Local & Regional Markets & Growth Rate

Telecom
(Mobile Phones, Tablets, Laptop, Routers, CPE, GPS, Fiber Optics)

LED Lighting
(LED Chips)

Semiconductors → Wafers / IC Fab / Packaging / Power Electronics

LED Displays
Opencell Panels/ Optical films..)

Smart Meters

Industrial Electronics

Solar
(Cells/Panels/Inverters..)

Printed Circuit Boards Fabrication

Lithium Batteries

Feeding Industries

egypt makes electronics

Vertical Industries of Focus Products

Focus Products	Local Added Value	Target Vertical Industries
TV Displays / Set-top-Boxes	CKD production, PCBA, Cabinets (plastic/Metal), Speakers, LED back lights, LCD panels assembly, power cords, some internal wire harness, Packaging (carton, foam)	Optical films, PCB, all wire harness, Open-cell (LCM), Power Adaptors
Mobile / Tablets / Telecom	CKD, PCBA, Housing, (Plastic, Metal) packaging	PCB, Chargers, LCM, metal or plastic housing, earphone speakers, Lithium batteries
LED Lighting	CKD, PCBA, metal or plastic covers	LED chips, PCB, Inverters
Digital / Smart Meters	CKD, PCBA, Housing (metal, Plastic)	Relays, PCB, displays, smart cards
Industrial Electronics	PCBA of control boards, wire harness, power cords for home appliances, elevators, electrical panels,...etc	
Solar / Renewable Energy	Solar panels	Inverters, Solar cells , Batteries
Semiconductors	Wafers, IC Fabs, Testing & Packaging, MEMS / Sensors, Power Electronics	

Engineering R&D Opportunities (Investment Opportunities)

Investment in Design and Development of Electronics Systems and Components (IC Chip) and Embedded Systems

- AI / ML / Deep Learning / Data Analytics / DevOps / SW Testing
- Electronics IC Chips (Analog/Digital) / MEMS / EDA & Circuits design
- IoT / IIoT and Smart Cities Solutions
- Automotive Electronics Systems / Autonomous Drive
- Industry 4.0 Digital Transformation Solutions
- Embedded systems development
- Healthcare biomedical equipment.

Government provides attractive incentive package for establishing electronics design house inside Knowledge city furnished with whole electronics eco-system

SUPPORTIVE GOVERNMENT

Investors Support and Aftercare System

1 Market Insights & Decision Support	2 Set up and Legal Establishment	3 Operational support	4 Account Management
Respond to RFIs	Recommend Legal Advisors Firms	Recommend Recruitment firms	Dedicated Account Manager
Arrange Due Diligence visits	Recommend Real Estate Advisors	Connect with ITIDA capacity talent	Conflict Resolution

SUPPORTIVE GOVERNMENT

1 **30% - 50%** Corporate Tax reduction, **up to 80%** of total paid capital

2 Fund **for HR development for qualifying enterprise staff** (local/overseas) **(Q4E)**

3 Subsidize rental cost in Tech. Parks **30% 40%**

4 **Availing Public and Private tax-Free Zone**

5 **Funding** for R&D projects and local designs

6 **White List** For Customs Clearance Resilience

7 **Gov training** Providing Professional & vocational programs

INSPIRING INNOVATION

60% Foreign Investors

2nd MENA Startup Ecosystem in Knowledge

16 Innovation Hubs

Startup Genome

International Hubs

PLUGANDPLAY, 500

Capacity building Labs

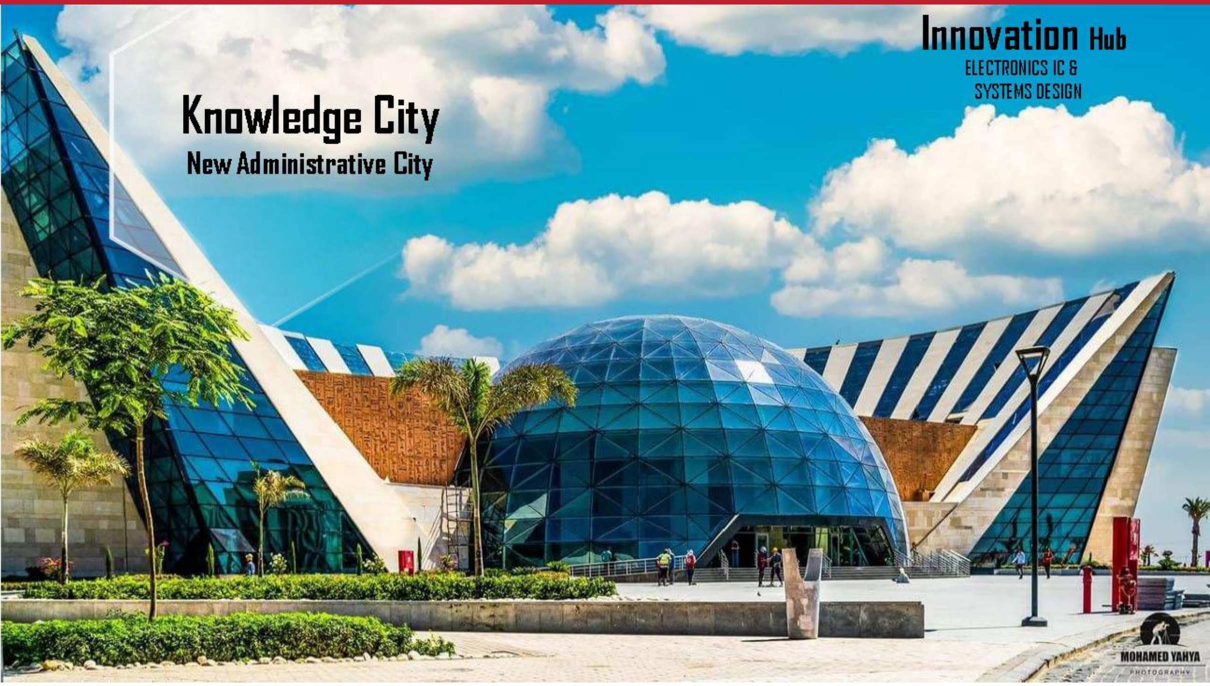
CREATIVA, SILICON WAHA

Startups

SUITERA, MASTER MICRO, Mabrains, SWIFTACT, DevisionX, OGASSAM, PULSAR

Innovation Initiatives

ERICSSON, orange, Valeo, SAMSUNG


Knowledge City
New Administrative City
Innovation Hub
ELECTRONICS IC &
SYSTEMS DESIGN
MOHAMED YAHYA
PHOTOGRAPHY


INSPIRING
INNOVATION
Knowledge
City
Micro electronics & Mems Labs
IOT & Robot Lab
Ind 4.0 Innovation Lab
Electronics Training (EDA&CAD CAM)
Technology Incubator
Multimedia VR|AV Lab
Home of Local | INCs Design Companies
Eco-System
eme
egypt.makes.electronics

	Opportunity	Description	Location
1	*Outsourcing Building*	The outsourcing building has rental spaces suitable for outsourcing companies or telecommunications companies, attached with meeting and training rooms, administrative offices, vault rooms and a cafeteria for customer service activities. The building consists of: two floors (ground floor and first floor).	**Menofia** *Technological Zone in Sadat City with total Surface Area 4,600 m2*
2	*Outsourcing Building*	The outsourcing building has rental spaces suitable for outsourcing companies or telecommunications companies, attached with meeting and training rooms, administrative offices, vault rooms and a cafeteria for customer service activities. The building consists of: two floors (ground floor and first floor).	**Beni Suef** *Technological Zone in Beni Suef City with total Surface Area 4,600 m2*
3	*Outsourcing Building*	The outsourcing building consists of (ground, first, and second floors). It has rental spaces suitable for outsourcing companies or telecommunications companies, attached with meeting rooms, administrative offices, vault rooms and a cafeteria for customer service activities. Ground floor: ground floor surface area is 1376 m2. It contains 2 customer service halls and 4 vault rooms. First floor: first floor surface area is 1653 m2. It contains 2 customer service halls, 4 vault rooms, a warehouse and a cafeteria. Second floor: second floor surface area is 1655 m2. It contains 2 customer service halls, 4 vault rooms, a warehouse and 2 meeting rooms.	**Assiut** *Technological Zone in New Assiut City with total Surface Area 4,684 m2*
4	*Outsourcing Building*	The outsourcing building has rental spaces suitable for outsourcing companies or telecommunications companies, attached with meeting rooms, administrative offices, vault rooms and a cafeteria for customer service activities. The building consists of 3 floors: Ground floor: ground floor surface area is 1371 m2. It contains 2 customer service halls and 4 vault rooms. First floor: first floor surface area is 1645 m2. It contains 2 customer service halls, 4 vault rooms, a warehouse and a cafeteria. Second floor: second floor surface area is 1647 m2. It contains 2 customer service halls, 4 vault rooms, a warehouse and 2 meeting rooms	**Alexandria** *in the Technological Zone in New Borg El Arab City with total Surface Area 1,371 m2*

Transportation & Logistics Sector

Ministry of Transport Achievements

Ministry of Transport has planned and begun implementing many projects aimed at facilitating the movement of people and goods by developing a diverse network in various fields of transport (roads and bridges - railways - tunnels and electric traction - seaports - land and dry ports and logistical centers - river transport - Land transport regulatory authority.

infrastructure projects are financed and implemented by national Egyptian companies.

Roads and bridges

2014

23.5 thousand km main road network

38 Bridges on the Nile

1500 bridges/tunnels (main roads/sliders).

125 thousand km local roads

530 billion pounds

2023

7,000 km of new roads, bringing 30.5,000 km to the road network, and developing 10,000 km of the current network.

Create 13 new axes, bringing the number to 51 axes

Construction of 935 new bridges.

Raising the efficiency of 41,000 km of local roads,

300 billion pounds

2030

3,000 km of new roads, bringing 33.5,000 km of length to the network, and developing 4,000 km of the current network, bringing 14,000 km more.

Create 21 new axes, bringing the number to 72 axes

365 new bridges, bringing the number to 2,800 bridges/tunnels

Raising the efficiency of 34 thousand km of local roads

bridges projects

regional ring road is 400 km

Shubra / Banha 40 km

Railways

2014

900 thousand Passenger daily

4 million tons Cargo annually

Poor levels of safety, and regularity of train schedules and passenger services

225 billion pounds

2023

1.2 million passengers daily

5 million tons of cargo annually

Levels of safety, insurance, and regularity of train schedules and passenger services increased to 85%.

75 billion pounds

2030

2 million passengers daily

13 million tons of cargo annually

Levels of safety, insurance, and regularity of trains and passenger services reach international standards

Tunnels and Electrical Traction

2014

(2 metro lines - a phase of the third line) with a length of 80 km

64 stations
106 train
2.5 million passengers daily

→ 1100 billion pounds →

2023

(3 metro lines - train line Electric LRT - Monorail East of the Nile) with a length of 220 km

123 stations
220 train
5 million passengers daily

→ 400 billion pounds →

2030

(5 metro lines - electric train - 2 monorail lines - fast train network - Alexandria Metro - Raml Tram) with a length of 2700 km

334 stations
672 train
13.5 million passengers daily
12 million tons of cargo annually

Maritime

2014		2023		2030
15 port		18 port		18 port
37 km of berths, 8-12 m deep, with an area of 40 km2	129 billion pounds	67 km of berths, 15-18m deep, with an area of 75 km2	170 billion pounds	100 km of berths, 18-22 m deep, with an area of 40 km2
160 million tons of goods 11 million containers 2 million transit containers One million passengers 5 thousand medium-sized ships		270 million tons of goods 25 million containers 4.5 million transit containers 2 million passengers 20 thousand medium-sized ships		400 million tons of goods 40 million containers 10 million transit containers 10 million passengers 30 thousand medium-sized ships

Dry ports and logistics centers

2014

5 land ports
A million passers-by
107 thousand vehicles
1.2 million tons of goods
0 Dry ports
0 Logistics areas

15 billion pounds

2023

7 land ports
3 million passers-by
352 thousand vehicles
5 million tons of goods
3 Dry ports
2 Logistics areas

Trading volume is 130 thousand containers annually

50 billion pounds

2030

9 land ports
4.5 million passers-by
500 thousand vehicles
7 million tons of goods
10 Dry ports
5 Logistics areas

