

# TUNISIA

## EDUCATION, TRAINING AND EMPLOYMENT DEVELOPMENTS 2020

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# KEY POLICY DEVELOPMENTS IN EDUCATION, TRAINING AND EMPLOYMENT (SEPTEMBER 2019–AUGUST 2020)

Though its overall impact is not yet clear, the Covid-19 pandemic pushed the Tunisian economy, which registered GDP growth of just 1% in 2019, into the red in 2020, with an anticipated contraction in GDP of -2% to -7%, depending on the source (some, like the European Bank for Reconstruction and Development, are more optimistic and expect a quick recovery in 2021). Nevertheless, some parts of the economy, such as the tourism sector, have been hit hard by Covid-19, with a reduction of up to 75% in the number of visitors and amount of revenue assessed for the period between January and August 2020 compared with the same period in 2019.

Governance of the education and training system in Tunisia is spread across various ministries and there is little coordination among them. With the new Ministry of Youth, Sports and Employability (MJSIP) now responsible for vocational education and training (VET), this fragmentation continues. In addition, there has been political volatility (new ministers have been appointed every year since the revolution), which, in the past, has led to sudden reprioritisation or retraction of earlier decisions. The risk of this happening is even higher now, with the new ministry taking over responsibility for VET. There is a silver lining, however, in that the integration of VET into the MJSIP may mean that the issue of young people who are not in education, employment or training (NEET) is addressed more holistically.

Though the implementation period of the ambitious VET reform strategy covering 2016–2020 has formally expired, the strategy is still relevant. Whether or not it is to be continued has yet to be confirmed by the newly established MJSIP.

During the Covid-19 lockdown of schools, the Ministry of Education responded by organising digital and online learning, and arranged for lessons to be broadcast on TV for general education. After months of Covid-19-induced closure, schools are gradually reopening for the 2020–2021 academic year, albeit with rigorous health protocols in place, including obligatory face masks for teachers and secondary-school students, and social-distancing measures. For various reasons, including complexity around work-based learning, VET providers have not been able to offer online training during this period. This puts considerable pressure on the 2020–2021 school year in terms of catching up on lost school time.

Initial statistics indicate that unemployment went up during the Covid-19 lockdown. 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 has exacerbated an already fragile socioeconomic situation (one third of households said they were having difficulties achieving food security and six in ten 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 Independent Work (ANETI) launched various support programmes, including for companies in difficulty and beneficiaries of ongoing active labour market programmes (ALMPs).

# 1. KEY DEMOGRAPHIC AND ECONOMIC CHARACTERISTICS

Young people account for a significant share of the Tunisian population. In 2019, 20.7% of the country's 11.7 million inhabitants were aged between 15 and 24 (down 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 live births per woman, according to the United Nations Development Programme (UNDP)) and a longer average life expectancy (77.0 for women and 72.3 years for men). This demographic structure and forecasted change puts 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.

Tunisia is traditionally a country of emigration, with 6.9% of its population living abroad in 2019, mainly in Europe (78%). Remittances contribute significantly to gross domestic product (GDP), amounting to 4.9% in 2019, according to the World Bank. Remittances come predominantly from France and Italy<sup>1</sup>. In recent years, Tunisia has increasingly become a country of immigration, particularly for Libyans, and a country of transit for migrants from sub-Saharan Africa heading to Europe. Exact figures on immigrants are not available, but the Tunisian Ministry of Commerce estimates that the total number of refugees hosted by the country is around 1 million – 10% of Tunisia's population. Other sources cite higher numbers, closer to around 1.8 million<sup>2</sup>.

Following the signing of a Mobility Partnership Agreement with the EU in March 2014, Tunisia developed a National Migration Strategy to comprehensively manage migration issues. The implementation of the strategy is supported by the EU-funded ProGreS Migration project (EUR 12.5 million), which was launched in March 2019. In addition, a number of other programmes address legal migration and mobility schemes, including the regional Towards a Holistic Approach to Labour Migration Governance and Labour Mobility in North Africa (THAMMS) programme (EUR 25 million). Recognition of emigrants' and immigrants' qualifications is a major issue for the education and VET systems in facilitating access to the labour market.

Tunisia is a lower middle-income country. Several dichotomies affect the country's potential for economic growth and employment generation, including age, gender and regional disparities. Political volatility is an additional challenge. The Tunisian economy is characterised by several structural dysfunctions that generate low-productivity activities and mainly low-quality jobs.

Industry and manufacturing are declining, accounting for 22.7% of GDP in 2018 (down from 29% in 2010). Agriculture accounts for 10.4% of GDP (up from 7.5% in 2010), while services play an increasingly important role and, at 59.2% (up from 56.7% in 2010), this sector is now the biggest contributor to GDP. Although the erosion of the industrial sector has implications for the economic structure, there is no clear vision for economic development and priority economic sectors have not been clearly identified.

