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## Local Perspectives on Green Hydrogen Cooperation between the EU and Egypt: The case of the Suez Canal Economic Zone

### ABSTRACT

Green hydrogen is set to become a cornerstone of Europe's decarbonization strategy, creating a strong demand for imports from third countries. Egypt has the potential to emerge as a key production hub. While technical and economic aspects of green hydrogen cooperation have been explored widely, less attention has been given to local acceptance. This Policy Brief analyzes the social dimension of EU-Egypt cooperation on green hydrogen, focusing on local perspectives in the Suez Canal Economic Zone. Survey data from Port Said and Suez show high acceptance of hydrogen development, with both export and domestic-use scenarios viewed positively. When asked to choose, however, respondents expressed a stronger preference for domestic use. Support for exports, then, is more conditional, and tied especially to local economic benefit. Policy recommendations point to the importance of institutionalizing reciprocity, anchoring cooperation in visible local benefits, and balancing export ambition with domestic need.

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## RÉSUMÉ

L'hydrogène vert est censé devenir un pilier de la stratégie européenne de décarbonation, générant une forte demande d'importations en provenance de pays tiers. L'Égypte dispose d'un potentiel significatif pour s'affirmer comme un pôle de production majeur. Si les dimensions techniques et économiques de la coopération autour de l'hydrogène vert ont été largement examinées, l'attention portée à l'acceptabilité locale demeure plus limitée. Ce Policy Brief analyse la dimension sociale de la coopération entre l'Union européenne et l'Égypte en matière d'hydrogène vert, en se focalisant sur les perspectives locales au sein de la zone économique du canal de Suez. Les données d'enquête recueillies à Port-Saïd et à Suez révèlent une acceptation élevée du développement de l'hydrogène, les scénarios orientés vers l'exportation comme ceux centrés sur l'usage domestique étant perçus de manière positive. Toutefois, lorsque les répondants sont invités à exprimer une préférence, ils privilégient plus nettement l'utilisation intérieure. Le soutien aux exportations apparaît dès lors plus conditionnel, et particulièrement associé aux retombées économiques locales. Les recommandations formulées soulignent l'importance d'institutionnaliser la réciprocité, d'ancrer la coopération dans des bénéfices tangibles pour les communautés locales et de rechercher un équilibre entre ambition exportatrice et besoins domestiques.

## Introduction

Hydrogen produced by renewable energy, the so-called “green hydrogen” is a cornerstone of the European Union’s strategy to fully decarbonize by 2050. In its REPowerEU<sup>[1]</sup> strategy of 2022, the European Commission sets out the target to produce 10 million tonnes and likewise import 10 million tonnes by 2030. In a 2050 perspective, green hydrogen is projected to cover 10% of Europe’s energy needs.

Focussing on the import side, Egypt stands out as privileged partner of the EU. In 2022, both jurisdictions signed a memorandum of understanding (MoU) on a strategic partnership on renewable hydrogen that would channel significant EU funding into the development of this sector in Egypt. This was followed up by the 2024 “Joint Declaration on the Strategic and Comprehensive Partnership between The Arab Republic Of Egypt and the EU”, again underlining the commitment to jointly develop green hydrogen. The declaration was complemented by an MoU for the disbursement of up to €1 billion to Egypt in Macro-Financial Assistance, channelled i.a. into green hydrogen development. At a joint EU-Egypt investment conference, some € 40bn were mobilised, primarily for green hydrogen and related energy projects. A bilateral summit at the end of October 2025 is to confirm the deepening partnership in hydrogen development.

The Suez Canal Economic Zone (SCZONE) stands out as major hub for green hydrogen development in Egypt, having attracted some 64 bn US\$ in 12 cooperation agreements and aiming at producing about 18 tonnes of green hydrogen annually. As the SCZONE is part of a global sea route that processes 12% of global trade, the area

is best suited both in terms of production and shipping conditions. This allows Egypt a choice and a trade-off between national use and export of green hydrogen.

Despite the well-acknowledged macroeconomic benefits of north-south energy cooperation, several studies caution against barriers that exist at local level. Notably, local resistance is recognised as a barrier to the development of renewable energy and green hydrogen development, both in industrialised and industrialising countries. In recent (2024) reports, the International Renewable Energy Agency (IRENA) identified challenges such as insufficient public engagement, the lack of community involvement in planning, and the need for better policy coordination to ensure projects address local needs and provide benefits like job creation and economic development. This brief aims to deepen insights into these aspects of green hydrogen cooperation.