The target trading volume is 130 thousand containers annually

Inland waterway

2014

289 transport units passenger/goods

3 million tons of goods

3.6 million passengers

1,800 km of navigation routes including 9 locks

47 wharf/river port

Using beacons to determine navigational routes

4 billion pounds

2023

289 transport units passenger/goods

7 million tons of goods

18 million passengers

1,850 km of navigation routes including 10 locks

51 wharf/river port

Using the RIS information infrastructure system for a distance of 1000 km

7 billion pounds

2030

500 transport units passenger/goods

10 million tons of goods

21 million passengers

1,850 km of navigation routes including 11 locks

53 wharf/river port

Using the RIS information infrastructure system for a distance of 1855 km

Logistics corridors

- (Sokhna / Alexandria) logistical corridor
- (Sokhna / Alexandria) logistical corridor
- Cairo/Alexandria logistical corridor
- Tanta / Mansoura / Damietta corridor
- Jarjoub /Salloum corridor
- The Cairo - Aswan - Abu Simbel (logistical) corridor
- (Safaga - Qena - Abu Tartur) logistical corridor

Transport sectors

Railways sector

Electric traction sector

Maritime sector

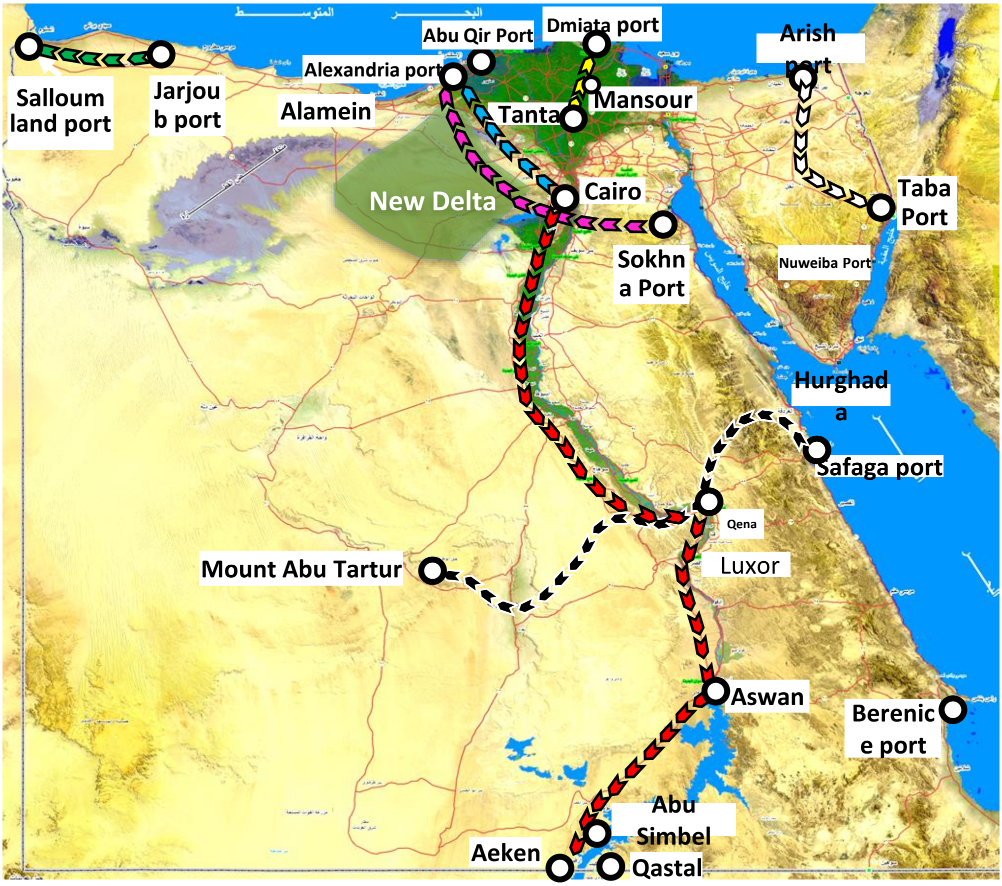
Dry ports and logistics centers sector

Inland waterway transport sector

Domestic and international land transportation sector

Logistics corridors

Logistics corridors



Establishing integrated logistical corridors to link production areas (industrial - agricultural - mining) with seaports or linking seaports on the Red Sea to seaports on the Mediterranean via a railway network (diesel/high-speed electric train) or a network of main roads passing through dry ports and logistical areas located On these routes as part of the Belt and Road plan and to make Egypt a center for global trade and logistics, which are:

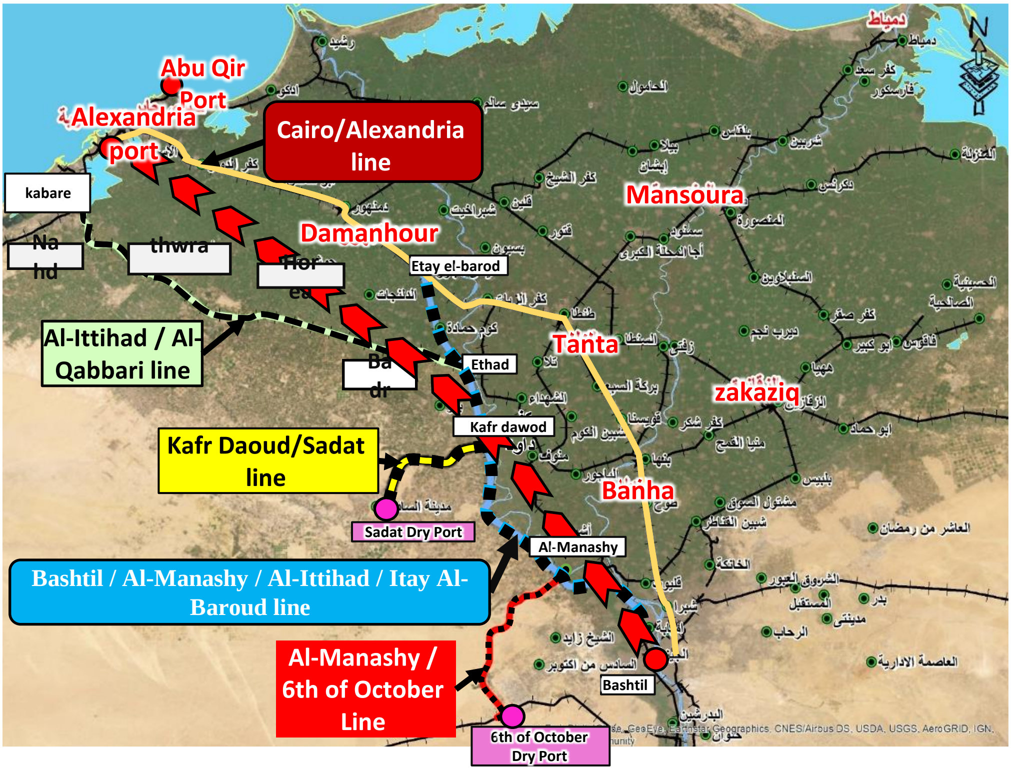
1. (Sokhna / Alexandria) Corridor
2. (Al-Arish / Taba) Corridor
3. (Cairo / Alexandria) Corridor
4. (Tanta / Mansoura / Damietta) Corridor
5. (Jarjoub / Salloum) Corridor
6. (Cairo - Aswan - Abu Simbel) Corridor
7. (Safaga - Qena - Abu Tartour) Corridor

1 - Sokhna Port
2 – The first line of the high-speed electric train
3 - Dry Port, 10th of Ramadan
4 - Railway line (Al-Roubiki /10th of Ramadan/Belbeis)
5 - Alexandria Grand Port

The (Sokhna/Alexandria) logistical corridor is located on the multimodal transport axes (Ain Sokhna and Alexandria), which is the main development hub in the Arab Republic of Egypt, and the main axis for the movement of goods exported and imported to and from the Republic through the port of Alexandria, through which 70% of the volume of Egypt's exports and imports passes. The total length of the axis is 400 km, and the axis connects 4 main governorates (Suez/Cairo/Giza/Alexandria). The axis is based on a developed and highly efficient transportation network of main roads and railway networks with the aim of increasing the carrying capacity for transporting passengers and goods. the hub .

1. **Al-Arish sea port**
2. **Railway line (Al-Ferdan / Bir Al-Abd / Al-Arish / Taba / and the East Port Said link)**
3. **Taba land port**
4. **A plan to establish 8 logistical areas in the Sinai Peninsula (Rafah - Al-Auja - Al-Hasana - Al-Naqab - Taba - Al-Tur - Ras Sidr - Bir Al-Abd)**

The (Al-Arish/Taba) logistical corridor is located on one of the main development axes in the Arab Republic of Egypt (the Mediterranean and Sinai axis), and connects the North and South Sinai governorates, and also connects the White and Red Bahrain from the port of Al-Arish to Taba.



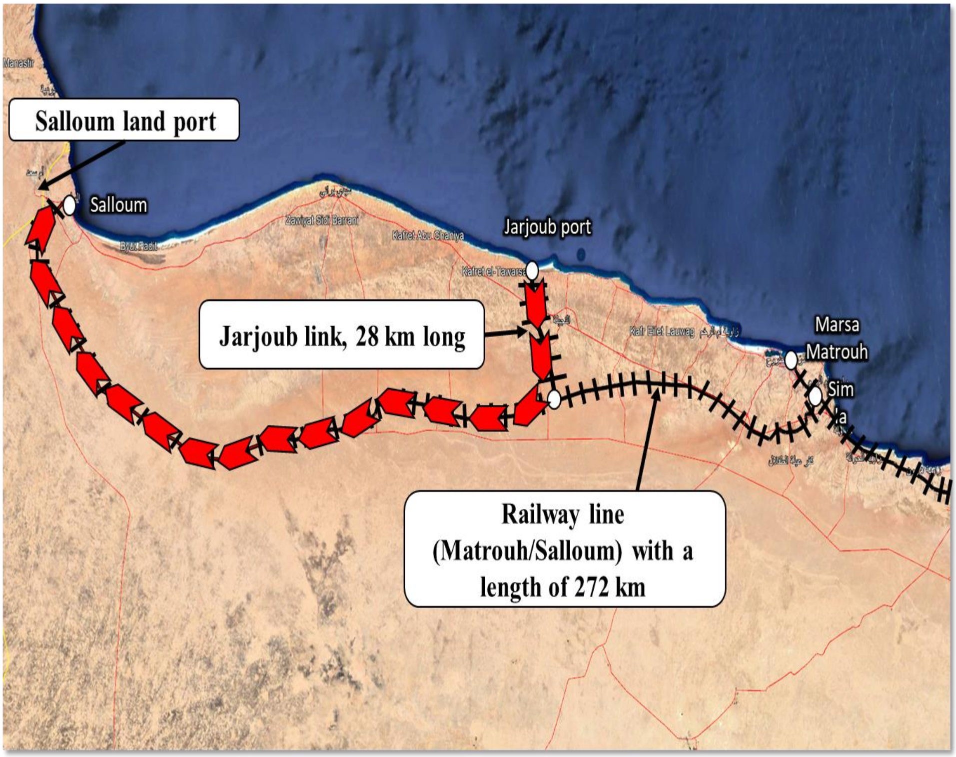
1- Upper Egypt Railway Station in Bashteel .
2- Duplication and development of the railway line (Bashtil/Al-Ittihad/Itay al-Baroud/Al-Qabbari)
3- Dry October Port
4- Railway line (Al-Manashy / 6th of October)
5- The dry port in Sadat City
6 - Railway line (Kafr Daoud / Sadat)
7- Alexandria Grand Port

The (Cairo/Alexandria) logistical corridor is located on the multimodal transport axes (Ain Sokhna and Alexandria), which is the main development axis in the Arab Republic of Egypt, and the main axis for the movement of goods exported and imported to and from the Republic through the port of Alexandria, through which 70% of the volume of Egypt's exports and imports passes. The axis also connects 4 main governorates (Suez/Cairo/Giza/Alexandria)

Logistics corridors 4. (Tanta / Mansoura / Damietta) Corridor

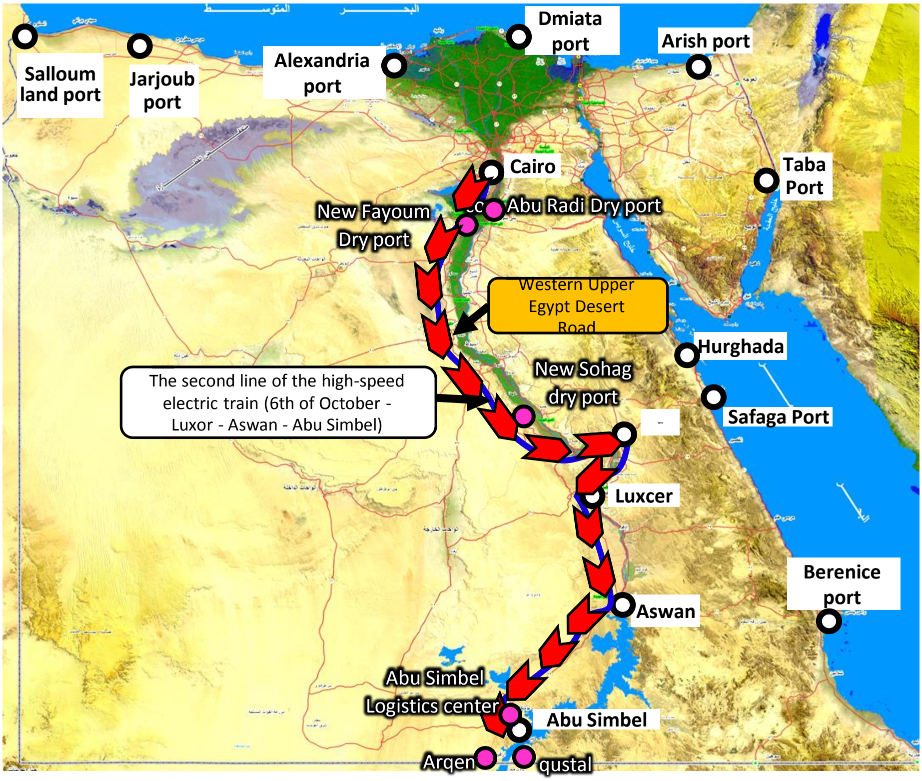
1- Logistics area in Tanta
2- Railway line (Tanta / Mansoura / Damietta)
3- The dry port in New Damietta City
4- Damietta Port

The (Tanta / Mansoura / Damietta) corridor is located on the Damietta / Cairo / Port Said axis, and it is one of the main corridor for the movement of export and import goods through the ports of Port Said and Damietta, which represents approximately 30% of the volume of Egypt's exports and imports, in addition to transit activity. The length of the corridor is 443 km. Approximately km, it connects a number of governorates, the most important of which are (Damietta - Dakahlia - Sharkia - Menoufia - Cairo - Ismailia - Port Said). The corridor is based on an advanced and highly efficient multimodal transport network with the aim of increasing the transport capacity on the corridor.