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1 <http://www.worldbank.org/en/topic/migrationremittancesdiasporaissues/brief/migration-remittances-data>

2 Karasapan, O., 'The impact of Libyan middle-class refugees in Tunisia', Future Development, Brookings, 17 March 2015.

In general, the pace of economic development has been very slow, with GDP growth at 2.7% in 2018 and dropping to merely 1% in 2019,<sup>3</sup> well below the annual 5% envisaged in the National Development Plan 2016–2020. Though its overall impact is not yet clear, the Covid-19 pandemic has pushed the Tunisian economy into the red, with an anticipated contraction in GDP of -2% to -7% in 2020, depending on the source<sup>4</sup>. Some organisations, like EBRD and the International Monetary Fund, are more optimistic about the future and expect a quick recovery in 2021. The impact on the various economic sectors cannot be underestimated. Stakes were high in 2020 for the tourism sector, to name but one. After a number of difficult years, there were promising projections that the tourism sector would be one of the main drivers of the Tunisian economy<sup>5</sup>. After a serious dip in 2015, the sector was showing initial signs of recovery, with 9 million tourists in 2019. But based on initial data, the sector has been hit hard by Covid-19, with a reduction of up to 75% in the number of visitors and amount of revenue assessed for the period between January and August 2020 compared with the same period in 2019.

The impact of Covid-19 comes on top of a set of structural issues that Tunisia was already facing. The vast majority of major enterprises remain state-owned, and public administration is still large. The inefficiency of government bureaucracy, political instability and corruption are three major factors that negatively impact the business environment, according to the Global Competitiveness Index 2020, in which Tunisia ranked 87th of 140 economies (stable since 2018 but much lower than its 40th place in 2011)<sup>6</sup>. The country ranked 74<sup>th</sup> out of 180 countries in the 2019 Transparency International Corruption Perceptions Index<sup>7</sup>, one place higher than in 2017.

A high level of informality and the large number of micro and small and medium-sized enterprises (SMEs) that do not have the capacity to grow, innovate and create quality jobs are making economic development more challenging. In the Ease of Doing Business Index<sup>8</sup>, which examines how conducive the business environment is in 190 countries, Tunisia climbed to 78<sup>th</sup> place in 2020 (up from 88<sup>th</sup> in 2018) but is still far below its 36<sup>th</sup> place in 2008. Tunisia's efforts to make it easier to start a business (by combining different registrations at a one-stop shop), to register property on a more transparent basis and to pay taxes (by not extending the exceptional corporate income-tax contribution introduced in 2016) are listed as the main reasons for this improvement, as are the country's efforts to strengthen protection for minority investors<sup>9</sup>. However, the recent assessment of the reforms identified in the SME Policy Index indicates that Tunisia should further increase its efforts to develop a better business environment and a more strategic SME policy<sup>10</sup>.

The National Development Plan 2016–2020 identifies major infrastructure works and investment in innovation and technology as drivers of growth. Its success depends heavily on the country's capacity to attract investment (EUR 50 billion). The plan intends to create 400,000 new jobs, in particular for

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<sup>3</sup> World Bank, World Development Indicators.

<sup>4</sup> The World Bank predicts GDP to contract by 4%, the IMF believes it will contract by 7%, while the EBRD estimates that the contraction will be around 2.5%.

<sup>5</sup> Moreover, the Tunisian Federation of Hotel Owners (FTH) is questioning national statistics that estimate the sector's contribution as 4.1% of GDP: a recent FTH study estimates it to be 13.8% – <https://www.jeuneafrique.com/790526/economie/tunisie-tourisme-les-enjeux-derriere-la-bataille-des-chiffres/>

<sup>6</sup> World Economic Forum, *Global Competitiveness Report 2020*.

<sup>7</sup> <https://www.transparency.org/country/TUN>

<sup>8</sup> <http://www.doingbusiness.org/en/rankings>

<sup>9</sup> <https://www.doingbusiness.org/en/reforms/overview/economy/tunisia>

<sup>10</sup> OECD/EU/ETF, *The Mediterranean Middle East and North Africa 2018: Interim Assessment of Key SME Reforms*, SME Policy Index, OECD Publishing, Paris, 2018.

highly-skilled graduates, thus presenting an opportunity for VET and higher education provision<sup>11</sup>. This is supported by a recent survey, which pointed to the information and communication technology (ICT) sector as having the most potential for growth and for attracting foreign investment, followed by the energy and mining, industry and tourism sectors<sup>12</sup>.

The Deep and Comprehensive Free Trade Agreement (DCFTA) that was concluded with the EU<sup>13</sup> – Tunisia’s major trading partner – has again been put on the table by the new government, in view of the post Covid-19 economic recovery. In addition, Tunisia is expanding its international network by, for example, enrolling in regional networks in Arab and African contexts.

