



THE CONTRIBUTION OF HUMAN RESOURCES DEVELOPMENT TO MIGRATION POLICY IN TUNISIA



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DECEMBER 2007

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Foreword

In 2006 the European Training Foundation (ETF)¹ launched a pilot study on the links between migration, the education and training system and the labour market. Since knowledge related to the overall consequences of migration in relation to education, skills and labour markets is limited, the ETF research approach included desk research, fact-finding missions and field surveys in the four selected countries, namely Albania, Egypt, Moldova and Tunisia. Some of these countries are new sources of migration to the EU, and some are traditional sources.



For the Tunisian part of the study, a local company, Pro-Invest Tunisia, was contracted to carry out the field survey and first level of data analysis.

A fact-finding mission to Tunisia took place from 17 to 22 September 2006, and was carried out by an ETF team of experts who were assisted by an international expert, Professor Richard Black of Sussex University (UK), and by Mr Maurice Mezel, foreign affairs adviser, of the French Ministry of Employment, Labour and Social Cohesion. Some key national stakeholders in the Tunisian context were visited during the mission. They included the Ministry of Development and International Cooperation, the Agency for the Promotion of Industry, the Employers' Association, the Ministry of Social Affairs, Solidarity and Tunisians Living Abroad, the Tunisian Agency for Technical Cooperation (ATCT), the Ministry of

Employment, and some local offices of international organisations and/or entities such as the EC Delegation, the Canadian Embassy, the French National Agency for Foreigners and Migration (ANAEM), and the International Organization for Migration (IOM).

The data produced on potential and returning migrants were analysed by Chamseddine Ouerdiane and Ikbil Elloumi from Pro-Invest. The ETF Migration Team, composed of Professor Richard Black, Natalia Popova, Francesco Panzica, Jesús Alquézar and Ummuhan Bardak, drafted a report, and its findings were validated by national stakeholders during an event organised in Tunis on 22 October 2007.

¹ Established in 1990, the European Training Foundation (ETF) assists its 30 partner countries in developing high-quality systems for human resources development. Its role is to share expertise and advice on policies in education and training across regions and cultures. Working on behalf of the European Union, the ETF helps its partner countries to develop people's skills and knowledge to promote better living conditions, active citizenship and democratic societies that respect human rights and cultural diversity.

EXECUTIVE SUMMARY

The phenomenon of migration is an integral part of the development process. Development has an effect on migration, and migration in turn has an effect on development. History shows that the development process causes profound changes in a country's socioeconomic structure. It encourages the opening-up of these countries and their people to the outside world, and it is one of the main causes of population movements. In fact, a majority of the migrants' countries of origin are middle-income developing countries, and the migrants do not generally come from the poorest groups of their societies of origin.

Tunisia is still at a stage of development that does not offer sufficient opportunities for economic integration into society, but instead creates incentives to emigrate. In addition, trends towards urbanisation and an increase in the number of women entering the labour market will remain strong over the coming decades. Modernisation of agriculture and the restructuring of the industrial sector, implemented within the framework of structural adjustment programmes, have an impact by eliminating jobs. The Free Trade Agreement signed with the EU will further accelerate this process. All of these developments, which are considered necessary to guarantee economic development in the long term, will increase the propensity of part of the population to emigrate in the short term. It is only after a certain stage of economic expansion that development and improved living standards make emigration less advantageous and give the population the means to become economically integrated at home, thus acting as a brake on emigration.

The survey data presented in this report suggest that migration will continue to play a role in Tunisia in the short term. Over 63% of respondents aged 18–40 said they were thinking of leaving to live and work abroad. But if their actual ability to go abroad is taken into consideration, the percentage diminishes considerably, to 23.8%. The interest in emigration is particularly strong among younger people (under 30 years old), while 24.2% of returning migrants plan to emigrate again. The survey clearly demonstrates that the main push factors for migration are a desire to improve the standards of living of individuals and their families, and a lack of sufficient job opportunities. The overwhelming majority of potential migrants interviewed for this study expected to send remittances home to family members, and the vast majority of returnees confirm this tendency.

Although contributing to the immediate living expenses of relatives at home was almost always the use of remittances first mentioned by respondents, many potential migrants, and especially returning migrants, also reported that they hoped to use, or had some experience of using, remittances for other purposes, including the purchase of property and household items, and investment in businesses. Almost a quarter of the returning migrants who were interviewed appeared to have invested some of their savings in a business activity, and to have benefited from this in terms of employment when they returned. An aspiration to invest in business activities was not so prominent among potential migrants; this might be a reflection of the age of potential migrants, who had not yet formulated business plans, in even a notional way. It is also worth noting that there is no independent way of assessing the quality or significance of businesses that migrants have invested in.

In contrast to expectations regarding remittances, few of the returning migrants and potential migrants interviewed for this study had either received or expected to receive significant training or educational benefits from migrating abroad, either before they left or during their stay overseas. Nor had they received significant social benefits, such as pensions. However, a majority of returnees felt that they had benefited from the experience of migrating in less formal, non-monetary ways. In a ranking of the most popular destinations among potential migrants, France was first (50.9% of respondents), followed by Italy (17.6%) and Germany (5.8%). These figures are in line with official data on the present distribution of Tunisians abroad. In addition, 8.5% of respondents said they were most likely to go to Canada, and 2.5% to the United States. Interestingly enough, the Gulf States do not appear to be a preferred destination for many respondents; the Arab Emirates were cited as a destination by only 2.4% of potential migrants.

As a result of the considerable improvement of education levels among the Tunisian population in the last 30 years, and partly because of high levels of unemployment among graduates with a higher education, increasingly significant numbers of qualified workers are emigrating from Tunisia. Censuses in host countries² confirm a rise in the educational levels of Tunisian populations abroad,

² Recensement de la population de 1999, INSEE, France, July 2001.

which reflects in part the new types of emigration, including scientific, technological and business-oriented emigration.

Significant decreases in population growth and the fertility rate, combined with educational policies that aim to reach a post-secondary enrolment of 46% for 2010, will result in a decrease and/or stabilisation of the demand for primary and secondary education, and a pressing, rapid increase in the demand for higher education. Projections of the Ministry of Higher Education suggest that there will be an annual flow of almost 100 000 new graduates reaching the labour market each year. This trend is expected to become accentuated in 2016 and 2017, when unemployment rates of 21.6% and 26.1% respectively are expected in this particular segment of the population³. Many mechanisms (such as the Tunisian Solidarity Bank, 21-21 Funds, microcredit funds and business incubators) are being implemented to promote job creation and entrepreneurship. These mechanisms have proved to be efficient and should be strengthened.

With regard to education, survey findings show that those respondents who were more qualified were not significantly more likely to be thinking seriously about migration than those who were less qualified. However, among respondents who were thinking about migration, those with post-secondary and university qualifications were less likely to be thinking of moving to the EU. Instead, they were more likely to be considering other destinations, especially Canada or the United States. This may reflect the influence of the Canadian points system, in which a university education counts as an important factor in securing entry. Emigration may be orientated in part towards achievement of educational goals, and this is confirmed by the fact that 12.2% of potential migrants named education as one of their three main reasons to migrate. Respondents who had a higher level of education were more likely to be aware of official migration programmes and/or private companies that help people find work abroad.

With regard to employment, the survey shows that both casual workers and people earning lower salaries and working in less skilled jobs were more likely to report that they were thinking about migrating than respondents who were working in professional and managerial occupations. Surprisingly, the majority of high-level managers interviewed said they were thinking seriously of migrating. But, in general, the more comfortable the financial situation of the respondents, the less likely they were to say they were thinking of migrating. Not unsurprisingly, 95.6% of respondents thought that migration abroad would improve their financial situation.

Interestingly, those who were most sure of leaving had the least familiarity with official emigration programmes (85.2% were absolutely sure that they would migrate but were totally unaware of such programmes), while those who said it was very unlikely they would leave were better informed about the programmes. This might be explained by the fact that those respondents who were sure they would leave had already found another means of emigrating, and so they did not pay attention to such programmes, while those who were less certain of leaving thought that if they did leave, they would have to resort to official recruitment programmes and institutions.

Those who knew about a recruitment programme but did not intend to use it were asked why they would not use the programme. A total of 59.2% of those respondents said such programmes were corrupt, 22.4% said they were costly, and a further 28.5% did not feel such programmes were suitable for them. Just 18.4% of respondents said they felt they did not possess the qualifications required for taking part in such programmes. This suggests that the scope for developing 'managed migration' through official programmes may be limited by obstacles that go beyond a lack of appropriate skills among potential migrants.

