

KEY POLICY DEVELOPMENTS IN EDUCATION, TRAINING AND EMPLOYMENT

TUNISIA

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EXECUTIVE SUMMARY

In July 2022, Tunisia entered a new phase when the country adopted a new constitution introducing a presidential regime and a bicameral legislative system. In the elections on 6 October 2024, incumbent President Kaïs Saïed was confirmed as head of government.

The Tunisian economy is facing challenges due to the persistent drought, limited demand and restricted financing conditions. Tunisia's growing dependence on domestic resources to fill the external financing gap could present medium-term risks for currency and price stability.

Education was, and remains, a universal right. Under the Constitution, it is compulsory until the age of 16. The Education Act makes education an absolute priority for the country and recognises it as a fundamental right that fosters social opportunities and development. Considerable efforts and financial resources have been invested in education, mainly to widen access and increase literacy. However, significant challenges remain in the areas of quality, efficacy and early school leaving, which has increased over the past year, and the education rate remains low.

After a short stint under the responsibility of the Ministry of Youth and Sport, vocational education and training (VET) was placed under the supervision of the Ministry of Vocational Training and Employment. This ministry is carrying out consultations with a view to updating the 2008 law on education, vocational training and employment (VET) and other related laws and regulations. The intention is to bring a new dynamism to the system, improve quality and equip young people with the skills needed to meet the current and future needs of the labour market. To this end, tripartite social dialogue, already formalised in the VET field, should be further strengthened and skills needs should be identified and analysed on a regular basis.

The Ministry has also made significant progress in fostering an entrepreneurial mindset thanks to a process that led to the accreditation of nine VET centres as Entrepreneurial VET centres in 2021. Significant efforts have also been made to reform certification and quality assurance systems.

Despite the demand for continuing education and training, skills upgrading and retraining, there is no overarching policy on continuing VET and the system remains fragmented. This is also reflected in the low rates of participation in education and lifelong learning.

Activity rates among the population aged 15+ remain low, despite some slight improvements among women. The number of people not in employment, education or training (NEETs) is also increasing. In Tunisia, this phenomenon seems to affect women as well as men, unlike in other North African and Mashriq countries.

1. MAIN POLITICAL, DEMOGRAPHIC, ECONOMIC AND SOCIAL CHARACTERISTICS

Political developments

On 6 October 2024, Tunisia held a presidential election that was dominated by Kaïs Saïed, the incumbent president, who won around 89% of the vote with very little opposition. Marked by a low turnout (less than 30%), the main opposition parties, some of whom had called for a boycott, described the electoral process as being manipulated and barring any real political competition.

In July 2023, the European Union signed a comprehensive partnership agreement with Tunisia. The agreement covers four areas of cooperation: i) enhancing economic and trade links; ii) a sustainable and competitive energy partnership; iii) migration; iv) bringing peoples together. At the same time, a memorandum of understanding was signed by the European Commissioner for Neighbourhood and Enlargement, Olivér Várhelyi, and the Secretary of State of the Ministry of Foreign Affairs, Migration and Tunisians Abroad, Mounir Ben Rjiba, opening a new chapter in relations between the European Union and Tunisia. The memorandum of understanding covers five pillars: macro-economic stability, trade and investment, the green energy transition, bringing peoples together, and migration and mobility. It will be implemented through the various strands of cooperation between the European Union and Tunisia, in accordance with the relevant regulations and applicable procedures.

Tunisia has taken a firm stance in support of Palestine in the current conflict in Gaza, having condemned Israel's military actions and appealed to the United Nations for intervention. In a statement at the Security Council in October 2023, the Tunisian Ambassador called on the UN to 'discharge its responsibilities' in the face of the violence in Gaza and criticised what he described as a 'gross violation' of international law by Israel.

Demographics

In 2023, Tunisia had a total population of 12 458 000, manifesting an upward trend over the past 10 years. The relative proportion of young people in the population was 20.3% in 2023, representing a steady decline since 2010. This suggests that Tunisia, which currently has a large young population, will soon be entering a phase of transition in terms of its age pyramid. Average life expectancy will increase (77 years in total, 75 years for men and 79 years for women) (World Bank database, 2020a) and the fertility rate will decrease (World Bank, 2020b). This population structure and the expected changes are putting considerable pressure on policymakers in the short to medium term as to how they can develop an adequate education system and create jobs. In the longer term, expenditure on health and pensions will become the main challenge.

Migration rates have increased over the last 20 years, from 5% in 2000 to 7.6% in 2022 (UN DESA, 2020). Remittances have increased since the mid-1990s, reaching 5.4% of GDP in 2020. The percentages of male and female migrants have remained relatively stable over the last 20 years, but a persistent upward trend in female migration (accounting for up to 44.3% of the total migrants) since 1990 can be observed, particularly among women with higher education qualifications (OECD, 2018 and ETF, 2022a).

The main reasons for migration are economic, migrants being driven by the hope of finding better economic conditions and the opportunities offered by labour markets abroad, especially for highly skilled Tunisians (ETF, 2022a).

Main economic developments

In 2023, the GDP growth rate fell to 0.4% due to the drought that affected the agricultural sector and a fall in domestic demand. Driven by rising commodity prices, inflation continued to rise, reaching 9.3% in 2023. Despite a tax burden of 24.5%, the budget deficit remained unchanged, at around 6.8% of

GDP. The current account deficit changed to 2.8% of GDP, due to fewer imports and resistance from manufacturing exports, tourism revenues and remittances from migrant workers. This improvement in the current account deficit strengthened the foreign exchange reserves (USD 8.5 billion at the end of 2023). However, the TND-USD exchange rate, which remains volatile, depreciated during 2023. Government debt, of which foreign debt had a 60% share, increased from 77.6% of GDP in 2022 to 80.2% in 2023. A law passed in February 2024 authorised the central bank to grant exceptional financing of TND 7 billion (USD 2.2 billion) to the Treasury on favourable terms, enabling the government to meet part of its foreign debt repayments. The bank solvency ratio consolidated at 14% in 2022, compared to 13.3% in 2021, and the share of non-performing loans decreased from 13.1% to 12.6% of gross loans in 2021 and the end of 2022 due to debt write-offs.

