European Training Foundation

TUNISIA

EDUCATION, TRAINING AND EMPLOYMENT DEVELOPMENTS 2021

KEY POLICY DEVELOPMENTS IN EDUCATION, TRAINING AND EMPLOYMENT

The COVID-19 pandemic has pushed the Tunisian economy into the red in both 2020 and 2021. Some sectors, such as the tourism sector, have been severely hit with a reduction of up to 75% in the number of visitors in 2020 and especially in 2021, when the country witnessed a high increase in Covid cases and a serious health crisis in the summer.

The protracted socio-economic crisis, aggravated by COVID-19 effects, impacted on the consequent financial and political crisis. Following the decision by the President of the Republic in July 2021 to dismiss the Prime Minister and halt work in progress in Parliament, in an attempt to address the several crisis, a new Prime Minister, Najla Bouden, was appointed at the end of September 2021, and the formation of her new government was announced on 11 October. The new Government sees vocational education and training moving back to the Ministry of Employment and Vocational Training, after having been under the responsibility of the Ministry of Youth and Sports for about 18 months.

This political instability and volatility does not favour coordination and coherence. The education and training sector remains fragmented, with several ministries and bodies in charge of different sub-sectors and services. The change in decision-making powers and ministerial turnover in the past have led to earlier decisions being suddenly reprioritised or retracted. As a result, protracted challenges linked to youth inactivity and unemployment risk not being dealt with coherently or holistically.

Though the implementation period of the VET reform strategy covering 2016-2020 has formally expired, some key pillars remain relevant and some important achievements have been accomplished. During the closure of schools during COVID-19, efforts have been deployed to continue education services and ensure access to this basic right. Digital and online learning solutions were put in place, with lessons broadcast on television for general education. However, similarly to other countries across the world, in 2021 and 2022 Tunisia will have to face difficulties in catching up with protracted closures and delays in the delivery of education programmes.

Initial statistics indicate that unemployment went up during the COVID-19 crisis and economic downturns. The National Statistics Institute (INS), together with the World Bank, undertook a phone survey of more than 1 000 households, the results of which indicated that the crisis aggravated an already fragile socioeconomic situation (one third of households said they were having difficulties achieving food security and 6 in 10 said they were feeling the impact of the crisis, mostly due to loss of employment or the increase in food prices). The National Agency for Employment and Self-Employment (ANETI) launched various support programmes, including for companies in difficulty and beneficiaries of ongoing active labour market programmes (ALMPs).

Tunisia, with its new Government, will have to face several challenges ahead, to avoid, among others, rising frustration and the likelihood of escalating protests.

1. KEY DEMOGRAPHIC AND ECONOMIC CHARACTERISTICS

▪ Political developments and health situation

Presidential elections were held in 2019, resulting in the election of President Kais Saied. The difficult economic and financial situation, aggravated by Covid and the tough sanitary situation in summer 2021, provoked a series of protests across the country. On 25 July 2021, the President suspended Parliament and dismissed the Prime Minister. At the end of September 2021, a new Prime Minister was appointed, Najla Bouden, the first female Prime Minister in the country's history. A new Government was formed and officially presented on 11 October 2021.

The political instability and volatility that characterises the country does not favour coordination, continuity and coherence in policy-making and policy implementation. Changes in decision-making powers and ministerial turnover in the past have led to earlier decisions being suddenly reprioritised or retracted. As a result, challenges linked to youth inactivity and unemployment risk not being dealt with coherently or holistically.

Tunisia, with its New government, will have to face several challenges ahead, to avoid, among others, rising frustration and the likelihood of escalating protests.

The sanitary crisis induced by Covid increased significantly in summer 2021, with one of the highest case rates in the world. The health system was hit hard though a lack of hospital beds and equipment. The vaccination campaign was boosted, also with support from the European Union and internationally. The situation improved significantly between September and October: on 6 October 2021, Tunisia registered 221 cases out of 4 199 tests done, with a positive rate of 5.26%. Our World in Data reports that 41% of the population was fully vaccinated on 15 November 2021.

▪ Demographics

The total population of Tunisia in 2020 was 11 818 600, showing an increasing trend in the last 10 years. The relative size of the youth population was 20.4% in 2020, a decrease from 27% in 2010. Unlike its north African and Middle Eastern neighbours, Tunisia will soon shift from being a 'youth-bulge' country to having a transitional age structure, with lower fertility (2.2 in 2019, World Bank DataBank) and a longer average life expectancy (78.0 for women and 74.3 years for men, 2019, World Bank DataBank). This demographic structure and forecasted change put severe pressure on policymakers in the short to medium term with regard to adequate schooling and job creation. In the longer term, health and pension expenditure will become the main challenges.

▪ Economic developments, informal economy, remittances

The COVID-19 pandemic has pushed the Tunisian economy into the red in both 2020 and 2021. Some sectors have been severely hit, such as the tourism sector, with up to 75% fewer visitors across 2020 as well as in the summer of 2021, when the country witnessed an unprecedented number of cases and deaths.

Tunisia is a lower-middle-income country. It is engaged in a process of integrating into the world economy, such as through Association Agreements with the European Union (EU), the Agadir Agreement, and talks with the World Trade Organization. However, the impact on the country's economy has so far been rather low. Major disparities among the different regions, age groups and genders affect the country's potential for economic growth and employment generation.

According to Balghouthi (2018), the Tunisian economy suffers from structural dysfunctions, which include inequality, corruption, deindustrialisation and a prevalence of low-value-added sectors, such as the export of olive oil and phosphate. The economic development model, which has existed since the 1980s and divides companies into those for exports and those for the internal market, has remained largely unreformed. Framework agreements regulating the working conditions of employees have not been reviewed for the past 20 years.