1- Jarjoub sea port
2- Establishing the Jarjoub link and developing the Matrouh/Salloum railway line with a total length of 300 km.
3- Salloum land port

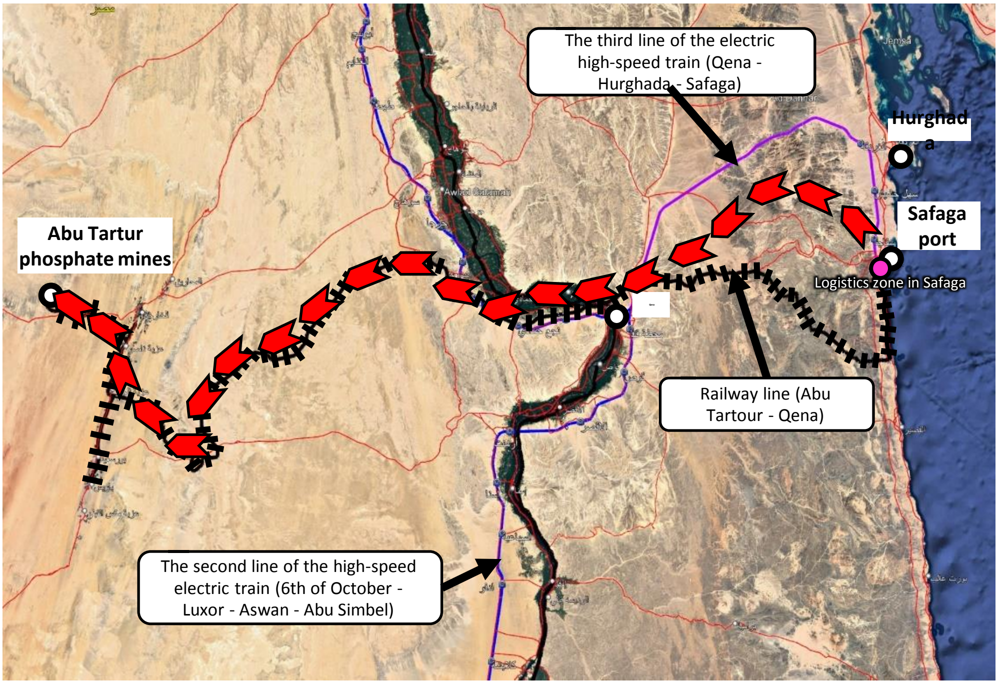
The (Jarjoub/Al-Salloum) logistical corridor is located on one of the main development axes in the Arab Republic of Egypt (the Mediterranean axis), and connects Matrouh Governorate in the west with the rest of the Republic's governorate through the railway network, along the Mediterranean coast. It is part of a project to link The Maghreb in the Arab Levant, its length is approximately 1,021 km, and the road begins west from the Salloum crossing in Matrouh Governorate on the border with Libya, until the Rafah crossing in the east on the border with the Gaza Strip.



1. **The second line of the high-speed electric train network**
2. **Developing and expanding the Western Upper Egypt Desert Road**
3. **Dry land ports and logistics areas (New Fayoum - Kom Abu Rady- – New Sohag – Abu Simbel)**
4. **The agricultural reclamation area in Toshka, East Al-Owainat, and the Abu Simbel tourist area**

The (Cairo - Aswan - Abu Simbel) corridor is located on the Upper Egypt axis, which is the main corridor of trade movement from northern to southern Egypt, as it extends from Cairo to Aswan with a length of 1,115 km and is considered the second longest corridor of development. The corridor is also located on one of the most important international trade attempts on the continent of Africa, which is the (Cairo - Cape Town) axis. The length of this axis is estimated at 10.2 thousand km, and it will contribute to increasing the volume of trade exchange between the countries of Egypt, Sudan, Ethiopia, Kenya, Tanzania, Zambia, Zimbabwe, Gabon and South Africa.

Logistics corridors 7. (Safaga - Qena - Abu Tartour) Corridor



1. The third line of the high-speed electric train network
2. Railway line (Abu Tartur - Qena)
3. Logistics area in Safaga
4. Safaga PortThe (Safaga - Qena - Ab

The (Safaga - Qena - Abu Tartur) logistical corridor is located on the corridor. The axis is based on contributing to raising the efficiency of transportation to and from the Red Sea ports and linking them with the governorates of South Upper Egypt via railway, road and river transport networks in order to serve the development areas in the Golden Triangle.

Transportation Sectors


Maritime

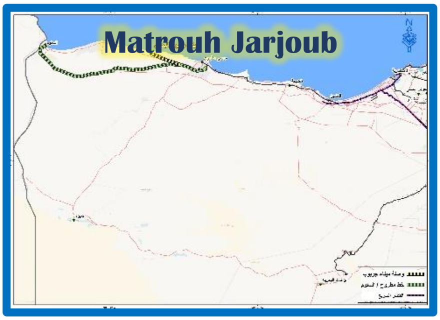

Railways


Electric traction


Inland waterways

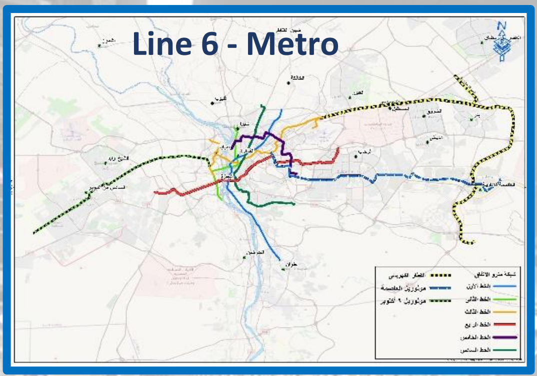

Dry ports and logistics centers

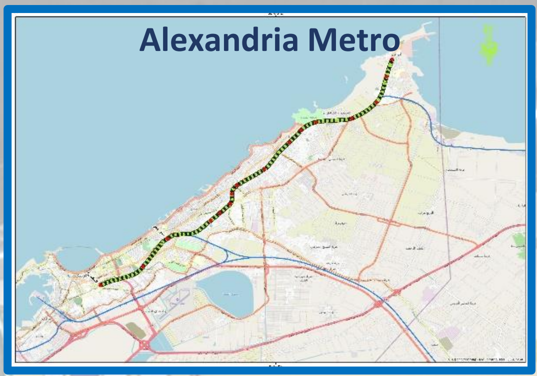
First: Projects of the Egyptian National Railway Authority

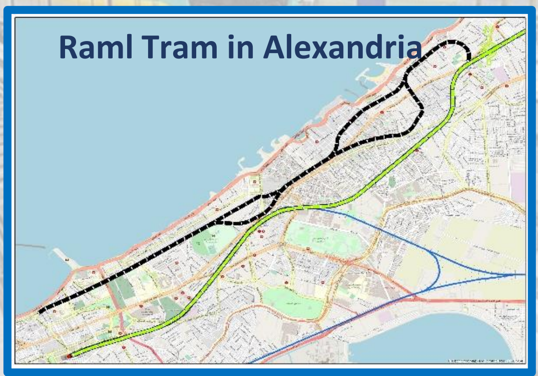


- Management and operation of main workshops
- Management and operation of companies affiliated with the Railway Authority

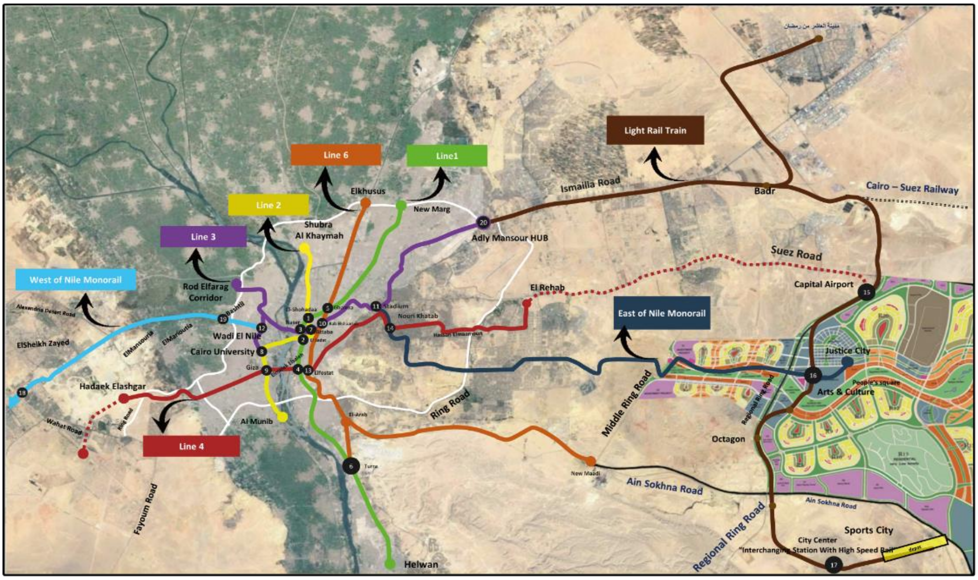
Second: The National Authority For Tunnels Projects





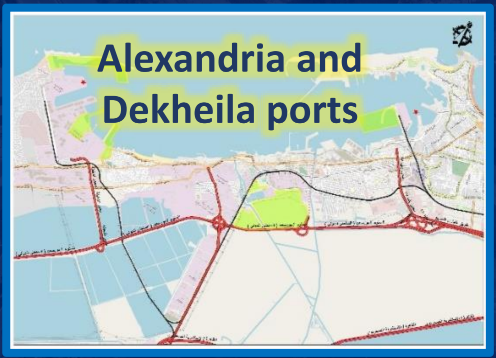


Greater Cairo Metro Network



1. El-Shohadaa : Metro L1&2
2. El Sadat : Metro L1&2
3. Naser : Metro L1&3
4. Elmalek Elsaleh : Metro L1&6
5. Ghamra : Metro L1&6
6. Turra : Metro L1&6
7. Attaba : Metro L2&3
8. Cairo University : Metro L2&3
9. Giza : Metro L2&4
10. Bab Elshaariya : Metro L3&6
11. Stadium : Metro l 3 & East Monorail
12. Wadi El Nile : Metro L3 & West Monorail
13. Elfostat : Metro Line 4&6
14. Nouri Khattab : East Monorail & Metro L4
15. Capital Airport : LRT &Metro Line 4
16. Arts & Culture : LRT & East Monorai
17. Central Capital : LRT & HSR
18. Engineers Syndicate : West Monorail & HSR
19. Bashtil : West Monorail & ENR
20. Adly Mansour : Metro L3 ,LRT, BRT, ENR, Superjet

