

NEW FORMS OF WORK AND PLATFORM WORK IN SEMED

Country profile: Tunisia

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CONTENTS

CONTENTS	3
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SETTING THE SCENE	4
Main economic indicators	4
Labour market	4
Youth statistics	5
Internet and digitalisation	6

ONLINE WORK ON AND OFF DIGITAL LABOUR PLATFORMS	8
Prevalence and attractiveness of online work	8
Online work occupations and worker profiles	10
Working conditions	12

ON-LOCATION PLATFORM WORK	14
Prevalence and attractiveness of on-location platform work	14
Worker profiles and working conditions	15

CURRENT REGULATION, POLICIES AND STRATEGIC APPROACHES	17
Labour market, employment and skills development	17
Digitalisation	18

POLICY IMPLICATIONS	20
Challenges and opportunities of the current situation	20
Gaps in the existing strategic and policy approaches	20
Implications / possible measures for regulation	20

SUMMARY	22
----------------	-----------

REFERENCES	23
-------------------	-----------

LIST OF INTERVIEWEES	25
-----------------------------	-----------

Setting the scene

Main economic indicators

Tunisia is a lower-middle income country with a GDP per capita of USD 3 776¹ and a population of around 11.8 million inhabitants.² The largest sector in the country in terms of GDP share is the service sector (around 60%), followed by industry (23%) and agriculture (10%).³

Economic growth in Tunisia has been affected by a series of external and internal shocks since the mid-2000s. These shocks include the international financial crisis of 2007/2008, the ‘Arab Spring’ in 2011, the recent COVID-19 pandemic in 2020 and the war in Ukraine in 2022. Consequently, economic growth rates have decreased from an average of 4.2% between 2000 and 2010 to 1.2% between 2011 and 2022.⁴

Tunisia has in recent years endeavoured to promote a dynamic market-oriented economy. However, such efforts have been hampered by political instability, limited international investments and rather conservative legislation that does not fully promote entrepreneurship and self-employment. The main sectors that have been identified as having a comparative advantage in exports and employment in the past 10 years include Information and Communication Technology (ICT), professional services, transportation and logistics, tourism and the medical sector.⁵

Worsening economic conditions have accelerated the flow of Tunisians abroad, with the percentage of emigrants increasing from 5.8% to 15.4% of the total Tunisian population between 2010 and 2022.⁶ The country’s limited resources and chronic trade deficits have compelled its authorities to facilitate and organise massive labour emigration, including the emigration of skilled workers.⁷ Approximately 7% to 10% of the Tunisian population lives abroad as of 2022. Over 80% of the emigrants are in Europe, with 50% in France and 12% in Italy. Only about 20% of Tunisian emigrants live in the United States.⁸ This migration has deeply impacted labour market supply, depriving the country of its younger and most productive workers. In the mid-2010s, over 70% of the migrants were young persons aged between 15 and 29 years with diverse educational attainments.⁹

Labour market

The Tunisian labour market is characterised by high labour inactivity, unemployment and informality, particularly as regards women. These trends are pervasive across the SEMED region.

According to the KIESE data compiled by ETF, around 53% or over half of the people in the country were not active in the labour market in 2021. This figure is much higher for women with a massive 71%

¹ <https://blogs.worldbank.org/opendata/new-world-bank-country-classifications-income-level-2022-2023>

² *Statistiques Tunisie*. <https://www.ins.tn/statistiques/111>

³ World Bank. *Services Value added (% of GDP) – Tunisia and Agriculture - Value added (% of GDP) – Tunisia*. <https://data.worldbank.org/indicator/NV.SRV.TOTL.ZS?locations=TN>

⁴ World Bank. *GDP growth (annual%) – Tunisia*.

<https://data.worldbank.org/indicator/NY.GDP.MKTP.KD.ZG?locations=TN>

⁵ World Bank (2015). *Tunisia: Breaking the Barriers to Youth Inclusion*. Chapter 4, p.48; Ministère de l’économie, des finances et de la souveraineté industrielle (June 2022). *Tunisie – Veille Sectorielle*. Direction générale du trésor.

⁶ The number of Tunisian emigrants reached 1.82 million persons in 2022. See ETF (2021), *Fiche Pays Migration et Compétences Tunisie*. *op.cit.*, p.6.; “Tunisie : la diaspora tunisienne à la rescousse d’un pays en crise ». *Econostrum*. 12 Octobre 2023.

⁷ ETF (2015). *Migrant Support Measures from an Employment and Skills Perspective (Mismes) – Tunisia*, p.3. From 1990 and 2019, the caseload of migrants increased by about 75% (from 465,000 to 813,000), in ETF (2021), *Fiche Pays Migration et Compétences Tunisie*, p. 6.

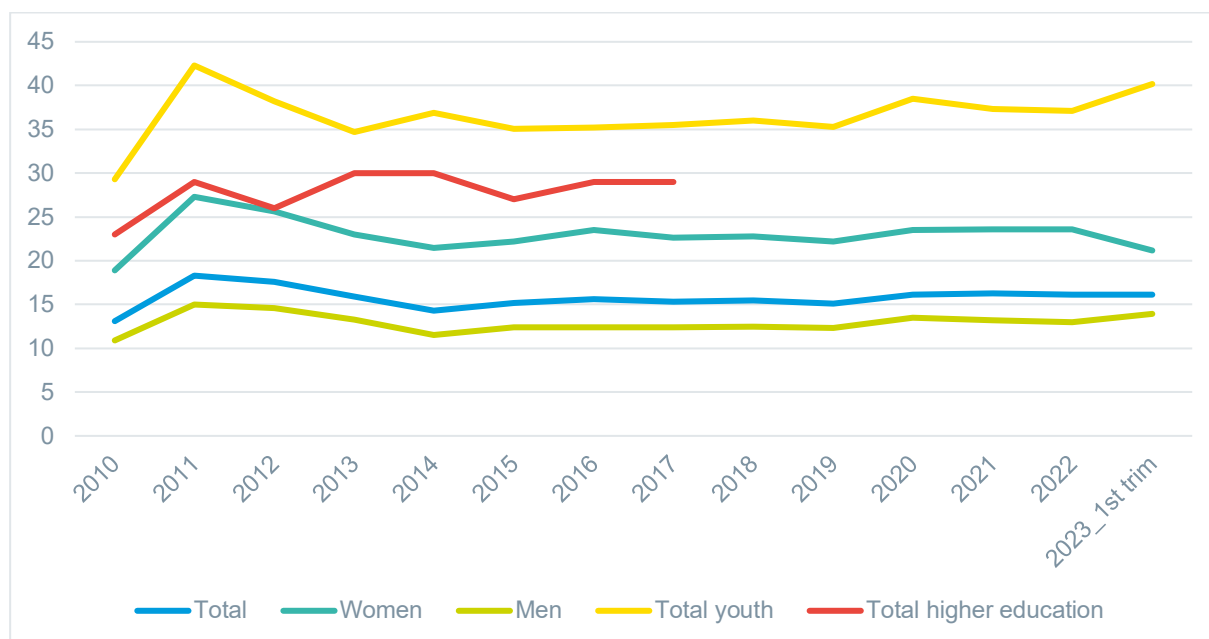
⁸ ETF (2021), *Fiche Pays Migration et Compétences Tunisie op.cit.*, p. 7.

⁹ ILO (2019). *Stratégie Nationale pour l’Emploi – Rapport de Diagnostic*. https://www.ilo.org/wcmsp5/groups/public/-ed_emp/documents/publication/wcms_867712.pdf

inactivity rate. This low female labour market activity rate has remained relatively stable between 2012 and 2022.¹⁰

Unemployment in Tunisia is also comparatively high, standing at around 18% in 2022¹¹ – 15% for men and almost 24% for women. World Bank data reveals a more complex trend in unemployment rates by different worker categories over time (see figure below). According to this data, unemployment rates have been relatively stable over time with a smaller peak in 2011. Apart from significant gender disparities, the highest unemployment rates have been recorded for Tunisian youth, which was 40.2% in 2022. Surprisingly, unemployment rates are also extremely high for those with higher education. These statistics signal a lack of opportunities on the local labour market for young and highly skilled workers, which are compatible with high emigration rates among youth.