The contribution of the different sectors to the GDP shows a decreasing trend for industry (from 29% in 2010 to 21.8% in 2020, INS) and an increasing trend for services (from 56.7% in 2010 to 61.3%, INS) and agriculture (from 7.5% in 2010 to 11.7% in 2020, INS).

The GDP growth rate in 2020 shows an significant negative downturn (-8.6%), which is the direct result of the sanitary, political and financial crisis coupled with the COVID-19 crisis and related lockdowns. The large tourism sector and exporters that supply the European automotive and textile industries have experienced a strong negative impact. Economic activity contracted by an unprecedented 21.6% in the second quarter of 2020 (INS).

The vast majority of large enterprises remain state-owned, and public administration is dominant. Outside the public sector, there is a high level of informality and a large number of micro, small and medium-sized enterprises. They offer either no jobs or low-skilled jobs and have little capacity to grow and innovate. Job creation has been low, even in periods of sustained growth in pre-COVID-19 times. A favourable macro-economic environment is an essential precondition for generating jobs.

Informality is widespread. According to the Medina and Schneider (2018), the informal sector accounted for 30.9% of GDP in 2015, with informality often linked to the size of companies. Based on ILO data from 2014 (ILO, 2018, using 2014 data), overall, 84% of the jobs held by young people aged 15 to 19 and 42% by those aged 20 to 24 were informal. This often involves low-skilled jobs, poor working conditions, low pay and a lack of social protection – ultimately leading to a devaluation of human capital.

Remittances, which come predominantly from France and Italy, contributed significantly to GDP, amounting to 5.3% in 2020 (World Bank, 2020).

2. EDUCATION AND TRAINING

2.1 Trends and challenges

- **Education expenditure, access, participation and early leaving**

Human capital development and gender equality have traditionally been high on the agenda of the Tunisian Government. Similar to pre-revolution levels, public expenditure on education has remained high, accounting for 6.1% of GDP, or 21.1% of total public expenditure (UNESCO Institute for Statistics – UIS, 2017, last available year). These figures are above EU and Organisation for Economic Co-operation and Development (OECD) averages.

The Tunisian education system, including VET, is predominantly public and includes grants that allow for access to education at all levels. However, recent years have seen an expansion of private provision, especially at university level, marketed as providing better job opportunities. Private VET centres have a long tradition and provide courses mainly in fields related to business management.

According to the latest available data, gross enrolment ratios were high, with 115.4% attending primary level in 2018, representing a steady increase from 104.8% in 2008.

Tunisia has seen a significant improvement in the literacy rate, reaching 97.4% adult literacy in 2019 (UIS). Education attainment rates show an increase for higher education, despite remaining relatively low (17.4% in 2020, compared to 15.6% in 2017, INS), and a decrease in low and medium education levels (from 66.0% and 21.5% in 2010 to 19.5% and 17.4% in 2020 respectively, INS). Women made bigger gains: while there used to be a 5.5% difference between men and women with a lower educational background in 2010, this had reduced to only 1.4% in 2019. Equally, the share of women with high levels of education in 2019 outweighed men by far, with a further widening of the gap since 2015 (18.1% vs. 14.6%, INS).

These positive trends are in contrast to the persistently high rate for early school leavers. Despite major improvements compared to 2010 when the rate stood at 54.9%, early school leaving still affected 37.1% of people aged 18–24 in 2019 (INS). With a rate of 42.6% in 2019 (down from 54.9% in 2010), more young males dropped out of school than young females (rates for females were 31.6% in 2019, down from 47.7% in 2010).

Dropout rates in Tunisia remain high, often linked or coupled with other concerns such as continuous security issues and a lack of appropriate programmes, facilities, transport, and educational and family support. There is a close link to the NEET rate: one in three young people aged 15 to 24 (or 32% in total; 31.0% of men and 33.0% of women, INS) who did not complete secondary education were NEETs.

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

Trend data does not show major improvements in the total NEET rate. The NEET rate has traditionally been higher for women. However, when observing trends over the last 10 years (2010-2020), data shows that the NEET rate for men has increased sharply, and according to 2020 data, there is only a marginal difference between men and women (29% for men and 31.4% for women). The poor job opportunities is one of the main reasons for young men to be discouraged to enter the labour market, in addition to mismatches with personal aspirations and a lack of decent job prospects. For young women, while the rate is higher, it is still lower than in other countries in the region. Together with similar difficulties that young men encounter, young women also suffer from a lack of safe education and job opportunities, as well as, in many cases, being bound by family obligations.

- **Education during the COVID-19 pandemic**

Like other countries worldwide, Tunisia was confronted with the closure of schools, which was enacted on 14 March 2019, when the country recorded 16 cases. In the first wave of Covid and subsequent lockdowns, schools remained closed for 26 weeks (EMEA [Euro-Mediterranean Economists Association], ETF, 2021). In some areas, students in the final year of secondary education returned to school on 29 May 2020 to prepare for exams. Other levels did not return until the following school year.

In terms of hygienic measures, schools were sterilised and equipped with individual protective devices, sterilisation equipment and thermometers. Nevertheless, the reopening process proved difficult, with some schools not ready and not equipped with the necessary sanitary equipment and IPDs.

During the school closure, two platforms were set up and used. One is the portal of the National Centre for Technologies in Education (CNTE), which contains a virtual library and other useful resources. The other one is Edunet, the official online learning platform of the Ministry of Education, which displays information on examinations, digital school-related projects, events, and training resources.

According to the EMEA-ETF study that applied the methodology developed by the EMEA to measure preparedness to respond to Covid-19, Tunisia has the lowest preparedness score (see study on p. 49), indicating difficulties in anticipating, managing and recovering from the crisis.