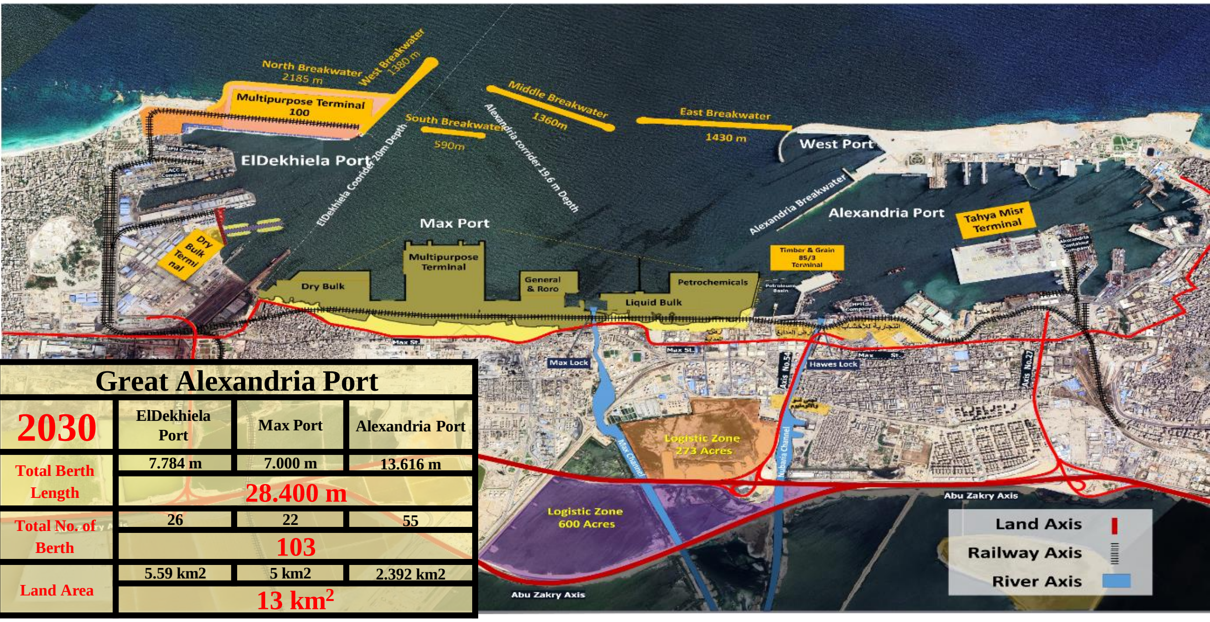
Third: Maritime sector projects



Alexandria and Dekheila ports Projects

Alexandria and ElDekheila Port Plan to 2030

Alexandria and Dekheila Port Plan until 2030

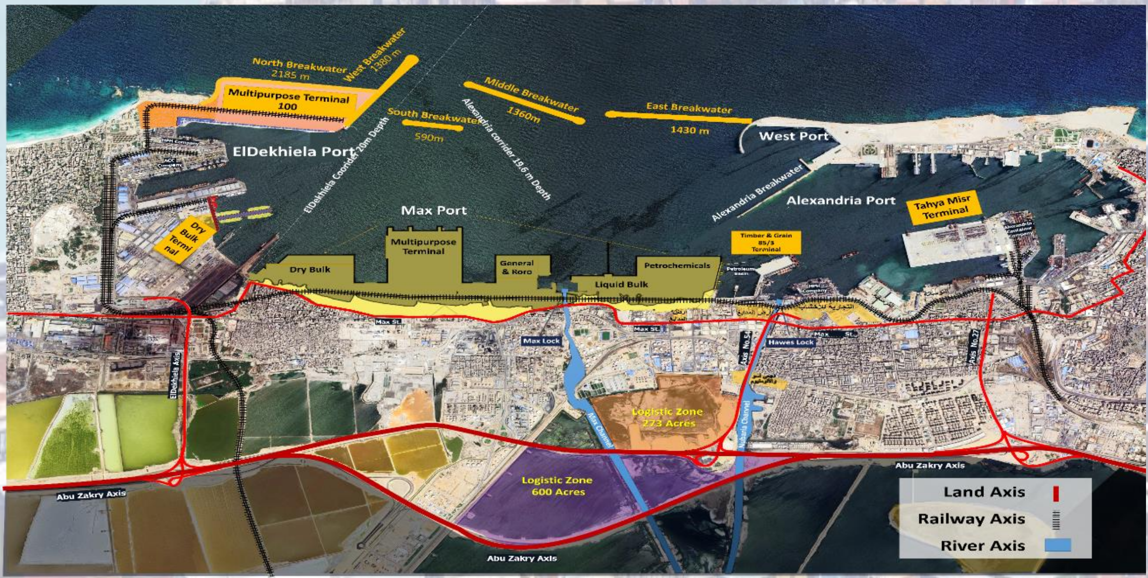


Great Alexandria Port			
2030	ElDekhiela Port	Max Port	Alexandria Port
Total Berth Length	7.784 m	7.000 m	13.616 m
	28.400 m		
Total No. of Berth	26	22	55
	103		
Land Area	5.59 km2	5 km2	2.392 km2
	13 km^2		

Alexandria and ElDekheila Ports Projects

Construction of Al-Max Port project between the ports of Alexandria and Dekheila (Middle Port)

Future Projects (Alexandria-ElDekhiela – ElMax)



Construction of El-Max Port project between the ports of Alexandria and Dekheila (Max Port)

Added Water Area	12.300 Km2
Berth Length	7 Km
Added Land Area	1.45 billion m2
Area North Max Port	1.1 thousand m2
Total Land Area	1.56 billion m2

Logistic Zones

Alexandria / ElDekhiela

On June 6th,2023 the Republican decree No. 227 of 2023 was issued for the following lands:

1- An area of **17.72 acres** sector (C)
2- An area of **143.37 acres** Sector (D)
3- An Area of **386.49 acres** Sector(E)

Second Logistic Center (547.58 acres)

On August 1st, 2023, the plots of land were received by presidential decree and registered in the Land Registry Office with Registry No. (1038) of 2023.As well as the logistic center (first phase) of 273.6 acres, according to Republican Decree No. (466) of 2021.

Establishing, managing and operating the logistics zone

Logistic zone (273.7 acres)

Current operating ports

Kalaa Company river port
Misr Aluminum company river port
Silos company river port

New ports

River port 4
River port 5
River port 6
River port 7
River port 8

Ports on old quays in need of rehabilitation

River port 1
River port 2
River port 3

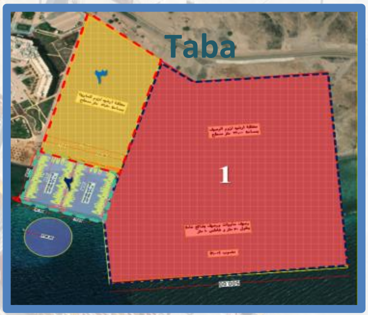
Axis

El-Tameer Axis south
Bridge 54

Rail ways

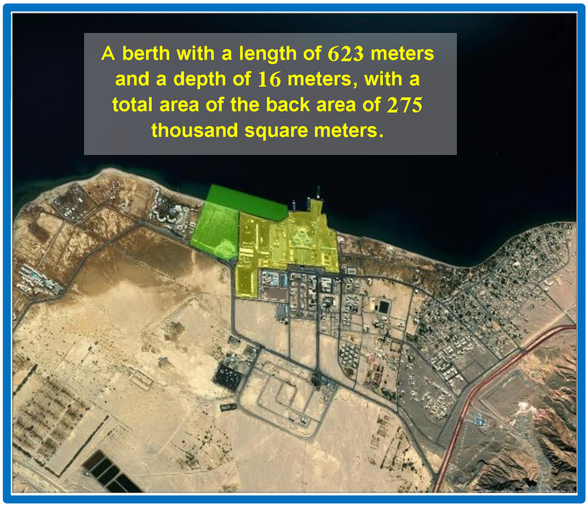
Rail way line for cargoes
Rail way line (Alexandria / Matrouh)

Red Sea Ports Authority

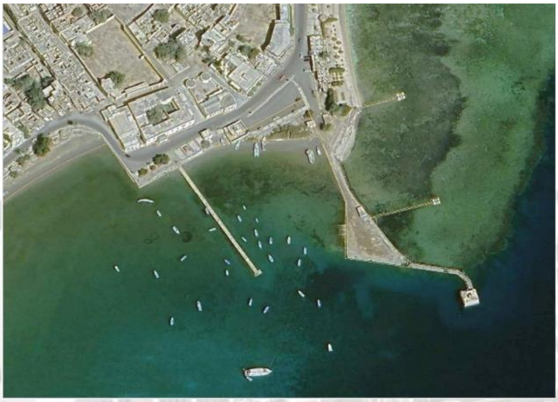


1- Superstructure of the Ro- Ro Terminal at North quay in Portawfik port

2- Superstructure, managing, and operating a multi-purpose Terminal at Nuwibae port



3- Constructing a ship-lift for maintaining yachts in Qusair port



4- superstructure, managing and operating the the Sokhna port

“In April 2021, President Abdel Fattah El-Sisi launched the starting signal to implement a giant project and comprehensive development of the Port of Sokhna to match the largest international ports by establishing berths with a length of 18 km, internal trading yards with an area of 19 km2, and internal logistics areas with an area of 4 km2, in addition to a road network with a length of 17 km and a railway network (Electric/diesel) with a length of 17 km, in addition to administrative and service areas, and this plan will end in 2025.

6 km2 water area

19 km2 hinterland

4 km2 internal logistics areas

29 km2 area

23 KM of berths

18 meters deep

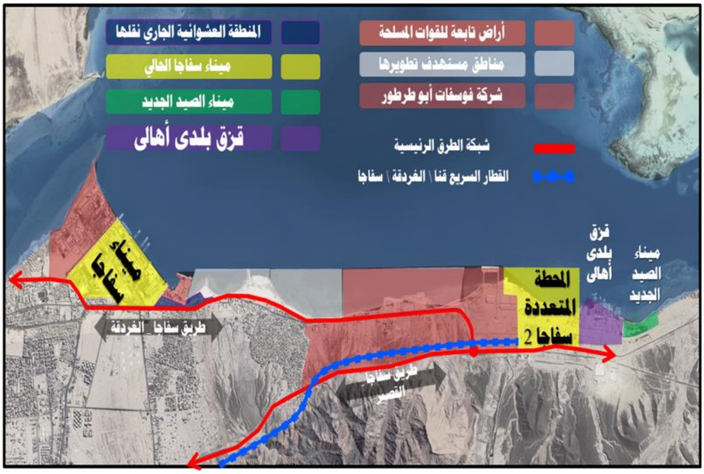
Sokhna Port 2025

What was accomplished in Sokhna Port during 5 years (2021-2025) is equal to 4 times what was accomplished in 15 years.

To be the main pivotal port for the logistical corridor (Sokhna - Alexandria) on the Red Sea

5- Development of the Great Safaga Port

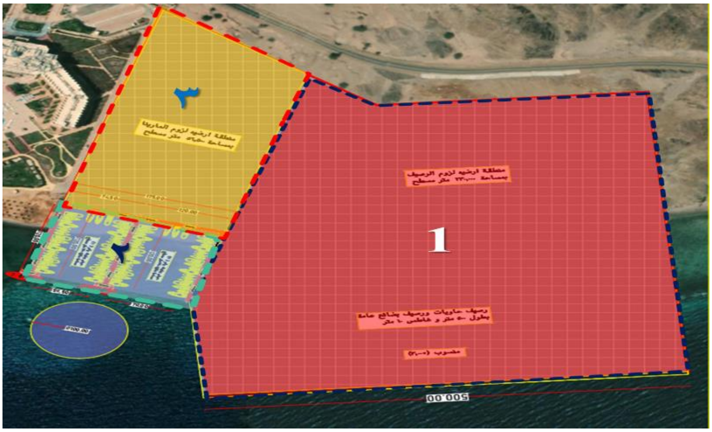
"Connecting Safaga Port to the multipurpose dock with a length of 4 km"



6- Superstructure, managing, and operating a multi-purpose Terminal at Taba port

Brief about the Project:

1- A container and general cargo quay measuring 500 meters long and with a depth of 12 meters, covering an area of 230,000 m2 . The quay is ready to be connected to the Taba – El Arish railway line after it has been planned by the railway authority.