Figure 1. Unemployment rates in Tunisia in 2010-2023



Source: World Bank, *Unemployment as total% of the labour force, population aged 15+ (modelled ILO estimate), various categories*; and Institut National de la Statistique.

Another issue that plagues the Tunisian labour market is the high degree of informality of work arrangements, either in informal or formal enterprises. In 2019, about half (44.8%) of the labour force was working informally, namely they are not registered with the national security system and often operate without written contracts.¹² Because these informal arrangements are not covered by the provisions of the labour law, workers are suffering from poor working conditions.

Youth statistics

Youth in Tunisia suffers from extremely high unemployment rates, large numbers of youth not in employment and education (NEETs), as well as the lack of high-skills job opportunities.

According to KIESE data, youth unemployment in Tunisia was around 41% in 2021, with minor differences between males and females. The high unemployment rate of those with higher degrees in

¹⁰ World Bank data, *Labor force participation rate (% of population ages 15+) (modelled ILO estimate – Tunisia) for female, male and total populations for Tunisia, Morocco and Egypt*. <https://data.worldbank.org/indicator/SL.TLF.CACT.MA.ZS>

¹¹ KIESE database

¹² “Informal employment in Tunisia reaches 43.9%”. *Zawyia*. July 3, 2023. This represents about (1,592 million persons, 600,000 of whom are self-employed. In: Saidi, Marwa (10/05/2023). “Le marché du travail en Tunisie”. *La Presse.tn*. Egypt and Morocco also reported high rates, 62.5% and 77.3% respectively.

education is particularly stark. The unemployment of university graduates, which remained high at 23.1% in 2023, is of particular concern to authorities.¹³

The share of NEETs (41% of the young population) is also high in Tunisia, with this share being 2% higher for men than for women.¹⁴ The largest proportion of NEETs are inactive, with around 18% of the total young population, including 26.7% of women. Another portion of 15.2% of youth are unemployed, and are actively looking for a job (12.3% of women).¹⁵ In general, the share of NEETs in Tunisia is higher than for the rest of the SEMED region, indicating stark prospects for the country's youth.

Internet and digitalisation

The still nascent but rapidly growing ICT sector in Tunisia is raising prospects for broader digital transformation of the Tunisian economy, and is increasingly seen as the solution for low youth employment and entrepreneurship. In 2017 the ICT sector contributed around 7.5% to the Tunisian GDP, and employed around 80,000 people.¹⁶ While there is no more recent data available, it is probable that both indicators have increased since, particularly due to the expansion of the sector with the COVID-19 pandemic.¹⁷

Internet usage in Tunisia is high – around 79% of the total population (9.8 million persons) were using the internet at the start of 2023. This represents a significant increase in the number of internet users compared to early 2022 and early 2021, when internet penetration stood at 66% of the total population.¹⁸

There is disparity in the use of the internet between different social groups with usage depending on age, income level and gender. Internet users are more likely to be university graduates (91% – men; 85.5% – women); young people – 15-24 years (92% – men; 91% – women) and earn higher incomes – higher than 5,000 Tunisian Dinars (TD) (men – 91.5%; women – 68.3%). Conversely, internet use is significantly lower among those with lower education, older than 55 (men – 26.5%; women – 23.6%), as well as those who earn less than 4,000 TD (men – 29.1%; women – 24.7%).¹⁹ Among those who do not use the internet, around 37% cannot afford it.²⁰

Despite high internet usage, the economy still suffers from poor internet infrastructure. The internet speed for fixed broadband in Tunisia is around 8 Mbps, which is one of the lowest rates in the SEMED region. This is also one of the lowest internet speeds globally (Tunisia is ranked 166th globally which is one of the main obstacles to further digitalisation of the Tunisian economy).

Despite the favourable impact of the COVID-19 pandemic on the expansion of IT employment, there are also other obstacles to broader digital transformation in Tunisia. Firstly, the country lacks the digital skills necessary for harnessing the benefits of digitalisation, and digital education among youth and employees of start-ups is generally low and needs to be significantly enhanced. Secondly, digitalisation

¹³ Down from 28.1% in FT 2020, an improvement due to the decrease in the percentage of unemployed female higher education graduates from 38.3% to 29.4% during the same period. According to Institut National de la Statistique, in Touhami, Habib (17/06/2023). "L'emploi et le chômage en Tunisie au premier trimestre 2023". *Leaders*.

¹⁴ KIESE data.

¹⁵ In: ETF (2022). *Key Indicators on Education, Skills and Employment*, p. 22.

¹⁶ https://tia.gov.tn/storage/app/media/ARGUMENTAIRES/TIA_TUNISIA_ICT/TIA_TIC_2020.pdf

¹⁷ As noted in one report, there are no systematic surveys regarding the use of the internet and the use of digital technologies in Tunisia; in Ben Youssef, Adel (2021). *Digital Transformation in Tunisia: Under Which Conditions Could the Digital Economy Benefit Everyone?* ERF Working Paper Series, p. 12.

https://erf.org.eg/app/uploads/2021/11/1637495187_570_734598_1512.pdf

¹⁸ Kemp, Simon (14 February 2023). *Digital 2023: Tunisia*. <https://datareportal.com/reports/digital-2023-tunisia>; and Kemp, Simon (14 February 2022). Also *Digital 2022 and 2021 versions*.

¹⁹ UNDP (2020). *La stratégie Tunisie Digitale 2021-2025* pp.10-12.

https://www.undp.org/sites/g/files/zskgke326/files/2023-03/IIN_Full.pdf

²⁰ UNDP (2020). *La stratégie Tunisie Digitale 2021-2025* pp.10-12.

https://www.undp.org/sites/g/files/zskgke326/files/2023-03/IIN_Full.pdf, p.13.

has affected certain sectors (media, tourism) more than others (administration) and has yet to translate into tangible economic outcomes.²¹

²¹ Ben Youssef, Adel (2021). *Digital Transformation in Tunisia: Under Which Conditions Could the Digital Economy Benefit Everyone?* ERF Working Paper Series. op.cit. pp.16, 21.

Online work on and off digital labour platforms

Online work has expanded in Tunisia in recent years, particularly since the outbreak of the COVID-19 pandemic. This type of work has become visible and prominent in the media for two main reasons. Firstly, it is widely seen as an alternative to the dearth of traditional, formal, wage jobs in the public and the private sector, and thus a means of facilitating the transition from school to work and decreasing unemployment.²² Secondly, the informal status of most online workers²³ is tied to financial vulnerability and limited social protection. These trends have been noticed by the media and relevant non-governmental organisations, however, thus far the trends have not received attention from the Tunisian authorities. Although the Tunisian state has shown interest in the growth of the ICT sector, it has not made labour conditions of online freelance workers a priority.²⁴