As in many other countries in the region and worldwide, the sanitary crisis has brought to the fore the difficulties that education and training systems have in reacting rapidly to external shocks, and has shown how difficult it is to put in place longer-term reforms and changes that would enable systems to be more flexible and responsive to a fast-changing world.

Digital gaps and social disparities also emerged, which highlight persistent limited access to IT/digital equipment, along with limited IT/digital skills, particularly among teachers.

2.2 VET policy and institutional setting

- **Strategic and legal framework for VET and adult learning**

Tunisia has been making an effort to reform its education and training system. The Strategic Plan for the Education Sector 2016–2020 aimed at revamping quality standards through improved teacher training, upgraded curricula and infrastructure, and an enhanced framework for private-sector partnerships. The comprehensive reform package is also expected to respond to the key challenges at basic and secondary education levels, in particular the high dropout rates, a lack of infrastructure and generally low quality standards.

At the higher education level, the Strategic Plan for the Reform of Higher Education and Scientific Research 2015–2025 sets out five main objectives: improving the quality of teaching and, thus, the employability of new graduates; promoting research and innovation; fostering good governance and optimising resource management; reviewing university planning to ensure regional balance; and developing teacher training.

With regard to VET, in an attempt to address the challenges that the subsector faces, a VET reform strategy was launched, covering the period 2016-2020. The implementation period has formally expired and a new reflection on the reform process is ongoing, also in view of the COVID-19 crisis and related challenges brought with it. Some key pillars of the strategy were built around the Social Pact and lessons learned from the earlier MANFORME and PEFESE programmes co-funded by the EU.

The VET reform strategy aimed to achieve the following main objectives, some of which remain relevant and valid:

- increase the attractiveness of VET;
- support the professional development of trainers;
- involve regional stakeholders;
- improve data collection and analysis, and enhance the monitoring and evaluation function; and
- develop entrepreneurial mind-sets across the VET system.

The strategy clustered reform measures under 14 different VET reform projects. The change in decision-making powers, the expiration of the timeframe of the reform, and the pressing challenges imposed by the COVID-19 crisis, make it difficult to provide indications related to what areas of the reform will be addressed as a priority. What can be reported is that some areas of the reform showed significant progress and achievements, including the formalisation of the tripartite social dialogue for VET and employment, the existence of a training levy system (although its functioning requires improvement), the regulation of WBL, and major achievements in the development of an entrepreneurial mindset and the design and development of the VET entrepreneurial centres.

There is a demand for continuing education, skills upgrading and retraining. However, despite structural reforms and the existence of a training levy system in Tunisia, comprehensive policies for continuing VET are lacking and the system remains weak.

Continuing training is coordinated by the National Centre for Continuing Training and Professional Promotion (CNFCPP – *Centre National de Formation Continue et de Promotion Professionnelle*) The ANETI in turn is responsible for training unemployed jobseekers as one among other active labour market measures.

- **VET governance arrangements**

Vocational education and training represents a sub-sector within the overall education system. At the time of writing, this falls under the responsibility of the Ministry of Vocational Training and Employment, after having been under the umbrella of the Ministry of Youth and Sports for about 18 months. Historically, VET has been attached to the Ministry of Employment and Vocational Training and Employment due to the important links between VET and the world of work.
Other ministries and agencies are also present to play a role and cover responsibilities for VET, which makes management of the sub-sector quite complex. The public training centres report to different sectoral ministries. In addition, numerous private training centres operate in Tunisia. The ILO refers to over 2 700 such centres, while ONEQ quoted 189 accredited and 935 non-accredited centres for the 2016/17 academic year (ONEQ, 2016).

VET is delivered at initial and continuing levels. Initial training is delivered at lower and upper secondary levels; however, it can also play a role in upskilling and reskilling adults. In this context, an earlier report for the Education For All Global Monitoring Report 2012 (Walther, 2011) highlights the significance of building skills required in the informal sector, which is widespread in Tunisia. Individual VET programmes differ by content, place of delivery and duration, and lead to different levels of qualifications.

- **Quality and quality assurance**

In 2018, the Ministry of Employment and Vocational Training re-launched the Directorate of Quality and Evaluation, with the objective of operationalising quality-assurance axes, in particular in terms of products and processes in the VET system. Regarding the process, the focus is on adopting a quality approach within the VET centres, in particular with regard to the national standards for Quality

Assurance (Référentiel national de la qualité de la formation professionnelle, RNQFP). This has been revamped by the ATFP by digitising it and assessing the centres according to the referencing system.

The ISO certification process of VET centres that are part of the ATFP had started in the past but came to a stop in 2012. In 2021, the Ministry discussed and agreed with the ETF to receive specific support in view of revamping this process, as a follow up to Tunisia's participation in the ETF VET Quality Assurance Forum.

In order to boost quality of VET diplomas, the process of standardisation and recognition of both training and qualifications according to learning outcomes was initiated. The project includes different components: (i) a process to develop norms and standards, (ii) an accreditation process for VET centres; (iii) a national recognition system for learning outcomes; and (iv) a system for validating prior learning (RPL).

- **Work-based learning arrangements**

As the most common schemes of WBL, the Tunisian system distinguishes between alternance training, internships and apprenticeships. In terms of the share of persons involved, alternance training represents slightly more than 80% of students, followed by the residential model with some period of training spent on company internships (13%), and apprenticeship training (6%). In contrast, non-diploma-based learning involves, by definition, 100% training at the workplace (Chelbi, 2017, p. 6).