Existing studies on green hydrogen development and hydrogen cooperation between the EU and its partners in the Middle East and North Africa region largely relate to political, economic or technical aspects. This policy brief adds to existing knowledge by complementing the social perspective and investigating in the perceptions of local stakeholder. It investigates the local perspective on renewable energy development and green hydrogen production, focusing on the case of the SCZONE. First, it takes stock of the framing conditions for green hydrogen development in both the EU and Egypt. Second, it surveys local perceptions and factors that facilitate support for green hydrogen development. This allows deriving policy recommendations to ensure continued local acceptance of EU-Egypt green hydrogen cooperation.

[1] REPowerEU is a proposal from the European Commission aimed at ending dependence on Russian fossil fuels by 2030 in response to Russia’s invasion of Ukraine in 2022.

This brief draws on a peer-reviewed study in the International Journal of Hydrogen Energy (2024) by the authors, “Green Hydrogen Cooperation between Egypt and Europe: The Perspective of Locals in Suez and Port Said.”

## I. Hydrogen development in the EU and Egypt: Strategies and state of play

### 1.1 Hydrogen development in the EU

The EU is a leader in hydrogen technologies, covering the entire value chain, from production and storage to distribution, end-use applications, as well as international partnerships. In hard-to-abate sectors such as steelmaking, shipping, and aviation, green hydrogen is poised to become a cornerstone of the EU’s decarbonization strategy. Green hydrogen is projected to supply around 10% of the EU’s total energy demand by 2050, yet as of 2022, it accounted for less than 2% of final energy consumption, with 96% of hydrogen still produced from fossil fuels, primarily natural gas. In response, the European Commission is advancing a comprehensive hydrogen strategy, combining EU legislative initiatives with strategic international partnerships that place green hydrogen at the centre of its decarbonization and industrial transition agenda.

Under the 2020 Hydrogen Strategy for a Climate-Neutral Europe, the EU outlined a phased roadmap to scale up renewable hydrogen production, starting with a target of installing at least 6 GW of electrolyzers by 2024 and expanding to 40 GW by 2030. Domestic capacity is intended to produce up to 10 million tons of renewable hydrogen annually with an additional 40 GW of electrolyser capacity expected in third countries to facilitate imports. These ambitions were significantly reinforced by the 2022 REPowerEU plan, which formalized the target of 20 million tons of renewable hydrogen consumption per year by 2030, equally split between domestic production and imports, positing green hydrogen as a central element of EU energy security and climate neutrality. Complementing this strategy, the 2021 Fit for 55 package introduced binding targets for the use of renewable hydrogen in industry and transport through the revised Renewable Energy Directive, while the accompanying Hydrogen and Decarbonized Gas Market Package proposed a dedicated regulatory framework for hydrogen infrastructure, storage, and market operations.

Import cooperation through strategic international partnerships are central to achieving the EU’s hydrogen ambitions. The EU is actively engaging with renewable-rich third countries, particularly in North Africa and the Middle East to establish

green hydrogen supply chains. Egypt, with abundant solar and wind resources and strategically situated at the intersection of African, Arab, and European energy corridors, has emerged as a strategic partner. The EU-Egypt Renewable Hydrogen Partnership, formalized through a joint declaration at COP27 in 2022, outlines cooperation on renewable electricity generation, green hydrogen production and transport infrastructure, regulatory alignment, and investment facilitation, aligned with broader EU frameworks such as the Global Gateway and the emerging Mediterranean Hydrogen Partnership. Egypt’s 2024 National Low-Carbon Hydrogen Strategy positions the country as a regional hub for green hydrogen production, with the primary goal of becoming one of the largest exporters of clean hydrogen in the region. Yet, while the geopolitical and economic rationale for EU-Egypt hydrogen cooperation is well established, less attention has been paid to how these developments are perceived by local communities in export regions.

### 1.2 Framework for green hydrogen development in Egypt

Egypt’s recent economic profile is characterized by fluctuations. GDP growth reached 6.6% in 2022, but declined to 3.8% in 2023, reflecting import restrictions, weakened purchasing power, and slower corporate activity. GDP per capita remains at US\$ 4,295, which is well below the global average, and the Human Capital Index is 0.49, which is low. By 2022, unemployment had dropped to 6.4%, continuing the steady decline observed since 2014.