Prevalence and attractiveness of online work

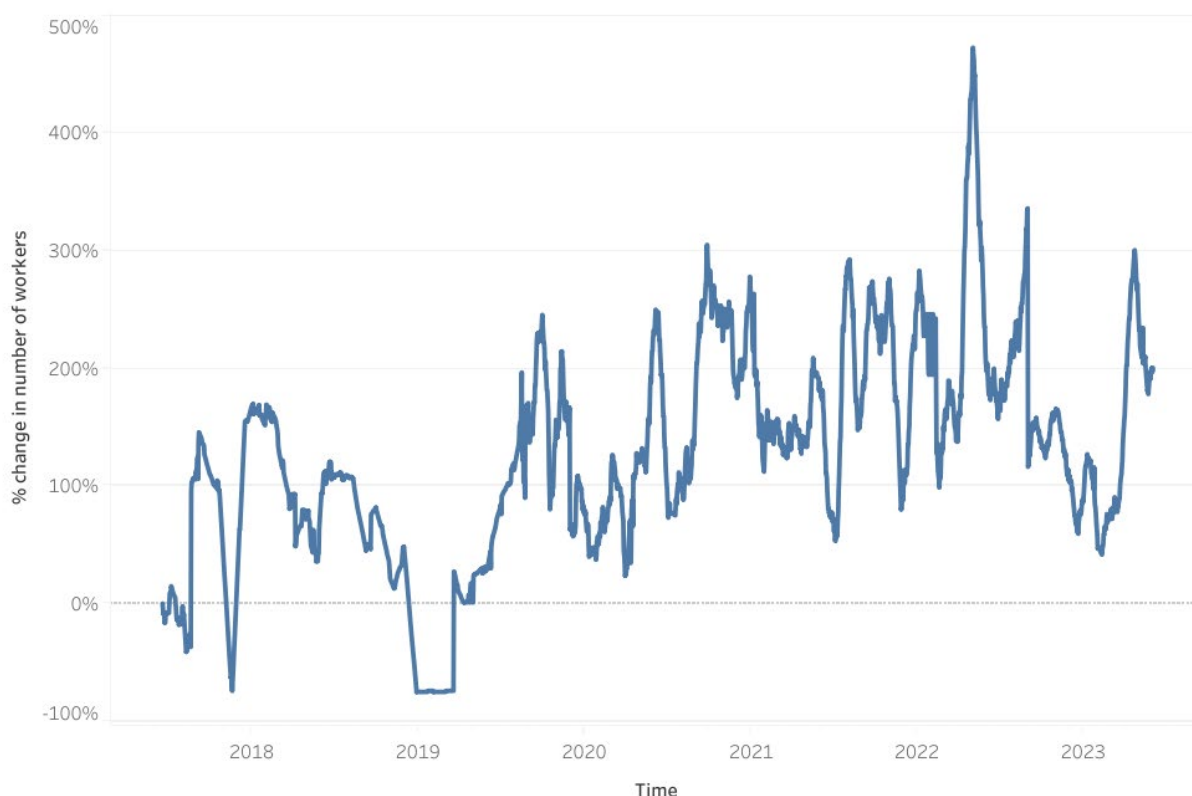
According to OLI data, online work engagement in Tunisia showed a steady upward trend from 2017 to 2023, accompanied by some fluctuations. The biggest spike in worker activity was observed in the middle of 2022, but it was followed by a sharp decline. A notable drop in online worker activity occurred at the beginning of 2019. As of the most recent measurement in May 2023, worker engagement was around 200% higher compared to the initial measurement in June 2017. Throughout this period, Tunisian online workers' activity accounted for around 0.16% of the global share of platform work across the measured platforms in the observed time period.

²² Saidi, Maewa (19/05/2023). 'Le «freelancing» dans les secteurs créatifs: Les opportunités fleurissent'. *La Presse de Tunisie*. <https://www.turess.com/fr/lapresse/1158748>

²³ Saidi, Maewa (19/05/2023). "Le «freelancing» dans les secteurs créatifs: Les opportunités fleurissent". *La Presse de Tunisie*. <https://www.turess.com/fr/lapresse/1158748>

²⁴ Interview ILO National Coordinator, 1/08/202 Interview ILO National Coordinator, 1/08/2023 3 (see References); and Pr. Belhadj, Aram, 26/07/2023.

Figure 2. Change in engagement of Tunisian online platform workers over time relative to June 2017



Source: Online labour index.²⁵

Note: The graph presents the percentage change between the number of active workers from Tunisia on a specific day compared to the number of active workers at the start of data collection in 2017, which is used as a reference date. This graph was based on OLI data which calculated a weighted estimate of currently active workers by periodically sampling workers on five of the largest online platforms once every 24 hours. These platforms include Upwork, Freelancer, Fiverr, PeoplePerHour and MTurk.²⁶

Available estimates point out that the population of online freelancers in Tunisia varies from 120,000 to 192,000.²⁷ However, according to a survey organised by Open Startup Tunisia (OST) with 10 different freelance communities, for most Tunisian freelancers (87%) online work is not a principal source of income. Instead, it represents a complementary source of income alongside the traditional job or part-time job for persons with limited time for work, such as students and housewives.²⁸ Consequently, only around 9% of online freelancers in Tunisia do this work full time. Around 30% of workers do it 10 to 20 hours a week, 39% of them work 5 to 10 hours a week, and 16% for only 1 to 5 hours a week.²⁹

Data collected among the 6,401 registered online workers from Tunisia across the three targeted platforms (Freelancer, Guru and PeoplePerHour), shows that only 5% can be considered active. Active workers are those who had at least one task completed on the platform. Most active workers (87%) are

²⁵ <http://onlinelabourobservatory.org/oli-supply/>

²⁶ The findings are limited to the five globally popular online labour platforms and exclude other popular platforms in the region, primarily Arabic language ones such as Mostaqil or Ureed.

²⁷ Saidi, Maewa (19/05/2023). 'Le «freelancing» dans les secteurs créatifs: Les opportunités fleurissent'. *La Presse de Tunisie*. <https://www.turess.com/fr/lapresse/1158748>. and *Welcome to the freelance era: a worldwide trend in exponential expansion, around the world and in Tunisia*. 26 May 2021. <https://openstartuptunisia-competition.medium.com/welcome-to-the-freelance-era-a-worldwide-trend-in-exponential-expansion-around-the-world-and-in-b6263c4740ca>

²⁸ Open Startup Tunisia (2021). *Welcome to the freelance era: a worldwide trend in exponential expansion, around the world and in Tunisia*. <https://openstartuptunisia-competition.medium.com/welcome-to-the-freelance-era-a-worldwide-trend-in-exponential-expansion-around-the-world-and-in-b6263c4740ca>

²⁹ Open Startup Tunisia (2021). *Welcome to the freelance era: a worldwide trend in exponential expansion, around the world and in Tunisia*. <https://openstartuptunisia-competition.medium.com/welcome-to-the-freelance-era-a-worldwide-trend-in-exponential-expansion-around-the-world-and-in-b6263c4740ca>

registered on the Freelancer platform, while PeoplePerHour and Guru account for 12% and 1% respectively. It is important to note that this is only a fraction of online platform workers in Tunisia, as many are also working on other global and local online labour platforms.³⁰

The various digital labour platforms used by digital freelancers in Tunisia include Prod'it: a Tunisian network matching interactively freelancers in any online to potential customers; Arabic language platforms like Mostaq and English language platforms like Upwork, Freelancer, Fiverr, PeoplePerHour and Truelancer.

A survey conducted on Tunisian freelancers revealed that they mostly prefer to work for French, American and Canadian clients. The main reason for this is the high popularity of clients from the West that offer significantly higher compensation than local clients, coupled with the widespread use of the French language. Of those freelancers surveyed, 43% work for local enterprises, 38% for foreign enterprises, and 19% for both.³¹

There are three main ways in which workers find online work opportunities in Tunisia: networking (personal connections), social media and digital platforms. The largest segment of online freelancers finds job opportunities through networking (41%), followed by social media groups (30%). Only 28% of them rely on digital platforms, despite global outreach.³²

Online freelance work is easier to obtain than traditional jobs and provides temporal flexibility, especially for the segments of the population whose time for work is limited (students, housewives, persons with disabilities), as well as spatial flexibility i.e. a possibility to work from anywhere. This type of work also provides freelancers who have no other work opportunities with a professional status and an opportunity to develop their skills. However, they have almost no social protections and most of them have low monthly incomes.