Another dimension of the findings is relevant to expectations regarding migration. Nearly half (47.4%) of those working in Tunisia as unskilled workers expected to be employed as skilled workers when they moved abroad. This shows a high level of aspiration regarding overseas employment, but does not necessarily paint an accurate picture of the work that would actually be undertaken. The same trend is observed when data on expected employment abroad are related to educational level. Almost half of the potential migrants (48.9%) with a university diploma said they wanted to work abroad as middle or high-level managers, 11.1% said they wanted to work as professionals, and 21.2% said they wanted to work as skilled or unskilled workers. The remaining 18.8% said they did not know. In fact, data from the survey on returning migrants show that 51.8% of respondents worked as skilled workers, 29.9% as unskilled workers, 6.4% as professionals and just 10% as managers⁴.

³ Communiqué de l'Institut National des Statistiques, September 2006.

⁴ The remaining 1.9% did not answer this question.

The majority (72.1%) of returning migrants said that they had not received any further training while living abroad. However, those with a higher educational level were more likely to have received some training. The majority of those who received training received it from their employer, and that category was followed by those who pursued university studies. Just 7.1%, representing under 2% of the total sample, reported that they attended a course on 'integration'.

The management of migration from Tunisia currently involves a number of activities, including projects aimed at stemming potential migration, initiatives to channel certain types of migrants towards particular destinations, and attempts to promote the reintegration of returning migrants. All of these types of programmes have been touched on in this report, but none clearly presents a model of good practice that could be developed either in Tunisia or elsewhere.

Official return assistance programmes to help migrants wishing to return do not appear to be very important. Only 11.9% of respondents were aware of them, and only 24.0% of this group said that they benefited from them. This might be explained by the fact that few programmes actually exist at the European level, or in the Gulf States, to assist migrants to return.

As noted in section 1.3 of this report, among donor-driven programmes aimed at stemming migration pressure there exists a programme of the International Organization for Immigration (IOM) that focuses on the Kassarine region as an area of 'high emigration'. It was not within the scope of this study to evaluate this or other programmes, but two points are worth noting.

First, the assumption of this programme that development could reduce migration makes sense in the context of the study, in which it appears that much migration is motivated by economic factors, yet it is somewhat at odds with further evidence that it is not only less wealthy and less skilled people who are migrating. Moreover, this programme focuses on a particular region as an area with 'high emigration potential', but this study suggests that all regions have similar migration potential, with the exception of the coastal strip, where tourism appears to provide sufficient employment opportunities to reduce the demand for migration.

Second, the Tunisian government appears to have invested significantly in support services for migrants to assist both their placement abroad and their return and investments. However, very few of those interviewed for this study had heard of these services, and even those who had heard of them tended not to have a very positive view of their efficiency and relevance to their own migration projects. The exception appears to have been programmes designed to facilitate the migration of relatively skilled workers and professionals to the Gulf States and to Saudi Arabia. Those programmes appeared to have higher take-up rates and to have been more significant in guiding both migration and return. This experience is important in the field of managed labour migration, and its cost-effectiveness should be carefully assessed. A key component in managed labour migration schemes is pre-departure training, which needs to be readily available and accessible to potential migrants; it would enable migrants to use their skills fully and would avoid skill mismatches and skills wastage.

The fact that migration is generally assessed as a positive experience, in terms of both capital and skills accumulation, can represent an advantage in the local context. Ongoing work by the government has the aim of improving the use of remittances and savings and promoting skilled migration as part of initiatives to combat unemployment among graduates. This effort should be linked to overall improvement of the business environment and investment climate. The best way to encourage return is to offer a combination of sensible government policies and a vibrant economy at home. Providing support and/or incentives for returning migrants to start businesses in Tunisia should be given priority.

This would also require parallel investments in the education and training system and in labour market reforms to promote economic development. A better match between the outcomes of the education and training system and the demands of the world of labour is also necessary. The education and skills dimension is crucial to transforming migration into a win-win scenario for both Tunisia and receiving countries. Skill shortages and oversupply as a result of migration are difficult to quantify. Sectoral analyses need to be undertaken to ensure that the education system is better linked with the demands of the local, regional and international labour markets.

It is important to have an informed and evidence-based debate among policymakers on how the education and skills of migrants can be turned into an advantage for both potential and returned migrants. This issue becomes even more relevant regarding the new flows of migration towards Europe, in which education level does not match expectations in terms of jobs for migrants, and young migrants in particular. This implies that information on the education and/or skill levels of migrants

should be collected on a regular basis to avoid skill mismatches in both the domestic and international labour markets.

Improving education and training systems in terms of relevance and quality is a concern for both public stakeholders and the private sector, and it is a priority for future actions. Efforts are being undertaken by the government, with the support of donors, to reform the education and training system. This reform is needed to equip Tunisia with a labour force that can meet the objectives of socioeconomic development and competitiveness set by the Tunisian government. From the perspective of migration, improving the quality and relevance of the education system and filling in skills gaps is equally crucial, particularly in relation to the competition in international markets.

1 INTRODUCTION

1.1 Characteristics of migration flows

Tunisia has historically been an important provider of labour for Europe, particularly during the second half of the 20th century. The country's status as a former French colony, in addition to Europe's need for a labour force for reconstruction after the Second World War and the demand for semi-qualified labour during Western Europe's strong economic growth in the 1960s and 1970s, ensured that emigration increased substantially, to the point at which it is an important source of income for the Tunisian economy.

More recently, partly as a result of the considerable improvement in the levels of education of the Tunisian population over the past 30 years, and partly because of high levels of unemployment among higher education graduates, increasingly significant numbers of qualified workers have emigrated from Tunisia, not only towards Europe but also towards the Gulf States and North America.

Tunisia is a country of out-migration, but it is also gradually becoming a transit country for migrants from Sub-Saharan Africa and other Maghreb countries. The development of the Tunisian economy has also made the country a destination for some of these transit migrants.

Migration flows and destinations

According to the Ministry of Foreign Affairs, in 2005 it was estimated that Tunisian migration involved 933 944 persons. The estimates are based on consular registers of Tunisian citizens resident abroad⁵. The registers include people who are citizens of the host country and who hold dual nationality, as well as second-, third- and even fourth-generation migrants who were born abroad. According to the same data source, the average annual growth rate of the Tunisian community living abroad was 3.7% per annum over the past 10 years. The net rate of migration⁶ was -0.5% in 2005, compared to -0.7% in 2000.

Figures on the total number of Tunisian migrants vary. For example, in the Global Migrant Origin Database⁷ the number of Tunisians living in other countries is recorded as 384 643. Tunisian sources tend to give higher numbers than the host country sources; according to French statistics only 150 000 Tunisians live in France, while Tunisian sources report 490 000. According to the Euro-Mediterranean Consortium for Applied Research on International Migration (CARIM)⁸, the number of Tunisians abroad totals more than 843 000 (see Table 1).

⁵ Consulates provide special identification cards called *Cartes Consulaires* to Tunisian citizens who have legal status in the host country, to allow to them to benefit from some of the advantages reserved for migrants when they return on visits to Tunisia. There are no requirements for obtaining this card that are relative to the country of citizenship and/or country of birth, and for this reason the figures tend to be higher than those of other sources.

⁶ Net migration rate: Ratio of the difference between the number of in-migrants and out-migrants from a particular area during a specified period to the average population of that area during the period considered. (United Nations Definition, available at: <http://www.un.org/esa/sustdev/natlinfo/indicators/indisd/english/chapt5e.htm>)

⁷ See http://www.migrationdrc.org/research/typesofmigration/global_migrant_origin_database.html. Figures are based on 2001 national Census.

⁸ Fargues, P., ed. (2005), *Mediterranean migration 2005 report*, Tunisia section, pp. 293–321, CARIM Research Reports, European University Institute, Florence.

Table 1. Distribution of Tunisians abroad (by region)

Europe	701 660
France	493 028
Italy	101 042
Germany	53 925
Maghreb	78 110
Libya	60 023
Algeria	13 554
Other Arab countries	38 816
Africa	1 149
Asia	669
America and Oceania	22 800
TOTAL	843 204

Source: www.carim.org

The differences are probably a result of the double citizenship of some Tunisian migrants and the different definitions used in different countries. There is a need to collect on a regular basis more reliable migration data based on commonly agreed definitions.

It is estimated that Europe absorbs 83% of Tunisian migration⁹, and 58.5% of Tunisian migrants live in France. Tunisian migrants in France generally have academic qualifications and relatively high income levels, and they benefit from dual citizenship. They tend to remain permanently in France and to pay visits home for holidays.