In terms of human development, Tunisia ranked 91<sup>st</sup> out of 189 countries in the UNDP Human Development Index (HDI) 2019 (up from 162<sup>nd</sup> in 2010), thus qualifying for the ‘high human development’ category, with significant improvements noted over the timeframe of one generation.<sup>14</sup> However, 3.8% of the Tunisian population are classified as extremely poor<sup>15</sup>. Major disparities exist between interior and rural regions and those in the north of the country and along the coast. Tunisia is one of the Arab countries at the forefront of acknowledging women’s rights, and recent legislative developments include a new law institutionalising gender mainstreaming<sup>16</sup>. However, Tunisian women continue to suffer discrimination, both socially and economically, mostly demonstrated in terms of employment and labour-market participation.

## 2. EDUCATION AND TRAINING

### 2.1 Trends and challenges

Human capital development is high on the policy agenda in Tunisia<sup>17</sup>. As before the revolution, public expenditure on education remains high, accounting for 6.1% of GDP in 2017, or 21.1% of total public expenditure, which, in relative terms, is above the European Union and OECD averages. The Tunisian education system, including VET, is predominantly public and non-fee paying, and grants equal access at all levels. Private provision has been developing in recent years, especially at university level, and is marketed as offering better employment opportunities. Private VET centres have a long tradition and mainly provide courses in business-related fields.

Tunisia has made considerable improvements in literacy and schooling rates over the years: the overall illiteracy rate fell to 19.0% in 2015 (down from 31.7% in 1994)<sup>18</sup>, while youth literacy rates (15–

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<sup>11</sup> <https://www.tia.gov.tn/opportunities-investissement>

<sup>12</sup> <https://oxfordbusinessgroup.com/news/le-secteur-de-l-energie-tunisien-a-l-heure-du-changement>

<sup>13</sup> The first negotiating round to establish a DCFTA between the EU and Tunisia took place in April 2016 and the fourth round took place in May 2019. Discussions covered a wide range of issues, including agriculture, services and sustainable development. The overall goal of the negotiations is to create new trade and investment opportunities and bring about the better integration of Tunisia’s economy into the EU’s single market.

<sup>14</sup> Since the 1990s, Tunisia’s HDI value has increased by about 30%, with life expectancy at birth increasing by 7.7 years, mean years of schooling by 3.7 years and expected years of schooling by 4.6 years – [http://hdr.undp.org/sites/all/themes/hdr\\_theme/country-notes/TUN.pdf](http://hdr.undp.org/sites/all/themes/hdr_theme/country-notes/TUN.pdf)

<sup>15</sup> Ministry of Development, Investment and International Cooperation, 2016.

<sup>16</sup> <http://www.jeuneafrique.com/576997/societe/tunisie-heritage-droits-des-femmes-liberte-de-culte-le-rapport-reformateur-de-la-presidence/>

<sup>17</sup> Human capital development and equality for men and women have traditionally been high on the agenda of both citizens and the Tunisian government.

<sup>18</sup> Ministry of Development, Investment and International Cooperation, 2016.

24 age group) increased to 96.8%. The overall educational attainment rates of the active population also show a positive trend. The share of low-educated individuals decreased to 63% in 2019 (66.0% in 2010). Higher education levels improved, going from 12.6% in 2010 to 16.4% in 2019, while medium-level education, including VET, remained stable at around 20.5% (21.5% in 2010).

Gross enrolment rates are high, with 78.9% attending upper secondary level in 2016<sup>19</sup> and 24.6% (aged 30–34) in continuing studies at tertiary level (2016 data), up from 19% in 2010. However, the share of vocational students in secondary education is very low and decreased to 9.1% in 2016 (from 13.9% before the revolution in 2011), confirming the lack of attractiveness of VET, especially for girls (6.2%). The perception of second-chance education leading to jobs with a low social status and a lack of pathways between VET and higher education are among the main reasons for this. Poorer security conditions after the revolution are also mentioned in policy debates as a reason for declining enrolment, especially in the case of girls.

The quality of education is a growing concern in Tunisia. Results from the OECD-led Programme for International Student Assessment (PISA) in 2015 showed a worrying decline in reading capacity: 71.6% of participants under-achieved – a figure much worse than the 50.2% recorded in 2009 (the EU average was 19.7% in 2016). In science, under-achievement increased to 65.9%, while in mathematics, 74.8% of participants were considered to be low performers, compared with 73.6% in 2009. This compares with EU rates of 22.2% and 20.6% for science and mathematics, respectively, in 2016. The poor quality of education at primary and secondary levels is a key challenge in Tunisia; it is at the heart of problems in the education system and, in a broader sense, in the establishment of a knowledge society. The main challenges include weak selection mechanisms for teachers, their continuing training<sup>20</sup> and poor school conditions, especially in disadvantaged regions.