The medium-term economic outlook could worsen as a result of the high risk of over-indebtedness hampering access to foreign financing, social tensions caused by the high cost of living and persistently high interest rates in developed economies. The acceleration of reforms (in particular those aimed at improving the governance of public enterprises, the business climate and the control of current expenditure) could, however, stimulate growth and reverse the debt trajectory. In March 2024, Moody's revised its outlook on the country's sovereign rating (Caa2) from negative to stable due to the increase in foreign exchange reserves.

Tunisia's latest national development plan for the 2023–2025 period aims to revitalise various economic and social sectors, building on structural reforms and investments. The plan is part of the 2035 strategic vision and focuses on several key areas, including strengthening the social role of the state, improving the business climate, and promoting innovation and private investment.

On the economic front, the government is forecasting an increase in production in strategic sectors such as phosphate, for which production should rise to 12 million tonnes in 2025, compared with 3.7 million tonnes in 2022. In parallel, initiatives supporting the energy transition are being encouraged, including the objective of producing 1 700 megawatts of renewable energy. The plan also envisages a series of actions to boost economic resilience, including support for local industries and 'green' agriculture based on sustainability and water management in regions affected by drought.

Main social issues

Tunisia ranked 101st out of 193 countries in the 2022 Human Development Index and ranks 5th out of 54 African countries.

Tunisia has experienced inequality and social unrest since before the 2011 revolution, mainly linked to economic factors. Unfortunately, the reforms implemented following the revolution failed to resolve the country's persistent social problems, which has led to a resurgence in protests and social unrest.

The country continues to suffer from socio-economic disparities, including in terms of local human and business development, with more than 50% of the population having attained only a level of education equivalent to primary education. Tunisia's national development plan 2023-2025 includes education reforms aimed at rebuilding infrastructure and reducing school dropout rates, as well as health and housing initiatives to strengthen social inclusion. The government hopes that these reforms and initiatives will reduce unemployment and provide more decent jobs, while tackling poverty and exclusion in the areas most affected.

Tunisia's coastal regions are much more developed and account for 80% of urban areas and 90% of employment. Access to services, including education, reflects these disparities. The poverty rate is estimated to have risen from 14% in 2020 to 21% in 2021 (Carnegie Endowment for International Peace, 2021). This follows a period in which the poverty rate fell from 20.5% in 2010 to 13.8% in 2019, thanks in particular to a decrease in rural poverty (World Bank, 2022b).

Tunisia has also experienced significant migratory flows, not only of people leaving the country to seek better socio-economic opportunities abroad, often illegally and putting their lives at risk, but also of people from sub-Saharan Africa, who transit through Tunisia or travel to Tunisia as their final destination (Human Rights Watch, 2022).

2. EDUCATION AND TRAINING

2.1 Trends and challenges

Educational strategy and legal framework for education

Education remains a universal right and is compulsory up to the age of 16 (Article 44 of the new Constitution). The Education Act (No 2002-80 of 23 July 2002) makes education a priority for the country, given that it can offer people better opportunities for social and professional development.

The budget allocated to the Tunisian Ministry of Education for 2024 is approximately TND 7.9 billion, which represents an increase of 4.86% compared to the previous year. This amount, approved by the Assembly of People's Representatives (ARP), is intended to strengthen educational infrastructure, improve teachers' working conditions and address the challenges in the education system, in particular to reduce early school leaving and improve the quality of education (*Tunisie Numérique*, 2023).

Tunisia is currently in the midst of an ambitious reform of its education system which aims to align its system with international standards and to better respond to the needs of Tunisian society. In 2023, a national consultation was launched involving over 580 000 participants, including students, teachers and parents. The aim of the consultation was to gauge public opinion on the matter, and identify the priorities and challenges in the education sector.

The results of this consultation are being processed and will be used to develop a comprehensive educational strategy. Among its stated objectives, the reform aims to ensure fair access to quality education, to promote the digitalisation of education with the introduction of the 'School of Tunisia of the Future' platform and to strengthen science and technology teaching (L'Économiste Maghrébin, 2023).

The latest available education sector plan covered 2016-2020, a period in which considerable effort was made to widen access to education and increase literacy levels. However, significant difficulties remain in the areas of quality, efficacy and early school leaving. As regards early school leaving, Tunisia recorded an increase among the total population, from 29.7% in 2021 to 32.4% in 2022. The latest figures for 2023 show a change in direction, with the rate falling to 29.5%. Early school leaving is particularly common among boys, for whom the rate of early school leaving rose from 35.2% in 2021 to 36.1% in 2023. It should be noted, though, that the overall rate for both genders, although quite high in 2020 – most likely due to the COVID-19 epidemic – has been decreasing since 2010 thanks to the Tunisian government's efforts to keep young people in school and provide them with an education and better prospects.

The average education rate of the population aged 15 and over increased from 24.5% in 2022 to 32.2% in 2023.

Access, participation and early school leaving

Net enrolment rates are only available for primary and higher education. Records show that rates have remained stable since 2012 and stood at 98.4% in 2021 (32.8% for higher education) (UNESCO Institute of Statistics, ISU, 2021).

Educational attainment levels among the population in medium and higher education have increased, while they have slightly decreased for lower educational levels. Higher education attainment rates among women have remained relatively stable at 19.2% in 2020 and 18.2% in 2021, after rising from 11.9% in 2010 to 18.1% in 2019. Higher education attainment among women has been consistently higher than among men since 2016 (INS).

As mentioned above, early school leaving remains a critical problem for Tunisia, with a total early leaving rate of 29.5% in 2023. According to trend figures analysed over the years, the rate of early

school leaving has increased among men and women (37.6% and 25.4% respectively in 2022, and 36.1% and 22.7% in 2023, INS).

Relatively high expenditure on education does not have a major effect on the quality of outcomes, which show a high unemployment rate among school leavers with medium to high levels of education.

Tunisia last participated in PISA in 2015. There is therefore insufficient recent data to analyse.

Young people not in employment, education or training (NEETs)

The phenomenon of NEETs in Tunisia is particularly concerning: 30.3% of young people for the 15-29 age group (2023) are not in employment, education or training.