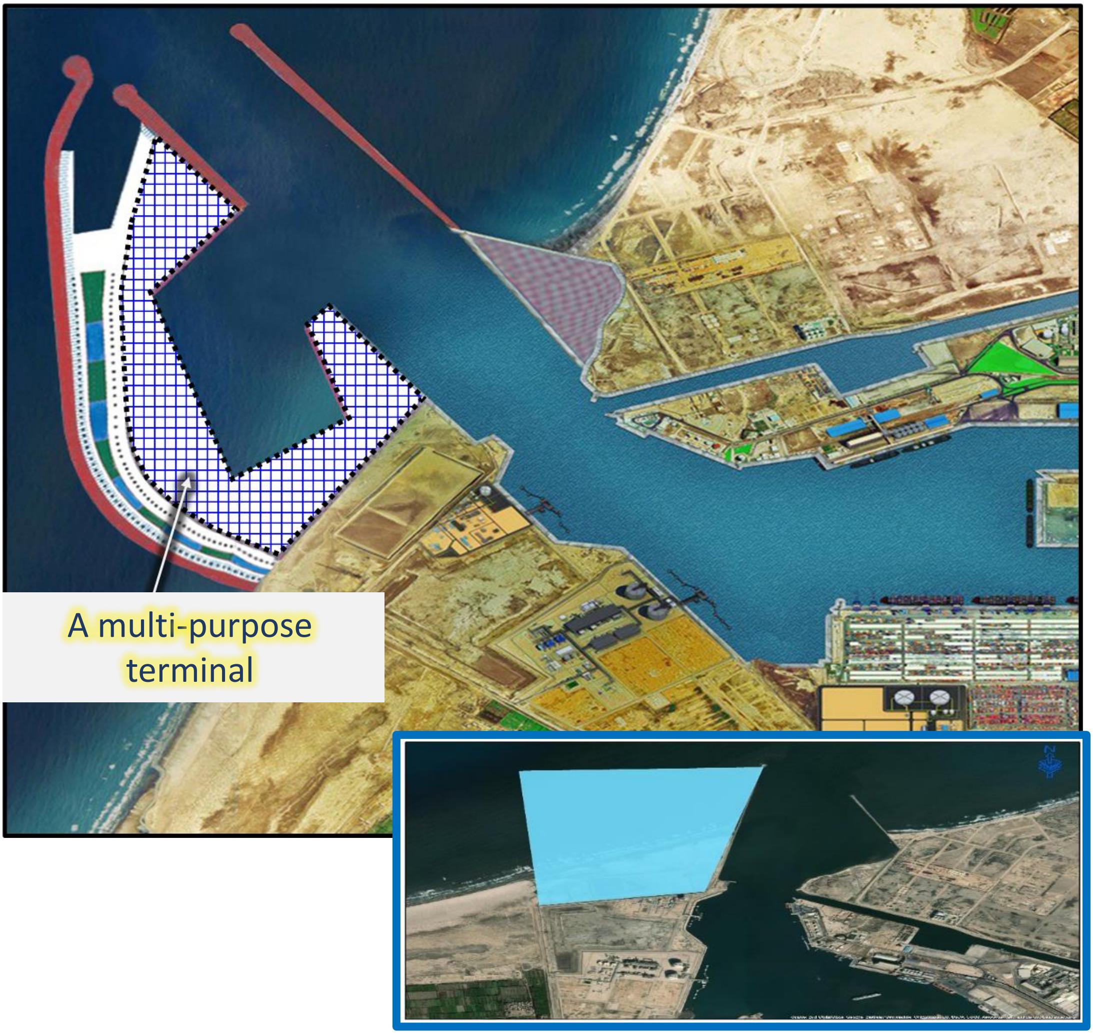


2- A marina for yachts with a draft of -4 to -2.5 accommodates yachts of varying lengths.

3- service and management area for the marina with an acquired area 56,500 m2 .

Damietta Port Authority projects

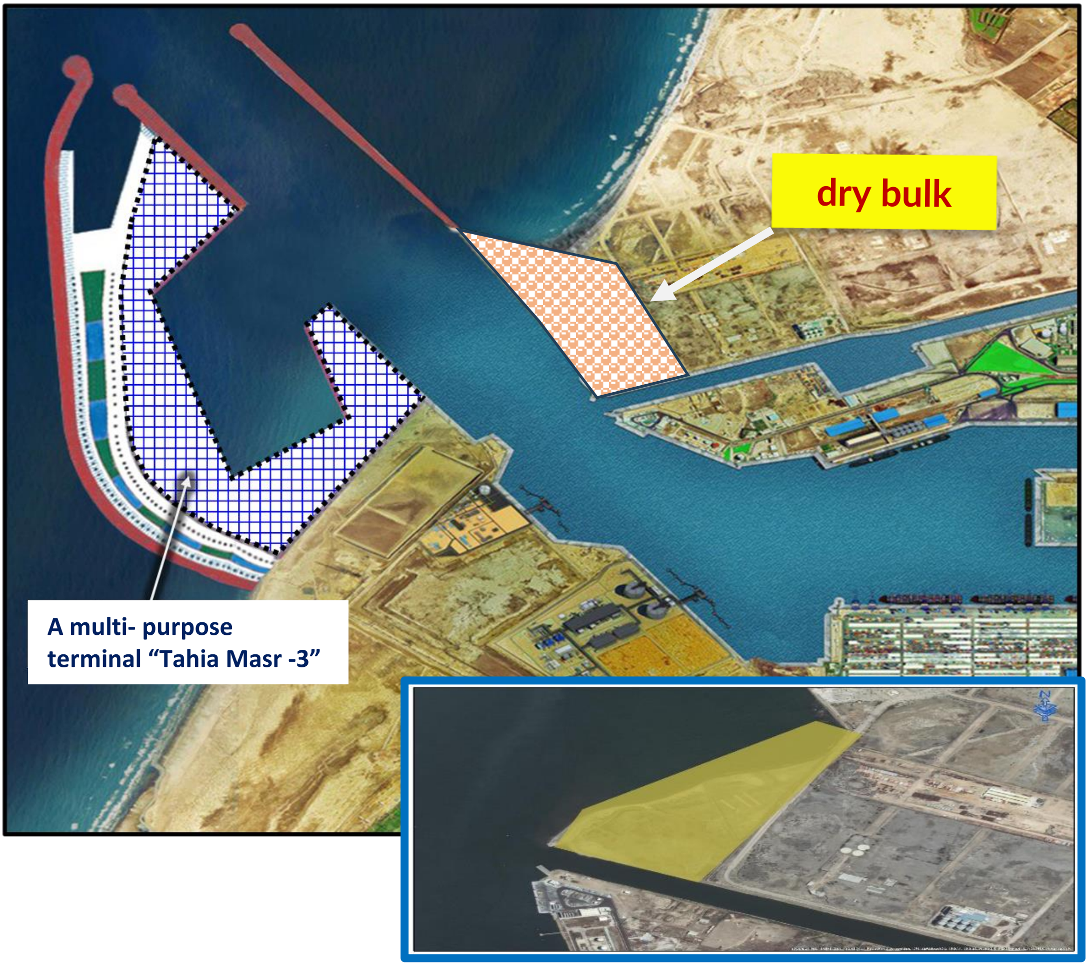
1- superstructure, managing and operating a multi-purpose station behind the western barrier



increasing the port's capacity to meet the expected increase in the movement of ships and goods, the project includes:

- 3400m long berths with a depth of 18m
- backyard with an area of approximately 2.2 million square meters (stores - yards)
- Capacity (17 million tons annually).
- Storage capacity (24 million tons annually).
- Estimated cost (8.3 billion Egyptian pounds)

2- Developing and operating a dry bulk terminal with a length of 600 meters and a total area of 270 thousand square meters

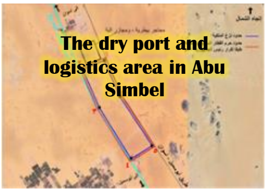


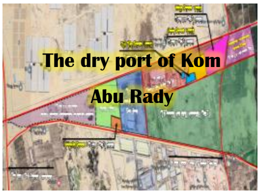
Enhancing the competitiveness of Damietta Port by increasing the capacity for handling and storing grains in order to meet the increasing demand for these goods. Project Description:

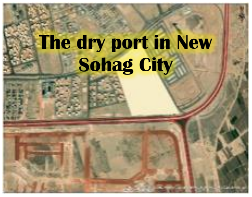
- berths : 600 meters
- Depth: 17 meters
- Back yard: 270 thousand square meters (including warehouses and silos)
- Capacity: 3 million tons annually
- Storage capacity: 10 million tons annually
- Estimated cost: 1.35 billion Egyptian pounds

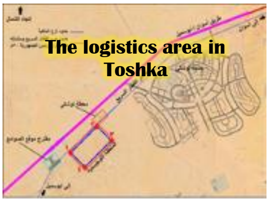
Fourth: Projects of Dry Ports and Logistic Centers

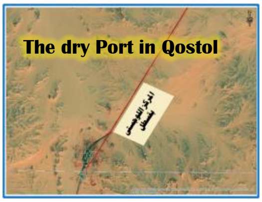
General Authority for Land and Dry Ports

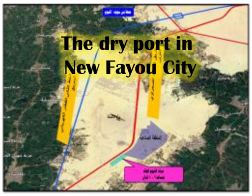


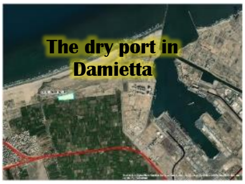


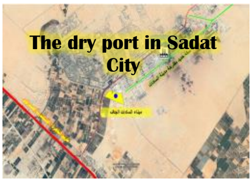


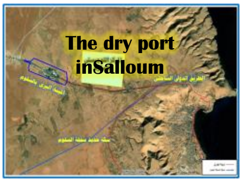












Dry Ports and Logistic Areas

No.	Logistic Centers
1	6th of October
2	Toshka
3	Salloum
4	Qustal
5	Arquen
6	8 Dry Ports and Logistic Areas
7	New Administrative Capital

No.	Dry Ports
1	Abu Simbel
2	Salum
3	Sadat
4	Shak El-Thuban
5	Damietta
6	Al-Tor
7	Beni Suef (Kom Abu Radi)
8	New Suhag
9	New Fayoum
10	New Damietta

Fifth: Waterways Transport Authority Projects

Dandara Waterways Port

Al Mansha river port

2 waterways port in Alexandria port

Establishing companies to manufacture, manage and operate river units

Construction, operation and maintenance of new Waterways ports with usufruct system

project synopsis

In the framework of the development and upgrading of the Waterways liner, especially the Cairo-Aswan waterway, the land allocated to the Authority was put forward for the use of the right-benefit system for investors to establish and operate the following Waterways ports:

- Dandra Waterways Port in Qena Governorate.
- The Port of The Facility in Sohag Province

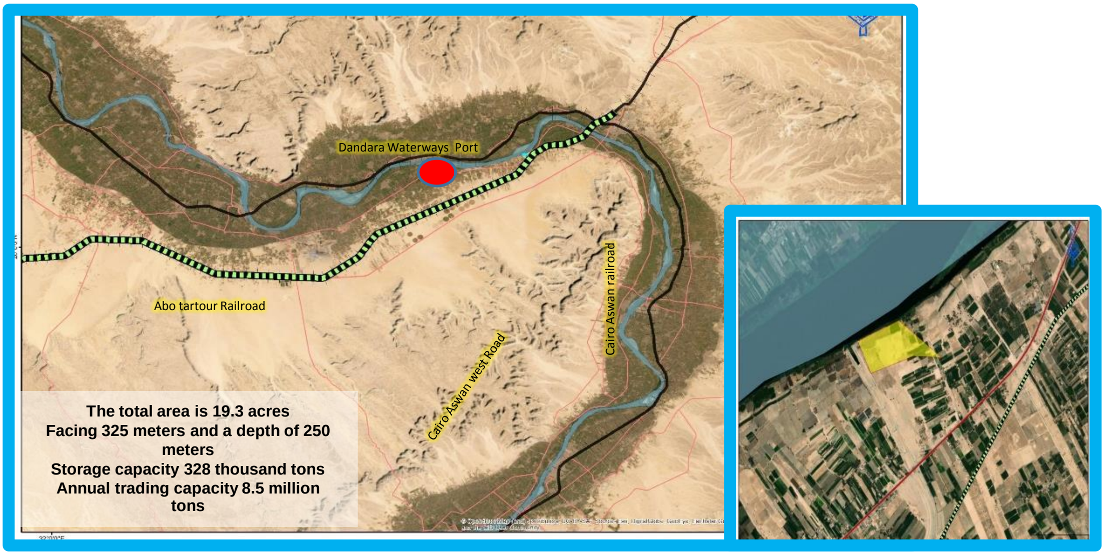
Project importance

Increasing the annual volume of goods through the internal water transport network.

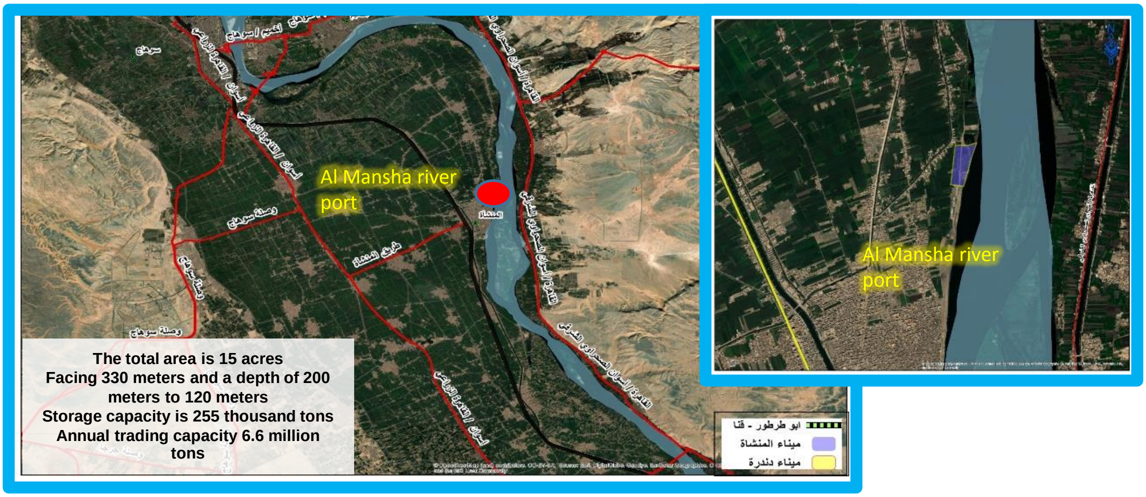
Project goals

- Increasing the operating capacity of the inland water ways.
- Reducing road maintenance costs.
- Reducing road accidents.
- Reducing fuel consumption.