In parallel, Egypt’s energy profile reflects a transitional state between net importer and exporter, with imports comprising 4.8% of total energy supply in 2021. Final energy consumption is dominated by oil products (47%) and natural gas (24%), while renewables account for only 3.3%. Sectoral demand is led by transport (30.8%), and followed by industry and residential use. Since achieving universal electricity access in 2016, the country’s energy production has remained heavily dependent on fossil fuels, with renewables comprising only 11.5%. Electricity exports reached 1643 GWh in 2021, representing an exponential 401% increase since 2000. More specifically, Egypt’s hydrogen ambitions are anchored in its Integrated Sustainable Energy Strategy (ISES) and its goal for renewables to supply 42% of electricity by 2035. Since COP27, the government has signed over 19 MoUs for hydrogen feasibility studies and is positioning itself as a green hydrogen hub for exports to Europe and Asia. Studies consistently highlight Egypt’s strong technical potential, supported by abundant solar and wind resources, existing ammonia production capacity, and proximity to European markets.

***“Residents are in favour of green hydrogen production in the Suez Canal Economic Zone.”***

The economic picture for green hydrogen is well documented but nuanced. Estimates for hydrogen production costs in Egypt range from around US\$1.25/kg for grey, US\$1.65/kg for blue, and US\$1.5-4.3/kg for green hydrogen, depending on assumptions. Blue hydrogen, supported by carbon capture and storage, is viewed by some analysts as a more cost-effective short to medium-term option, though storage capacity estimates vary and are often tied to depleted hydrocarbon reserves. Achieving large-scale green hydrogen production would require more than 110,000 GWh of additional renewable electricity, equivalent to over 60% of Egypt's current total generation capacity. This raises serious concerns, among them that diverting renewable energy to hydrogen exports could undermine national decarbonization targets.

Infrastructure and resource constraints are also barriers. There is no direct pipeline that connects Egypt and Europe, and proposals for a "South-Nordstream" hydrogen pipeline would require an estimated €16.5 billion in investment and strong EU coordination. Water scarcity further complicates green hydrogen development: while desalination capacity is set to expand, reliance on coastal siting may limit deployment. The Carbon Border Adjustment Mechanism (CBAM) could pose a risk to Egypt's export competitiveness if hydrogen exports are based on blue rather than green production pathways.

Despite these economic challenges, recent political developments, including a US\$80 million loan from the European Bank for Reconstruction and Development (EBRD) in 2023 for a 100 MW electrolyser facility, as well as new legislation that provides incentives for green hydrogen projects, signal momentum. Studies suggest Egypt could achieve relatively low electrolysis costs compared to many competitors, making it an attractive partner for Europe if the structural challenges of renewable expansion, transport and water use can be well addressed.

## II. Data and methods

The study employed a survey-based approach to capture local perspectives on green hydrogen development in the Suez Canal Economic Zone (SCZONE), conducting a standardized survey in Suez and Port Said in March 2023. Fieldwork was carried out by Ipsos using computer-assisted personal interviews with members of the active workforce in public spaces. After data quality checks, the final sample comprised 505 valid respondents roughly split between Suez and Port Said. Demographics were ages 25 to 50, two-thirds identifying as male and one-third identifying as female, with all having completed university-level education.

The survey instrument included 38 pre-tested questions. A split-ballot design randomly assigned respondents to one of two scenarios: the first being hydrogen produced in the SCZONE used entirely for export to Europe and the second, hydrogen production entirely for domestic use in Egypt. Responses were captured on point rating scales and aggregated into indices measuring overall scenario support, national interest concerns, and local opposition to hydrogen projects in the SCZONE. Additional items assessed perceived benefits of export, including income, trade, and investment impacts. A short Social Desirability Scale was applied to account for response bias.

In terms of methodical limitations, differences between Suez and Port Said could not be fully explained by the regression models, despite broadly similar results in other analyses. A relatively large share of respondents declined to choose between export and domestic use, which may reflect knowledge gaps or uncertainty in the framing of the question. The survey was also conducted in the same year as Egypt's 2023 presidential elections, raising the possibility of politically influenced responses, though the timing of fieldwork that occurred in early 2023 likely

reduces this risk. Finally, the survey did not cover attitudes toward alternative trade partners, such as China, which may limit insights into potential biases beyond Europe.