Alternance training is seen as a suitable alternative to full-time studies at training centres to help familiarise students with the working culture and technologies of companies, engage in real-life projects and acquire practical skills. Investing in this system is connected with the hope of investing in future skills. However, in Tunisia, alternance training has remained a weakness despite existing partnership agreements with companies. Depending on the sector, students struggle to get internship places in companies. In a few sectors with generally less attractive working conditions, such as the leather industry, more training places are offered and young people find employment more easily, sometimes even before completing their VET programme (Chelbi, 2017).

In pre-COVID-19 times, there were some positive signals from both the textile and tourism sectors. A decade ago, the textile sector was in sharp decline: materials and equipment had fallen out of use and investments had dropped. With the sector picking up again, it also started to reinvest. Similar trends have been observed for the tourism industry. Recognising the contributions that alternance training can make to producing the necessary skills of future employees, new partnerships with companies were fostered. This included agreements with training centres, the provision of internships, and the assignment of company mentors to students and remuneration for their work (Ferchichi, 2019). The recent COVID-19 crisis abruptly halted these positive developments. Ensuing consequences may be drastic for the alternance training system, as economic sectors, especially tourism, face an oversupply of jobseekers and workers and undersupply of income/visitors.

The ETF 2019 study on WBL highlights five areas of challenges: i) the presence of different governance and funding issues; ii) trainers and apprenticeship consultants at training centres are increasingly reluctant to go to the company to monitor young people; iii) communication, an area in which centres made little effort and where public supervisory bodies were not very effective; iv) the absence of trained tutors available to instruct and supervise trainees at companies; and v) mobility, which can be viewed from two perspectives: mobility between regions and mobility between countries (Chelbi, 2017).

- **Digital education and skills**

COVID-19 has accelerated digitisation, including in education, like never before in the country.

The Digital Strategy 2021-2025 (Stratégie numérique 2021–2025) includes five axes, one of which, Smart Tunisia, looks into the potential of human capital to boost Tunisia's digitisation and to make it a talent hub for job creation and growth.

Specific actions on digital education and training started long before Covid, although not at such a large scale as recently. Orange put in place digital schools (écoles numériques), which make specific devices available. In May 2021, there were 130 primary and secondary schools equipped with more than 38 000 devices. Equipment and digital tools are more readily available in private centres and schools, thanks to the availability of funds.

- **Donor support to education and VET for young people and adults**

Donors provide major resources and technical assistance to design concepts and methodologies, and implement VET reform in restricted areas or pilot institutions. They contribute to the capacity-building of policymakers and social partners and most of the projects to date, but this is not enough to make the system work differently. National capacity is limited, and at times donors act in an uncoordinated manner, with some examples of coordination tables that have not been continuous and streamlined.

Several projects are in place to support different areas of the reform. Particularly active donors in the field of education and training in Tunisia include the EU, bilateral cooperation agencies such as the AFD, GiZ, and the Swiss Agency for Development and Cooperation; international organisations such as the ILO, UNICEF, UNESCO and the UNDP; and banks such as the EBRD, the WB, AfDB.

The EU has been focusing in the last few years on major investment in skills and employment through some key initiatives. IRADA (*Initiative régionale d'appui au développement économique durable* – Regional Economic Development Support Initiative) includes two components, one on private-sector development and one on vocational education and training. The project addresses regional development and is ongoing. PAFIP (*projet d'Appui à la formation et l'insertion professionelle* – Project for Supporting Training and Professional Integration) is an EU-funded project, implemented and co-financed by the AFD. Its primary objective is to boost employability and job integration through an overall upscaling of the training system and a systemic approach focused on building the capacity of stakeholders at central and local levels. GiZ is also implementing several projects linked to economic development and employment, some of them targeting specific economic sectors. The ILO has been active in the field of qualifications, through a project funded by Norway, which included a component on recognising prior learning. the EU-funded THAMM regional project looks into migration and mobility and is implemented through a consortium led by the IOM (with the ILO and GiZ).

3. LABOUR MARKET AND EMPLOYMENT

3.1 Trends and challenges

- **Labour market and employment challenges in general**

The Tunisian labour market is characterised by very low rates among the active population. Although slight improvements have been seen in the last 10 years, the total rate among the active population in 2020 was only 47.7%, with a big gap between men and women (69.9% and 26.7% respectively, 2020).

The activity rate for women remains low for the 15+ population, although it shows improvement for women with a higher education level (reaching 62.4% in 2020, INS). However, these improvements are not mirrored by a decrease in unemployment rates, which have not improved in the last 10 years; on the contrary, they have deteriorated (from 32.4% in 2010 to 39% in 2020, INS). One of the main reasons for this is the persistent skills mismatch between the level of education attained and the opportunities offered by the labour market.

- **Employment**

Furthermore, the overall employment rate in Tunisia remains low. In 2020, only 30.3% of the total population was employed, with an extremely low employment rate for women (9.7% in 2020) and accounting for only 2.6% in the 15-24 age group. Young people are particularly at risk of being excluded by the labour market: in 2020, the total youth unemployment rate was 35.7%, with little difference between men and women (35.4% and 36.2% respectively). Youth unemployment trends from 2015 do not show significant differences, indicating that the structural challenges young people experience in finding a job have not changed in the last 5 years. Data for 2021 and 2022 will provide further indications on whether COVID-19 has impacted even further on these challenges.

Many Tunisians work in precarious conditions. Jobs that are created, largely in the agriculture, manufacturing, construction and service sectors such as tourism and trade, are still for the most part of an informal and/or non-decent nature. The incidence of vulnerable employment in 2020 was 19.1%, with 25.9% among self-employed people. The incidence of both vulnerable and self-employment shows a decreasing trend from 2010, when the rates were 24.7% and 31.4% respectively.

Informality is also widespread (see previous section).

Employment opportunities are uneven across the country. Geographical factors also determine gender disparities: while differences between young women and men in dynamic urban areas are small, they are much more pronounced in the less dynamic rural areas. Young women living in the northern, central and interior areas are more vulnerable to unemployment, while those living in southern areas are often completely outside the labour market (Mansuy and Werquin, 2015).