The NEET rate for the 15-29 age group has risen sharply over the last 10 years in Tunisia. In 2019 (before COVID-19), the NEET rate was 35.0% (29.9% among men and 40.2% among women), rising in 2020 to 38.1% (31.8 for men and 44.4 for women). According to the latest ILO report (2023), the phenomenon is even more pronounced in some areas, particularly in Kairouan, Sidi Bouzid and Gafsa. The reasons for this situation include a lack of support for school leavers, barriers to employment, and a mismatch between the skills acquired and the needs of the labour market.

Women are particularly affected by economic inactivity (72.7%, aged 15+), partly due to cultural barriers and family responsibilities. Although NEET men are more numerous in some regions, women face more obstacles to enter the labour market.

2.2 Initial VET and adult learning

Strategic and legal framework for initial VET and adult learning

It has been difficult to make headway on certain priority reforms in the VET sector. There are two main reasons for this. The first is instability at the top, at the Ministry of Employment and Vocational Training; there are constant changes in ministers, which has a negative impact on the continuity of decision-making, strategic orientation and also on the risk of certain areas of reform being blocked, including those implemented with the support of the European Union or other donors. The second, linked to the first, is the absence of an overarching sectoral strategy since the last strategy expired in 2020. Through specific projects and with support from the donor community, this last strategy aimed to address the critical issues and challenges in the VET sector, including the attractiveness of the profession, teachers' professional development, improving entrepreneurship, and strengthening the monitoring and evaluation mechanism.

In October 2021, the Minister of Employment and VET launched a consultation on the strategic framework and the need to modernise the legal framework. The 2008 VET Act has been under review for several years, along with other related laws and regulations. The intention is to inject new dynamism into the system, improve quality and equip young people with the skills to respond to the needs of the labour market now and in the future. To this end, tripartite social dialogue, already formalised in the field of VET, should be further strengthened, and skills needs identified and analysed on a regular basis.

Entrepreneurship can be strengthened by building on the noteworthy results achieved by the establishment and accreditation of the Entrepreneurial VET centres. In November 2021, nine VET centres received this accreditation following a seven-year process. They were supported in this endeavour by the Ministry's strategic reform process and the European Training Foundation (ETF).

Despite demand for continuing education and training, skills upgrading and retraining, there is no overarching policy on continuing VET and the system remains fragmented. In 2023, only 1.3% of the population participated in training activities in the context of lifelong learning.

Continuing vocational training is coordinated by the National Centre for Continuing Education and Professional Advancement (CNFCPP). The National Agency for Employment and Self-Employment

(ANETI), Tunisia's public employment service, is responsible for training unemployed jobseekers and active labour market measures.

Non-formal adult learning opportunities are mainly available in the areas of literacy and digital skills and are mainly delivered by civil society organisations. DVV International runs activities in Tunisia to promote social and economic participation among adults, and women in particular. The importance of adult education and training has only recently been recognised in Tunisia, partly as a consequence of the ageing population and the shortage of skilled workers. The 2022 International Conference on Adult Education (CONFINTEA) helped guide discussions and policy work in this area.

VET governance and financing arrangements

VET is a subsector of the general education system. For approximately 18 months between 2020 and 2021, the VET sector was placed under the responsibility of the Ministry of Youth and Sport. It has since been brought back under the Ministry of Employment, which is now called the Ministry of Employment and Vocational Training (MEFP).

There are several agencies under the supervision of the Ministry of Employment and Vocational Training, including:

1. the Tunisian Vocational Training Agency (ATFP), which manages 136 VET centres and covers 300 fields of study;
2. the National Centre for Teacher Training and Training Course Design (CENAFIFF), responsible for pedagogical and curriculum development;
3. the National Centre for Continuing Education and Professional Advancement (CNFCPP);
4. the National Agency for Employment and Self-Employment (ANETI);
5. the National Observatory for Employment and Qualifications (ONEQ), which assists the Ministry in designing and monitoring its strategy and policies, and produces studies and analyses.

VET provision comprises both initial and continuing VET. Initial VET, which falls under the responsibility of the Ministry of Employment and Vocational Training, covers four levels (*Certificat de compétence*, *Certificat d'aptitude professionnelle*, *Brevet de technicien professionnel*, *Brevet de technicien supérieur*). It is provided at upper secondary and post-secondary levels. It also plays a role in the professional development and retraining of adults. The higher education system provides both academic and non-academic vocational training.

Public training centres in areas such as agriculture, tourism, crafts, health or defence report to different sectoral ministries, making the management of each subsector extremely complex. Many private training centres also operate in Tunisia.

Because VET is not well integrated into the education system as a whole and has weak links with other education subsectors, the educational pathways open to VET students are limited in terms of the flexibility to move between training courses at the same level and between levels (ETF, 2021b).

Based on a preliminary analysis of the 2024 Budget Act, the budget allocated to the MEFP for employment and VET is approximately TND 999.6 million, amounting to 1.43% of Tunisia's total budget and representing a slight increase of around 1% compared with the 2023 budget, which was TND 990.5 million.

More than 50% of the MEFP's financial resources are devoted to the vocational training and employment support programme.

Qualifications, validation and recognition of skills

In 2009, Tunisia adopted the national qualifications classification (CNQ), a reference framework designed to link the certificates and diplomas issued by different institutions to the corresponding qualification level (Presidential Decree 2009-2139 of 8 July 2009). The national qualifications

classification covers the different pillars of the education and training system, but has had limited success to date in linking up the different educational pathways.

In recent years, the Ministry of Employment and Vocational Training has been developing a register of qualifications as part of a general reform of qualifications, which includes the operationalisation of the national qualifications classification. This work is still in its early stages. Over the last few years, a team from the Ministry of VET has been working closely with the ETF and the European Union on the qualifications system, partly to provide support for the development of a qualifications directory, and partly on the design of a skills and diploma recognition system. The work is currently being implemented.

There have been some pilot schemes on the validation and recognition of skills acquired through non-formal and informal learning for qualifications in particular sectors. Although this is a high priority for the ministry, due to the higher number of migrants, programmes in this area have not yet been rolled out on a larger scale.

Tunisia is also part of the African Continental Qualifications Framework (ACQF). The national qualifications classification and the qualifications register could be linked to the ACQF and to the European Qualifications Framework.