During the Covid-19 lockdown of schools, the Ministry of Education responded by organising digital and online learning and arranged for lessons to be broadcast on TV for general education. For various reasons, including complexity around work-based learning, VET providers have not been able to offer online training during this period<sup>21</sup>. This puts considerable pressure on the 2020–2021 school year, in terms of catching up on lost school time.

## 2.2 Education and training policy and institutional setting

Faced with deteriorating quality standards and high unemployment rates among young graduates, the government is looking to overhaul the education and vocational training system with a series of reform measures that could significantly change the face of Tunisia's education system in the coming years.

Governance of the education and training system in Tunisia is spread over three different ministries and is effectively implemented by the Ministry of Education, the Ministry of Higher Education and Scientific Research and the new Ministry of Youth, Sports and Employability (MJSIP), which is now responsible for VET. Each ministry has developed a structured approach to tackling the main problems

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<sup>19</sup> <http://uis.unesco.org/en/country/tn>

<sup>20</sup> The ETF conducted a survey of teachers and instructors in 2018.

<sup>21</sup> ETF, 'Mapping Covid-19: the overview' – <https://www.etf.europa.eu/en/news-and-events/news/mapping-covid-19-overview>



and receives a dedicated state budget to implement actions within the context of the National Development Plan 2016–2020<sup>22</sup>.

The aim of the Strategic Plan for the Education Sector 2016–2020 is to revamp 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 most pressing challenges currently facing the country at both basic and secondary levels, in particular high dropout rates, a lack of infrastructure and 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.

The management of VET provision is highly fragmented in Tunisia. Although the MJSIP is the main governing authority of the vocational training system, many agencies are involved in VET provision. Training is provided by several training centres managed by these agencies, each of which has a reporting line to a different ministry, including the MJSIP (136 centres), Ministry of Tourism (eight centres), Ministry of Agriculture (39 centres), Ministry of Health (18 centres) and the army (12 centres)<sup>23</sup>. In 2013, a self-assessment exercise was carried out within the framework of the VET reform strategy. It identified a number of weaknesses of the VET system, including a lack of harmonisation in terms of management; a lack of clear vision for reform; and, in terms of training delivery, the weak capacity of the VET system to adapt training to the qualitative and quantitative needs of the productive sectors of the economy, as well as to respond to the training needs of individuals. The absence of skills anticipation mechanisms, among other factors, is acknowledged as a root cause of this<sup>24</sup>

As an attempt to remedy the challenges facing VET, an ambitious VET reform strategy was launched for the period 2016–2020. This strategy was organised around a framework of 14 ambitious projects coordinated under the umbrella of a project management unit. According to this strategy, the main objectives for VET include: increasing the attractiveness of VET; supporting the professional development of trainers; involving regional stakeholders; improving data collection and analysis, and enhancing the monitoring and evaluation function; and developing entrepreneurial mind-sets across the VET system. Though the implementation period has formally expired, the VET reform strategy is still relevant. Whether or not it is to be continued has yet to be confirmed by the newly established MJSIP.

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<sup>22</sup> Within the framework of the National Development Plan 2016–2020, special attention was given to an integrated governance approach at the top ministerial level of education, vocational training and higher education to better promote human capital development in a context of mutually reinforcing initiatives and lifelong learning. A new commission for human capital development, composed of representatives of all three ministries responsible for education and training, was set up, though its effectiveness has yet to be determined.

<sup>23</sup> In addition, private training centres operate in Tunisia (the ILO refers to more than 2,700 centres, while ONEQ refers to 189 accredited and 935 non-accredited centres for 2016/17). There is also a number of centres responsible for instructor training and training engineering (CENAFFIF), continuous education and agricultural pedagogy and other disciplines (ILO/Ministry of Industry and Commerce, 'Compétences pour le commerce et la diversification économique (STRED): Cas du secteur de l'agroalimentaire', 2016).

<sup>24</sup> MFPE, 'Réforme du dispositif national de la formation professionnelle. Document d'orientation et plan d'opérations 2014–2018', 2013.

The key elements for an efficient VET system in Tunisia are in place: formalised policies on social dialogue, a training levy and work-based learning legislation. However, the VET system is not functioning at its full potential. Implementation of the 14 projects covered by the VET reform strategy is proceeding slowly, given the limited human and material resources available. Although the Tunisian authorities have taken real ownership of VET reform and the social partners have provided support, most of the projects have, so far, been funded by technical and financial partners, who have supported the capacity-building of the social partners in the area of education and training. In addition, there has been political volatility (new ministers have been appointed every year since the revolution), which, in the past, has led to sudden reprioritisation or retraction of earlier decisions. This risk is even more acute now, with a new ministry taking over responsibility for VET<sup>25</sup>.

Although overall implementation is slow, progress has been made on several elements of VET reform. In line with the new constitution adopted in 2014, the gradual decentralisation of VET functions is ongoing. This is an innovative approach to addressing youth employability by managing the quality and relevance of VET supply at local level. In 2019, a new decree was adopted giving increased independence to VET centres in terms of management and functioning, and in the setting up of partnership committees, but it remains to be worked out how it will be implemented<sup>26</sup>.