Overall, 20% of migrants went to Europe to pursue studies and 9%, mainly women, for family reunification. There is also anecdotal evidence that an increasing number of 'educated females', mainly those from urban areas, want to migrate on their own without being linked to male relatives. However, more research is needed to prove this trend scientifically.

Reasons for migration and the socio-demographic profile of Tunisian migrants

Migrants who have left Tunisia over the past five years come from regions with high levels of unemployment, usually in poor rural areas. Their main motivation for migrating is to save as much money as they can to help their families at home.

Two factors are changing the typical sociodemographic profile of Tunisian migration. The first is the fact that migration, which was initially dominated by the movement of men, has become more and more family-oriented since the 1980s. As a consequence, there are more women migrants and more Tunisians permanently residing in host countries. As a result of policies legalising family reunification, the proportion of men in the Tunisian community abroad decreased to just 54% in 2004, compared to more than 85% during the 1970s¹⁰.

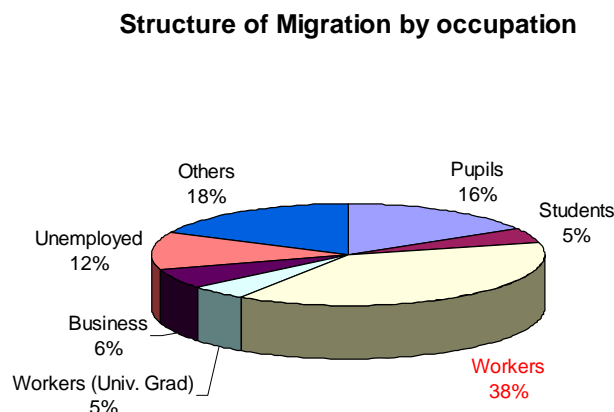
A second factor that has had a direct impact on migration, and that is confirmed by censuses in host countries¹¹, is a rise in the educational levels of the Tunisian population abroad. It is the result in part of new types of migration, including scientific, technological and business-oriented migration (see Figure 1).

⁹ Office des Tunisiens à l'étranger, 2005.

¹⁰ *Consular register*, Foreign Affairs Ministry, December 2005.

¹¹ *Recensement de la population de 1999*, INSEE, France, July 2001.

Figure 1. Composition of Tunisian migrant population by occupation



Source: Consular register, Foreign Affairs Ministry, December 2005

Labour market trends and education levels

Demographic background

According to the most recent Tunisian census, in 2004 the total population of the country was estimated at 9.93 million. Annual crude population growth is 1.12%, and the fertility rate is 2.04¹². Demographic indicators have changed in the past three decades. Life expectancy has risen from 50 years in 1970 to 73.5 years in 2005, partly reflecting a drop in infant mortality from 70 deaths/1 000 live births in 1970 to 20.3 deaths/1 000 live births in 2005¹³. However, the population still has a young age structure (about a third of the population is under 15 years old), and annual labour force growth is expected to be higher (about 2.5%) than population growth during the next decade¹⁴.

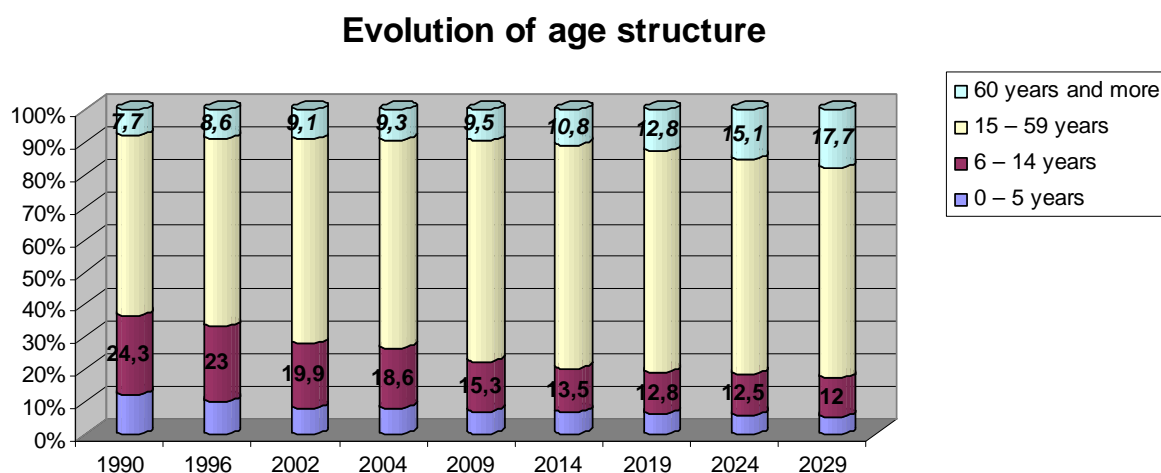
These demographic changes will have an important impact on the population structure. The projections of the National Statistics Institute for the year 2029 are for a population of about 11 million, for a life expectancy of 77 years, and for a doubling in the number of old people (see Figure 2).

¹² Euro-Mediterranean Statistics - http://epp.eurostat.ec.europa.eu/cache/ITY_OFFPUB/KS-DI-06-001/EN/KS-DI-06-001-EN.PDF

¹³ Euro-Mediterranean Statistics - http://epp.eurostat.ec.europa.eu/cache/ITY_OFFPUB/KS-DI-06-001/EN/KS-DI-06-001-EN.PDF

¹⁴ See Population Division of the Department of Economic and Social Affairs, United Nations Secretariat. World Population Prospects (<http://esa.un.org/unpp>).

Figure 2. Evolution of the age structure of the Tunisian population, 1990 – 2029



Source: Institut National des Statistiques

Economic background

Following a balance of payments crisis in 1986, Tunisia embarked on a Structural Adjustment Programme with the support of the International Monetary Fund. In the last decade, it has stabilised its macroeconomic framework and opted for free trade, price liberalisation and privatisation. The country has also seen a significant decrease in inflation and public deficits.

These economic reforms resulted in an improvement of the average annual growth rate of the gross domestic product (GDP), which rose from 2.8% per annum during the period 1982–1986 to 4.8% per annum in 1991–2004. In 2005, Tunisia had a GDP of TND37 billion (almost EUR24 billion) and a real GDP growth rate of 4.2%. The country has also diversified its economy by modernising the agricultural and manufacturing sectors. Currently, agriculture accounts for 13% of GDP, industry for 32%, and services for 55%. The main industrial subsectors are textiles, footwear, agro-industry, and electromechanics, while the main service subsectors are tourism and information and computing technology (ICT).

In terms of the employment share by sector, over recent decades employment in agriculture has fallen from 50% to 18.7% in 2005. The share of employment in the manufacturing sector (including industry, mining, energy and public enterprises and works) has been stable at 32.3%. But there have been significant structural changes within the manufacturing sector; the textiles and clothing subsectors have been the most important employers, but their share of total employment has decreased and is likely to decrease further as a result of growing competition. The service sectors (including trade, restaurants, hotels, transport, communications and finance) have been the main contributors to employment creation, with a 49% share of total employment¹⁵. The informal economy plays a substantial role in job creation, accounting for an estimated 38% of GDP¹⁶ and 50% of non-agricultural employment¹⁷.

The economic policy adopted by the Tunisian government has created a positive environment for foreign direct investments, which in 2006 amounted to TND4 403 million, involving 2 800 enterprises and employment of 273 600 workers.

Foreign trade is conducted mainly with EU member countries, especially France, Italy, Germany and Spain. The principal export commodities are textiles, mechanical goods, phosphates, chemicals and

¹⁵ Source: INS 2006.

¹⁶ http://rru.worldbank.org/Documents/PapersLinks/informal_economy.pdf

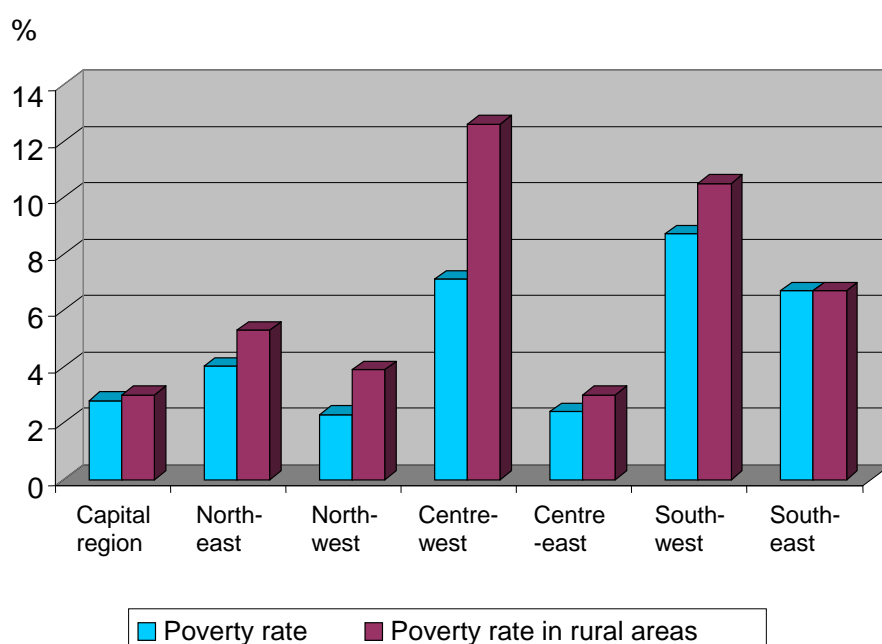
¹⁷ ILO (2002), *Women and men in the informal economy: a statistical picture*, page 17, Table 2.1.

agricultural products. The main imports are machinery and equipment, chemicals and agricultural products.

