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# FROM ENERGY SECURITY TO SOVEREIGNTY

## PATHWAYS FOR A JUST ENERGY TRANSITION IN EGYPT, MOROCCO, AND TUNISIA

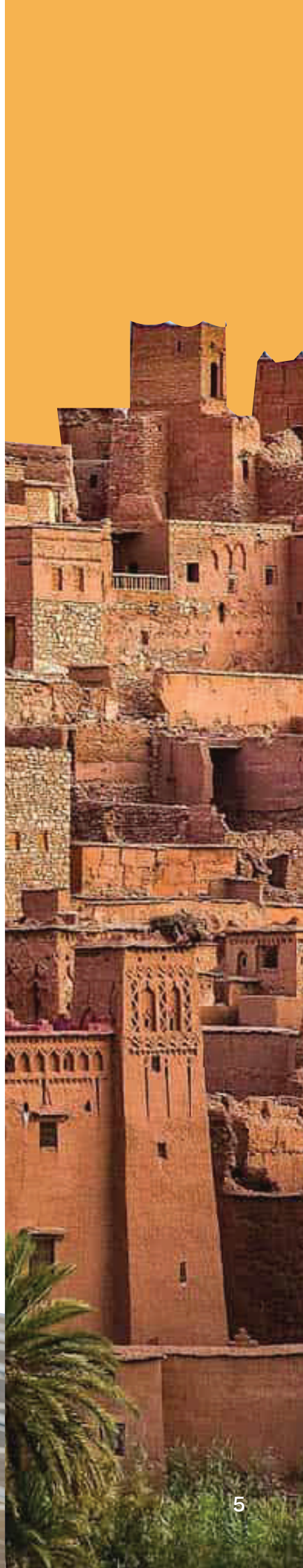
# EXECUTIVE SUMMARY

This report maps how energy value is created, transferred, and captured across Egypt, Tunisia, and Morocco and uses an adapted Energy Sovereignty Index to assess who controls resources, who benefits, and how policy space is constrained. It traces the fossil-fuel value chain, current energy mixes, and the rise of utility-scale renewables to show that the region's transition is changing technologies faster than it is changing power relations. The central finding: pursuit of energy security and export-led hard-currency goals has been prioritized over energy sovereignty, delivering short-term adequacy while deepening external control over prices, technology, and planning.

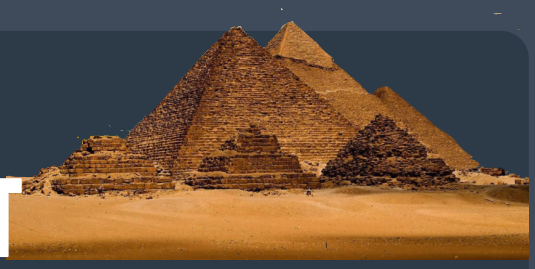
Methodologically, the Energy Sovereignty Index assessment for the 3 North African Countries, was against four dimensions—Renewable/Energy "cleanness," Independence & Resource Control, Accessibility & Justice, and Policy Autonomy, through concrete indicators (e.g., domestic control of production, rent capture, outage frequency, export-first obligations). Country readings converge on a sovereignty deficit, albeit for different reasons and were scored against an average score of 10. Egypt scores 4.5 as it is gas-dominant and contractually export-oriented, with IMF-era reforms pressuring affordability and policy autonomy. Tunisia scores 4.25 as it is import-dependent and implementation-constrained, with renewables still marginal and pipeline-anchored gas shaping dispatch. Morocco scores the highest at 5.5 as it has moved fastest on renewables and planning, yet remains coal-locked for domestic supply and heavily reliant on foreign-owned assets and export-facing projects.

The analysis identifies “false solutions” that entrench dependency such as technology “fixes” including carbon capture and storage that extend fossil lock-ins, and false narratives that rebrand many International Oil Companies as “energy companies” while externalizing costs. Furthermore, policy models (such as Build-Own-Operate BOO Model) that secure investor returns without guaranteeing public benefit or domestic offtake. Across the three countries, mega-projects often sit on public land and grids while profits, technology, and control flow outward.

Pathways forward focus on rule-changes, not just megawatt additions. There must be a phase down of new fossil exploration awards, publish decommissioning ladders, cut methane and flaring with fee-rebate designs, and domestic-priority clauses. Renewables must pivot to “distributed-first” systems (rooftops, microgrids, municipal/co-op models) that are decentralized by nature especially when considering the geography of the 3 countries, mandate minimum domestic offtake (25–15%) for export-oriented projects, establish community dividends funded from gross revenues, and bind local-content and workforce obligations into operation and maintenance. To finance a just transition and ensure accountability, the report outlines polluter-pays instruments (starter levies on IOC profits, methane/flare fees, strict liability and decommissioning bonds), strategic litigation grounded in the 2025 ICJ advisory opinion, and formula-based revenue sharing to ring-fence funds for environmental repair, water protection, public health, and just-transition livelihoods. International tracks (e.g., a UN tax convention) should complement, never replace, domestic accountability and guaranteed public returns when public assets are used. Together, these tools transition extraction into enforceable public obligations, reclaiming energy sovereignty and policy space across Egypt, Tunisia and Morocco.