Quality and quality assurance

VET quality assurance is overseen by the MEFP's Directorate for Evaluation and Quality in Education. Quality assurance involves a 'product', meaning learning outcomes that comply with the relevant descriptions in the national qualifications classification, and a 'process', which ensures that training establishments deliver high quality training. This process is based on the National Vocational Training Quality Standard (RNQFP). This standard was developed some years ago as a digital tool. However, it has never been fully implemented and now requires some revisions.

The quality assurance mechanisms of training providers vary depending on whether they are public or private institutions. The Tunisian Vocational Training Agency (ATFP) encourages public institutions under its remit to use the National Vocational Training Quality Standard. It is, however, up to the institutions whether they do so. The ATFP has begun to update its eight quality assurance process standards, introducing a digitalisation process, to allow it to bring its VET centres within the framework of the National Vocational Training Quality Standard.

It is important to extend the use of the National Vocational Training Quality Standard to all public and private institutions, and doing so is one of the Ministry's priorities for the coming years. It should also be noted that private institutions are free to adopt their own quality assurance procedures and processes (ETF, 2021a).

The Ministry monitors performance indicators and oversees the system of diplomas and certificates, the quality of training providers and teacher training. Performance indicators include the number of learners and their pass rates, graduate employment rates by qualification level and sector of employment, and unemployment rates by education/qualification level. The Ministry's unit responsible for performance-based budget management publishes these figures in the annual performance reports (GBO, 2022).

Qualifications and their quality are also monitored using a specific system developed by the EU PEFESÉ¹ programme. To improve the quality of the certificates awarded following initial training, a project was launched to standardise the system for recognising diplomas, including in the areas of training and certification of learning outcomes (ETF, 2021a).

Work-based training

There are three types of work-based training programmes in the Tunisian system: apprenticeships, dual learning and traineeships. The vast majority of students on work-based training programmes are

¹ Budgetary support programme for education, training, higher education and graduate employability.

undertaking dual learning (79%), followed by residential training (15%) and apprenticeships (6%) (ONEQ and MEFP, 2018).

Dual learning is a good alternative to full-time study at a training centre. It helps students become familiar with working culture and the technology companies use, and to work on real projects and acquire practical skills. Investing in this system is seen as a way to invest in the skills of the workforce of the future. However, despite partnership agreements having been signed with companies, Tunisia's dual learning offering has remained limited. Students sometimes struggle to secure work experience placements. Some sectors that offer less attractive working conditions, such as the leather industry, generally have more training places. Young people hence find employment more easily in these sectors, sometimes even before completing their VET programme (Chelbi, 2017).

In pre-COVID-19 times, the textile and tourism sectors were showing positive signs of recovery. A decade ago, the textile sector was in decline: materials and equipment had fallen into disuse and investment had plummeted. But when the sector started to recover, investments resumed. Similar trends were observed in the tourism sector. Given the important role that dual learning can play in helping future employees acquire the skills they need, new partnerships were developed with companies. This led to agreements being signed with training centres, traineeships being set up, companies appointing mentors and students being remunerated for their work (Ferchichi, 2019). The recent COVID-19 crisis put an abrupt end to these positive developments. This could have dire consequences for the dual learning system, as the labour market, particularly in the tourism sector, faces an oversupply of workers and jobseekers and a shortage of income/visitors.

The 2019 ETF study on work-based learning highlights five issues: (i) the presence of various governance and funding challenges; (ii) the growing reluctance of trainers and apprenticeship advisers at training centres to attend companies' sites to check on their trainees; (iii) communication, an area in which centres have made little effort and in which public supervisory bodies are not very effective; (iv) the lack of trained tutors available to instruct and supervise trainees at companies; and (v) mobility, which has two facets: mobility between regions and mobility between countries (Chelbi, 2017).

Education and digital skills

The 2021-2025 Digital Strategy has five components, one of which, 'Smart Tunisia', concerns the potential of Tunisia's human capital to catalyse its digitalisation and transform it into a talent hub to drive job creation and growth.

Specific measures on digital education and training had been launched well before the emergence of COVID-19, but on a smaller scale than recent efforts. The French telecommunications company Orange has set up several digital schools, which make digital devices available to students.

Launched in 2023, the Tunis Future School project is a joint initiative by the Tunisian Ministry of Education and Classera, a company specialising in educational technology. It seeks to transform education in Tunisia through a digital learning platform. The platform is expected to be made available to around 2.5 million students in 500 schools in its initial phase, and then gradually extended throughout the country.

Education and training statistics

Tunisia has no comprehensive education information system. Some ministries and related institutions collect data on specific indicators, such as student numbers and grades. The data is published regularly by the National Statistics Institute (statistics on education) and the relevant ministries or institutions (ONEQ in the case of VET). The short *VET in figures* report was last published in 2020, based on data for 2018.

The importance of monitoring, particularly performance monitoring based on specific criteria and indicators, is a key priority for the country and for the education and training reforms. Monitoring was an integral component of the action plan for the VET reform, for example. As indicated above, the VET system has a performance-based budget. However, this system is yet to be fully implemented.

Although data does exist and is collected regularly, it is not always easily accessible. Furthermore, the absence of digitised systems and databases complicates the analysis and assessment of trends and potential problems related to policies in the sector.

3. LABOUR MARKET AND EMPLOYMENT

3.1 Trends and challenges

Characteristics of the labour market

The slowdown in Tunisia's economy since 2010 is part of the 'middle-income trap' phenomenon, which describes the tendency for countries to see their growth rate decline once they reach a middle-income level. This is a key element in the transition to an upper-middle-income level, according to the World Bank's 2024 World Development Report. This background is very important for putting into context the rather weak performance of the labour market, which is not sufficiently stimulated to create new jobs. The modest recovery in agriculture, combined with losses in the oil and gas industry and the clothing and construction sectors, has slowed down economic growth, and has not been absorbed by other growth sectors. In 2023, 54.5% of employment was in services, compared with 33.7% in industry and 11.8% in agriculture (ETF, 2023).

Activity rates among the population aged 15 and over remain consistently low, not having exceeded 47% for more than five years.

The participation rate for women remains even lower than that for men. There has been only a slight decrease in the gender participation gap since 2015, from 42 percentage points to 38 percentage points in 2023.