Up until the Covid pandemic , the share of youth not in employment, education or training (NEETs) had decreased, reaching 26.3% in 2019. It is expected that employment opportunities for young graduates and the workforce will worsen as the health crisis continues to affect the country and economies around the world.

The skills mismatch measured on the basis of the Labour Force Survey datasets reveals is rather high, with many employees working in jobs requiring skills below their level of education (vertical mismatch) or in jobs not matching their field of study (horizontal mismatch).

In 2019, almost half (49.7%) of employees with a tertiary education were overqualified, being employed in jobs requiring qualification levels below their education attainment. The same type of mismatch affected almost a third of employees with a medium level of education.

A vertical mismatch seems to affect mainly the highest and lowest age groups of employees with a medium level of education (33.4% young and 34% older), while most university graduates start their professional careers in mismatched jobs (almost 60%), but mismatches tend to recede with age (27.1% among workers aged 50+)

- **Unemployment**

Overall, unemployment rates show persistent challenges, with increasing trends in the last 10 years in both the 15+ and the 15-24 age groups. INS data for the third quarter of 2021 indicates that unemployment rate increased to reach 18.4%, compared to 16.4% in the third quarter of 2020. It is not only young people who are badly affected by unemployment, but also those with higher education levels, although a positive trend has been recorded for women with higher education levels, following a record low in 2012. The Tunisian labour market, characterised by a low level of technology of most MSMEs, is offering more opportunities for semi-skilled and unskilled labour. Unemployment rates by education level still show lower rates for low- and medium-educated population groups (10.8% and 15.6% respectively in 2020, and 28.7% for higher-educated). A recent survey on the impact of Covid on the labour force indicates that individuals with a low level of education are much more affected by the rise in unemployment, with a peak of +80% for people with less than basic education levels (ILO, 2021).

As indicated above, employment opportunities vary according to the geographical area in which people reside. Unemployment rates were lowest, at 9.9%, in the centre-east of the country, and highest, at 26.2%, in the south-west (ETF, 2017; ILO, 2018).

- **Statistical data collection and labour market information**

The National Institute of Statistics provides data regarding key demographic, economic, social and labour market statistics. The ONEQ provides regular data regarding education and training. It should be noted, however, that not all key labour market and education information are not available.

- **Poverty**

Poverty and weak economic perspectives have been at the source of protests and unrest among the Tunisian population. The persistent economic, financial and sanitary crisis will further aggravate the current situation. People, especially in disadvantaged regions, could give up searching for a job and become further alienated from the labour market. All this could lead to a further underutilisation of existing human capital. Furthermore, with 470 000 people potentially falling below the poverty line and a carefully estimated poverty rate of 19%, Tunisia could be thrown some 15 years back in development (UNDP, 2020).

3.2 Employment policy and institutional setting

- **Strategy and legal framework in the employment policy field**

Responsibility for employment issues is under the recently merged Ministry of Vocational Training and Employment. The Ministry is in charge of developing strategic political priorities and policy orientations. In December 2012, the National Employment Strategy 2013–2017 was adopted, although it has never been implemented.

Hence, in 2017, Tunisia relaunched a national discussion on this topic, and in 2018, a labour market diagnostic study was carried out. In May 2019, the line ministry and relevant departments of other ministries, together with the main employers' union (UTICA), the Federation of Trade Unions (UGTT) and the ILO started drafting a new employment strategy to cover the period from 2020 to 2030.

The tripartite dialogue introduced by the Social Contract (*Contrat social*) between the state, the UTICA, the UGTT and the Agriculture and Fisheries Union (UTAP) was formalised by the creation of the National Council for Social Dialogue (CNDS) in November 2018. Nevertheless, the contributions of the social partners often come only at the end of the decision-making process and on a purely consultative basis, particularly in terms of designing and implementing employment policy.

- **Initiatives to boost employment**

Tunisia has a tradition of active labour market programmes (ALMPs). Following the revolution, several new initiatives were introduced in 2012 (Decree No 2012-2369 of 16 October 2012). They include a job-search assistance cheque; an employment subsidy to encourage private companies to hire people looking for their first job; a support programme for small-enterprise creators; and a partnership programme with the regions to promote employment and facilitate the insertion of various types of unemployed people into the labour market by supporting local and regional initiatives for job creation. ALMPs target mainly higher-education graduates. Only a few programmes and services are aimed at helping low-qualified and disadvantaged individuals. Combined with the lack of unemployment insurance, this imbalance means that very few non-graduates register with the public employment service.

A number of agencies are responsible for implementing ALMPs. The National Agency for Employment and Self-Employment (ANETI) is the main public, non-administrative body attached to the Ministry of Vocational Training and Employment. ANETI's mission is rather broad and includes implementing ALMPs and supporting self-employment and entrepreneurship. The limited resources available to ANETI to fulfil its public employment service role, especially as an intermediary, is one of the main challenges it faces.

Encouraging entrepreneurship and supporting start-ups are currently priorities for the Government. Small and medium-sized enterprises (SMEs) have been suffering significantly from the impact of COVID-19; a study by the *Institut arabe des chefs d'entreprises* (IACE, 2020) in early spring 2020 indicated that 61% of respondent companies had to reduce their number of employees because of the crisis. In response, a number of support programmes, including the EU-funded IRADA and PAFIP, have reallocated funding to support SMEs and young entrepreneurs with a focus on saving jobs. ANETI also launched a programme to support enterprises in restructuring their activities to address the Covid crisis.