Online work occupations and worker profiles

Tunisian online platform workers mostly work in software development and technology and creative and multimedia sectors. Most of these workers are young and there are more men than women working on online labour platforms.

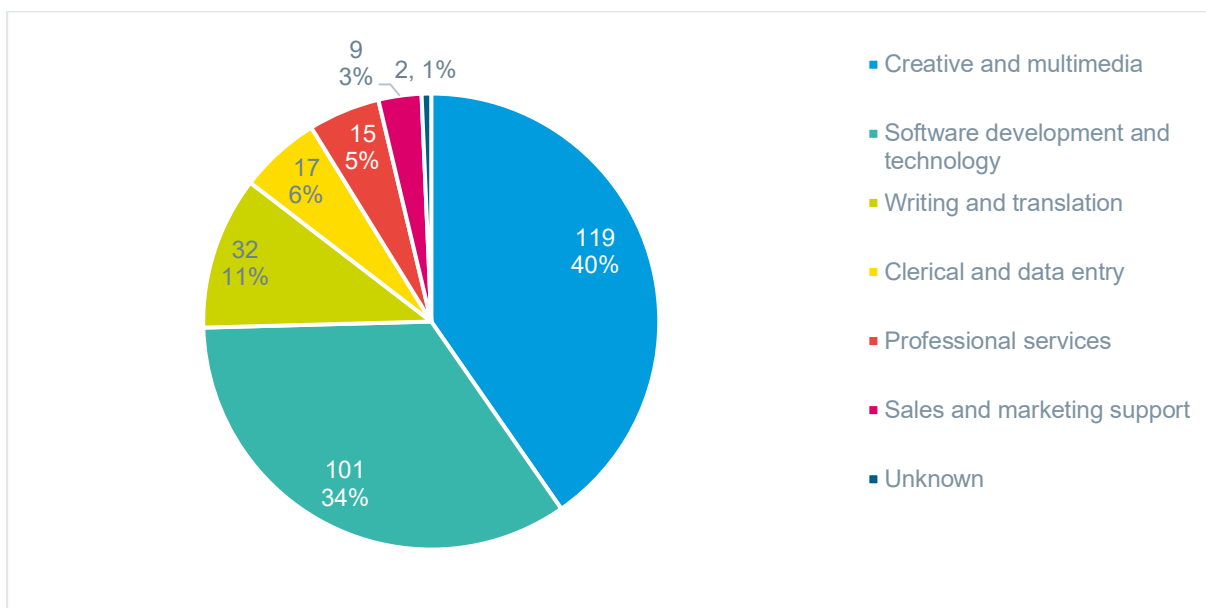
The distribution of occupations among Tunisian online platform workers is heavily asymmetrical (see Figure 3 below). Creative and multimedia, and software development and technology account for three quarters of all workers with 40% and 34% shares respectively. The remaining 25% is distributed among writing and translation, clerical and data entry, professional services and sales and marketing support.

³⁰ These platforms were selected for the analysis because they were the most popular English language platforms that we could apply web scraping techniques to.

³¹ Open Startup Tunisia (2021). *Welcome to the freelance era: a worldwide trend in exponential expansion, around the world and in Tunisia*. <https://openstartuptunisia-competition.medium.com/welcome-to-the-freelance-era-a-worldwide-trend-in-exponential-expansion-around-the-world-and-in-b6263c4740ca>

³² Open Startup Tunisia (2021). *Welcome to the freelance era: a worldwide trend in exponential expansion, around the world and in Tunisia*. <https://openstartuptunisia-competition.medium.com/welcome-to-the-freelance-era-a-worldwide-trend-in-exponential-expansion-around-the-world-and-in-b6263c4740ca>

Figure 3. Distribution of occupations among active online platform workers

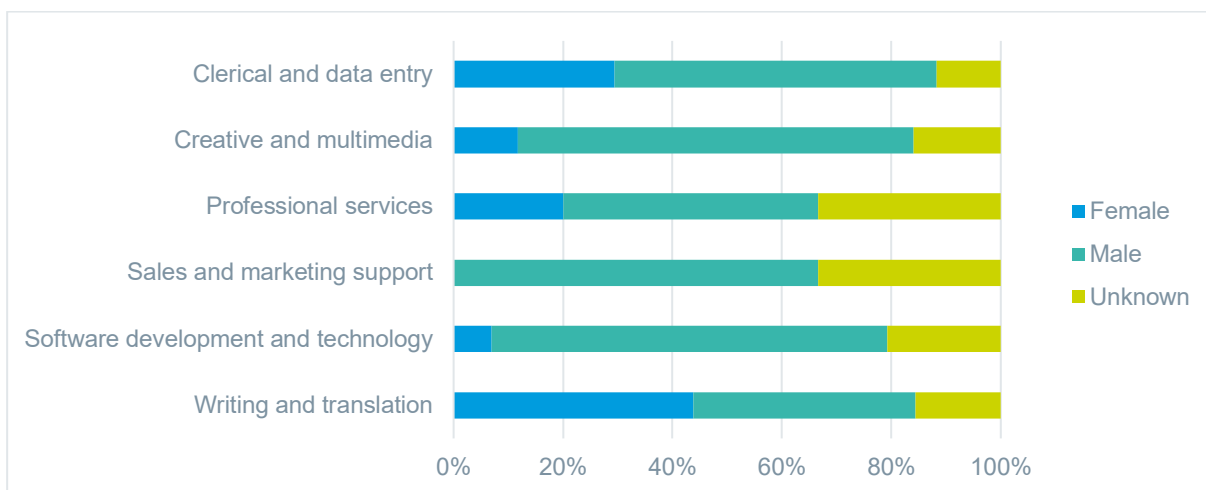


Source: PPMI, based on data from Freelancer, Guru and PeoplePerHour collected in March 2023.

Note: “Unknown” category shows worker profiles for which gender could not be identified.

Moreover, automatically collected data confirmed that in Tunisia male platform workers tend to dominate online labour platforms and Tunisian men were around 5 times more likely to work on three selected platforms than women (see Figure 4 below). Gender distribution also differed per occupation. There are slightly more female workers working in the writing and translation segment, which was also observed in other contexts. However, the remaining five occupations are dominated by men. Out of these, women are the most represented in clerical and data entry and the least in sales and marketing support and software development and technology.

Figure 4. Gender distribution of active online platform workers by occupation



Source: PPMI, based on data from Freelancer, Guru and PeoplePerHour collected in March 2023.

Note: “Unknown” category shows worker profiles for which gender could not be identified.

A survey of Tunisian online freelancers reveals a similar pattern. About two thirds of freelancers (67%) in Tunisia are men and the remaining one third are women. This lower percentage for women is aligned with the lower percentage of Tunisian women in the labour market (as seen above). Interestingly, this

per cent still remains higher than the world average rate of women in the global participation of women on online labour platforms (23%).³³

As regards age, the majority of digital freelancers in Tunisia are young. Half of the surveyed freelancers were in the 18-24 age range and 88% in the 18-34 age range.³⁴

Working conditions

The business model driving the online platforms contributes to aggravating the vulnerable situation of informal freelancers. The latter are in principle engaged as “independent contractors” who do not have the protection provided to traditional formal workers by the Labour Code and social security.³⁵ Furthermore, since the recent Finance Law of 2023 excludes most online sector activities from the self-employment status, most of these independent contractors work informally, with around 77% of them not working under any kind of contract.³⁶

Due to having no actual beneficial legal status, most freelancers have no social protections such as social security and medical insurance; they are also not covered by the provisions of the labour law that covers wage level, hours of work, occupational health and safety, vacations and official days off, etc. For example, a survey of Tunisian freelancers indicates that only 38% of them have access to social security.³⁷

The key demand of almost all freelancers seeking to fully engage in online work (because of the availability of job opportunities, the flexibility and mobility offered by such activity), is recognition by the government of the freelancer status and facilitated access to social security.³⁸ So far, the government has not regulated their status despite civil society initiatives aimed at enhancing platform workers' profile in national debates through public events, such as the ‘Tunisian Freelance Day’ in April 2023.³⁹ Some of them have also organised themselves into cooperatives in order to help each other and to exert pressure collectively on the government for official recognition of their work status.⁴⁰

The hourly wages offered on online labour platforms are significantly higher than the national average hourly wage. According to Numbeo,⁴¹ the average net hourly pay in Tunisia in March 2023 was only USD 1.83. This amount is more than 11 times lower than the average hourly wage requested by Tunisians on online labour platforms (USD 21.01). However, these figures are not directly comparable as incomes on platforms are irregular, workers are engaged in large amount of unpaid labour and their actual rates might differ from requested.