1- Construction, operation and maintenance of Dandara Waterways Port in Qena governorate



2- Construction, operation and maintenance of Mansha Waterways port in Sohag GOV



3- River units projects

Establishment of companies with the participation of the government to be managed in a private sector manner to build a river fleet of new river units with specifications commensurate with the current infrastructure (length - width - height - draft) commensurate with the water level and with a tonnage of 750-1000 tons for transporting goods or containers, provided that the transportation takes place from door to door (multimedia).

Establishing companies with or without the participation of the government to transport passengers in the governorates or the river bus.

Establishing governmental companies or without them to carry out dredging works in the navigational sewers of the Nile River.

وزارة النقل
LTRA
جهاز تنظيم النقل البري الداخلي والدولي
LAND TRANSPORT REGULATORY AUTHORITY

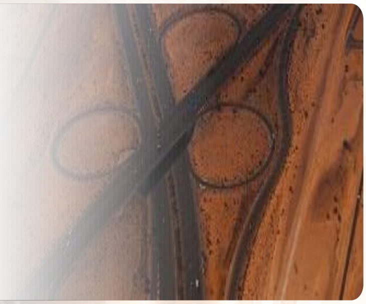
Sixthly: Land transport regulatory authority

1- A project to establish, manage and operate (15) technical inspection centers for vehicles




Trade logistics I Significant Improvements

Egypt developed its trade logistics capabilities in the last 10 years

	2014		2024
Average customs clearance time 	18 days	>	3 days
Road quality global ranking 	118th	>	18th
World Bank Logistics Performance Index 	62nd	>	57th

	Opportunity	Description	Location
1	*Operating a Container Terminal*	The project involves operating a container terminal at East Port Said Port. This initiative aims to enhance port operations.	**SCZONE** *East Port Said Port*
2	*Operating a special cargo terminal*	Operating a specialized break-bulk terminal in Ain Sokhna will handle cement and clinker. The quay's infrastructure is already established, with the superstructure development being the responsibility of the operator. This terminal aims to improve the efficiency of handling bulk cargo in the region.	**SCZONE** *Ain Sokhna*
3	*Operating logistic area and storage facilities East Port Said port*	Build and operate a logistic center for storage & warehouses facilities distribution center, and third-party services. The proposed location is adjusted to a different type of 4 terminals, and the superstructure development being the responsibility of the operator. This center aims to enhance logistics efficiency and service quality in the region	**SCZONE** *East Port Said port*
4	*Developing a marine servicing port*	Develop and operate Al-Tor Port which located in South Sinai direct to at the middle of Gulf of Suez to provide fuel, water and food supply and light maintenance works to the yacht and cruise activities and similar vessels, utilizing investments being done in 3 nearby yacht ports by AD Ports	**South Sinai** *Tor Port*
5	*Upgrading a Sea Port*	Upgrading Abu-Zenima Sea Port on the Red Sea coast. The project aims to enhance port facilities and operations, boosting its capacity and efficiency to support maritime transport and trade. This upgrade will strengthen the region's economic growth and connectivity.	**South Sinai** *Abu Zenima Sea Port*

	Opportunity	Description	Location
6	*Management and operation of a berth*	The project aims to leverage Port Tawfiq's strategic location near Cairo and the new administrative capital, enhancing services for maritime transport and increasing port capacity. Key components include dredging and deepening docks to accommodate larger ships, constructing a 1,000-meter sea berth with extensive backyards, and receiving up to 70,000-ton ships. The estimated cost is based on a feasibility study, funded through a private sector partnership. The project will create jobs, attract major car companies and cruise lines, and handle up to 50,000 vehicles annually, targeting markets in Saudi Arabia and East Asia.	**Port Said** *Port Tawfik port*
7	*Establishing Mechanical Slipway for Yachts Repair and Maintenance and establishing Yacht Marina*	Converting “Al Quseir” into a yacht marina, which achieves the goal of its establishment due to its ancient history, in addition to developing it into a “tourist marina” to form an additional value to the yacht ports on the Red Sea coast. Contributing significantly to the development of tourism and provide new vacancies in the region. Activating The one-day tourism due to the port’s proximity to many tourist areas (Luxor - Aswan). Providing all services and performing maintenance and repairs for small and medium-sized ships and tourist yachts.	**Red Sea** *Quseir Port*

Healthcare Sector

EGYPT’S HEALTHCARE SECTOR COMPETITIVE ADVANTAGES

1) General Advantages:

Abundant Human Capital: Egypt boasts a large and well-trained workforce in the healthcare sector, including a significant number of doctors, nurses, and technicians.

Extensive Experience: With decades of experience in providing health services, Egypt has a well-established system for delivering healthcare to its citizens.

Political Stability: Egypt's relative political stability makes it a safe and attractive destination for investment in the healthcare sector.

Technological Advancements: Egypt is actively enhancing technology in the healthcare sector by:

- Utilizing information and communications technology (ICT) to improve the delivery of health services;
- Incorporating robotic technology to perform surgical operations with precision and efficiency; and
- Using 3D printing technology in manufacturing prosthetics and other medical applications.

NB:
These technological developments contribute to enhancing patient care and treatment outcomes, lowering expenses through efficient and innovative technologies, and making healthcare more accessible to a broader population.

Future Potential of Egypt's Healthcare sector

Growing Population: Egypt's population is projected to increase significantly in the coming years, driving up demand for health services.

Economic Growth: The Egyptian economy is expected to grow steadily, leading to increased spending on healthcare.

Awareness of Health Importance: There is a growing awareness of the importance of health in Egypt, resulting in higher demand for high-quality health services.

Establishing New Healthcare Facilities:

- Low current beds per 1k persons compared to global average offering opportunity for expansion
- Attractive incentives for investors, including tax breaks, reduced tariffs on medical equipment, & streamlined approval processes.

Healthcare Partnerships and Operatorships:

- Value proposition
- Many opportunities to enhance and expand existing healthcare facilities with modern technology and management practices, ensuring quicker returns on investment
- Lower operational costs compared to many other regions, making investments more profitable while maintaining high-quality services
- Attractive incentives for investors, including tax breaks, reduced tariffs on medical equipment, & streamlined approval processes

POCs
Ministry of Health and Population

Example success stories:

SANOFI

European Bank for Reconstruction and Development

CHG

السعودي الألماني الصحية
Saudi German Health

Roche

PHILIPS

SIEMENS Healthineers

EGYPT'S HEALTHCARE SECTOR
COMPETITIVE ADVANTAGES

Target Export Opportunities and Market Size:

- Egypt's strategic location positions it as a gateway to Arab and African markets, opening vast opportunities for exporting health services. The health services market is estimated at about USD 100 billion in the Arab world and USD 200 billion in Africa.
- An increasing number of free trade agreements and political will to develop the healthcare sector are going to enhance export opportunities.
- Egypt's favorable demographic factors support a robust healthcare market.
- The country offers low labor with a large pool of highly trained doctors, pharmacists, engineers, and technicians.
- Initiatives to promote public health in Egypt, focusing on the gradual rollout of a comprehensive health insurance system, are underway.

Number of private hospitals

1,145

Total number of employees in private hospitals

92,981

Opportunity details

Various opportunities for partnerships and operatorships with current public hospitals, including:

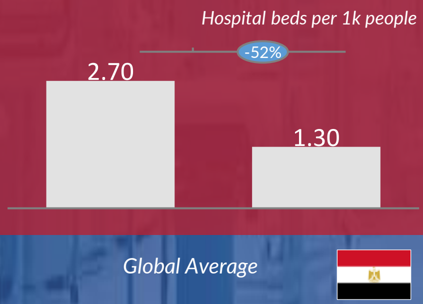
- Infrastructure development
- Equipment upgrades
- Specialized services
- Training and development
- Pharmacy and supply-chain
- Etc.

Contracts and deals vary based on case and context, e.g. equity investment, JVs, PPPS, management contracts, ...

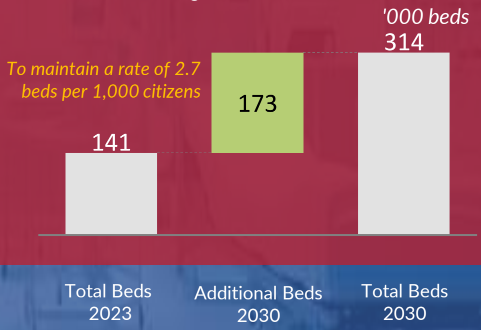
Value proposition

Non-exhaustive

Egypt's healthcare sector is **heavily undersupplied compared to global standards,** providing ample opportunity for expansion



An additional 173k beds are needed by 2030 to satisfy market demand and reach global standards



Applicable incentives

Non-exhaustive

Incentives are determined based on scale of operations and project details[1]

Granting facilities for land allocation In exchange for services / partnership

Land lease fee exemption For a maximum period of 10y

Tax exemptions On net taxable profits for projects

Using foreign labor within the limit of 10% of the total employees, can be increased to 20%

The state bears part of the capacity building cost of employees

Golden License All necessary licenses for project streamlined

1. Incentives detailed and determined according to the Ministry of Health and Population's incentive scoring system, based on 12 criteria, including number of employees, beds, innovation and research

Source: IFC, Egypt State Information Service

	Opportunity	Description	Location
1	*Partnerships and operatorships agreements with hospitals in Healthcare Sector*	In line with the State Ownership Policy, multiple partnerships and operatorships are available across various government hospitals, new and existing, including but not limited to: • Infrastructure development • Equipment upgrades • Specialized services • Training and development • Pharmacy and supply-chain • Management and operation	**Al-Agouza Hospital, Giza** (capacity of 134 beds) **New Cairo Hospital, Cairo** (capacity of 105 beds) **Heliopolis Hospital, Cairo** (capacity of 165 beds) **Abu Teeg Hospital, Asyut** (capacity of 185 beds) **Kom Hamada Hospital, Beheira** (capacity of 262 beds) **Hurghada Fever Hospital, Red Sea** (capacity of 63 beds)
2	*Partnerships for establishing new Hospitals on dedicated plots of lands*	The investor obtains the piece of land allocated for establishing a project in the healthcare sector with facilitation and a package of incentives to establish new hospitals, equip, and operate them.	**Giza** New October, **Sharkia** Tenth of Ramadan **Cairo** Capital Gardens, Administrative Capital, 15th of May, New Cairo, ElShorouk, First Settlement. **Qualyubia** Al Obour, New Obour **Beheira** New Nubaria **Damiete** New Damietta **Matrouh** New Alamein **Beni Suef** New Beni Suef **Minya** New Minya (2) **Qena** New Qena

Required Procedures for Obtaining Approval from the Relevant Authority for Operating in the Sector/Activity:

- Company's articles of incorporation;
- Recent extract from the Commercial Register for the company applying for the partnership;
- Photocopy of the tax card of the company applying for the partnership;
- Company's track record in the healthcare sector activities;
- Acknowledgment to the effect that the company will abide by all rules and regulations related to the company's business activity as set out by the applicable laws and regulations;
- Evidence that the company is solvent enough to carry out the project;
- Preliminary feasibility study for the project, including a timetable for its implementation; and
- Investment Gazette.

Education Sector

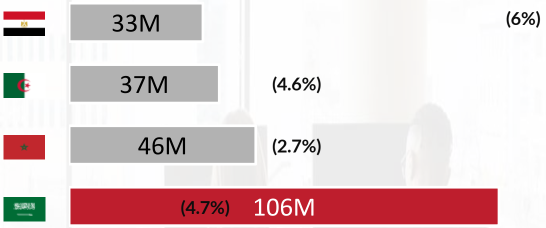
The education sector projects and activities are eligible for the Golden License.