Despite the lack of a systematic monitoring and evaluation system, it is generally agreed that ALMPs in Tunisia have had some positive impact, especially on young people. ALMPs have provided opportunities for first-time jobseekers and young people with business ideas. Yet, it is also acknowledged that, in view of the huge public investment, outcomes in terms of placements and improved employability of beneficiaries could have been better (ILO, 2018).

The main shortcomings of ALMPs in Tunisia include both their targeting and their geographical distribution. ALMPs are aimed mainly at higher-education graduates, while only a few programmes and services assist low-skilled and disadvantaged individuals. In addition, programmes are more easily accessible in Tunis and the coastal regions. The interior regions are less well covered, so the number of ALMP beneficiaries among the long-term unemployed and low-skilled people remains low. Given that there is no unemployment insurance, this has resulted in a strong imbalance: resources have de facto been distributed unequally between different groups (e.g. women holding secondary or higher education degrees versus women without formal qualifications) and between different regions, which exacerbates existing dichotomies.

- **Initiatives to increase the capacity of the public employment services**

The main body responsible for offering public employment services is ANETI. As indicated by the 2021 Torino Process assessment, ANETI's mission is fairly broad, ranging from managing active labour market policies (ALMPs) to supporting self-employment and entrepreneurship. However, despite this plethora of tasks, the resources assigned to ANETI are very limited, which hampers its role as a fully functioning public employment service.

ANETI, as the main PES provider, has benefitted from donors' initiatives, including capacity building and support with specific projects targeting unemployed people.

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STATISTICAL ANNEX - TUNISIA

This annex includes annual data from 2010, 2015, 2019, and either 2020 or the last available year.

	Indicator		2010	2015	2019	2020
1	Total population (000s) (1)		10 635.2	11 179.9	11 694.7	11 818.6
2	Relative size of youth (age group 15–24 and age in the denominator 15–64, %) (1) C		27.0	22.7	20.7	20.4
3	GDP growth rate (%)		3.5	1.2	1.0	-8.6
4	GDP by sector (%)	Agriculture added value	7.5	10.3	10.3	11.7
		Industry added value	29.0	25.0	22.7	21.8
		Services added value	56.7	58.7	61.7	61.3
5	Public expenditure on education (as % of GDP)		6.3	6.6	MD	MD
6	Public expenditure on education (as % of total public expenditure)		24.8	22.7	MD	MD
7	Adult literacy (%)		79.1	79.0 (2014)	MD	MD
8	Educational attainment of adult population (aged 25–64 or 15+) (%)(2)(3)	Low	44.2	41.1	40.4 (2017)	MD
		Medium	37.5	37.6	37.5 (2017)	MD
		High	18.2	21.0	22.0 (2017)	MD
9	Early leavers from education and training (aged 18–24) (%)	Total	51.3	36.9	37.1	34.0
		Male	54.9	41.2	42.6	42.0
		Female	47.7	32.5	31.6	25.8
10	Gross enrolment rates in upper secondary education (ISCED level 3) (%)		75.6	77.9	M.D.	M.D.
11	Share of VET students in upper secondary education (ISCED level 3) (%)		9.1	9.6	MD	MD
12	Tertiary education attainment (aged 30–34) (%)		19.0	23.8	MD	MD
13	Participation in training / lifelong learning (aged 25–64) (%)	Total	1.8	1.3	2.9	MD
		Male	1.7	1.2	2.8	MD
		Female	1.9	1.5	3.1	MD
14	Low achievement in reading,	Reading	50.2 (2009)	71.6	NA	NA

	Indicator		2010	2015	2019	2020
	mathematics and science – PISA (%)	Mathematics	73.6 (2009)	74.8	NA	NA
		Science	53.7 (2009)	65.9	N.A.	N.A.
15	Activity rate (aged 15+) (%)	Total	46.9	47.1	46.9	47.7
		Male	69.5	68.8	68.0	69.8
		Female	24.8	26.0	26.6	26.7
16	Inactivity rate (aged 15+) (%)(3)	Total	53.1	52.9	53.1	52.3
		Male	30.5	31.2	32.0	30.2
		Female	75.2	74.0	73.4	73.3
17	Employment rate (aged 15+) (%)	Total	40.8	39.9	39.7	40.0
		Male	61.9	60.3	59.6	60.4
		Female	20.1	20.3	20.6	20.6
18	Employment rate by educational attainment (% aged 15+)	Low	9.3	43.4	36.9	37.1
		Medium	13.7	39.6	40.1	42.3
		High	22.9	23.2	50	48.0
19	Employment by sector (%)	Agriculture	17.9	15.0	13.7	14.6
		Industry	32.9	32.8	34.4	33.4
		Services	49.2	52.2	51.9	52.0
20	Incidence of self-employment (%)		31.4	26.8	26.3	25.9
21	Incidence of vulnerable employment (%)		24.7	20.1	19.0	19.1
22	Unemployment rate (aged 15+) (%)	Total	13.0	15.2	15.3	16.2
		Male	10.9	12.4	12.3	13.5
		Female	18.9	22.2	22.4	22.8
23	Unemployment rate by educational attainment (aged 15+) (%) (4)	Low	9.3	8.8	9.9	10.8
		Medium	13.7	16.3	16.1	15.6
		High	22.9	26.8	26.9	28.7
24	Long-term unemployment rate (aged 15+) (%)		MD	MD	MD	MD
25	Youth unemployment rate (aged 15–24) (%)	Total	29.4	34.0	34.4	35.7
		Male	27.8	33.5	34.2	35.4
		Female	32.7	35.5	34.5	36.2

	Indicator		2010	2015	2019	2020
26	Proportion of people aged 15–24 not in employment, education or training (NEETs) (%)	Total	25.2	29.1	32.0	30.2
		Male	19.4	25.3	31.0	29.0
		Female	31.2	32.8	33.0	31.4

Last update: September 2021

Sources:

Indicators: 9, 12, 13, 15, 16, 17, 18, 19 (2010, 2019, 2020), 20 (2015, 2019, 2020), 21 (2015, 2019, 2020), 22, 23, 25, 26 – National Statistical Office of Tunisia (INS)

Indicators: 1, 2, 3, 4 – World Bank, World Development Indicators

Indicators: 5, 6, 7, 10, 11 – UIS UNESCO

Indicators: 14 – OECD

Indicators: 8, 19 (2015), 20 (2010), 21 (2010) – ILOSTAT

Notes:

The data received from National Statistical Office of Tunisia relates to the second quarter of the year for the period 2010-2019 and third quarter of the year for 2020.