³³ Open Startup Tunisia (2021). *Welcome to the freelance era: a worldwide trend in exponential expansion, around the world and in Tunisia*. <https://openstartuptunisia-competition.medium.com/welcome-to-the-freelance-era-a-worldwide-trend-in-exponential-expansion-around-the-world-and-in-b6263c4740ca>

³⁴ Open Startup Tunisia (2021). *Welcome to the freelance era: a worldwide trend in exponential expansion, around the world and in Tunisia*. <https://openstartuptunisia-competition.medium.com/welcome-to-the-freelance-era-a-worldwide-trend-in-exponential-expansion-around-the-world-and-in-b6263c4740ca>

³⁵ Interview with a representative of the University of Carthage in Tunisia and the Islamic University in Riyadh in Saudi Arabia.

³⁶ Open Startup Tunisia (2021). *Welcome to the freelance era: a worldwide trend in exponential expansion, around the world and in Tunisia*. <https://openstartuptunisia-competition.medium.com/welcome-to-the-freelance-era-a-worldwide-trend-in-exponential-expansion-around-the-world-and-in-b6263c4740ca>

³⁷ Open Startup Tunisia (2021). *Welcome to the freelance era: a worldwide trend in exponential expansion, around the world and in Tunisia*. <https://openstartuptunisia-competition.medium.com/welcome-to-the-freelance-era-a-worldwide-trend-in-exponential-expansion-around-the-world-and-in-b6263c4740ca>

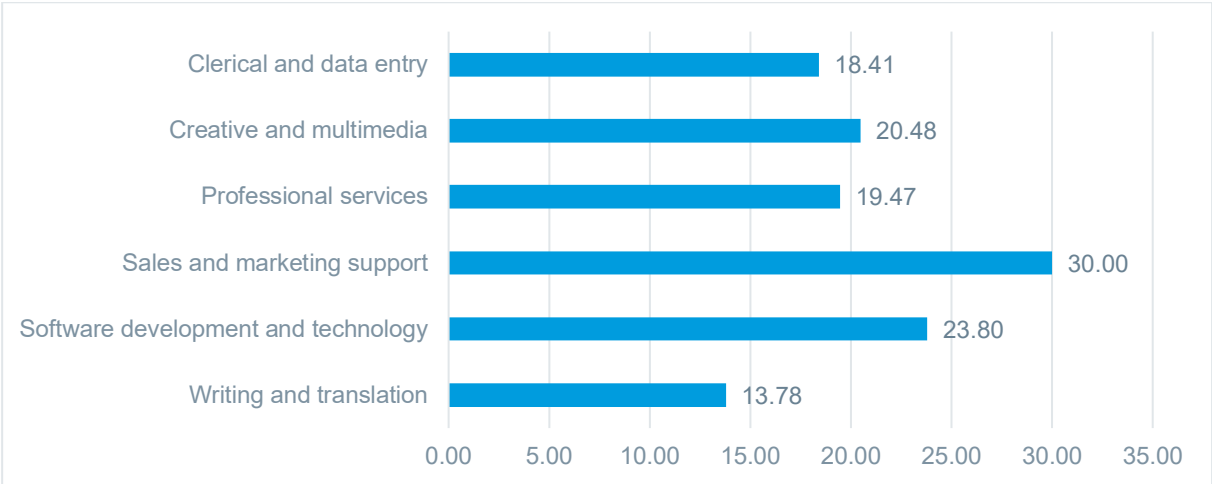
³⁸ Saidi, Maewa (19/05/2023). ‘Le «freelancing» dans les secteurs créatifs: Les opportunités fleurissent’. *La Presse de Tunisie*. <https://www.turess.com/fr/lapresse/1158748>

³⁹ The event was organised by the TICDCE, student associations and the University of Jendouba; see Saidi, Marwa (25/04/2023). op. cit.

⁴⁰ See COOP Tunisian Freelancers. *Bienvenue dans Tunisian Freelancers COOP*. <https://tunisian-coop.tn/> However, as the ILO Coordinator Hichem Ouertani puts it, there is still a long way to go for the cooperatives to be able to put sufficient pressure on the government to meet their demands (interview on 1/08/2023, see references).
⁴¹ https://www.numbeo.com/cost-of-living/country_price_rankings?itemId=105

There are significant differences in earnings of Tunisian online platform workers (see Figure 5 below). The highest average hourly rates are in software development and technology at USD 30.00. Those who work in writing and translation can expect more than double the lower rates – USD 13.78. As well as occupational differences, there are also significant gender differences in earnings, with men requesting higher hourly rates than women. On average, men are requesting USD 22.66 per hour, while women are requesting USD 14.70. This difference can be partly explained by the overrepresentation of men in software development and technology, which is the highest paid occupation, and higher representation of women in writing and translation, which is the lowest paid occupation.

Figure 5. Hourly rates of active online platform workers by occupation



Source: PPMI, based on data from Freelancer, Guru and PeoplePerHour collected in March 2023.

In contrast with the high hourly wages requested on platforms, a survey of workers indicates a different reality. On average, online digital work is not economically rewarding. According to the survey, 52% of online freelance workers make less than 500 Tunisian dinars (TND) (around EUR 150) per month (compared to a minimum monthly wage of about TND 460 for a 48h non-agricultural work/week). Just 37% of the freelancers make between TND 500 and 1500, and only 11% earn more than 1500.⁴² This discrepancy between platform hourly rates and survey data could be explained by the fact that although online workers request high hourly rates on platforms, these rates do not represent their real incomes. Instead, only a minority of these online workers manage to secure work on platforms, which is in most cases quite irregular. Furthermore, requested rates ultimately might differ from what workers negotiate with the clients on the platforms. Thus, hourly rates on platforms cannot be used as an indicator of the real monthly income of the online workers.

⁴² Open Startup Tunisia (2021). *Welcome to the freelance era: a worldwide trend in exponential expansion, around the world and in Tunisia*. <https://openstartuptunisia-competition.medium.com/welcome-to-the-freelance-era-a-worldwide-trend-in-exponential-expansion-around-the-world-and-in-b6263c4740ca>

On-location platform work

In recent years, on-location platform work in Tunisia has proliferated. Apart from the large influx of foreign on-location labour platforms, several important local platforms have emerged, including Tayara, Jumia, and Dabchy.⁴³ Food delivery platforms are particularly prominent in Tunisia. The leader in the sector, Glovo, is heavily advertised on billboards across the country.⁴⁴ Likewise, transportation platforms like Bolt have become an irreplaceable feature of the landscape of big cities like Tunis and Sousse.⁴⁵ The media attention primarily focused on topics important for users of the platforms such as availability and price of platform services, while less attention has been paid to the working conditions of on-location platform workers.⁴⁶

Prevalence and attractiveness of on-location platform work

The history of on-location platform work in Tunisia can be traced to 2016 when Jumia, an e-commerce platform transformed into the food delivery service, Jumia Food. Other food delivery services such as Glovo, Yassir Express and Kool soon followed suit and started operating in the country between 2020 and 2021. At the same time, several local food delivery platforms emerged, including Founa – the first Tunisian click and collect grocery service – Wefood service, and Tayara.