# EGYPT FACTSHEET



## ENERGY SOVEREIGNTY SCORE 4.5/10

Egypt is an Energy rich country, with potential for domestic stability, and decision making sovereignty

## SNAPSHOT:

### CLEANNESS 5/10

**15%** of power from Renewable Energy, largely gas heavy supply and new Liquefied Natural Gas/Export Lockins

### RESOURCE CONTROL & INDEPENDENCE 4/10

There is weak rent capture and International Oil Companies dominate operations song with EU financed green megaprojects

### ACCESSIBILITY & JUSTICE 5/10

Near-universal electrification, but recent blackouts and rising tariffs continue to challenge electricity accessibility across Egypt as community benefits remain challenged

### POLICY AUTONOMY 4/10

IMF reforms have significantly affected policy autonomy while investments and new project developments have been geared towards export-led $H_2$/LNG shape choices; arbitration limits leverage.

## BLOCKERS

Export-first lock-ins (LNG/$H_2$ offtake) override domestic security.

Foreign-led green megaprojects on public land with weak domestic offtake.

Cost-recovery PSAs depress state take and policy space.

Affordability squeeze from tariff reforms, along with repeated fuel supply risks.

## OPPORTUNITIES

Large, proven wind & solar corridors
Grid modernization experience

Institutional roadmaps (ISES 2035) that can be re-targeted toward domestic needs.

Zones and corridors (e.g., SCZone) that could anchor local manufacturing along with operations and maintenance if there is local requirement

# WHAT CAN EGYPT DO TO MOVE FROM SEEKING ENERGY SECURITY TO ATTAINING ENERGY SOVEREIGNTY

**Domestic-first clauses:** %25–15 minimum local offtake in export projects; curtail export during shortages.

**Distributed-first renewables:** rooftops, microgrids, municipal/co-ops; net-metering that's bankable.

**Community dividend:** fixed share of gross revenues to local funds; publish use and impacts.

# TUNISIA FACTSHEET

## ENERGY SOVEREIGNTY SCORE 4.25/10

Tunisia is important dependent on Gas, and has a slow rollout for renewables although it has significant potential to localize energy through solar and wind. Due to this prices are exposed, along with finance and decisions being shaped from the outside

## SNAPSHOT:

### CLEANNESS 4/10

**>10 %** of energy mix is renewable and fossil fuel subsidies are still in place

### RESOURCE CONTROL & INDEPENDENCE 3/10

There is limited domestic control on the energy supply chain, and upcoming projects include a focus on export oriented projects.

### ACCESSIBILITY & JUSTICE 6/10

Near-universal electrification but the potential outages are tied to import risks. Some land right concerns persist for areas where new developments are proposed

### POLICY AUTONOMY 4/10

- IMF-linked tariff reforms have affected policy decisions.
- There is clear fragmentation in long-term planning, while legacy contracts limit leverage that the Government has

## BLOCKERS

Import-anchored gas system shapes dispatch and prices

Tendering delays & grid limits slow renewable build-out

Debt & fiscal stress constrain domestic investment pace.

## OPPORTUNITIES

Large, proven wind & solar corridors
Grid modernization experience

Decentralization potential (municipal/dg models) to bypass bottlenecks

Strong interconnection potential if designed for domestic floors before exports

# WHAT CAN TUNISIA DO TO RECLAIM ITS ENERGY SOVEREIGNTY

Fast-track grid + storage for Renewable Energy zones and areas

Ensure sufficient local content and operation and maintenance quotas for any Renewable Energy project

Additional and sufficient community engagement across the project, starting with consent and disclosure of projects and continued with access to benefits from the projects.

# MOROCCO FACTSHEET

## ENERGY SOVEREIGNTY SCORE 5.5/10

Morocco leads regionally on planning and renewables scale-up, but coal lock-in and foreign-owned assets keep value and control abroad, although there are promising signs of phasing out.

## SNAPSHOT:

### CLEANNESS 6/10

**20 %** of generation from Renewable Energy and

**52 %** installed-capacity target by 2030 however coal still reaches

**>60 %**generation.

### RESOURCE CONTROL & INDEPENDENCE 5/10

MASEN/ONEE steer the new project developments, but foreign developers/finance dominate assets and rents.

### ACCESSIBILITY & JUSTICE 6/10

- **99 %**electrification showcasing a high level of access for communities and moroccans
- However, CSP projects showcase water/land concerns, and there has been reported to be limited community benefits.

### POLICY AUTONOMY 5/10

- There is a strong vision articulated in the Low Emission Strategy 2050
- Donor and foreign investments do have pull/indirect influence on policy direction

## BLOCKERS

Coal baseload dependence and new LNG create lock-ins.

Foreign-owned Renewable Energy projects with long PPAs limit rent capture.

Export-facing hydrogen/Renewable Energy risks crowding domestic needs.

Thin local manufacturing weakens industrial autonomy.

## OPPORTUNITIES

Institutional capacity (MASEN/ONEE) to steer policy tools.

Interconnection strength and grid codes that already integrate Renewable Energy.

Proven power delivery that can be redirected to domestic floors and local industry.

# HOW CAN MOROCCO FURTHER BUILD OUT ITS ENERGY SOVEREIGNTY

Commit to the Coal Phase out by 2040 with main replacement by storage-backed Renewable Energy

Mandatory domestic offtake in export $H_2$/Renewable Energy, and ensuring there are tariff shields for households/SMEs.

Community dividends and water-use safeguards for CSP projects integrated into PPAs.