Building on previous experience gained by the European Training Foundation and other actors, implementation of the EU-funded IRADA programme (regional initiative to support sustainable economic development, worth EUR 32 million) began in 2018. In 2019, IRADA, the National Observatory for Employment and Qualifications (ONEQ) and the ETF piloted the Torino Process assessment in eight governorates, with the aim of reinforcing regional multi-stakeholder platforms to steer human capital development according to local labour-market needs. As one of its first actions, IRADA is also revamping the National Qualifications Framework, using technical assistance. More transparent and 'portable' qualifications would help professional and geographic mobility within the country and abroad.

In contrast to initial education, lifelong learning opportunities are under-developed, with only 1.3% of the active population (aged 25–64) participating in adult education and training. Despite structural reforms and the introduction of financing tools such as a training levy, continuing vocational education and training (CVET) remains weak in Tunisia. Red tape and complex application processes are the main reasons for the under-utilisation of funds (only 10% of the funds are used for CVET). There are opportunities to expanding upskilling and reskilling (including a role for VET), but policies have yet to be formulated. Discussions are under way on how to simplify the use of existing funding mechanisms to improve access to lifelong learning options.

In 2019, the VET ministry made significant efforts to map out ongoing donor support programmes to improve coordination. This exercise could be further expanded to track the efficient use of financial and human resources. This approach should help identify funding gaps, facilitate a division of labour among technical and financial partners, and provide a clear road map for supporting systemic VET reform.

Various uncoordinated initiatives are currently aimed at boosting the relevance of training and increasing employability. A EUR 144 million project, co-financed by a loan from the African

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<sup>25</sup> <https://www.businessnews.com.tn/le-ministere-de-la-formation-professionnelle-denonce-son-rattaement-au-ministere-de-la-jeunesse,520,101514,3>

<sup>26</sup> Governmental decree No 2019 802, dated 15 August 2019.

Development Bank, is focused on upgrading technical, technological and digital skills. GIZ (the German development agency) and other agencies support various centres of excellence through sectoral associations. AFD (the French development agency), in collaboration with the EU, is supporting VET centres and several employment pools around the country within the EUR 27 million PAFIP (Programme d'Appui à la Formation et à l'Insertion Professionnelle), which supports training and work placements. The ILO is implementing a number of projects in support of enhancing VET and employment. UK Aid, through the United Nations Children's Fund (UNICEF), is investing GBP 5 million to support the enhancement of second-chance education. With support from the Swiss Agency for Development and Cooperation (SDC), the non-governmental organisation Swiss Contact is implementing a programme to improve the employability of young people and the quality, relevance and attractiveness of CVET.

## 3. LABOUR MARKET AND EMPLOYMENT

### 3.1 Trends and challenges

Lack of quality employment, weak job creation and high unemployment, especially among young people (graduates and females) remain concerns for the Tunisian authorities, as protesters organise regular demonstrations in Tunis and elsewhere in the country to demand more jobs. The full impact of Covid-19 is yet to be understood, but, in Tunisia, it is an extra burden on top of an already underperforming labour market.

Labour-market participation remains very weak, with an activity rate of only 46.9% in 2019 and a particularly wide gender gap (26.6% activity rate for women compared with 68.0% for men). Unemployment continues to be a huge challenge, with 15.3% of the active population out of work in 2019, (up from 13.0% in 2010). This applies to both men (12.3% in 2019 versus 10.9% in 2010) and women (22.4% in 2019 versus 18.9% in 2010), although the latter are affected to a greater extent. Geography also affects unemployment trends and significant differences exist between the regions: the unemployment rate ranges from 9.9% in the centre and east of the country to 26.2% in the south-west<sup>27</sup>. According to research conducted by the ILO<sup>28</sup>, the gender gap is driven by age and region. Differences between young women and young men are small in dynamic urban areas, but wider in the less dynamic regions and in rural areas. Young women living in the northern or central interior areas are more vulnerable to unemployment and those living in southern areas are more often classified as being outside the labour market.

Concerns about the skills mismatch of the workforce are increasing. High unemployment rates coexist with unfilled job vacancies, as demonstrated in a survey on labour market and skills dynamics and employment policies conducted by the ETF in 2018–2019 to better understand labour-market trends and skills mismatches. The study underlines the need to revisit the value chains, improve the business environment and move towards a better-performing private sector to allow for better harmonisation between labour demand and supply<sup>29</sup>.

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<sup>27</sup> European Training Foundation (ETF), *Torino Process Report*, 2016.

<sup>28</sup> International Labour Organisation (ILO), *Labour market entry in Tunisia: The gender gap*, ILO, Geneva, 2015.