The main international ride-hailing service in Tunisia, Bolt, was launched in 2019. Indrive, another ride-hailing platform was already present in the country. In the context of domestic companies, Sabil is presently available in 26 Tunisian cities,⁴⁷ while the first Tunisian scooter-taxi service, IntiGo, was launched in 2019.⁴⁸ Traditional taxi and transportation services are in a less favourable regulatory position compared to the platform work that is not yet regulated by law.⁴⁹ Because of this, former taxi drivers use platforms to bypass existing regulatory tariffs.

There are also several domestic work platforms available in Tunisia, specialising in different types of services. For example, Homeschooltunis provides tutoring services, Bambinosit provides babysitting and elderly care services and Ijeni provides cleaning services.

There is no reliable data on the size of the platform workforce in Tunisia. However, desk research and fieldwork conducted in the country imply a significant growth of on-location platform workers. New platform workers find out about work opportunities by word-of-mouth and social networks, especially Facebook groups.

Apart from the main motivation of on-location platform workers which is the lack of other employment opportunities, there are other important factors: possibility to earn incomes that are higher than locally available wages, low skill requirements as well as flexibility of working hours.

⁴³ Mounir Dahmani and Adel Ben Youssef, Unraveling the Determinants of Platform Economy Adoption in Developing Countries: An Extended Application of the UTAUT2 Model with a Privacy Calculus Perspective, [Platforms | Special Issue : Platforms: A Deep Transformation in the Labor Market? \(mdpi.com\)](#)

⁴⁴ Zeïneb Ben Ismail (09.06.2023). [Survey | Delivery platforms: a business on the backs of delivery drivers – Inkyfada](#)

⁴⁵ [A Bolt to the Tunis Taxi Market - Meshkal](#)

⁴⁶ Exemplary articles: [Controversy over the legality of a scooter taxi service \(lecourrierdelatlas.com\)](#); [Ministère du Transport : les tarifs des taxis via les applications sont illégaux \(businessnews.com.tn\)](#); [Taxis in Tunisia: Headed in the wrong direction – Nawaat](#)

⁴⁷ [About – Sabil \(sabil-tn.com\)](#)

⁴⁸ [First Mobility and Logistics Tunisian Startup \(intigo.tn\)](#)

⁴⁹ According to the authorities, ride-hailing services do not fall under any of the definitions of road transport (tourist, public or private) in Law No. 2004-33 on the organisation of land transport.

Worker profiles and working conditions

The overwhelming majority of people who work on the delivery and ride-hailing platforms are young men.⁵⁰ The situation is different with the domestic services platforms, dominated by women, many of whom are migrants from Africa and the Middle East.⁵¹

Workers on on-location platform are mostly working as independent contractors through labour market intermediaries. The service contract is concluded between the worker ('beneficiary') and the 'service provider' who is not the platform but a company who plays the role of an intermediary between the courier and the platform.⁵²

These labour intermediaries are highly prevalent on Tunisian on-location labour platforms. They are, generally, limited liability companies with a small number of employees, usually composed of a person in charge of managing the couriers in the field and their administrative obligations. All Jumia Food couriers and the vast majority of Glovo deliverers (around 95%) are hired through this intermediary system. This is a globally widespread business model that platforms use as the costs of hiring workers through intermediaries can be 20-30% lower than hiring workers directly.⁵³ If couriers want to be hired directly by the platform with a contract, they must have a licence to perform the activity. Because of this, platforms rarely hire self-employed workers, but instead partner with licenced intermediaries that then hire workers on behalf of the platform mostly as independent contractors.⁵⁴

Couriers' remuneration varies depending on the platform. At Kool, the basic monthly salary is TND 500 (~EUR 150) with an hourly regime of 48h per week. The rate for working on official holidays is double the normal rate, and different premiums are also available. The top couriers earn up to TND 1,200 (~EUR 360) per month. Couriers are paid on a per-race basis, comprising a fixed base rate along with additional sums calculated according to the distance travelled and the waiting time at restaurants. Similarly, earnings can be increased by tips and bonuses e.g. working during peak hours.⁵⁵ Finally, delivery platform workers and intermediaries sign contracts by which intermediaries are entitled to get from 10% to 20% of the workers income.

Platforms rarely provide work equipment as the platform worker is formally considered a self-employed 'partner', not a worker operating for the platform. Before starting work, the courier needs to obtain a vehicle, make sure that they possess a sufficiently capable smartphone, and purchase their own equipment such as helmet and insulated bag. For example, a contract with an intermediary partnering with Glovo states that 'the delivery person is invited to pay the amount of the Glovo bag TND 150 TND (~EUR 40) in three instalments, and when they leave, the money will be returned to them after returning the bag'. Kool is the only company that provides all the equipment, including the motorcycle, as well as the maintenance service.⁵⁶ As regards taxi services, because the current legislation regulating land transportation guarantees taxi drivers the exclusive right to provide individual car rides to passengers in exchange for payment, platform applications can only recruit registered taxi drivers. Therefore, in Tunisia, taxi platform applications have not opened up new job opportunities for job seekers (such as they have in Jordan for instance), but they have instead introduced privately-owned technological services within the sector.⁵⁷

Workers on on-location platforms are generally protected with insurance. Even if the contracts with intermediaries include no provisions of coverage and insurance, couriers are supported anyway as these

⁵⁰ [Survey | Delivery platforms: a business on the backs of delivery drivers – Inkyfada](#)

⁵¹ Fairwork (2022), Domestic platform work, Middle East and North Africa, [Fairwork-MENA-report-2022-en.pdf](#)

⁵² Zeïneb Ben Ismail (09.06.2023), [Survey | Delivery platforms: a business on the backs of delivery drivers – Inkyfada](#)

⁵³ ILO, World Employment and Social Outlook. The role of digital labour platforms in transforming the world of work (2021), [2021 World Employment and Social Outlook \(ilo.org\)](#)

⁵⁴ Zeïneb Ben Ismail (09.06.2023), [Survey | Delivery platforms: a business on the backs of delivery drivers – Inkyfada](#)

⁵⁵ [Survey | Delivery platforms: a business on the backs of delivery drivers – Inkyfada](#)

⁵⁶ [Survey | Delivery platforms: a business on the backs of delivery drivers – Inkyfada](#)

⁵⁷ Ignacio Villalón (2022). "A Bolt to the Tunis Taxi Market". *Meshkal*. <https://meshkal.org/a-bolt-to-the-tunis-taxi-market/>

are 'public policy provisions, which apply even where contracts do not mention them'. Representatives of Kool stated that they provide insurance coverage and benefits to couriers equivalent to those offered to office workers, and that additionally, all motorcycles in the fleet are modified so that they cannot be ridden above 70km/h.⁵⁸

The findings on work conditions on on-location labour platforms providing domestic services in Tunisia are mixed. On the one hand, the research on domestic labour platforms in Tunisia conducted by Fairwork found that local digital platforms generally provide safer client / worker matching in the domestic service sector compared to traditional word-of-mouth methods, although cases of abuse and disrespect have been reported. On the other hand, because the labour law protection provisions are not enforced, the platforms included in the study scored extremely low on all Fairwork dimensions of decent work such as fair pay, fair conditions, fair contracts, fair management and fair representation. In addition, domestic platform workers have no safety nets in the form of compensation paid by the platform if they sustain injuries while at work and they have no automatic right to social protection. They all fall below the governmental radar as, similar to traditional domestic workers, they are not included in governmental data.⁵⁹

⁵⁸ Zeïneb Ben Ismail (09.06.2023), [Survey | Delivery platforms: a business on the backs of delivery drivers – Inkyfada](#)

⁵⁹ Fairwork (2022), Domestic platform work, Middle East and North Africa, [Fairwork-MENA-report-2022-en.pdf](#)

Current regulation, policies and strategic approaches

New forms of work, such as platform and online work have entered the Tunisian public discourse in recent years. While these new forms of work are seen as detrimental for the work conditions and taxation efforts, online and platform work have been increasingly recognised as an instrument for mitigating high unemployment, particularly among youth. However, these considerations of online and platform work are not yet included in government policies.