Looking at employment by level of education, it can be observed that the employment rate increases with educational attainment, ranging from 50.9% for people with a high level of education to 35.4% for people with a low level of education in 2021. While this could also suggest that people with a low level of educational attainment are more likely to work in the informal sector, it does indicate that people with a higher education qualification have a better chance of finding a job. It would be beneficial to assess whether their position matches their level of education and field of study. An ETF study to measure skills mismatches found that, in 2019, a high percentage of employees in Tunisia were underqualified for their jobs (45%, ETF, 2022c).

As regards employment status, employees account for the majority of the active population aged 15+. This figure has remained relatively stable in recent years, at around 70% (74.1% in 2021, followed by a small decrease in 2022 to 72.5%) (INS). Self-employed people make up 25.1% of the active population (INS, 2023).

Unemployment among the population aged 15 and over fell from 18% in 2021 to 15.6% in 2023, although there was a small increase between 2022 and 2023 (INS). The unemployment rate among young people aged 15-24 follows the same trend, i.e. decreasing from 42.2% in 2021 to 37.2% in 2022, then increasing to 38.1% in 2023 (INS), with a growing gap between men and women (37.4% for men and 36.6% for women in 2022 versus 39.2% and 35.8%, respectively, in 2023). At the same time, the unemployment rate for women remains higher than that of men in the 15+ population (21.1% and 13.2% respectively in 2023), a gap that has stayed relatively constant since 2015 (22.2% and 12.4%).

These figures suggest that young people in Tunisia face many challenges, with high inactivity rates, especially among the male population, high NEET rates and very high unemployment rates. This situation also reflects the lack of opportunities in the labour market and the general despondency and disillusionment that young people are experiencing regarding their employment prospects.

Labour market and employment statistics

Statistics on the labour market and employment are collected and published regularly by the National Statistics Institute (INS). However, according to anecdotal evidence, the INS suffers from a shortage of staff and resources. The data is available on its website and also on request. The National Agency for Employment and Self-Employment (ANETI) also collects data on the labour market, in particular by analysing the data received from the INS. ANETI produces annual activity reports which can be consulted on its website. The National Observatory for Employment and Qualifications (ONEQ) also produces regular analyses and reports focusing on the skills supply.

There is no comprehensive information system on the labour market, nor any systematic sectoral analyses of needs that would better match skills supply and demand.

The Ministry of Employment and Vocational Training received support from the EU, in particular through the ONEQ, to test a methodology for forecasting skills needs. This pilot study is underway. However, predictive analyses focusing on forecasting future skills needs are not applied systematically or across all sectors.

The ETF produced an analysis of future skills needs in the energy sector, on a larger scale and with a focus on skills. The energy sector is a key economic sector that is expected to provide job opportunities in the future, especially in the context of the green transition.

3.2 Employment policy and institutional frameworks

Strategy and legal framework in the employment policy field

The Ministry of Employment and Vocational Training is responsible for setting the strategic policy direction and priorities. In 2019, a new vision for employment by 2030 was developed under the leadership of a political steering committee. It is based on the tripartite dialogue set up as part of the social contract and benefited from the involvement of social partners. This 2030 vision is still under development and will be fully integrated into the national framework to generate growth and added value by leveraging human capital and natural resources effectively and efficiently. According to the information available on the Ministry's website, this vision will be used to support the development of five-year action plans. These plans will comprise innovative measures and take account of the digital and green transitions, with a view to overcoming the socio-economic, political and health-related challenges of recent years.

Initiatives to boost employment

Tunisia has a long tradition of implementing active labour market programmes. Pursuant to Decree No 2019-542 of 2019, programmes financed by the National Employment Fund have now been launched, some of which are continuations of previous programmes launched in 2012. These programmes allow young people to enrol on training courses to develop skills and competences that should help them find a job. They can also be used to complement or complete their qualifications and training courses in order to broaden their skills and open up more opportunities in the job market.

The following three programmes are aimed at all unemployed jobseekers.

- Work experience contract (*Contrat d'initiation à la vie professionnelle*): This is a placement with a 12-month contract, that can be extended to up to 24 months. All companies can access this type of contract.
- The KARAMA dignity contract (*contrat-dignité*) encourages companies to recruit first-time jobseekers with higher education qualifications and help them improve their skills.
- The civil service contract (*contrat service civil* – CSC) aims to support higher education graduates who are first-time jobseekers by enabling them to develop their practical skills and competences in

a professional setting, and to facilitate their integration into working life as employees or self-employed workers.

It is worth noting that two of these measures are only open to higher education graduates. The National Agency for Employment and Self-Employment also offers an online training service, called [ANETI Tkawen](#), which offers training on ICT and soft skills, mainly with the aim of encouraging work placements.

These programmes are run by ANETI, the National Agency for Employment and Self-Employment, which is the main non-administrative public body reporting to the Ministry of Employment and Vocational Training. Other government-accredited private organisations can also help unemployed people and jobseekers to find job placements in Tunisia and abroad.

ANETI's activity reports for 2021, 2022 and 2023 show a steady downward trend in the number of registered unemployed people, the number reaching 391 927 in 2023, with a significant gap between the sexes (231 741 women compared to 160 186 men) and a fairly equal representation of unemployed people with low or average levels of qualifications compared to those with a higher level of education. Despite the decrease in the number of unemployed persons, ANETI has managed to steadily increase its provision of career guidance, counselling and matching services, helping around 100 000 participants in 2023 compared to just over 65 000 in 2021. Participation in skills development programmes, including traineeships organised by ANETI, decreased slightly to 111 853 (from 124 006 in 2022). The data shows that there has been a strong focus on women jobseekers. Furthermore, jobseekers with a high level of education are overrepresented in some employment and skills development programmes. In 2023, ANETI carried out almost 70 000 visits to employers and other types of institutions to identify their employment needs. In line with its mandate, ANETI is also implementing a series of schemes to support self-employment and small businesses. The support schemes are quite diverse in terms of design, duration and objectives, with some receiving external support. Around 48 000 people, mostly women, benefited from these types of support services and schemes in 2023.