<sup>29</sup> <https://www.etf.europa.eu/en/publications-and-resources/publications/marche-du-travail-dynamique-des-competences-et-politiques>

Young people are more affected by unemployment than the adult population. The unemployment rate for those aged 15–24 was 34.4% in 2019, indicating difficulties for both men and women equally, while, in 2010, there was a 5% gender gap, with 27.8% of young men and 32.7% young women facing challenges in accessing the labour market. The proportion of young people not in employment, education or training (NEET) is increasing every year, reaching 33% in 2019. Early school-leaving also remains a major issue, as it concerns more than half of those in the 18–24 age group, reaching 51.6% in 2016 (down from 54.9% in 2013). So far, there has been no specific analysis of what is driving this situation.

Graduate unemployment is a prominent feature of the Tunisian labour market. In 2019, 26.9% of Tunisians with a high educational attainment were unemployed versus only 9.9% of individuals with a low attainment. The main factor underlying this phenomenon is the low demand for (quality) skilled labour and employers' preferences for low-wage and low-skilled labour in light of the low technological level of most SMEs.

A recent tracer study conducted by the ONEQ among VET graduates of 2012 paints a slightly better picture of the VET path, with two thirds of individuals in employment four years after their graduation. Overall, 29.7% of VET graduates remain unemployed, though there is a large gender discrepancy: 45.5% of female graduates are unemployed compared with 21.7% male graduates. The low quality of jobs created by the national economy, often within the informal sector, creates frustration among young graduates, who frequently have tried and failed to set up their own project, or prefer to remain unemployed while waiting for formal and decent jobs<sup>30</sup>. The situation is changing in the services sector, where the requirement for higher skills might also lead to an improvement in the quality of the jobs<sup>31</sup>.

Services accounted for the largest share of employment (51.9%) in 2019, followed by industry (34.4%) and agriculture (13.7%). Meanwhile, after years of decline, the tourism sector had been picking up, providing a substantial number of jobs (13–14% of direct and indirect jobs, according to some sources)<sup>32</sup>. As one of the sectors most affected by Covid-19, however, a significant impact can be expected on the overall jobs market in Tunisia. Overall, the Tunisian private sector has not been particularly dynamic over the past few years. This is certainly the case in terms of job creation: 86% of companies established between 2000 and 2015 stated that they had not recruited a single employee. The public sector's capacity to absorb employment has also reached its limit, with 650,000 public servants, or 22.8% of the labour force (2012). Nevertheless, it is still very attractive to young people, as it provides safe and (relatively) well-paid employment<sup>33</sup>.

Self-employment accounts for around a quarter of overall employment (26.3% in 2019), down from 31.4% in 2010. Informality is also widespread (according to some sources, it accounts for 50% of employment) and hinders progress towards quality and decent jobs. According to various sources, such as the IMF, the informal sector accounts for one third of GDP, while the OCDE says it is attracting 41.5% of the active population (2018) into often precarious jobs, long working hours, low

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<sup>30</sup> ONEQ/MFPE, *L'insertion des diplômés du dispositif national de la formation professionnelle dans le marché de l'emploi. Rapport d'analyse*, 2019.

<sup>31</sup> For example, telecommunications, banking, insurance, health and education.

<sup>32</sup> <https://www.tresor.economie.gouv.fr/Articles/2018/01/22/le-secteur-du-tourisme-en-tunisie-janvier-2018>

<sup>33</sup> Ministry of Development, Investment and International Cooperation (MDICI)/UNDP, *Etude stratégique sur l'Economie Sociale et Solidaire en Tunisie*, 2017.

incomes (including unpaid family workers, most of whom are female), a lack of social protection and, ultimately, a devaluation of human capital<sup>34</sup>.

### 3.2 Employment policy and institutional setting

Responsibility for employment issues has now been integrated into the MJSIP. 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, since 2018, a labour-market diagnostic study has been 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 2020 to 2030.

The tripartite dialogue introduced by the *contrat social* between the state, UTICA, 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.

Tunisia has a tradition of active labour market programmes (ALMPs). Following the revolution, several new initiatives were introduced in 2012<sup>35</sup>. 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 is responsible for implementing ALMPs. The National Agency for Employment and Independent Work (ANETI) is the main public, non-administrative body attached to the MJSIP. 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, constitutes one of the main challenges it faces.

Encouraging entrepreneurship and supporting start-up businesses are currently priorities for the government. To this end, in December 2018 Tunisia launched the National Entrepreneurship Strategy (SNET), which was developed with the support of the UNDP. Small and medium-sized enterprises (SMEs) have been suffering significantly from the impact of Covid-19; a study by the l'Institut Arabe des Chefs d'Entreprises (IACE) 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 IRADA and PAFIP, have reallocated funding to support SMEs and young entrepreneurs with a focus on saving jobs.