Social background

Education, health and gender development have always been considered the pillars of Tunisia's social policies. These policies, combined with economic growth, have had an important impact on poverty rates, which declined from 22% of the total population in 1970 to 4.2% in 2001¹⁸. Yet the poverty rate still remains high in rural areas, especially in the Centre West and South West Regions (see Figure 3), which have been traditional sources of migration.

Figure 3. Poverty rate by region



Source: Enquête nationale sur le budget, la consommation et le niveau de vie des ménages, Volume A, Institut National des Statistiques, 2000.

Unemployment, economic growth, poverty reduction, health sector reform and human resources development are some of the major challenges facing Tunisia in the next decade (2007–2016). The objectives of Tunisia's 11th Development Plan are to:

- significantly reduce unemployment (estimated at 14% in 2006) by achieving a real average annual GDP growth of a minimum of 8% a year;
- fight poverty in rural regions through decentralisation and investment in water resources management and rural development, and by encouraging local initiatives;
- implement health sector reform by developing a new health insurance policy;
- introduce economic reforms to enhance competitiveness and foster foreign investment¹⁹;

¹⁸ Official data, according to 'Enquête nationale sur le budget, la consommation et le Niveau de vie des ménages', Vol. A, Institut National des Statistiques, 2000. The official poverty line is fixed at TND428/month/person. According to World Bank and IMF estimates, which are calculated differently, the poverty rate is 7%.

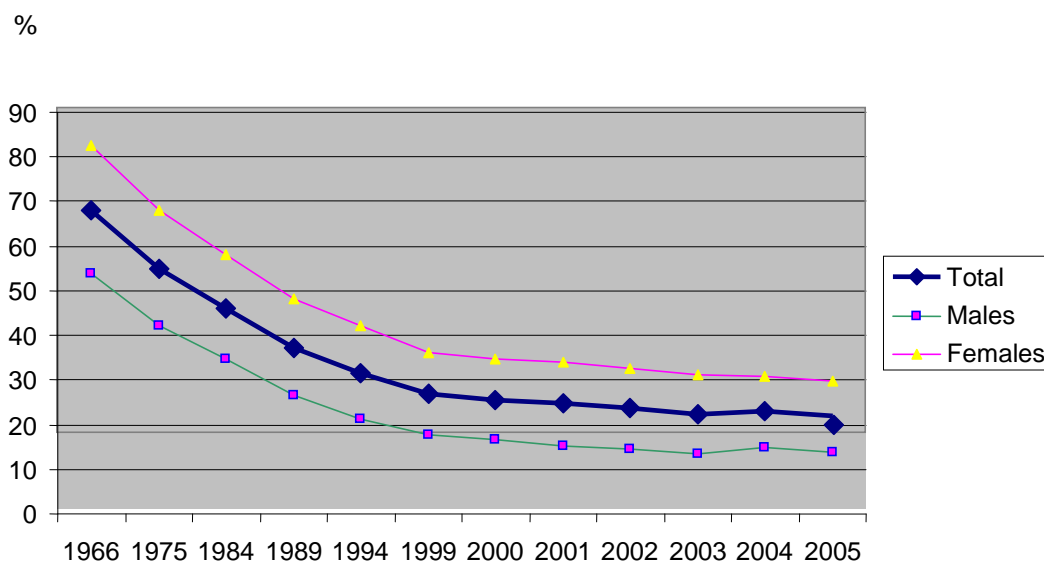
¹⁹ For example, Mise à Niveau de la Formation Professionnelle et de l' Emploi (MANFORME).

- foster human capital development by investing in a knowledge society.

Education and training

Tunisia invests heavily in education, which accounted for 21% of public expenditure and 6.4% of GDP in 2005. This policy has had a direct positive impact on the illiteracy rate among the Tunisian population, which decreased from 68% during the 1960s to 21% in 2005 (see Figure 4).

Figure 4. Illiteracy rates among the population aged 10 years and over, by sex

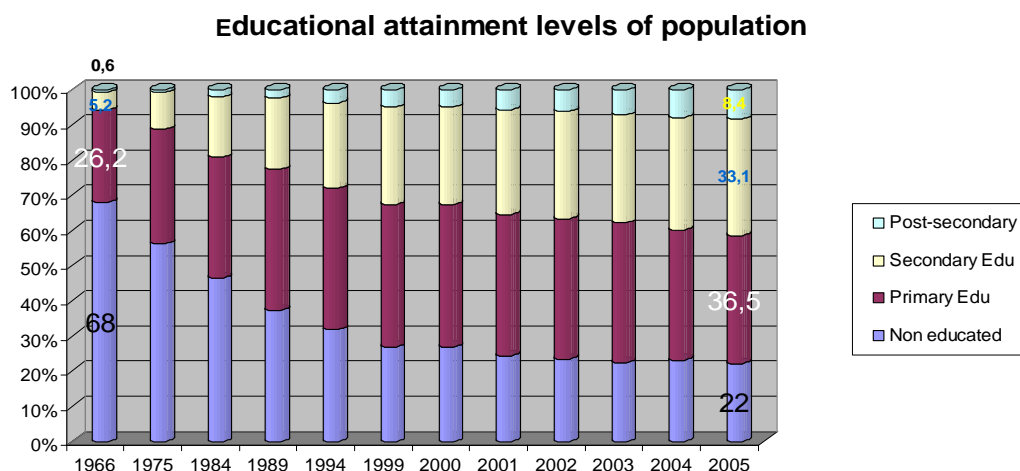


Source: Institut National des Statistiques

School enrolment is rising. In 2005, 99% of children aged 6 were enrolled in primary school and 75% of children aged 12 were enrolled in secondary school. These indicators are among the highest in Africa and the Middle East²⁰. And since the 1990s important efforts have been made to promote access to post-secondary education. In 2005, 28.6% of the population aged 19-24 was enrolled in institutions of higher education. These policies have helped to improve significantly the general level of education among the Tunisian population (see Figure 5).

²⁰ *Les indicateurs de l'éducation*, Ministère de l'Éducation et de la Formation, 2006.

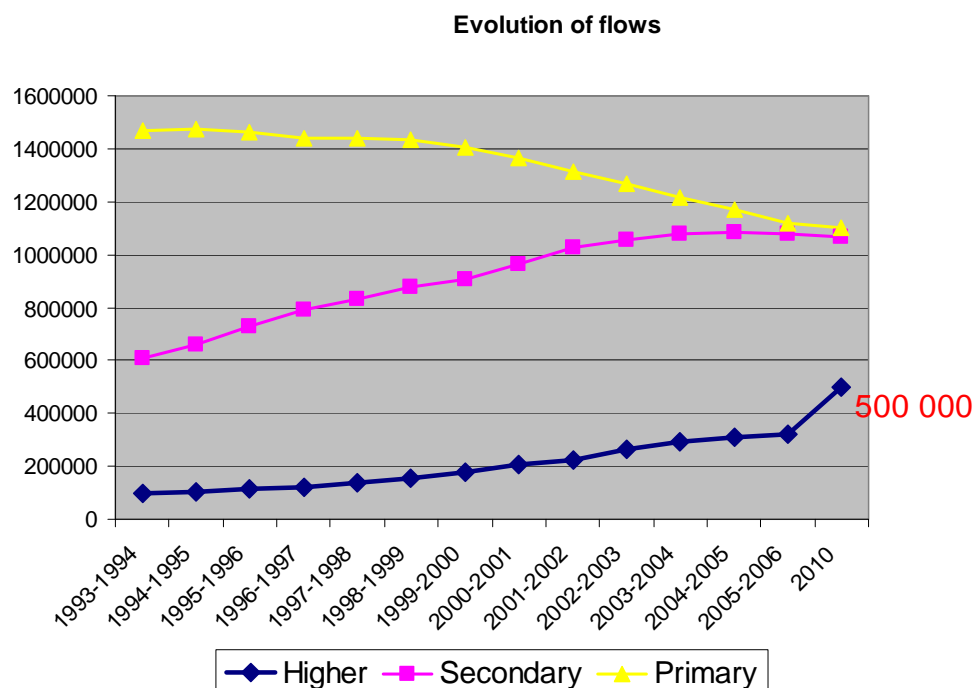
Figure 5. Evolution of educational attainment



Source: Institut National des Statistiques

As shown in Figure 6, important decreases in the population growth and the fertility rate, combined with higher education policies aiming to reach post-secondary enrolment of 46% by 2010, will result in a decrease and/or stabilisation of primary and secondary education demand and a pressing, rapid increase in the demand for higher education. Projections of the Ministry of Higher Education estimate that an annual flow of almost 100 000 new graduates will enter the labour market each year. The rapid increase in the number of graduates has been accompanied by qualitative interventions aimed at reinforcing the technical and scientific areas and improving employability.