ANETI also provides career guidance and support for self-employment and entrepreneurship. Encouraging entrepreneurship and supporting start-ups are priorities for the government. According to a study by the Arab Institute of Business Leaders (IACE, 2020) conducted in early spring 2020, 61% of the companies surveyed had to reduce their workforce due to the crisis. In response to this exceptional situation, a number of support programmes, including EU-funded IRADA and PAFIP, reallocated funding to support SMEs and young entrepreneurs, while making the safeguarding of jobs a priority. ANETI also launched a programme to help companies restructure their activities to allow them to weather the COVID-19 crisis. ANETI offers specific support to start-ups ([Start Up Act](#)), in the form of training and loans.

Initiatives to increase the capacity of public employment services

The National Agency for Employment and Self-Employment (ANETI) is the main public body responsible for providing public employment services. Other private agencies also help jobseekers to find a job.

As indicated above, ANETI is the main public employment agency and offers a relatively broad range of services. However, despite the breadth of its mandate, ANETI is allocated only limited resources, which prevents it from properly fulfilling its role as a fully operational public employment service. As the main provider of public employment services, ANETI has benefited from some donor initiatives, particularly relating to capacity building and support through specific projects targeting unemployed people.

ANETI is currently working on the vision 2030 plan, under which consultations and evaluations of its services are being carried out with a view to reshaping its future. The same or very similar services have been offered for a long time and the way they are delivered needs to be modernised. This process involves collecting feedback internally and conducting surveys among businesses.

A major digital transition project is underway, with the support of the World Bank and the European Union. It aims to bring services into closer alignment with jobseekers and the needs of the labour market. Digitising and automating registration, matching and other tasks should lighten employment advisers' workload. These advisers will then be able to support and guide jobseekers on their path to employment. It should also help to establish the profile of jobseekers across the country, given that ANETI is present in all regions, and to provide a service that is less standardised and better tailored to jobseekers' different profiles. The use of artificial intelligence for job matching is also being trialled.

ANETI is also working on a toolkit for jobseekers who want to set up their own business.

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STATISTICAL ANNEX – TUNISIA

The annex presents the annual data for 2015, 2019, 2020, 2021, 2022 and 2023, or the most recent year available.

	Indicator		2015	2019	2020	2021	2022	2023
1	Total population (thousands) ⁽¹⁾		11 557.8	12 049.3	12 161.7	12 262.9	12 356.1	12 458.2
2	Relative size of youth population (15-24 age group and 15-64 denominator, %) ^{(1) C}		23.2	20.7	20.4	20.2	20.2	20.3
3	GDP growth rate (%)		1.0	1.6	-8.6	4.6	2.6	0.4
4	Gross value added by sector (%)	Agriculture	9.2	9.8	10.4	10.1	10.8	9.5
		Industry	24.9	23.2	21.5	23.4	24.9	23.5
		Services	58.9	59.9	60.2	59.9	61.6	62.1
5	Public spending on education (% of GDP)		6.2	M.D.	M.D.	M.D.	M.D.	M.D.
6	Public spending on education (% of total public spending)		22.7	M.D.	M.D.	M.D.	M.D.	M.D.
7	Adult literacy (%)		M.D.	80.5	M.D.	M.D.	85.2	M.D.
8	Level of education of the total population (over 15 years old) (%)	Low ⁽²⁾	64.6	63.0	63.1	58.5	58.6	51.5
		Medium ⁽³⁾	20.7	20.5	19.5	25.1	24.5	32.2
		High ⁽⁴⁾	14.7	16.4	17.4	16.4	16.9	16.3
9	Early leavers from education and training (aged 18-24) (%) ⁽⁵⁾	Total	36.9	35.2	37.8	29.7	32.4	29.5
		Men	41.2	42.4	45.0	35.2	37.6	36.1
		Women	32.5	27.7	30.4	23.9	25.4	22.7
10	Net enrolment rates in secondary education (International Standard Classification of Education, level 2-3) (%)	Lower secondary	M.D.	M.D.	M.D.	M.D.	M.D.	M.D.
		Upper secondary	M.D.	M.D.	M.D.	M.D.	M.D.	M.D.
11	Share of VET students in upper secondary education (ISCED level 3) (%)		9.6	M.D.	M.D.	M.D.	M.D.	M.D.
12	Poor results in reading, mathematics and science – PISA (%)	Reading	M.D.	M.D.	M.D.	M.D.	M.D.	M.D.
		Mathematics	M.D.	M.D.	M.D.	M.D.	M.D.	M.D.
		Science	M.D.	M.D.	M.D.	M.D.	M.D.	M.D.
13	Activity rate (15+ years) (%) ⁽⁵⁾	Total	47.1	46.9	47.7	47.0	46.0	46.2
		Men	68.8	68.0	69.8	66.4	65.3	65.9
		Women	26.0	26.6	26.7	28.6	27.5	27.3

	Indicator		2015	2019	2020	2021	2022	2023
14	Inactivity rate (15+ years) (%) ⁽⁵⁾	Total	52.9	53.1	52.3	53.0	54.0	53.8
		Men	31.2	32.0	30.2	33.6	34.7	34.1
		Women	74.0	73.4	73.3	71.4	72.5	72.7
15	Employment rate (15+ years) (%) ⁽⁵⁾	Total	39.9	39.7	40.0	38.2	38.9	39.0
		Men	60.3	59.6	60.4	56.2	56.7	57.2
		Women	20.3	20.6	20.6	21.8	21.8	21.5
16	Employment rate by educational attainment (15+ years) (%)	Low ⁽²⁾	M.D.	M.D.	M.D.	M.D.	M.D.	M.D.
		Medium ⁽³⁾	M.D.	M.D.	M.D.	M.D.	M.D.	M.D.
		High ⁽⁴⁾	M.D.	M.D.	M.D.	M.D.	M.D.	M.D.
17	Employment by sector (%) ^(5, 6)	Agriculture	M.D.	13.7	14.6	11.5	11.5	11.8
		Sector	M.D.	34.4	33.4	32.5	32.0	33.7
		Services	M.D.	51.9	52.0	56.0	56.4	54.5
18	Incidence of self-employment (%) ^c		26.8	26.3	25.9	25.9	27.5	25.1
19	Incidence of vulnerable employment (%)		20.1	19.0	19.1	19.0	20.5	19.2
20	Unemployment rate (15+ years) (%) ^(5, 7)	Total	15.2	15.3	16.2	18.0	15.3	15.6
		Men	12.4	12.3	13.5	15.4	13.1	13.2
		Women	22.2	22.4	22.8	23.6	20.5	21.1
21	Unemployment rate by educational attainment (15+ years) (%) ⁽⁵⁾	Low ⁽²⁾	8.8	9.9	10.8	14.4	12.2	13.9
		Medium ⁽³⁾	16.3	16.1	15.6	19.5	15.7	12.6
		High ⁽⁴⁾	26.8	26.9	28.7	24.2	21.9	22.9
22	Unemployment rate (15-24 years) (%) ^(5, 7)	Total	34.0	34.4	35.7	41.5	37.2	38.1
		Men	33.5	34.2	35.4	42.2	37.4	39.2
		Women	35.5	34.5	36.2	40.0	36.6	35.8
23	Share of people aged 15-24 not in employment, education or training (NEETs) (%)	Total	M.D.	26.8	30.2	23.9	23.6	21.4
		Men	M.D.	27.0	29.0	23.7	25.2	22.6
		Women	M.D.	26.6	31.4	24.2	22.0	20.2
	Share of people aged 15-29 not in employment, education or training (NEETs) (%)	Total	M.D.	35.0	38.1	32.8	32.4	30.3
		Men	M.D.	29.9	31.8	27.6	29.3	27.3
		Women	M.D.	40.2	44.4	38.0	35.5	33.4