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<sup>34</sup> <http://www.oecd.org/fr/economie/etudes/Tunisia-2018-OCDE-etudes-economiques-synthese.pdf>

<sup>35</sup> Decree No 2012-2369 of 16 October 2012 'fixant les programmes du Fonds national de l'emploi, les conditions et les modalités de leur bénéfice' (establishing the programmes of the national employment fund, the terms and conditions of their benefit).

There is an increasing awareness of the need to address the issue of NEETs and school dropouts, given the additional risks of social instability and possible radicalisation. In this regard, the Tunisian government and UNICEF are implementing a programme of second-chance education for early school-leavers with the support of a GBP 5 million grant from the UK. With VET having been integrated into the ministry responsible for youth, there appears to be a window of opportunity to focus more attention on this pressing issue.

Initial statistics indicate that unemployment went up during the Covid-19 lockdown. The national statistics institute INS, together with the World Bank, undertook a phone survey with more than 1,000 households in April–May 2020. The survey highlighted how the crisis has exacerbated an already fragile socioeconomic situation. More than a third of households – especially poor families in more remote areas – said they were having difficulties achieving food security. More than 60% of the interviewed families said they had felt the impact of the crisis, mostly due to loss of employment or the increase in food prices. More than half of the interviewees have not been able to work during the lockdown. The employment service ANETI has provided support to companies in difficulty and to beneficiaries of ongoing ALMPs.

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- [Mapping of Covid-19 impact on education and training](#)
- ETF Torino process assessment (yet to be published in the ETF website)
- NQF Inventory Country Page <https://openspace.etf.europa.eu/nqf-inventories>

# TUNISIA: STATISTICAL ANNEX

Annex includes annual data from 2010, 2015, 2018 and 2019 or the last available year.

	Indicator	2010	2015	2018	2019	
1	Total Population (000) <sup>(1)</sup>	10,635.2	11,179.9	11,565.2	11,694.7	
2	Relative size of youth (age group 15–24 and age in the denominator 15–64, %) <sup>(1) c</sup>	27.0	22.7	21.1	20.7	
3	GDP growth rate (%)	3.5	1.2	2.7	1.0	
4	GDP by sector (%)	Agriculture added value	7.5	10.3	10.4	M.D.
		Industry added value	29.0	25.0	22.7	M.D.
		Services added value	56.7	57.4	59.2	M.D.
5	Public expenditure on education (as % of GDP)	6.3	6.6	M.D.	M.D.	
6	Public expenditure on education (as % of total public expenditure)	24.8	22.6	M.D.	M.D.	
7	Adult literacy (%)	79.1	M.D.	M.D.	M.D.	
8	Educational attainment of adult population (aged 25–64 or 15+) (%) <sup>(2)</sup>	Low	66.0	64.6	64.1	63.0
		Medium	21.5	20.7	19.6	20.5
		High	12.6	14.7	16.2	16.4
9	Early leavers from education and training (aged 18–24) (%) <sup>(3)</sup>	Total	51.3	36.9	41.9	37.1
		Male	54.9	41.2	47.1	42.6
		Female	47.7	32.5	36.8	31.6
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	M.D.	M.D.	
12	Tertiary education attainment (aged 30–34) (%)	19.0	23.8	24.6(2016)	M.D.	
13	Participation in training/lifelong learning (aged 25–64) (%)	Total	1.8	1.3	M.D.	2.9
		Male	1.7	1.2	M.D.	2.8
		Female	1.9	1.5	M.D.	3.1
14	Low achievement in reading, mathematics and science – PISA (%)	Reading	50.2 (2009)	71.6	N.A.	N.A.
		Mathematics	73.6 (2009)	74.8	N.A.	N.A.
		Science	53.7 (2009)	65.9	N.A.	N.A.

	<b>Indicator</b>		<b>2010</b>	<b>2015</b>	<b>2018</b>	<b>2019</b>
15	Activity rate (aged 15+) (%)	Total	46.9	47.1	47.0	46.9
		Male	69.5	68.8	68.3	68.0
		Female	24.8	26.0	26.6	26.6
16	Inactivity rate (aged 15+) (%) <sup>(4)</sup>	Total	53.1	52.9	53.0	53.1
		Male	30.5	31.2	31.7	32.0
		Female	75.2	74.0	73.4	73.4
17	Employment rate (aged 15+) (%)	Total	40.8	39.9	39.8	39.7
		Male	61.9	60.3	59.8	59.6
		Female	20.1	20.3	20.6	20.6
18	Employment rate by educational attainment (% aged 15+) <sup>(2)</sup>	Low	9.3	43.4	37.1	36.9
		Medium	13.7	39.6	41	40.1
		High	22.9	23.2	48.9	50
19	Employment by sector (%) <sup>(5)</sup>	Agriculture	17.9	15.0	14.1	13.7
		Industry	32.9	32.8	32.8	34.4
		Services	49.2	52.2	53.1	51.9
20	Incidence of self-employment (%)		31.4	26.8	25.0	26.3
21	Incidence of vulnerable employment (%)		24.7	20.1	18.4	19.0
22	Unemployment rate (aged 15+) (%)	Total	13.0	15.2	15.4	15.3
		Male	10.9	12.4	12.5	12.3
		Female	18.9	22.2	22.7	22.4
23	Unemployment rate by educational attainment (aged 15+) (%) <sup>(6)</sup>	Low	9.3	8.8	9.7	9.9
		Medium	13.7	16.3	16.6	16.1
		High	22.9	26.8	28.3	26.9
24	Long-term unemployment rate (aged 15+) (%)		M.D.	M.D.	5.8 (2017)	M.D.
25	Youth unemployment rate (aged 15–24) (%) <sup>(7)</sup> <sup>(8)</sup>	Total	29.4	34.0	33.2	34.4
		Male	27.8	33.5	32.1	34.2
		Female	32.7	35.5	35.7	34.5
26	Proportion of people aged 15–24 not in employment, education or training (NEETs) (%)	Total	25.2	29.1	34.8	32.0
		Male	19.4	25.3	31.4	31.0
		Female	31.2	32.8	38.1	33.0