Figure 6: Evolution of education flows, by level



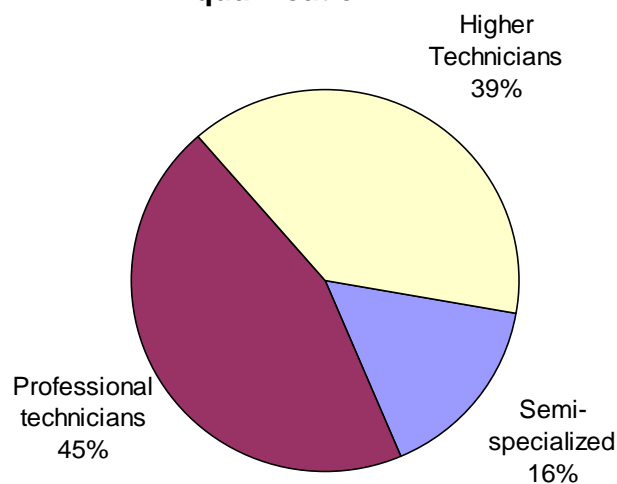
Source: Indicateurs de l'enseignement supérieur, Ministry of Higher Education, 2005

The vocational education and training (VET) system includes initial and continuing training²¹. The Ministry of Education manages the initial training, and it is mainly private centres that deliver continuing training. Initial vocational training is currently provided either entirely in the vocational centres, or by integrating school and work on the basis of specific conventions with enterprises, or through apprenticeship. The system of integrating school and work is becoming the dominant one and was used in training an estimated 70% of total trainees in 2007.

The total number of trainees in 2005 was 56 312. See Figure 7 for the distribution of formal VET graduates by level of qualification. Almost all economic sectors are covered. Training programmes are developed mainly on the basis of industry's needs (and are based on competency). It is estimated that non-formal vocational training reaches 49 180 individuals and provides trainees for semi-specialised occupations. Only 35% of the trainees are females.

Figure 7. Distribution of formal VET graduates by level of qualification

Distribution of formal VTE graduates by level of qualification



Source: Ministry of Education and Training, School statistics, 2003

In recent years, with the support of EU funds, the government has engaged in technical and vocational education reforms. However, the VET sector still faces many challenges.

Despite impressive achievements in education and training, equal access is still an issue. In 2003, Tunisian secondary enrolments in rural areas were as low as 19%, compared to 78% in Tunis. The repetition rate is about 16% in primary school and 16% in secondary school. With large-scale donor-funded programmes (such as *Mise à Niveau de la Formation Professionnelle et de l'Emploi* (MANFORME) to strengthen the links between vocational training and employment, progress has been made but the results need to be mainstreamed into the entire system.

The main reforms in general education relate to raising the quality of education (the training of trainers, decentralisation and programme reforms based on competency approaches), generalising the use of ICT, diversifying the training offer by introducing new technological fields, and reducing school drop-out rates, especially in rural areas. However, higher education remains the most important priority. The main objectives are to:

- raise the capacity to respond to rapidly increasing demand for higher education;
- raise the volume of post-secondary technical education;
- enhance quality and respond to industry's skills needs;

²¹ *Loi d'Orientation de la Formation Professionnelle*, No. 93-10 du 17 février 1993, amended by law No. 2001-15 of 30 January 2001.

- adhere to European and international standards in grading and qualification to facilitate international recognition of Tunisian skills and diplomas (in this context Tunisia has been working towards attaining observer status in the EU Bologna process);
- develop e-learning (in this context the Tunisian Virtual University has been created);
- foster research to promote linkages between universities and their socioeconomic environment and to prepare Tunisia to become a knowledge society.

Labour market trends

Since the mid 1990s, Tunisia has experienced important changes in its labour force as a result of the increase in the number of young people and women entering the labour market (creating demand for an additional 90 000 jobs in 2005). Unemployment among young graduates rose from 10.2% in 2004 to 14% in 2005. This trend is expected to increase further, in 2016 to 21.6% and in 2017 to 26.1% of unemployed graduates²². The unemployment rate among secondary school graduates is even higher (18%), and the unemployment rate of those with lower than secondary education is 14%. To improve this situation, some mechanisms have been implemented to promote job creation and entrepreneurship. They include the Tunisian Solidarity Bank, 21-21 Funds, microcredit funds and business incubators, but they have limited capacity and need to be strengthened.

In contrast to an increasing and better-educated labour supply, labour force participation and employment rates have been decreasing. An examination of employment by educational levels shows that the majority of workers (on average 60–65%) have primary education or less. The proportions in a pyramid of workers' qualifications in Tunisia show skill ratings of 60% low, 30% medium and 10% high, while corresponding figures for the EU were 20%, 60% and 20% respectively.

The problem of 'first entry' (the transition from school to work) is further complicated by two other features of the labour market: decreasing public sector employment and a large informal sector. With recent reforms, the share of public sector employment (both in administration and state-owned enterprises) has decreased from 25% to 13%. But the formal private sector has been weak in creating 'decent jobs', which are jobs with good working conditions and fair wages. It has been the informal sector, which constitutes 35% of non-agricultural employment in Tunisia that has absorbed most of the unskilled and low-skilled workers. The informal sector is the most important source of jobs for new entrants, and informalisation is concentrated in manufacturing. The proportion of informal workers with secondary education (12%) is low but not negligible. The highly precarious nature of jobs in the informal sector – characterised by a lack of social safety, low wages and long working hours – is in contrast to the high job security and social safety linked to the public and formal private sectors. Since half of the population is outside the social security system, family solidarity is the most solid social support system.

Structural labour market issues are particularly evident in the tourism, textile, ICT and service sectors, since there is a lack of an adequately trained labour force. The existing education system focuses on higher education, which is too theoretical, and this leads to skills shortages and mismatches in the private sector. The fact that young people are heavily affected by unemployment can have serious consequences for the country's economic development and can lead to increased emigration pressures.

1.3 Legislative framework and migration policies

Tunisian migration policies are guided by three axes of intervention:

- monitoring and support of Tunisians abroad;
- mobilisation of skilled people;
- remittances for development.

²² Communiqué de l'Institut National des Statistiques, September 2006.

Monitoring of the Tunisian community living abroad: Interventions are related to information programmes aimed at strengthening the national sentiment of Tunisians abroad, and to education programmes (on subjects such as the Arabic language, and cultural and religious themes).

Support to migrant communities: The government has created special offices (in embassies and consulates) for information and orientation in Tunisia and abroad. Special services are also provided for re-insertion of returning migrants.

Diaspora and remittances for development: Significant efforts are being made to identify and more effectively reach highly skilled Tunisians living abroad. The Ministry of Higher Education and Scientific Research has created a special unit for this purpose. In addition, activities have been organised by the Ministry of Industry and the relevant Tunisian investment agencies to inform migrants about investment opportunities in the country.

There are limited incentives and/or support schemes for Tunisian migrants who are interested in investing for business purposes at home. They include the following measures (FEMIP 2006 Annual Report)²³.

Tunisian migrants returning temporarily (for example, for holidays) are exempt from tax and customs duties on imported goods up to a value of TND1 000 a year if the goods are not considered to have a commercial character.

Tunisian residents abroad who return permanently to Tunisia enjoy a number of tax incentives on imported goods such as cars, up to a value of TND15 000.

Tunisian residents abroad who invest in businesses in their home country are exempt from customs duties for importing business-related material or cars (such advantages can be enjoyed only once in the lifetime of the migrant).