	Indicator		2015	2019	2020	2021	2022	2023
24	Participation in training/lifelong learning (15+ years) (%)	Total	M.D.	M.D.	M.D.	M.D.	M.D.	1.3
		Men	M.D.	M.D.	M.D.	M.D.	M.D.	0.9
		Women	M.D.	M.D.	M.D.	M.D.	M.D.	1.6
25	Human development index		0.724	0.740	0.734	0.729	0.732	M.D.

Last updated: 7 October 2024

Sources:

Indicators 1, 2, 3, 4, 5, 6, 7 (2019): World Bank, World Development Indicators (WDI) database

Indicator 7 (2022): UNESCO SDG

Indicators 10, 11: UNESCO Institute for Statistics

Indicators 8, 9, 13, 14, 15, 16, 18, 21, 22, 23, 24: National Institute of Statistics – LFS

Indicator 12: Results of the 2022 OECD PISA assessment (Volume I)

Indicator 25: UNDP

Remarks:

(1) Estimate

(2) Low – ISCED levels 0-1 from ISCED 97 ('Primary' in the national classification)

(3) Medium – ISCED levels 3-4 from ISCED 97 ('Secondary' in the national classification)

(4) High – ISCED levels 5-6 from ISCED 97 ('Superior' in the national classification)

(5) Second quarter of the year, third quarter of 2020

(6) Totals may not add up to 100% due to persons not classified in an economic activity

(7) 2015 provisional data

Key

C = ETF calculations

n/a = not applicable

M.D. = missing data

ANNEX: DEFINITIONS OF INDICATORS

	Description	Definition
1	Total population (in thousands)	The total population is the estimated number of habitual residents in a given country on 1 January of a given year. Where no information is available on the usually resident population, countries may report legal or registered residents.
2	Relative size of youth population (15-24 age group) (%)	This is the ratio of the youth population (aged 15 to 24) to the working-age population, generally aged 15 to 64 (or aged 15 to 74 or 15 and over).
3	GDP growth rate (%)	Annual growth rate as a percentage of GDP at market prices in constant local currency. Aggregates are based on constant 2010 US dollars. GDP is the sum of gross value added by all resident producers in the economy, plus product taxes and minus any subsidies not included in the value of the products. It is calculated without deducting for depreciation of fabricated assets or for depletion and degradation of natural resources.
4	Gross value added by sector (%)	Share of value added from agriculture, industry and services. Agriculture corresponds to divisions 1-5 of the International Standard Industrial Classification of all Economic Activities (ISIC) and includes forestry, hunting and fishing, as well as crops and animal production. Value added is the net production of a sector after adding up all outputs and subtracting intermediate inputs. It is calculated without deducting for depreciation of fabricated assets, depletion or degradation of natural resources. The origin of value added is determined by the ISIC, revision 3 or 4. Industry corresponds to tabulation categories C-F (revision 3) or tabulation categories B-F (revision 4) of the International Standard Industrial Classification (ISIC), and includes mining and quarrying (including petroleum production), manufacturing, construction and utilities (electricity, gas and water). Services correspond to ISIC divisions 50 to 99 and include value added in wholesale and retail trade (including hotels and restaurants), transport, and governmental, financial, professional and personal services such as education, healthcare and real estate services. They also include imputed banking service charges, import duties and any statistical anomalies found by the national compilers, as well as anomalies resulting from rescheduling.
5	Public spending on education (% of GDP)	Public spending on education expressed as a percentage of GDP. In general, the public sector finances education either by directly supporting the current or capital expenditure of educational establishments, or by supporting students and their families through grants or public loans, as well as by awarding subsidies to private companies or non-profit organisations for educational activities (transfer to private households and companies). Both types of transactions are included in total public spending on education.
6	Public spending on education (% of total public spending)	Public spending on education expressed as a percentage of total public spending. In general, the public sector finances education either by directly supporting the current or capital expenditure of educational establishments, or by supporting students and their families through grants or public loans, as well as by awarding subsidies to private companies or non-profit organisations for educational activities (transfer to private households and companies). Both types of transactions are included in total public spending on education.
7	Adult literacy (%)	Adult literacy is the percentage of the population aged 15 and over who can read, write and understand a short, simple sentence about their daily lives. In general, literacy also encompasses 'numeracy', that is, the ability to do simple arithmetic calculations.
8	Level of education of the total population (over 15 years old) (%)	Educational attainment refers to the highest level of education attained by individuals, expressed as a percentage of all persons in this age group. This indicator is most often measured on the basis of the highest educational programme successfully completed and is usually validated by a recognised