Labour market, employment and skills development

While on-location platform workers can register as self-employed (if they can afford the registration costs), the labour market status of online and platform workers in Tunisia is still unresolved and they mostly work informally.⁶⁰ This is worrying both due to poor access to social protection of online workers, and their tax liability.

Online freelancers have made themselves heard in national debates through public events, such as the 'Tunisian Freelance Day' in April 2023.⁶¹ Through these public events they aimed to draw the attention of regulators to their employment status. Freelancers have also organised themselves into cooperatives in order to help each other and to be able to exert pressure collectively on the government for official recognition of their work status.⁶²

The state authorities have been prompted to formalise the status of online workers by encouraging and streamlining the process of self-employment (decree law n°2020-33 to be implemented in 2024). This decree allows the self-employed to work from home, simplifies registration procedures and lowers expenses, as well as providing financial assistance during the first year post-registration.⁶³ In parallel with the government regulation, ILO is also aiming to help to resolve the status of online and platform workers in Tunisia by conducting a large-scale survey on platform workers in the country. This would inform the authorities about the position of workers and help them better regulate the platform economy.⁶⁴

On the broader topic of youth employability, the Tunisian government has taken several measures so far, although not directly related to platform work. Since the early 2010s, the Tunisian authorities have put in place active labour market policies (ALMP) designed to address the obstacles that young Tunisians are facing on the way to decent employment. More specifically, these policies have aimed, with limited results, at curbing migration-caused brain drain, reducing the mismatch between job seekers' skills and the demands of the private market, lowering reliance on public sector jobs, reinforcing the intermediation institutions (including the Public Employment Services – PES) between young

⁶⁰ Saidi, Marwa (25/04/2023). «“Freelances” dans le métier créatif 2: à la quête désespérée d'un statut». *La Presse.tn.*; and Saidi, Marwa (10/05/2023). «Marché du travail en Tunisie. Asma Ben Hassen, Présidente de l'Institut tunisien pour l'emploi inclusif à la Presse», *op.cit*

⁶¹ The event was organised by the TICDCE, student associations and the University of Jendouba; see Saidi, Marwa (25/04/2023). *op.cit*.

⁶² See COOP Tunisian Freelancers. *Bienvenue dans Tunisian Freelancers COOP*. <https://tunisian-coop.tn/> However, as the ILO Coordinator Hichem Ouertani puts it, there is still a long way to go for the cooperatives to be able to put sufficient pressure on the government to meet their demands (interview on 1/08/2023, see references).

⁶³ “Tunisie : Une loi sur le statut d'auto-entrepreneur, pour combattre le secteur informel”, *Gnet News*, 22/11/2022; and Saidi, Marwa (25/04/2023). “Statut de l'auto-entrepreneur: Un outil de migration vers l'économie formelle ». *La Presse.tn*.

⁶⁴ Interview ILO National Coordinator, 1/08/2023.

graduates and employers and boosting self-employment, revamping the still underdeveloped vocational training infrastructure as well as boosting job creation.⁶⁵

The 2019 labour market diagnostic that is meant to pave the way for a comprehensive and integrated National Strategy for Employment (NSE) identifies no less than 13 employment programmes targeting various groups of job seekers with different levels of educational attainments and periods of unemployment. Out of these programmes, 6 aim to facilitate access to paid employment through the acquisition and training of technical and soft skills in high demand in the labour market (86% of the beneficiaries). The other 7 programmes aim to assist young entrepreneurs through financial and technical support (14% of beneficiaries).⁶⁶ However, the NSE does not address the potential opportunities of digital platform work for youth, thereby reflecting the relatively limited interest the Tunisian authorities has so far placed on this emerging sector of the labour market.

Digitalisation

There is a growing awareness of the need for digital transformation in Tunisia. However, digital infrastructure, digital public services and digital skills, which are the key ingredients for digital transformation, are lacking in the Tunisian context.

As seen in the section ‘internet and digitalisation’, although internet access is high in Tunisia, the internet infrastructure is still underdeveloped and it requires significant investments from the government. Digital public services on the other hand are fairly developed in Tunisia, compared to the rest of the region, ranking 88th globally,⁶⁷ but still suffering significant weaknesses.

Equally important is the need to develop digital skills needed for the new digital economy. According to the research conducted by the Einstein Centre, there is a significant demand for digital skills in the Tunisian economy, particularly in the context of digital skills such as software development and graphic design.⁶⁸ Another research by OECD also showed that hard technical skills, such as software development are missing in the domestic labour market, alongside important soft skills.⁶⁹

Finally, e-payment has been constrained by strict limitations: international payments are limited due to the non-convertibility of the TND which prevents Tunisian residents from making transactions on international e-commerce sites such as eBay or Amazon. Only enterprises that have obtained a ‘digital technology charge card’ issued by the government can access international payments. More than 80% of Tunisia’s online transactions are conducted on a cash-on-delivery basis.⁷⁰ Moreover, e-payment on the local market is limited by the fact that several e-wallet applications such as PayPal, which provides consumer protection in the form of dispute resolution, are not available in Tunisia due to legal restrictions on currency exchange, compelling Tunisians to use less safe (but cheaper) e-wallet applications such as Skril.

In order to encourage the proliferation of the digital economy, significant development of digital skills and a liberalisation of the current legal framework are necessary. To that end, the Tunisian government launched an overarching digital transformation initiative ‘Tunisie Digitale 2020’. Starting in 2015, this initiative aimed to develop internet infrastructure, boost digitalisation of public services, increase the competitiveness and innovation of the economy, increase employment in the ICT sector and develop digital skills in the population.⁷¹ Although the initiative managed to reduce the digital divide by expanding

⁶⁵ Danish Trade Union Development Agency (2023). *Labour Market Profile Tunisia – 2023/2024*.

<https://www.ulandssekretariatet.dk/wp-content/uploads/2023/04/LMP-Tunisia-2023-final1.pdf>

⁶⁶ *Stratégie Nationale pour l’Emploi – Rapport de Diagnostic*, op.cit.

⁶⁷ <https://publicadministration.un.org/egovkb/Data-Center>

⁶⁸ Einstein Center (June 2021). *Digital talent: Mapping the demand for digital skills in Tunisia*. GIZ, Digital Transformation Center. Available at: <https://anastasiadanilov.de/wp-content/uploads/2021/07/Firpo-et-al.-2021.pdf>

⁶⁹ https://www.oecd-ilibrary.org/economics/improving-skills-and-employment-opportunities-in-tunisia_51e7a341-en

⁷⁰ *Tunisia – Country Commercial Guide* (2022). <https://www.trade.gov/country-commercial-guides/tunisia-ecommerce>

⁷¹ *Digital Transformation Center Tunisia*. <https://www.bmz-digital.global/en/initiatives/digital-transformation-center-tunisia/>

internet access to marginalised groups, such as rural populations and those with lower education, other effects of this initiative have fallen short of their goals. Namely, the spread of digital technologies among the public administration has been slower than expected, primarily due to resistance to technological change.⁷² Furthermore, digital technologies had very limited penetration in the educational system due to lack of equipment, as well as resistance from the teacher labour unions. The development of digital skills in the population was also limited.