Key institutions involved in migration policy

The following institutions are in charge of implementing Tunisian migration policies.

Ministry of Social Affairs, Solidarity and Tunisians Living Abroad: This ministry is responsible for drafting and implementation of national migration policies, which cover four fields²⁴:

- social, providing social assistance to migrants abroad through the network of social attachés at Tunisian Consular Offices, negotiating social security agreements with the receiving countries, and following up on the social aspects of the Association Agreement with the EU;
- cultural, maintaining the links between migrants and their homeland, through activities such as language courses for migrants' children and cultural events;
- economic, facilitating the use of migrants' savings and remittances for business purposes;
- information, providing information on legal channels of migration.

The ministry has two institutions responsible for implementing the above policies.

Office des Tunisiens à l'Étranger (OTE)²⁵, which was created in 1988 to provide the government with relevant information and recommendations on designing policies for Tunisian migrants, and is responsible for monitoring the implementation of migration policies;

Caisse nationale de sécurité sociale (CNSS), which was established in 1960 and manages pension funds in Tunisia belonging to Tunisians living abroad, and deals with bilateral social security agreements with host countries regarding the provision of medical care.

L'Agence Tunisienne de Coopération Technique (ATCT): This was created in 1972 as a public institution with autonomous management and budget under the supervision of the Ministry of Development and International Cooperation. It was established to mobilise Tunisia's human and

²³ FEMIP, 2006 *annual report*. Available at: <http://www.eib.org/projects/publications/femip-2006-annual-report.htm>

²⁴ See <http://www.sicad.gov.tn/xml111/fr/ministerefr21.html>

²⁵ See www.ote.nat.tn

institutional resources and know-how to serve international development projects. It plays an important role in placing and promoting highly skilled Tunisian personnel abroad as needed, especially in the Gulf States²⁶.

The agency carries out the following activities:

- identifying, selecting and appointing Tunisian professionals and experts to work abroad according to the needs of neighbouring and partner countries and regional and international organisations;
- organising and managing career development training for foreign professionals;
- carrying out feasibility studies related to projects;
- promoting South-South and multilateral cooperation;
- recruiting professionals from Tunisian administration, from universities and from public and private companies, to work abroad.

The number of professionals working in developing countries and international organisations has increased from 1 000 in 1980 to about 9 100 at present. They work mainly in the sectors of education, higher education, health, agriculture and petroleum. The number of engineers and technicians working in the fields of electricity, mechanics, computer science and information technologies is also significant.

Ministry of Foreign Affairs: Using its network of embassies and consulates, the ministry centralises and diffuses information concerning and supporting Tunisian migration. With the collaboration of OTE, it also manages special service areas called *Espaces femme et 2ème Génération*, which focus on second-generation migrants and women. The ministry also negotiates migration management instruments with other countries to combat illegal migration. It has signed bilateral agreements with Austria, France, Greece and Italy on the re-admission of migrants, and has signed a general agreement with the EU. In response to Italy's and the EU's concern over the increase in illegal migration from the Tunisian coasts, it introduced a series of laws in 2004 providing for closer surveillance of vessels in order to detect illegal migration, and it has introduced more severe penalties for people-smuggling.

Ministry of Employment and Professional Insertion of Young People: The ministry has a special Directorate on Migration, which collects updated information on the skills required by host countries. It also provides information, advice and relevant training to potential migrants selected to participate in managed migration schemes. The most recent migration dossier managed by the ministry concerns migration to Italy under the quota system. In the past five years, more than 12 000 migrants have received assistance for legal migration to Italy.

The ministry receives support from the Agence Nationale pour l'Emploi et le Travail Indépendent (ANETI)²⁷ for the implementation of migration policies, including:

- organising all activities linked to the implementation of legal migration schemes;
- facilitating the reinsertion of returning migrants.

Agence de Promotion des Investissements Agricoles (APIA), Agence de Promotion de l'Industrie (API) and Agence de Promotion de l'Investissement Extérieur (APIE): These agencies promote investment in Tunisia, offering fiscal benefits and financial incentives for potential investors.

Donor-driven initiatives on migration

Two pilot projects on migration are currently being implemented by the IOM. The projects have been identified within the framework of a labour agreement signed by Italy and Tunisia.

Programme for promotion for development of emigration zones in Tunisia (PROCHE)

²⁶ See www.tunisia-skills.org.tn

²⁷ See <http://www.emploi.nat.tn/fo/Fr/global.php>

This programme is financed with the support of the province of Turin, Italy. The objective of the programme is to support local economic development through sustainable creation of jobs in the Kasserine region, which is an area with a strong potential for emigration and a high rate of unemployment. The project focuses on existing local skills in order to promote job creation and thus attenuate migratory pressure. Complementary activities are undertaken in Italy, and Tunisian migrants living in Italy are encouraged to invest in and establish microenterprises in order to revitalise the area. Young unemployed people and women benefit from training courses in the field of entrepreneurship and are supported in creating their own small businesses, mainly in tourism, agriculture and craft industry.

Capacity-building of Tunisian institutions and training of trainers for a better professional and socio-cultural integration of Tunisian potential migrants

Italian Cooperation (the Directorate General for Development Cooperation, a department of the Italian Ministry of Foreign Affairs) finances this project, which has the objective of strengthening Tunisian institutional capacity in managing migration by training Tunisian trainers in facilitating the integration of the Tunisian migrants in Italy. Training covers the Italian language, cultural orientation, labour and migration regulations and workers' rights.

2 SURVEY METHODOLOGY

The implementation of the survey included the following phases, using both qualitative and quantitative methods:

- preliminary desk research;
- fact-finding mission;
- field survey of potential and returning migrants;
- drafting of country migration profile.

Phase 1: Preliminary desk research

Phase 2: Fact-finding mission

Meetings were held with the main national stakeholders involved in migration issues.

Phase 3: Field survey of potential and returning migrants

The survey consisted of face-to-face interviews with 1 027 potential migrants and 1 002 returning migrants, based on two structured questionnaires. The questionnaires were developed by the ETF and an international expert, Professor Richard Black, director of the Sussex Centre for Migration Research (UK), and were finalised with the contribution of the local contractor Pro-Invest. The survey was carried out in November and December 2006.

In Tunisia, a two-stage cluster sample was selected. The first-stage clusters, which were chosen to represent the geographical diversity of the country, were the following governorates: Ariana, Beja, Ben Arous, Bizerte, Gabes, Gafsa, Jendouba, Kairouan, Kasserine, Kebili, Kef, Mahdia, Manouba, Medenine, Monastir, Nabeul, Sfax, Sidi Bouzid, Siliana, Sousse, Tozeur and Tunis. The second-stage clusters, which were chosen to represent the geographical diversity of the selected regions, were villages, communes or municipalities. The details of this cluster selection were agreed with the local service provider, so that both stages (selection of regions, and selection of villages, communes or municipalities) would include areas with high and low levels of development, areas with high and low levels of international migration, and both rural and urban areas.

The procedure for selecting individual interviewees varied for potential migration and for return migration.

Timing of interviews: The questionnaires were administered in a way that included people who were away from their place of work, i.e. outside regular working hours.

Potential migration survey

In the first step, the number of households to be contacted in each cluster locality was calculated to reflect the proportion of the population living in different regions and areas. For example, if 15% of the country's population lived in the capital city, 15% of interviews were conducted in the capital city. Similarly, if 50% of the country's population was rural, then 50% of the interviews were in rural areas. This method was used in an attempt to approximate a nationally representative sample survey.

On the basis of this selection, interviewers were given a total number of households in each locality to contact for the potential migration survey. The number of households was based on a process that was either random or systematically structured to eliminate any potential bias. For example, a series of 'routes' for interviewers were selected at random, and along them interviewers systematically selected households²⁸ (for example, by selecting every fifth household).

²⁸ The definition of a *household* for the purposes of this study is: 'those who live together and have communal arrangements concerning subsistence and other necessities of life, plus those who currently live elsewhere, but whose principal commitments are to the household, and who expect to rejoin (or be joined by) the household in the future'. Thus children or siblings who have moved away from the household can be considered part of the household, but only if, on return, they can confidently be expected to live again within the original household. Sending remittances is not a sufficient condition to be considered part of the household.

Members of the selected households were first asked screening questions to identify the presence of potential and returning migrants.

For the purpose of this survey, a returning migrant was defined as anyone who left the survey country at age 18 or over, who had lived and worked at least six months continuously abroad, and who had returned at least three months previously and within the past ten years, and who was then present and available for an interview.

Those who had returned within the previous three months, or more than ten years ago, were not asked about their experiences abroad.