### ***“Local approval of export is shaped by the prospect of tangible co-benefits and participation”***

## III. Synthesis of findings

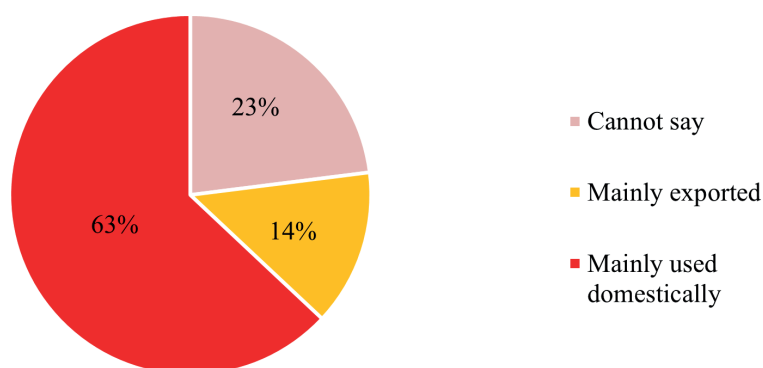
### 3.1 Willingness to develop green hydrogen in the SCZONE

The survey revealed generally high agreement to the hypothetical production and export of green hydrogen from SCZONE to European countries. Specifically, we confronted respondents both in Suez and in Port Said with two different scenarios. Both scenarios described renewable energy generation from solar and wind power in the Suez Canal Region in order to produce green hydrogen. Scenario 1 postulated that this green hydrogen should be entirely shipped to European countries, Scenario 2 postulated that it should be entirely used in Egypt.

Interestingly, both scenarios were equally positively rated in the statistical sense, implying that people are in favour of green hydrogen production in SCZONE, regardless of whether it is for export or for domestic use. When confronted with notions stressing Egyptian interests more than European ones (e.g., that SCZONE renewable energy should be made accessible to Egyptians rather than to Europeans), we find less agreement in both scenarios compared to notions appreciating the scenarios.

**Figure 1. Response behaviour to the forced-choice decision of green hydrogen export or domestic use**

Q: If green hydrogen was produced in the Suez Canal Region, should it be mainly exported or should it be mainly used inside Egypt?



Source: (Ringel *et al.*, 2025)

For Scenario 1, it seems plausible that agreement to the appreciation of export differs significantly from agreement to the emphasis of Egyptian interests. However, for Scenario 2, the result is surprising and thus very interesting: since Scenario 2 described the domestic use of hydrogen produced in SCZONE, agreement to the appreciation of this scenario could have been expected to be similarly high as agreement to the emphasis of Egyptian interests. However, this is not the case. When confronted with a hydrogen production scenario—no matter whether it is for export or domestic use—people seem to have the tendency to agree. On the other hand, when confronted with notions that sound little cooperative (e.g., “European countries should generate renewable energy in their own countries”), people do not agree in the same extent. This is plausible because appreciating hydrogen production and use in Egypt—especially if the question offers no alternative scenario—is far away from non-cooperative thinking (see Figure 1). To sum up, people tend to agree to the suggested scenarios but do not agree with non-cooperative or egoistic notions.

### 3.2 Benefits associated with green hydrogen production

The presentation of various statements expressing different potential benefits of green hydrogen export found generally high agreement. This holds true for statements concerning political and trade benefits as well as personal benefits. However, statements concerning improved political and trade relationships yielded higher agreement values than statements concerning personal benefits, such as the beliefs in raised income and in improved energy access. Respondents in Suez do not differ from respondents in Port Said in this regard. The only detectable difference between

the two subsamples’ benefit evaluation could be determined in the belief of raised income as a consequence of green hydrogen export. People in Suez seem to believe more in raised income than people in Port Said.

Export is associated with a range of potential benefits. Respondents most often linked it to income generation, investment attraction as well as stronger trade and improved political relations. Connections to improved domestic energy access were weaker, suggesting a gap between local expectations and national export ambitions. Across the two survey sites, the only significant descriptive difference concerned income. Suez respondents were somewhat more likely than those in Port Said to expect household gains from export.

Regression analysis further clarifies the conditionality of export support. In both Suez (Table 1) and Port Said (Table 2), expectations of increased income were the strongest predictor of positive attitudes toward export. Additional drivers varied slightly by site. In Suez, anticipated improvements in political relations played a role, while in Port Said, expectations of better energy access and investment were more influential, though these differences are better interpreted with further research.