Last update: end of August 2020

**Sources:**

Indicators: 8, 9, 12, 13, 15, 16, 17, 18, 19 (2010, 2018, 2019), 20 (Year 2015, 2018, 2019), 21 (Year 2015, 2018, 2019), 22, 23, 24, 25, 26 – National Statistical Office of Tunisia (INS)

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

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

Indicators: 14 – OECD

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

**Notes:**

Labour-market data refers to second quarter of the year.

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

(2) Low: ISCED 0–2, includes no schooling; Medium: ISCED 3–4; High: ISCED 5–6 (from ISCED 97 classification).

(3) Provisional data, low reliability.

(4) Calculated.

(5) Totals do not add up to 100% because of those not classified in any economic activity

(6) 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).

(7) Data received second quarter of the year.

(8) Provisional data for 2015.

**Legend:**

C = calculated data

N.A. = Not Applicable

M.D. = Missing Data

## ANNEX: INDICATORS' DEFINITIONS

	Description	Definition
1	Total population (000)	The total population is estimated as the number of persons 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 U.S. dollars. 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 his/her 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 lower secondary education who were not in further education or training during the four weeks preceding the survey. Lower secondary education refers to ISCED 1997 levels 0–2 and 3C short (i.e. programmes lasting under two 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) by sex (%)	Participants in lifelong learning refers to persons aged 25–64 who stated that they received education or training in the four 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 persons. The inactive population consists of all persons 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 persons who are classified as neither employed nor unemployed.
17	Employment rate (aged 15+) (%)	The employment rate is calculated by dividing the number of employed persons by the population of the same age group. Employed persons are all persons who worked at least one

	Description	Definition
		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. Employed persons are all persons 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. 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 are 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.
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.
22	Unemployment rate (aged 15+) (%)	The unemployment rate represents unemployed persons as a percentage of the labour force. The labour force is the total number of people who are employed or unemployed. Unemployed persons 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 two weeks following the reference week); are actively seeking work, i.e. had taken specific steps in the four-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, three months).
23	Unemployment rate by educational attainment (aged 15+) (%)	The unemployment rate represents unemployed persons as a percentage of the labour force. The labour force is the total number of people who are employed or unemployed. Unemployed persons 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 two weeks following the reference week); are actively seeking work (had taken specific steps in the four-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, three 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

	Description	Definition
		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 persons aged 15–24 by the total population of the same age group.
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. 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. Data are 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.

## LIST OF ACRONYMS

AFD	Agence Française de Développement (French development agency)
ALMP	Active labour market programme
ANETI	National Agency for Employment and Independent Work
CNDS	National Council for Social Dialogue
CVET	Continuing vocational education and training
DCFTA	Deep and Comprehensive Free Trade Agreement
FTH	Tunisian Federation of Hotel Owners
GDP	Gross domestic product
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit
ICT	Information and communication technology
ILO	International Labour Organisation
IMF	International Monetary Fund
ISCED	International Standard Classification of Education
ISIC	International Standard Industrial Classification
MFPE	Réforme du dispositif national de la formation professionnelle
MJSIP	Ministry of Youth, Sports and Employability
NEET	Not in employment, education or training
OECD	Organisation for Economic Co-operation and Development
ONEQ	Observatory for Employment and Qualifications
PAFIP	Programme d'Appui à la Formation et à l'Insertion Professionnelle
PISA	Programme for International Student Assessment
SDC	Swiss Agency for Development and Cooperation
SME	Small and medium-sized enterprise
SNET	National entrepreneurship strategy
TND	Tunisian dinar (currency)
UGTT	Federation of trade unions
UNDP	United Nations Development Programme
UNICEF	United Nations Children's Fund
UTAP	Agriculture and fisheries union
UTICA	Employers' union
VET	Vocational education and training

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