(1) The values shown are mid-year estimates.

(2) Data refers to active population aged 15+.

(3) Calculated.

(4) Low: ISCED 0–1 from ISCED 97 (*Primaire* in national classification); Medium: ISCED 3–4 from ISCED 97 (*Secondaire* in national classification); High: ISCED 5–6 from ISCED 97 (*Supérieur* in national classification).

Legend:

NA = not applicable

MD = missing data

ANNEX: DEFINITIONS OF INDICATORS

	Description	Definition
1	Total population ('000)	The total population is estimated as the number of people having their usual residence in a country on 1 January of the respective year. When information on the usually resident population is not available, countries may report legal or registered residents.
2	Relative size of youth population (age group 15-24) (%)	This is the ratio of the youth population (aged 15-24) to the working-age population, usually aged 15-64 (74)/15+.
3	GDP growth rate (%)	Annual percentage growth rate of GDP at market prices based on constant local currency. Aggregates are based on constant 2010 USD. GDP is the sum of gross value added by all resident producers in the economy plus any product taxes and minus any subsidies not included in the value of the products. It is calculated without making deductions for depreciation of fabricated assets or for depletion and degradation of natural resources.
4	GDP by sector (%)	The share of value added from agriculture, industry and services. Agriculture corresponds to ISIC divisions 1-5 and includes forestry, hunting and fishing, as well as cultivation of crops and livestock production. Value added is the net output of a sector after adding up all outputs and subtracting intermediate inputs. It is calculated without making deductions for depreciation of fabricated assets or depletion and degradation of natural resources. The origin of value added is determined by the International Standard Industrial Classification (ISIC), revision 3 or 4.
5	Public expenditure on education (as % of GDP)	Public expenditure on education expressed as a percentage of GDP. Generally, the public sector funds education either by directly bearing the current and capital expenses of educational institutions, or by supporting students and their families with scholarships and public loans as well as by transferring public subsidies for educational activities to private firms or non-profit organisations (transfer to private households and enterprises). Both types of transactions together are reported as total public expenditure on education.
6	Public expenditure on education (as % of total public expenditure)	Public expenditure on education expressed as a percentage of total public expenditure. Generally, the public sector funds education either by directly bearing the current and capital expenses of educational institutions, or by supporting students and their families with scholarships and public loans as well as by transferring public subsidies for educational activities to private firms or non-profit organisations (transfer to private households and enterprises). Both types of transactions together are reported as total public expenditure on education.
7	Adult literacy (%)	Adult literacy is the percentage of the population aged 15 years and over who can both read and write a short simple statement on their everyday life and understand it. Generally, 'literacy' also encompasses 'numeracy' – the ability to make simple arithmetic calculations.

	Description	Definition
8	Educational attainment of adult population (25-64 or aged 15+) (%)	Educational attainment refers to the highest educational level achieved by individuals expressed as a percentage of all persons in that age group. This is usually measured in terms of the highest educational programme successfully completed, which is typically certified by a recognised qualification. Recognised intermediate qualifications are classified at a lower level than the programme itself.
9	Early leavers from education and training (age group 18-24) (%)	Early leavers from education and training are defined as the percentage of the population aged 18-24 with at most a lower secondary education who were not in further education or training during the 4 weeks preceding the survey. Lower secondary education refers to ISCED 1997 levels 0-2 and 3C short (i.e. programmes lasting under 2 years) for data up to 2013 and to ISCED 2011 levels 0-2 for data from 2014 onwards.
10	Gross enrolment rates in upper secondary education (ISCED level 3) (%)	Number of students enrolled in a given level of education, regardless of age, expressed as a percentage of the official school-age population corresponding to the same level of education.
11	Share of VET students in upper secondary education (ISCED level 3) (%)	Total number of students enrolled in vocational programmes at a given level of education (in this case, upper secondary), expressed as a percentage of the total number of students enrolled in all programmes (vocational and general) at that level.
12	Tertiary education attainment (aged 30-34) (%)	Tertiary attainment is calculated as the percentage of the population aged 30-34 who have successfully completed tertiary studies (e.g. university, higher technical institution). Educational attainment refers to ISCED 1997 level 5-6 up to 2013 and ISCED 2011 level 5-8 from 2014 onwards.
13	Participation in training/lifelong learning (age group 25-64) (%)	Participants in lifelong learning refers to persons aged 25-64 who stated that they received education or training in the 4 weeks preceding the survey (numerator). The denominator is the total population of the same age group, excluding those who did not answer the question on participation in education and training. The information collected relates to all education or training, whether or not it is relevant to the respondent's current or possible future job. If a different reference period is used, this should be indicated.
14	Low achievement in reading, maths and science – PISA (%)	Low achievers are the 15-year-olds who are failing to reach level 2 on the PISA scale for reading, mathematics and science.
15	Activity rate (aged 15+) (%)	The activity rate is calculated by dividing the active population by the population of the same age group. The active population (also called 'labour force') is defined as the sum of employed and unemployed people. The inactive population consists of all people who are classified as neither employed nor unemployed.
16	Inactivity rate (aged 15+) (%)	The inactivity/out-of-the-labour-force rate is calculated by dividing the inactive population by the population of the same age group. The inactive population consists of all people who are classified as neither employed nor unemployed.
17	Employment rate (aged 15+) (%)	The employment rate is calculated by dividing the number of employed people by the population of the same age group. Employed people are all people who worked at least one hour for pay or profit during the reference period or were temporarily absent from such work. If a different age group is used, this should be indicated.
18	Employment rate by educational attainment (% aged 15+)	The employment rate is calculated by dividing the number of employed persons by the population of the same age group.