If no returning migrant was present, the potential migration survey was administered to a single respondent in the household between the ages of 18 and 40. Respondents were selected on the following basis:

- if only one person aged 18–40 was present (i.e. available for interview), he/she was interviewed;
- if more than one other person aged 18–40 was present (i.e. available for interview), one individual was selected by choosing the person by month of birth in relation to the date of the interview, or by a similar random method;
- if birth months were not known, respondents were chosen by lot;
- if no one aged 18–40 was present or available for interview, then the interviewer moved on to the next household, asking the screening questions again, to find a respondent who was aged 18–40.

It was important to eliminate any source of bias in choosing a respondent to be interviewed; in other words, the respondent was not always the oldest person, for example, or the best-educated, or a man. In theory, once the 1 000 interviews were completed across the country, the proportion of men and women interviewed, and the proportion of respondents with different levels of education, would accurately reflect proportions in the country as a whole for the 18–40 age group.

Return migration survey

If the first screening question revealed that a return migrant was present, then both the potential migration survey and the return migration survey were used, and two individuals were interviewed in the household.

Only one returning migrant was interviewed per household. If more than one returning migrant was present, one person was selected, as indicated above.

If there was only one eligible respondent in the household, and that respondent was both a returnee and aged 18–40, the return migration survey was used, and the interview was counted towards the quota of 1 000 interviews for both the potential and returning migration surveys.

If no returning migrant was present in the screened household, an additional interview was sought with another returning migrant in the locality in order to meet the quota of return migration interviews.

General

The aim was to make the potential migration survey broadly representative of the young adult population (aged 18–40) as a whole. The purpose of this was to ensure that in interviewing potential migrants, there was a control sample comprising those in the same age group who were not actively seeking to migrate.

Margin of error: Assuming a simple random sampling, for a confidence level equal to 95% and $p=q=0.5$, Table 2 shows the margin of error for different numbers of answers²⁹.

²⁹ The results of a survey include a statistical margin of error caused by the sampling process. This margin varies according to three factors:

- the sample size – The greater the number of respondents to a question, the smaller the margin of error;

Table 2. Margin of error per number of answers

Number of answers	1,000	750	500	250	125	100	50
Margin of error	3.1%	3.6%	4.4%	6.2%	8.8%	9.8%	13.9%

In order to be included in the interviews, returning migrants had to be aged over 18 at the time of their last migration.

The contractor was asked to keep a record of the number of men and women interviewed in each category, and to outline a process to ensure adequate representation of women (or men) in each sample.

Difficulties encountered in the field

The local service provider tried to ensure that the proportion of men and women interviewed was representative of the targeted population. However, there was a gap between the number of male and female respondents; it is linked to the nature of the migration phenomenon in the Tunisian context. There is a widespread belief that migration concerns primarily the (male) head of household, or men in general. For that reason, men were more often the respondents to the survey.

For various reasons there was also some difficulty in comparing the educational levels of migrants in the surveys with the official data. For example, Table 3 shows that the data from the ETF surveys underestimates the number of people with low education and overestimates the number of highly educated people. To some extent, this is because of the age of the sample population. The Census also includes those who are aged 0–18 and who are mainly in primary or secondary schools.

Table 3. Comparison of education levels between Census and ETF survey

	Less than primary	Primary + post-primary	Secondary	Postsecondary+ University
Tunisia Census 2005 ³⁰	22	36.5	33.1	8.4
Survey 2006 - Returning	8	50.2	26.6	15.1
Survey 2006 - Potential	1.4	24.1	34.4	40.1

Phase 4: Analysis of the survey data and validation

The ETF team of experts, with the assistance of Professor Richard Black and Pro-Invest, drafted a report based on the results of the survey. The findings were presented in a validation conference on 22 October 2007 in Tunis, under the auspices of the Ministry of Social Affairs, Solidarity and Tunisians Living Abroad.

-
- the result itself – The closer the result approaches 50%, the wider the statistical margin will be. This is expressed by 'p=q=0.5'. It represents the higher margin of error, or its upper limit for the answer to a question;
 - the degree of confidence – In the social sciences, the most widely used degree of confidence is 95%.

³⁰ *Institut national des Statistiques*, 2005.

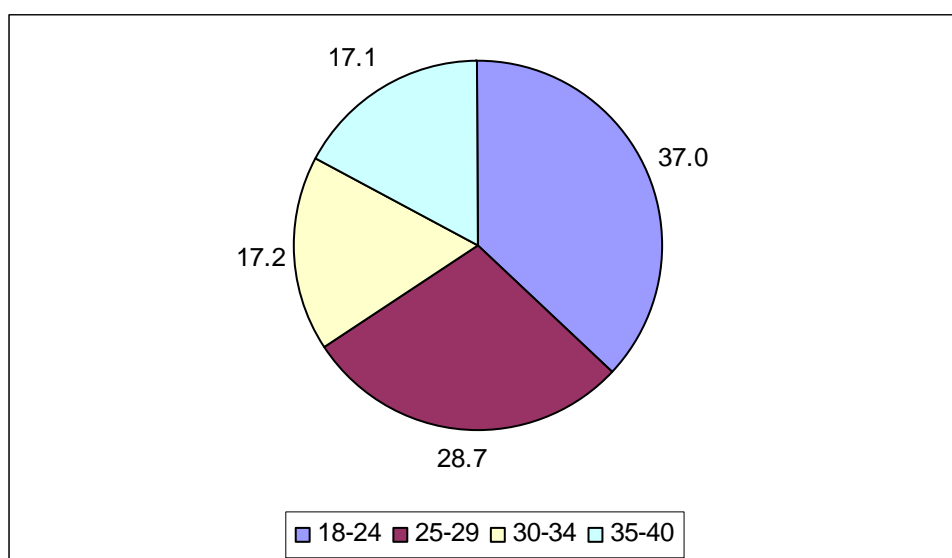
3 FINDINGS OF THE POTENTIAL MIGRANTS SURVEY

3.1 Socio-demographic and educational characteristics

Age and gender

The survey's sample group amounted to a total of 1 027 people, of whom 85.3% were men and 14.7% women. The average age of the sample group was 27.6 years. The distribution by age is shown in Figure 8.

Figure 8. Age distribution of sample population



Sample: 1 017 respondents

Civil status and family composition

Some 18.6% of the surveyed population were heads of households; 67.1% of the sample population were single and the vast majority of respondents did not have children.

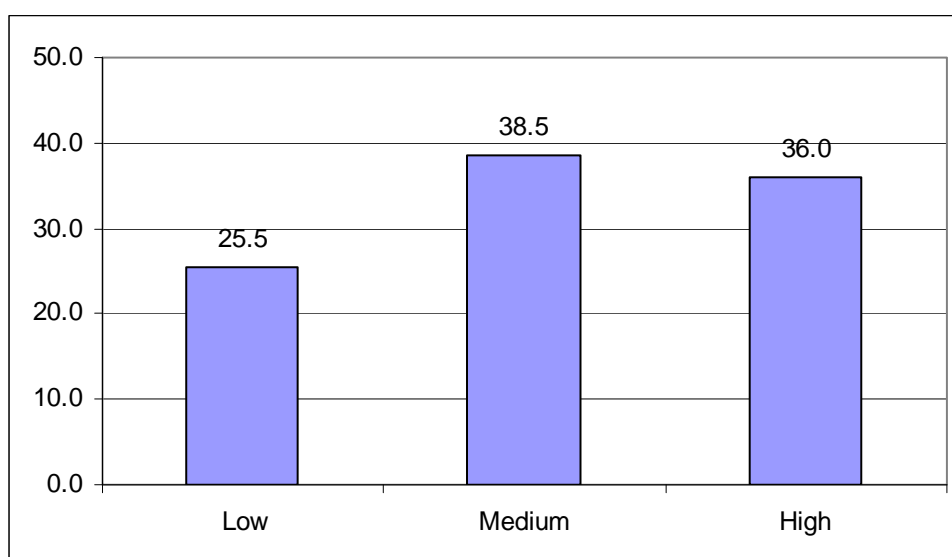
Language

In addition to Arabic as mother tongue, respondents mainly knew French and, to a lesser extent, English and Italian.

Level of education

More than one third of the sample had a medium or higher level of education, while the percentage of those with a low education was 25.5% (see Figure 9). Among those who attended secondary or post-secondary school, 25.2% attended secondary general school, 9.2% vocational school and 4.1% post-secondary school.