To compensate for the limited progress with the previous initiative, the Tunisian authorities introduced the 'Digital Tunisia 2025' initiative. This initiative aims to drastically improve internet speed, further develop e-governance capacities, reduce digital divide, upgrade digital skills in the population and facilitate innovation.⁷³ The results of this initiative are yet to be seen.

⁷² There has been no formal assessment of the 'Tunisia Digital 2020'. See Khdimallah, Meriem (30/03/2023). 'Transformation digitale': La Tunisie fait face à une forte résistance au changement numérique». *La Presse.tn*.

⁷³ <https://www.ticad8.tn/content/11/digital-tunisia>

Policy implications

Challenges and opportunities of the current situation

This report has highlighted opportunities and challenges related to the ongoing digitalisation process in Tunisia as well as the development of a platform economy likely to provide additional job prospects for youth job seekers and stem brain drain migration. The opportunities include Tunisians' awareness of digitalisation as a key catalyst of potential socio-economic growth through more efficient public and private institutions and additional employment possibilities. The Tunisian authorities have also aimed to develop the internet infrastructure across the country which has resulted in an increasing percentage of Tunisians using the internet (nearly 80% in 2023). Furthermore, they launched the digital transformation initiative 'Tunisie Digitale 2020' in 2015 that also seeks to boost the digitalisation of public services, promote start-ups and other innovative enterprises, increase employment in the ICT sector and develop digital skills within the population.

The current challenges to the digitalisation of the Tunisian economy (and society) are many, including poor infrastructure (internet speed for fixed broadband is substandard) and limited digital skills among Tunisians at large and more particularly among women, older people, less educated persons, and poor inhabitants of rural areas, for instance. Moreover, the linkage between digitalisation on the one hand, and employment and its economic outcomes on the other, remains to be fully developed. Persistent deficiencies include poor job creation and ensuing unemployment, an education system not sufficiently in line with the skills demands of the economy, and relatively inefficient Public Employment Services (PES) that have failed to alleviate the significant mismatch between young graduate job seekers and employers. Specifically, they have not fully acknowledged the opportunities of self-employment, especially in the digital sector.

Gaps in the existing strategic and policy approaches

From the digital employment perspective, the main challenge is the authorities' reluctance to fully acknowledge the status of digital workers and to consider online and on-location digital platform work as a viable option for youth job seekers. This leads to a situation where, in both platform sectors, there is an asymmetry between the platform companies and their independent contractors that results in gaps and shortcomings in the latter's working conditions and social protection. This being said, fully recognising and formalising the platform work is inherently difficult, for such a sector represents a wide range of activities (be it in the online or on-location sphere) and the modalities of employment range from full to partial (or complementary) employment and the levels of income earned by platform workers may vary considerably. In this respect, regulating the financial aspects of digital employment (avoidance of tax evasion) is also seen as a complicated regulatory issue.

Implications / possible measures for regulation

Important policy implications can be drawn from these findings. These implications, which may be formulated in the form of recommendations, concern both Tunisia's digitalisation process as well as the regularisation of the digital economy:

- The government should further invest in improving the quality of the internet infrastructure, and increase internet coverage and speed. Although these investments are costly, they have great potential and promise substantial returns in the future.
- Policy initiatives should be made to increase the access to safer international payment systems, which affect platform workers in Tunisia. The advantages extend beyond freelancers and have the potential to generate broader positive impacts on the local economy.

- The government should work on providing digital skills development schemes for Tunisians of all ages. Not only should digital literacy be promoted in primary and secondary education; digital literacy programmes should also be available to all workers at their place of work and more generally to the general public in the form of lifelong learning.
- The digital divide concerning both access to the internet and digital literacy must be addressed so that marginalised communities and groups can also benefit from the digital economy. This can be done through awareness campaigns, training, and financial support.⁷⁴
- Legal recognition of the status of digital workers by the authorities would result in improved working conditions (with monitoring procedures put in place), enhanced social protection for workers, and less tax avoidance. More generally, the improvement of working conditions has the potential to mitigate brain drain, stemming the migration of skilled Tunisians seeking job opportunities abroad. Although the Tunisian government has launched a few initiatives in this regard (for on-location workers in particular), significant additional efforts are required to better understand and accommodate the needs of online workers.
- Online work holds significant potential to empower women by offering them flexible work opportunities that can be adjusted to accommodate their domestic responsibilities. However, the Tunisian government should invest efforts in promoting new forms of work among women and equipping them with the requisite skills essential for these positions.
- More efforts from the Tunisian educational bodies (universities, vocational / technical training centres) and labour market institutions (PES, trade unions, employers' representatives) are required to facilitate job matching by connecting individuals with emerging job opportunities, implementing targeted training programmes to equip workers with skills in high demand, promoting entrepreneurship and innovation, and providing comprehensive career guidance services, etc.
- The government could encourage young people to participate in platform work. To encourage online freelancing, special efforts should be made to provide opportunities for gaining experience and developing skills before entering online markets.

⁷⁴ UNDP (2020). op.cit. p.154-157

Summary

Economic growth in Tunisia has been affected by a series of external and internal shocks since the mid-2000s, causing economic growth rates to stall, and unemployment and emigration rates to increase. Unemployment has particularly affected youth and women. Of particular concern is the lack of employment opportunities for graduates with higher education degrees. As regards the level of digitalisation, Tunisia is characterised by high internet coverage and a rapidly growing ICT sector, but with poor internet speed.

The number of online workers in Tunisia is steadily growing and it could be as high as 192,000. However, for a majority of such workers, online work is a primary rather than a secondary occupation complementary to another 'traditional' full-time job. The majority of online workers operate in the fields of creative and multimedia, as well as software development and technology. As in the rest of the region, most online workers are men, accounting for around two-thirds of all workers in the country. Online workers in Tunisia are also predominantly highly educated. While online work has a mixed impact on their livelihoods as regards working conditions, it does enable them to access highly paid tasks. However, most of them struggle to obtain sufficient tasks to earn a satisfactory income. In addition, as online work remains mostly unregulated, online platform workers are suffering from a lack of social protection and are exposed to exploitation from digital platform companies.

On-location platforms have also proliferated in Tunisia in recent years. Although there is no reliable data on the number of workers on these platforms, there is certainly an upward growth trend. On-location platform work in delivery and ride-hailing sectors is dominated by men, while work on domestic platforms is mostly done by women. Although on-location platforms may provide incomes that are higher than locally available wages, workers' social protection on on-location platforms is poor. On-location work also suffers from the lack of fair management and representation. This is mainly because most such 'independent contractors' work informally through labour market intermediaries.

The efforts made by the Tunisian authorities over recent years to boost digitalisation to enhance institutional efficiency and economic outcomes have so far neglected the full potential of the platform economy: Not only is it not actively promoted in public educational and employment services institutions; both online and on-location digital platform remain poorly regulated. The results of the timid regulatory initiatives adopted in this regard (especially for on-location platform workers that can register as self-employed persons if they can afford the registration fees) remain to be seen. The nature of their work is largely characterised by informality. More generally, the development of the digitalisation process in Tunisia is hampered by more structural factors, including weak infrastructure, poor digital skills in general, and segments of the society being excluded from it, including the poor, older people, inhabitants of rural areas, etc.

Policy implications of this research primarily revolve around enhancing digital skills among youth, bridging the digital divide by spreading digitalisation among Tunisians who have no or little access to the internet, properly regularising digital online and on-location digital platform work (with a focus on providing social protection mechanisms), and empowering young job seekers to enter the labour market by making them more aware of the potential of digital employment and providing them with the skills required to meet the demands of the labour market.

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List of interviewees

Name	Organisation	Title	Date of the interview
Hichem Ouertani	ILO	National Coordinator	01/08/2023
Aram Belhadj	University of Carthage, Tunisia	Professor	26/07/2023
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