Value Proposition

Egypt is a strategic destination for higher education investments, driven by…

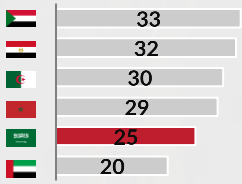
1 Large and increasing population…

2023 population in MENA region, (% growth vs 2020)

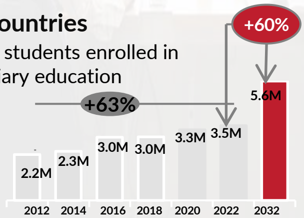


2 … that is young and increasingly educated…

Median age among peer countries



# of students enrolled in tertiary education



Tertiary education enrollment has been steadily increasing and is expected to grow by an additional 60% from 2022 to 2032

A youthful population is ideal for higher educational investments as many are entering and progressing through education

3 … which is already leading to the establishment of new universities

50 new universities will be built by 2032 to accommodate the increase in student enrollments

… showing the growing demand for high-quality education facilities

Source: World Bank, CAPMAS, Ministry of Education, ITA, Statista

COMPETITIVE ADVANTAGES EGYPT ENJOYS IN THE SECTOR:

Access to a Growing Market: The large population in Egypt and the increasing demand for higher education represent a significant opportunity to attract students.

Student Diversity: An international campus can attract students from all over the region, fostering a diverse and multicultural student body.

Cultural and Academic Exchange: Opening a university branch in Egypt can facilitate cultural and academic exchange between the host country and the foreign university, enhancing mutual understanding and global perspectives.

Government Support and Incentives: The Egyptian government often provides incentives and support to foreign universities looking to establish branches.

Research and Collaboration Opportunities: Collaboration with local institutions and companies can lead to unique research opportunities and innovative projects that benefit both the university and the host country.

Reputation and Branding: The foreign university can enhance its reputation and expand its brand presence by establishing a successful campus in Egypt.

Strategic Geographic Location: Egypt's strategic location serves as a gateway to the Middle East and Africa, allowing the campus to reach a broader regional audience.

Cost-Effective Education: Offering international education locally can provide more affordable options for students compared to studying abroad.

Local Partnerships: Forming partnerships with local organizations, companies, and government bodies can lead to valuable collaborations and initiatives.

	Opportunity	Description	Location
1	*Partnership Agreements in Education*	Establish and operate a university that focuses on applied sciences and technology, offering both diplomas and bachelor's degrees to meet market demand for skilled labor Develop and operate a research park affiliated with a university, hosting research facilities, startup incubators, and spaces for industry partnerships to foster innovation Develop universities and establish partnerships with international educational institutions for curriculum development and quality assurance	**Suez** Galala University with total surface area 173 Feddans (14 faculties) **Mansoura** New Mansoura University with total surface area 127 Feddans (13 faculties) Mansoura National University with surface area 43 Feddans (8 faculties) **Matrouh** Alamein University with total surface area 150 Feddans (15 faculties) **South Saini** King Salman University with total surface area 305 Feddans (17 faculties) **Cairo** Helwan National University with total surface area 17 Feddans (8 faculties) Zagazig National University with surface area 44 Feddans (8 faculties) **Menoufia** Menoufia National University with total surface area 18 Feddans (15 faculties) **Beni Suef** Beni Suef National University with total surface area 40 Feddans (19 faculties) **Minia** Minia National University with total surface area 41 Feddans (7 faculties) **Assiut** Assiut National University with total surface area 36 Feddans (7 faculties) **South Valley** South Valley National University with total surface area 41 Feddans (8 faculties) **Port Said** East Port Said National University with total surface area 44 Feddans (8 faculties) **Ismailia** New Ismailia National University with total surface area 29 Feddans (8 faculties) **Giza** International Branch of Cairo University University with total surface area 575 Feddans (6 faculties)

Procedures required to obtain approval from the relevant authority for sector/activity operation:

An application to establish a branch should be submitted by the legal representative of the parent university or the person entrusted with this task to the Minister responsible for higher education, accompanied by the following data, studies, and documents:

1. The name of the parent university and the country where its main headquarters is located.
2. Evidence of institutional accreditation of the parent university from the accreditation and quality assurance body in the country where its main headquarters is located.
3. A detailed study covering the branch's location, its suitability, the nature of the parent university's rights to the land where it will be established, and a complete vision for the stages of its establishment, including the properties and facilities necessary for it to effectively fulfill its mission.
4. An economic feasibility study that includes the expected financial situation of the branch in terms of financial flows to develop its resources, annual expenses, investment budget, and means to ensure the continued fulfillment of its mission.
5. The capital allocated for the branch and proof of sufficient funds to meet the requirements for establishing the branch.
6. A copy of the contract under which the parent university will entrust an individual or legal entity in Egypt with the construction of the branch buildings, its equipment, or the covering of its operational costs, along with a certified translation in Arabic if the parent university will not undertake this itself.
7. The draft bylaws of the branch.
8. The colleges, institutes, research units, academic programs, innovation centers, and science cities that the branch will include.
9. Details regarding the formation of councils that will manage the branch, particularly the Board of Trustees, university councils, or the committees derived from them, and their respective powers.

10. Rules for student admission at the parent university.
11. The general rules that the branch intends to follow regarding scholarships that exempt from or reduce tuition fees, along with a statement of those applied at the parent university.
12. The conditions and rules for appointing faculty members and their assistants as applied at the parent university, and the branch's plans for developing its faculty resources.
13. The duration, systems, methods, and curricula of study, exams, and the academic degrees awarded by the parent university, including the conditions for obtaining them, and a preliminary study that includes a comprehensive description of the added value that the branch's academic programs will offer compared to those taught at Egyptian universities.
14. A clear description of the research fields at the branch.
15. The parent university and branch's proposals regarding cooperation plans with Egyptian universities.
16. The proposed start date for studies in the various programs the branch intends to offer.
17. A commitment from the parent university to ensure the quality of all academic programs offered at the branch, as applied at the parent university.
18. Specification of the rules governing the filling of administrative positions at the branch.
19. How the branch's funds will be handled in the event of financial difficulties that make it impossible to continue its operations, and plans to ensure the graduation of all enrolled students in such a case, or if any academic program is suspended for any reason.
20. A commitment by the parent university to comply with the provisions of Law No. 162 of 2018 regarding the establishment and regulation of branches of foreign universities within the Arab Republic of Egypt and academic institutions.

Tourism Sector

i. Sector Local Indicators

Egypt ranked:

- 27th globally in the Road Trip Tourism Index out of 118 countries.
- 4th in Africa.
- Ranked 1th in the Arab world.
- 12th globally out of 138 countries in the Global Muslim Travel Index.

Inbound Tourism Indicators:

14.9

million tourists in 2023

27.1%

growth in the number of inbound tourists

3.3 million tourists during the first quarter of 2024

Egypt's Competitive Advantages in the Tourism Sector

Egypt enjoys numerous competitive advantages that attract a large number of investors, including:

- Egypt is a home to many enchanting places that are relatively undiscovered by many foreign tourists, such as Upper Egypt, Nubia, the White Desert, Siwa Oasis, and the Egyptian countryside, in addition to incredibly beautiful places with picturesque nature.

- Accordingly, the concept of sustainable tourism in Egypt can be developed, along with highlighting the diversity of different environments, such as Bedouin, rural, Upper Egyptian, and Nubian life, each of which has its own distinct character and identity.

- However, these areas currently lack sufficient hotels and effective tourism promotion, offering investors a unique opportunity to establish hotels that completely replicate the Egyptian environments or build tourist villages that entirely mimic Pharaonic styles. Given Egypt's rich Pharaonic heritage and iconic landmarks like the Pyramids and Karnak Temple and other, such projects could provide tourists with a unique experience and encourage them to repeat the experience many times.

- Egypt's strategic geographical location and its moderate climate throughout the year make it an ideal location for establishing various hotel projects.

Mercure
HOTELS

MÖVENPICK
Hotels & Resorts

SOFITEL
LUXURY HOTELS

NOVOTEL
HOTELS, SUITES & RESORTS

Fairmont
HOTELS & RESORTS

Tourism Incentives

Tourism projects enjoy a special incentive, by adding (Cairo – Giza – Qalibiya) governorates to the geographical scope of area (A) with regard to some tourism activities by granting them an investment incentive, a deduction from the net taxable profits at a rate of (%50), a deduction from the investment costs, with the aim of increasing and accelerating the rates of tourism development and encouraging increasing the number of new hotels rooms.

	Opportunity	Description	Location
1	Usufruct / Partnership agreements in Tourism Sector	A pioneering opportunities to establishing, managing and operating hotels/resorts/villages and tourist services. Entertainment tourism and commercial projects. Medical tourism projects (health resort project) Exploitation of a heritage Hotels.	**South Sinai** Sharm el-Sheikh- Dahab - Ras Sudr - Tur Sinai Various surface areas ranging from 7,000 m2 to 80,000 m2 (8 opportunities) **Fayoum** Ibshway – Tamiya - Youssef Al-Siddiq Various surface areas ranging from 6,000 m^2 to 27 Feddans (6 opportunities) **Beheira** Wadi Al- Natrun surface area 4,847 m^2 (near by the route of the Journey of the Holy Family) **Aswan** Abu Simbel surface area 4,5 Feddans (near by the Airport) **Cairo**

Required Document for Obtaining Approval from the Sector's Relevant Authority

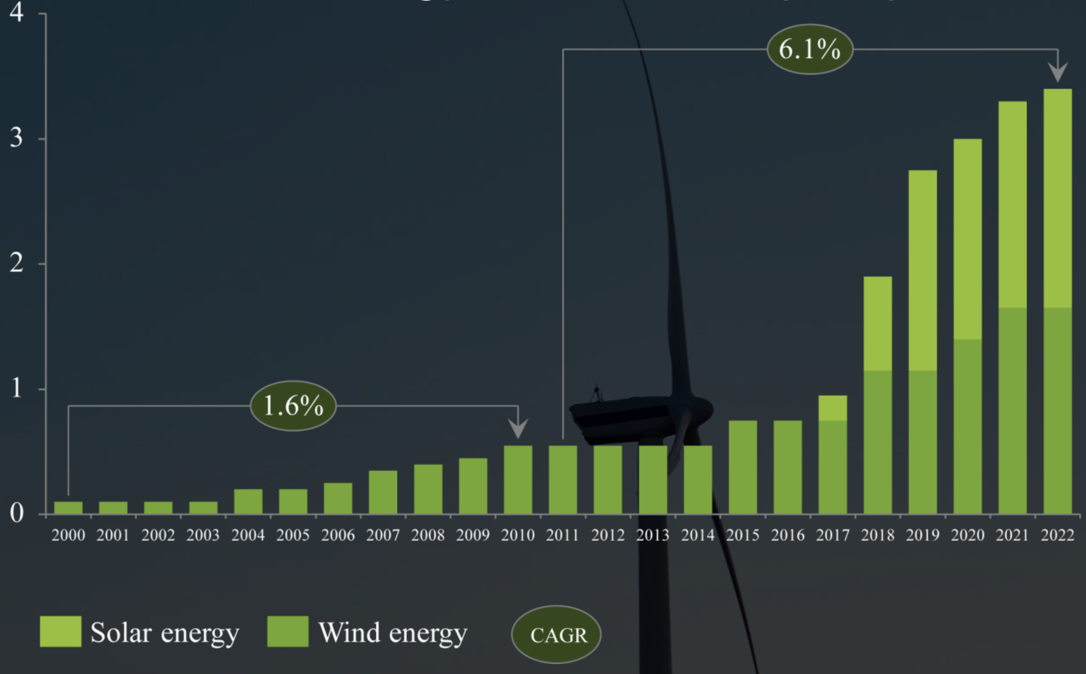
With regard to investment in the hotel sector and obtaining the necessary licenses to set up a lodging establishment, an application must be submitted to the Ministry of Tourism and Antiquities, specifically to the central administration for hotel establishments, and tourism shops and activities, provided that the application is made using the application form prepared for this purpose by the Ministry, attached to the following documents:

- A recent extract of the commercial register for the company (licensee), stating the business activity, which is to establish, operate, and exploit a lodging establishment;
- The company's (licensee) recent tax card + data certificate encompassing the name and address of the hotel;
- The title deed of the land on which the projected is proposed to be set up (ownership, lease, usufruct, exploitation agreement, allocation decree from the appropriate authority having jurisdiction over the land);
- The project's building permit to be obtained from the appropriate authority having jurisdiction over the land;
- The architectural drawings of the project and its facilities and amenities, approved by the appropriate authority having jurisdiction over the land;
- The articles of incorporation of the company to which the project is licensed; and
- The criminal record and national ID card of the legal representative of the licensed company.