	Description	Definition
		qualification. Recognised intermediate qualifications are classified at a lower level than the programme itself.
9	Early leavers from education and training (aged 18-24) (%)	This indicator is defined as the percentage of the population aged 18 to 24 with a maximum lower-secondary level of studies and having received no education or training in the four weeks preceding the survey. A lower secondary education corresponds to ISCED 1997 levels 0-2 and 3c short (i.e. programmes with a duration of less than two years) for data up to 2013 and ISCED 2011 levels 0-2 for data from 2014 onwards.
10	Net enrolment rates in secondary education (ISCED level 2-3) (%)	This indicator covers enrolments in a given level of education of children/young people who are in the official age group for that given level of education.
11	Share of VET students in upper secondary education (ISCED level 3) (%)	The total number of students enrolled in vocational training programmes at a given level of education (in this case, upper secondary education), expressed as a percentage of the total number of students enrolled in all (vocational and general) programmes at that level.
12	Poor results in reading, maths and science – PISA (%)	These are young people aged 15 whose results are below level 2 on the PISA scale for reading, maths and science skills.
13	Activity rate (15 years of age and older) (%)	The activity rate for a given age group is calculated by dividing the active population by the population of that age group. The active population (also called 'labour force') is defined as the sum of employed and unemployed persons. The inactive population includes people who are classified neither as employed nor unemployed.
14	Inactivity rate (15 years of age and older) (%) ^{(5)C}	The rate of inactivity / non-inclusion in the active population of a given age group is calculated by dividing the inactive population by the population of that age group. The inactive population includes people who are classified neither as employed nor unemployed.
15	Employment rate (15 years of age and older) (%)	The employment rate is calculated by dividing the number of persons in employment by the total population of the same age group. Economically active persons are defined as all people who, during the reference period, worked for pay or profit for at least one hour, or who were temporarily absent from such work. If a different age group is used, this must be specified.
16	Employment rate by level of education (15 years of age and older) (%)	The employment rate is calculated by dividing the number of persons in employment by the total population of the same age group. Economically active persons are defined as all people who, during the reference period, worked for pay or profit for at least one hour, or who were temporarily absent from such work. If a different age group is used, this must be specified. Educational attainment levels refer to the highest level of education successfully completed. Three levels are considered: low (ISCED levels 0-2), medium (ISCED levels 3-4) and high (ISCED 1997 levels 5-6 and ISCED 2011 levels 5-8).
17	Employment by sector (%)	This indicator provides information on the relative importance of different economic activities in terms of employment. Data is presented by major sectors of economic activity (agriculture/industry/services) based on the International Standard Industrial Classification of all Economic Activities (ISIC). In Europe, the statistical classification of economic activities (NACE) is consistent with the ISIC.
18	Incidence of self-employment (%)	The incidence of self-employment is expressed by self-employed workers (employers + own-account workers + contributing family workers) as a proportion of total employed workers.
19	Incidence of vulnerable employment (%)	The incidence of vulnerable employment is expressed by own-account workers and contributing family workers as a percentage of the total number of employed persons.
20	Unemployment rate (15 years of age and older) (%)	The unemployment rate represents the number of unemployed as a percentage of the active population. The active population is the total number

	Description	Definition
		of people in employment and unemployed. Unemployed people are persons aged 15 to 64, 16 to 59 or over 15 who were without work during the reference week, who are currently available for work (that is, are available for paid employment or self-employment within two weeks following the reference week), who are actively seeking work, that is, who had taken specific steps to find paid employment or self-employment during a four-week period ending at the end of the reference week, or who had found work and will start working within a period of up to three months.
21	Unemployment rate by level of education (15 years of age and older) (%)	The unemployment rate represents the number of unemployed as a percentage of the active population. The active population is the total number of people in employment and unemployed. Unemployed people are persons aged 15 to 64, 16 to 59 or over 15 who were without work during the reference week, who are currently available for work (that is, are available for paid employment or self-employment within two weeks following the reference week), who are actively seeking work, that is, who had taken specific steps to find paid employment or self-employment during a four-week period ending at the end of the reference week, or who had found work and will start working within a period of up to three months. Educational attainment levels refer to the highest level of education successfully completed. Three levels are considered: low (ISCED levels 0-2), medium (ISCED levels 3-4) and high (ISCED 1997 levels 5-6 and ISCED 2011 levels 5-8).
22	Unemployment rate (15-24 years of age) (%)	The unemployment rate represents the number of unemployed as a percentage of the active population. The active population is the total number of people in employment and unemployed. Unemployed people are persons aged 15 to 24 who were without work during the reference week, who are currently available for work (that is, are available for paid employment or self-employment within two weeks following the reference week), who are actively seeking work, that is, who had taken specific steps to find paid employment or self-employment during a four-week period ending at the end of the reference week, or who had found work and will start working within a period of up to three months.
23	Proportion of 15-24-year-olds not in education, employment or training (NEETs) (%) ^{(5) C}	This indicator provides information on young people aged 15 to 24 who fulfil the following two conditions: first, they are not employed (i.e. unemployed or inactive according to the ILO definition), and second, they have not received any education or training in the four weeks preceding the survey. The data is expressed as a percentage of the total population of the same age group and the same gender, excluding young people who did not answer the question on their participation in education and training.
24	Participation in training/lifelong learning (% aged 15 and older) ⁽⁶⁾	Participants in lifelong learning are defined as people aged 25 to 64 who responded that they had attended education or training in the four weeks preceding the survey (numerator). The denominator is the total population of the same age group, excluding non-responses to the question on participation in education and training. The information collected concerns all forms of education or training, whether or not they are relevant to the respondent's current or future job. If a different reference period is used, this must be specified.
25	Human development index	The index is a synthetic measure of average outcomes in key dimensions of human development: a long and healthy life, being well informed and having a decent standard of living.

ABBREVIATIONS AND ACRONYMS

ANETI	National Agency for Employment and Self-Employment
ATFP	Tunisian Vocational Training Agency
CENAFIF	National Centre for Training of Trainers and Training Course Design
CNFCPP	National Centre for Continuing Education and Professional Advancement
CNQ	National qualifications classification
CSC	Civil service contract
EBRD	European Bank for Reconstruction and Development
EFP	Vocational education and training
EU	European Union
GDP	Gross domestic product
ICT	Information and communication technology
INS	National Statistics Institute
MEFP	Ministry for Vocational Training and Employment
NEET	Young people not in employment, education or training (NEETs)
ONEQ	National Observatory for Employment and Qualifications
PAMT	Active labour market programmes
SMES	Small and medium-sized enterprises

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