	Description	Definition
		Employed persons are all persons who worked at least 1 hour for pay or profit during the reference period or were temporarily absent from such work. If a different age group is used, this should be indicated. Educational levels refer to the highest educational level successfully completed. Three levels are considered: Low (ISCED level 0-2), Medium (ISCED level 3-4) and High (ISCED 1997 level 5-6, and ISCED 2011 level 5-8).
19	Employment by sector (%)	This indicator provides information on the relative importance of different economic activities with regard to employment. Data is presented by broad branches of economic activity (i.e. agriculture/industry/services) based on the International Standard Industrial Classification of All Economic Activities (ISIC). In Europe, the NACE classification is consistent with ISIC.
20	Incidence of self-employment (%)	The incidence of self-employment is expressed by the self-employed (i.e. employers + own-account workers + contributing family workers) as a proportion of the total employed population.
21	Incidence of vulnerable employment (%)	The incidence of vulnerable employment is expressed by the own-account workers and contributing family workers as a proportion of the total employed population.
22	Unemployment rate (aged 15+) (%)	The unemployment rate represents unemployed people as a percentage of the labour force. The labour force is the total number of people who are employed or unemployed. Unemployed people comprise those aged 15-64 or 15+ who were without work during the reference week, are currently available for work (were available for paid employment or self-employment before the end of the 2 weeks following the reference week); are actively seeking work, i.e. had taken specific steps in the 4-week period ending with the reference week to seek paid employment or self-employment, or had found a job to start later (within a period of, at most, 3 months).
23	Unemployment rate by educational attainment (aged 15+) (%)	The unemployment rate represents unemployed people as a percentage of the labour force. The labour force is the total number of people who are employed or unemployed. Unemployed people comprise those aged 15–64 or 15+ who were without work during the reference week, are currently available for work (were available for paid employment or self-employment before the end of the 2 weeks following the reference week), are actively seeking work (had taken specific steps in the 4-week period ending with the reference week to seek paid employment or self-employment, or had found a job to start later (within a period of, at most, 3 months)). Educational levels refer to the highest educational level successfully completed. Three levels are considered: Low (ISCED level 0-2), Medium (ISCED level 3-4) and High (ISCED 1997 level 5-6, and ISCED 2011 level 5-8)
24	Long-term unemployment rate (aged 15+) (%)	The long-term unemployment rate is the share of people in the total active population who have been unemployed for 12 months or more, expressed as a percentage. The duration of unemployment is defined as the duration of a search for a job or as the period of time since the last job was held (if this period is shorter than the duration of the search for a job).
25	Youth unemployment rate (aged 15-24) (%)	The youth unemployment ratio is calculated by dividing the number of unemployed people aged 15-24 by the total population of the same age group.

	Description	Definition
26	Proportion of people aged 15-24 not in employment, education or training (NEETs) (%)	The indicator provides information on young people aged 15-24 who meet the following two conditions: first, they are not employed (i.e. are unemployed or inactive according to the ILO definition); and second, they have not received any education or training in the 4 weeks preceding the survey. The indicator is expressed as a percentage of the total population of the same age group and gender, excluding the respondents who have not answered the question on participation in education and training.

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LIST OF ACRONYMS

AFD	Agence Française de Développement/ French Development Agency
ALMPs	Active labour market policies
ANETI	Agence Nationale pour l'Emploi et le Travail Indépendant/ National Agency for Employment and Self-Employment
ATFP	Agence Tunisienne de la Formation Professionnelle/ Tunisian Agency for Vocational Education and Training
CENAFFIF	Centre National de Formation de Formateurs et d'Ingénierie de Formation/ National Centre for Trainer Training and Curriculum Development in VET
CNFCPP	Centre National de Formation Continue et de Promotion Professionnelle/ National Centre for Continuing Training and Professional Promotion
EBRD	European Bank for Reconstruction and Development
ETF	European Training Foundation
EU	European Union
GDP	Gross domestic product
IACE	Institut Arabe des Chefs d'Entreprises
ILO	International Labour Organization
INS	Institut National de la Statistique/National Institute for Statistics
IPD	Individual protective device
MANFORME	Programme de Mise à Niveau de la Formation Professionnelle et de l'Emploi/ Vocational Training and Employment Upgrading Programme
NEETs	(Young persons) not in education, employment or training
OECD	Organisation for Economic Co-operation and Development
ONEQ	Observatoire National de l'Emploi et des Qualifications/ Tunisian National Observatory for Employment and Qualifications
PAFIP	Programme d'Appui à la Formation et à l'Insertion Professionnelle/ Programme to Support Training and Job Integration
PEFESE	Programme d'appui au système de l'Éducation/Formation – Enseignement Supérieur et Employabilité des diplômés Programme to Support the Education/Training System – Higher Education and Employability of Graduates
PISA	(OECD) Programme for International Student Assessment
UIS	UNESCO Institute for Statistics
UNDP	United Nations Development Programme
UNESCO	United Nations Educational, Scientific and Cultural Organization
VET	Vocational education and training
WBL	Work-based learning

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