Renewable Energy Sector

An increasing number of deals and investments over the past years help realizing Egypt's ambition

Renewable Energy Generation Capacity (GW)



Solar

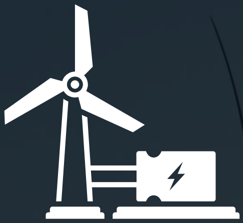
- Capacity CAGR of 53.4% over 2010-2021
- Energy generation increased by nine-fold, 553.1 GWh to 4 972.5 GWh over 2018-2021

Wind

- Capacity grew 10.4% over 2010-2021
- Energy generation quadrupled, 1 171.4 GWh to 5 269.4 GWh over 2010-2021

Source: International Renewable Energy Agency (IRENA), Socio-economic footprint of the energy transition: Egypt

Energy generation | Egypt's competitive advantage for solar energy generation



Renewable energy

Egypt has the **4th** highest solar potential globally, **second** highest in the region...

Solar is estimated at 32% of the total energy market by 2040 and a minimum of ~2800 GW increase in global demand is expected by 2028 in order to reach the targets of the International Energy Agency

Egypt's targets and ambitions to reach 39% of the electricity mix being renewable energy by wind and solar by 2035

Egypt's ambitions for 2035

- Diversifying energy supply
- Improving interconnection and grid infrastructure
- Supporting the supply chain of renewable technologies
- Liberalizing energy market
- Promoting independent energy regulatory bodies
- Increasing energy efficiency, reducing demand by 18%

Egypt's targets for 2035

25%

of the total electricity mix by solar energy

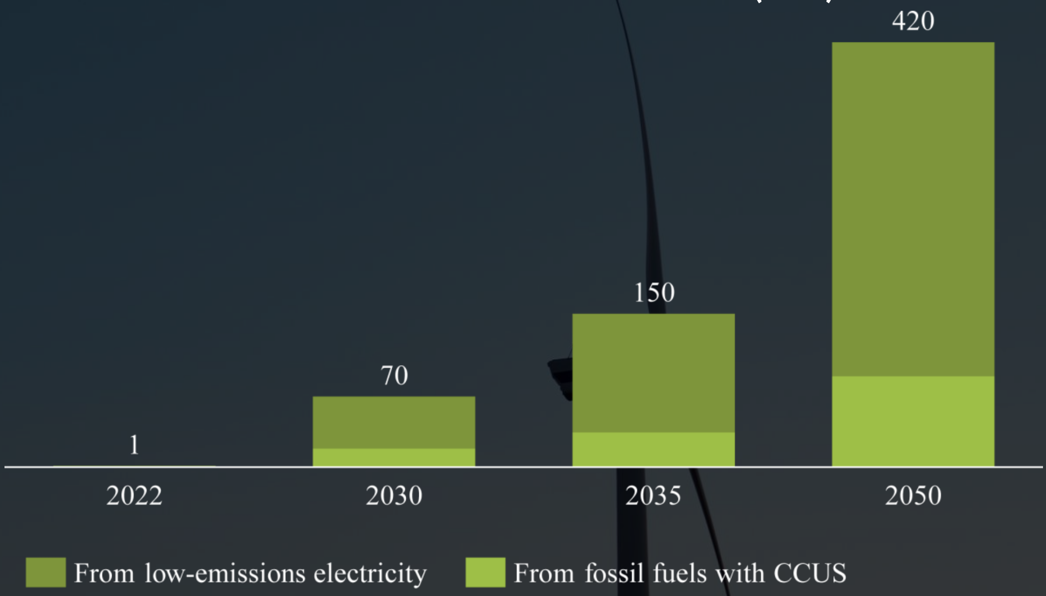
14%

of the total electricity mix by wind energy

Source: Integrated Sustainable Energy Strategy 2035

Low carbon hydrogen is a key element of our transition to a net zero energy system…

Projected global low carbon hydrogen production in the Net Zero Scenario (Mt)



- Hydrogen plays a fundamental role in hard to abate sectors
- Dedicated hydrogen production today primarily based on fossil fuel
- Scale-up low-emission hydrogen
  - Electrolyser capacity
  - Dedicated renewable capacity
  - Enhancement of the power grid

Source: International Energy Agency (IEA)

…however, there is a number of important focus areas in order to see the low carbon hydrogen rise

Off-take agreements
Contract and price structures

Logistics
Infrastructure for distribution

Cost competitiveness
Technology and incentives

Certification
Unification of requirements

Egypt's competitive advantage for the manufacturing facilities up in the renewable energy value chain

Three reasons for local manufacturing

1. **Growing market**
   Local market for renewable energy is growing because of internal (phasing out electricity subsidies) and external pushes (carbon border tax EU)

2. **Reducing costs**
   Import costs for solar panels and wind turbines and blades are high, local production could reduce the costs

3. **Export potential**
   Potential export market, for example to Morocco

What is Egypt's competitive advantage?

- Cost-effective production because of low labor costs and affordable land and facilities
- Abundant raw materials, particularly silicon and glass
- Strategic location for export due to proximity and Suez Canal access
- Supportive governmental policies and incentives for investment

Market potential and Egypt's competitive advantage for wind blades and turbines production

18 wind projects in Egypt currently in pre-construction phase, highlighting local demand next to global markets access

Egypt is a large producer of concrete, aluminum and steel – key raw materials to manufacture wind turbines

Egypt has competitive labor and energy costs and professional infrastructure suitable for local manufacturing

3 priority investment areas in Renewable Energy, Green Hydrogen & Recycling/ Reusing

Solar Energy

- 4th highest solar potential globally
- Strategic location, between Europe, Africa, and Middle East, access to the domestic market but also the regional and global market
- Government support and policies for renewables

Wind Energy

- Optimal wind conditions, e.g. around the Gulf of Suez, with ~26 GW untapped wind potential
- Strategic location allowing for access to the domestic market but also the regional and global market
- Government support and policies for renewables

Green Hydrogen

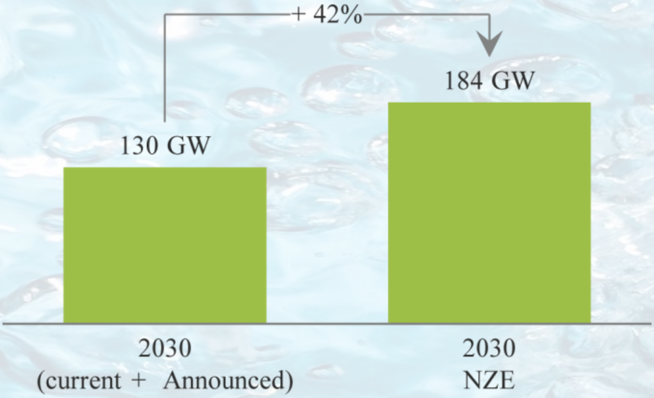
- Opportunities across the full value chain at SCZone
- Abundant renewable resources, e.g. solar and wind
- Strong government ambitions on production, with a projected production capacity of 5,5 million tonnes green hydrogen per year in SCZone alone

Green Hydrogen

Market potential and Egypt's competitive advantage for electrolyzer production

~43%

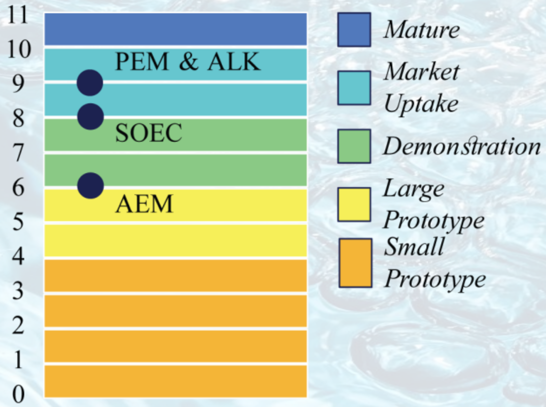
Additional electrolysis manufacturing capacity needed to satisfy 2030 NZE demand, indicating an enormous market opportunity.



2nd largest GH2 capacity

Globally planned in Egypt with an expected elecrolyzer capacity demand of 29GW, entailing large potential for local offtake.

PEM & ALK electrolyzers (focus of project) are mature compared to rest of technologies, and are being uptaken avidly by the market.



Green Urea and Ammonia

Egypt exports $327Mn worth of ammonia globally, and is the 5th largest urea exporter, emphasizing a great opportunity to produce green urea and ammonia utilizing the current industry value chains.

Source: IEA, SCZONE, Force Field Analysis Hydrogen Egypt

Egypt aims to capture 8% of global green hydrogen market by 2040 and made some big steps towards realizing this ambition

SCZONE signed 30 MoUs

8	15	22M — TONS/YEAR	84Bn — USD
Active MoUs	Signed framework agreements	Estimated Production	Estimated Investment

First operational integrated green hydrogen plant in Africa

100 MW — Green Hydrogen

NH_3 **50** KTPA — Green Ammonia

Scatec | The Sovereign Fund of Egypt | Fertiglobe | OCI

70 MW — Solar Energy

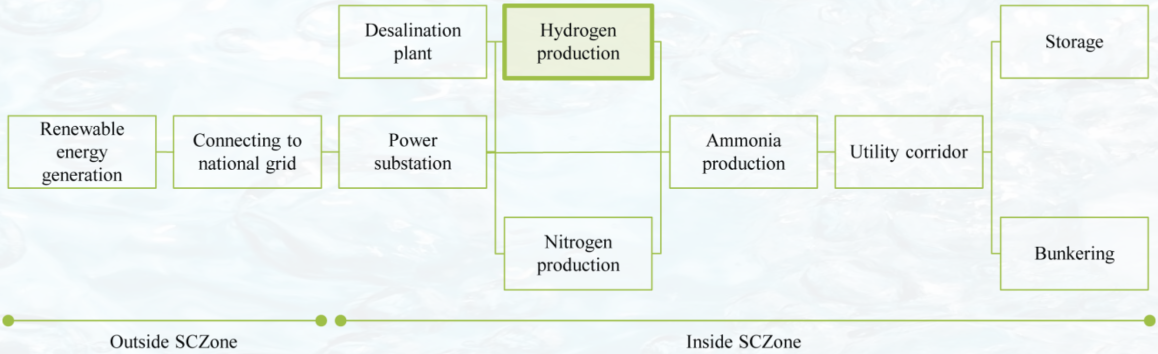
190 MW — Wind Energy

$417 M — Investment

Source: SCZONE

Market potential and Egypt's competitive advantage for electrolyzer production

Electrolyzer production as a feeding industry for hydrogen production as part of the full green fuel value chain at SCZone, serving both local and global markets



Total projected required production capacity for electrolyzers in SCZone is 50GW

For a projected production capacity of 5,5 million tonnes green hydrogen per year

Source: SCZONE

Egypt's competitive advantage and incentives program

- Suitable and low-cost renewable energy generation conditions, with an objective of 42% renewable by 2035
- Proximity to neighboring countries and access to the EU, African and ME markets
- Connectivity through existing ports and terminals (e.g. Suez Canal Economic Zone, Port Said, Alexandria Port)
- Infrastructure in place for regional hydrogen trade through existing (refurbished) pipelines

SCZone is entitled to grant investors a competitive incentive package:

Customs:

- Tax exemptions for all imports required to carry out the activity/business
- Customs are due on the foreign components imported only when the final product is exported to the local market Egypt

VAT (Value Added Tax):

- 0 % VAT; on all imports including imported commodity from the Domestic market to Zone
- 14% VAT; only applicable on products exported to the local market

Income Tax:

- Eligibility to deduction from the net taxable profits equivalent to 50% of total investment costs (up to 80% of capital and 7 years)
- Free Trade Agreements Egypt is signatory of, including

One-Stop-Shop at SCZone:

- Registration, licenses, permits
- Centralized taxes and customs system
- ...

Source: SCZONE

Renewable Energy | High potential investment opportunities to be explored

	Opportunity	Description	Location
1	*Establishing photovoltaic cell stations to produce electricity*	Multiple opportunities across Egypt to build and operate photovoltaic cell stations to produce electricity to be used in the grid or in service of green hydrogen facilities.	**Minya** (2 opportunities) **Assuit** (1 opportunity) **Aswan** (14 opportunities) **Suez** (1 opportunity) **Beni Suef** (1 opportunity) **Qena** (1 opportunity)
2	*Establishing a Solar PV Manufacturing Facility*	Greenfield investment to establish a photovoltaic cell manufacturing facility in the Suez Canal Zone with a capacity of 3.0 GW	**SCZONE**
3	*Establishing wind stations to produce electricity*	Multiple opportunities across Egypt to build and operate wind stations to produce electricity to be used in the grid or in service of green hydrogen facilities.	**Minya** (2 opportunities) **Assuit** (1 opportunity) **Red Sea** (1 opportunity) **Beni Suef** (1 opportunity)
4	*Establishing a Wind Blades Manufacturing Facility*	Manufacturing wind blades to cater for the expected demand of above 65 GW wind energy, leveraging the availability of world-class fiber glass producers at the SCZONE as a main feedstock component.	**SCZONE**
5	*Establishing a Wind Turbines Nacelle Manufacturing Facility*	Manufacturing wind blades to cater for the expected demand of above 65 GW wind energy, for solidification of the green hydrogen & derivatives ecosystem>	**SCZONE**

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