Overall, the findings depict strong support for green hydrogen production, cautious but not hostile acceptance of export, and a marked preference for domestic use when priorities had to be ranked. Local approval of export is shaped by the prospect of tangible co-benefits, indicating that EU-Egypt cooperation will be far better sustained if fairness and reciprocity are built into partnership frameworks.

Table 1. Regression coefficients of the multiple regression model on the Suez sample

Predictor	$\beta$	SE	t	p
Raise people's income	0.41	0.10	3.98	<0.001
Improve political relationships	0.20	0.10	2.11	0.036
Improve trade relationships	-0.13	0.09	-1.43	0.153
Economic development in Egypt	-0.07	0.09	-0.74	0.458
Attract further investments	-0.11	0.10	-1.16	0.248
Improve Egyptians' energy access	0.06	0.10	0.63	0.527
Age	-0.01	0.13	-0.08	0.933
Gender	-0.00	0.01	-0.71	0.480
Constant	1.98	0.67	2.94	0.004

Table 2. Regression coefficients of the multiple regression model on the Port Said sample

Predictor	$\beta$	SE	t	p
Raise people's income	0.40	0.10	3.91	<0.001
Improve political relationships	0.01	0.08	0.09	0.926
Improve trade relationships	-0.13	0.08	-1.58	0.115
Economic development in Egypt	0.00	0.08	0.02	0.985
Attract further investments	0.15	0.08	1.80	0.073
Improve Egyptians' energy access	0.32	0.08	4.07	<0.001
Age	0.13	0.11	1.21	0.226
Gender	-0.00	0.01	-0.25	0.805
Constant	0.97	0.66	1.46	0.146

Source: (Ringel *et al.*, 2025)

**Legend:**  $\beta$  - regression coefficient, SE – standard error, t – t-statistic, p – p-value

**Reading guide:** Row 1 of table 1 shows that, when holding the other factors in the model constant, the result suggests that the belief that green hydrogen development will raise people's income is associated with higher public acceptance of developing green hydrogen in the region: the regression coefficient is positive and fairly substantial ( $\beta = .4$ ), and the finding is statistically robust (SE=.1,  $t = 3.91$ ,  $p < .001$ ), meaning it is very unlikely to be due to chance.

Based on the findings of the survey data, the following policy recommendations are proposed to ensure continued local acceptance of EU-Egypt green hydrogen cooperation:

1. Anchor EU-Egypt hydrogen cooperation in visible local benefits by making income and jobs the paramount metrics for projects in the SCZONE. As the belief that green hydrogen exports will raise incomes is the strongest predictor of export support, cooperation should therefore commit to transparent reporting on local employment and wages and ensure that part of project revenues is earmarked for community development funds.

2. Balance export with domestic use to sustain legitimacy by reserving a defined share of output for Egyptian use. Sequencing early production toward domestic decarbonization and explicitly communicating this balance in EU-Egypt partnership documents would align projects with public expectations and thereby reduce concerns of inequity.

3. Institutionalize reciprocity and fairness in the EU-Egypt Renewable Hydrogen Partnership by embedding transparent benefit-sharing clauses, grievance redress, and safeguards against unequal burden-sharing in MoUs. This alignment would better ensure that renewable capacity for exports does not compromise Egypt's own energy transition.

4. Consolidate early acceptance through strategic planning by using pilot projects to create tangible benefits before deployment matures. That around one-quarter of survey respondents did not state a preference between export and domestic use indicates uncertainty. With this, projects that generate early local gains can build trust and address the conditional nature of export support before development at scale.

Aimed at closing the gap on local acceptance of green hydrogen production in the SCZONE, the findings distilled in this policy brief provide important first results and resulting policy implications for designing locally accepted green hydrogen trade partnerships, thereby completing similar analysis from international bodies like United Nations Industrial Development Organization (UNIDO) or International Renewable Energy Agency (IRENA). Based on this contributions, further lines of research could be developed. Future studies could adopt a broader scope by addressing trade relationships with various regions in comparison (e.g., Europe, US and China) to provide a more complete picture of the public opinion. Also, an expansion of surveys to other countries in the Middle East/North Africa region could provide promising insights. Furthermore, the methodology could also be broadened in future studies, for instance through qualitative components such as focus groups.

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