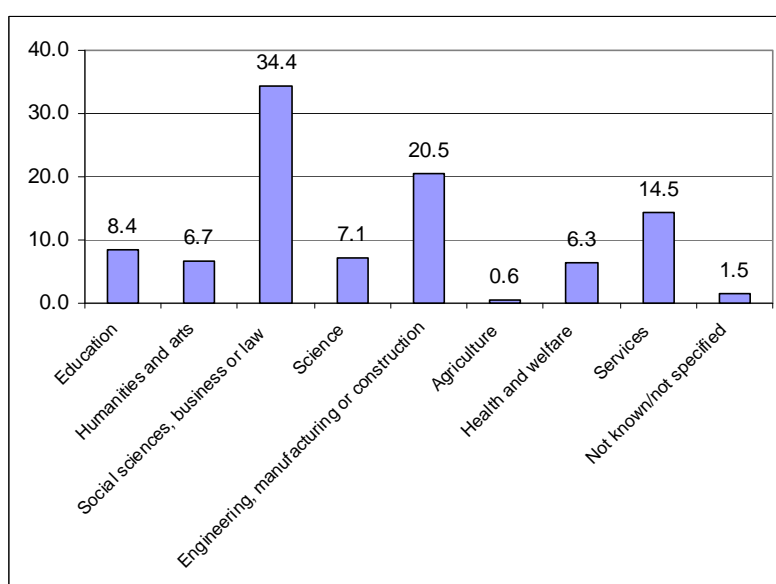
Figure 9. Levels of education of sample population



Sample: 1 008 respondents

The most popular fields of study were social sciences, business and law, followed by engineering, manufacturing and construction (see Figure 10). The survey confirms that men are more orientated towards engineering than women, while women are more orientated towards social studies, as well as health and welfare.

Figure 10. Fields of study of respondents with secondary, vocational or university education



Sample: 477 respondents with secondary vocational or university studies

Personal interest (61.7%) was the major factor in the choice of the area of study. A total of 17.2% of respondents stated that they chose their area of study in order to get a job and only 0.9% in order to go abroad. The remaining respondents said they had other reasons. The data indicate that there is no career guidance for new labour market entrants and that the choice of a field of study is not based on labour market demand.

The large majority of respondents agreed that education enhances living standards. The higher the respondents' education level, the more they felt that education could improve their standard of living, and therefore that it was important to invest in it. Some 28.6% of respondents intended to pursue further education and training, mainly in the field of social sciences, business or law. But more than one third of those who wanted to pursue their studies did not know in what field they would do so.

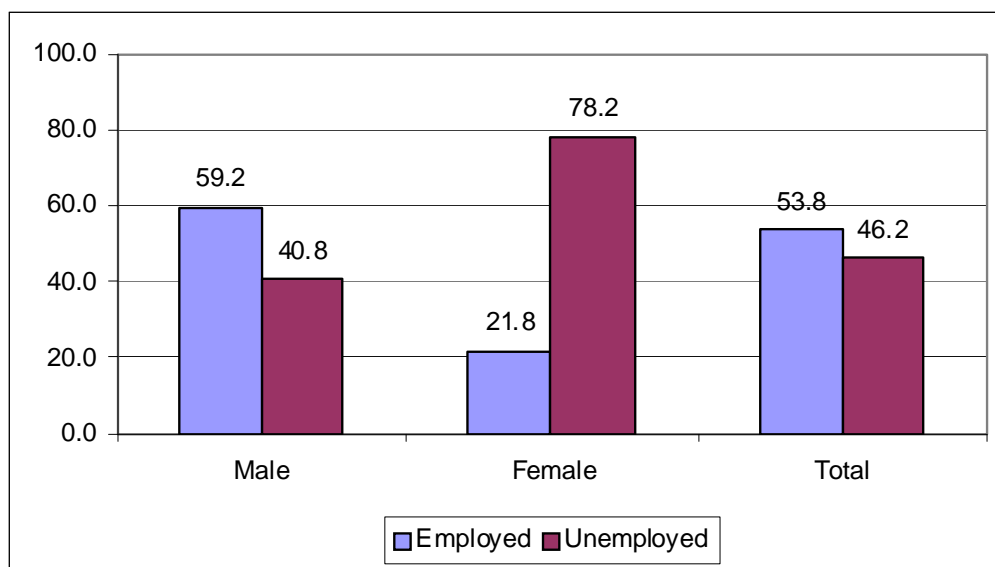
3.2 Employment

At the time of the survey, 53.9% of the respondents were working. Their main fields of activity were commerce, public administration, tourism and hospitality, construction, and agriculture.

Among the entire sample, 16.3% (or 36.2% of potential migrants) did not work because they could not find a job³¹. Almost 20% of the entire sample (or 43.1% of potential migrants) said they were not working because they were engaged in studies in Tunisia. The remaining percentages refer to those did not need to and/or want to work, or were on holiday, sick, or doing their military service.

The employment level is noticeably higher among males (59.2%) than among females (21.8%) (see Figure 11).

Figure 11. Employment level by gender

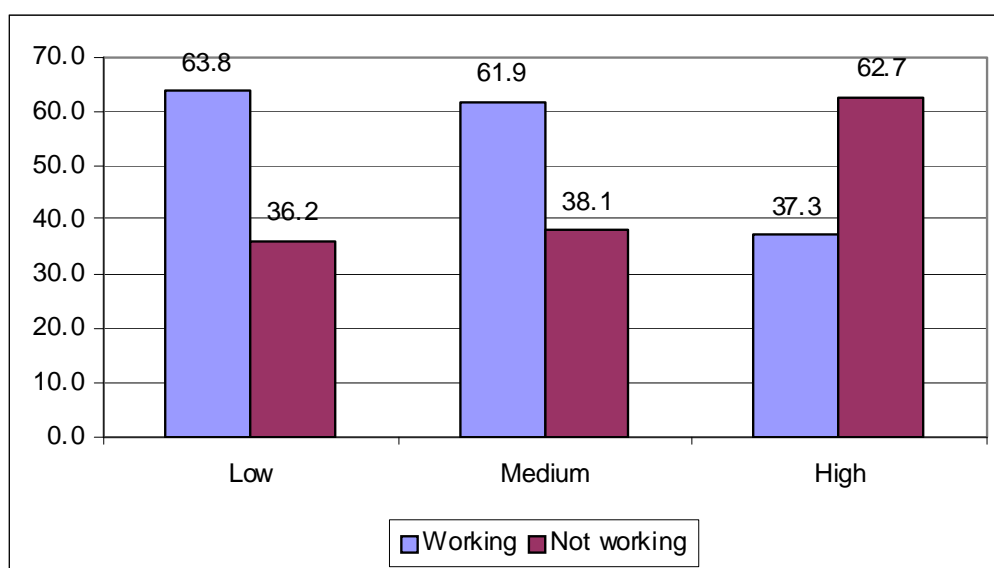


Sample: 1 008 respondents

Employment levels are closely linked with educational levels, but the higher the level of education and qualification of the respondents, the lower their employment level, especially among those with a university degree (see Figure 12). Some 47% of unemployed respondents are in the 25–29 age group. These results confirm the employment situation at national level, where new entrants with university degrees have difficulty integrating into the labour market as a result of the structural problems of the economy. In addition, often there is no organised information flow between the labour market and the education system.

³¹ According to the Tunisian National Institute for Statistics (www.ins.nat.tn), the unemployment rate was 14.3% in 2006.

Figure 12. Employment status by educational level



Sample: 1 008 respondents

Half of the survey sample worked more than 45 hours a week and earned less than TND300 per month (€167.14)³². There was a relationship between the level of education and wages, and 45% of those with higher education were earning more than TND500 per month³³.

Intentions to move abroad

Almost two thirds (63.1%) of the respondents said they were thinking seriously of migrating. They constitute the group of potential migrants. To allow a better understanding of the real likelihood of migration, a composite index called 'propensity to migrate' has been created on the basis of the following variables from the survey:

- likelihood of migrating within the following six months to two years;
- ability to finance the move abroad;
- knowledge of the language of the most likely destination (MLD) country;
- information about MLD country;
- possession of at least four out of six necessary documents (such as passport, visa, health certificate and work contract) and absence of difficulty in obtaining others.

Those who meet at least four of these conditions are considered 'prone to migrate'. In the case of Tunisia, 23.8% of the surveyed population had the resources needed to undertake migration, according to this indicator.

Who wanted to migrate from Tunisia and why?

Several factors influence the intention to migrate. They include gender, age, educational level, employment status, socioeconomic conditions, region of origin, and family and household factors.

³² TND1 = EUR0.557147 on 05 December 2007.

³³ The official minimum monthly wage (40hrs per week) is TND200. Source: www.tunisieindustrie.nat.tn

Gender

According to the data, migration was clearly a male-dominated phenomenon. The data show that 67.1% of males and 40.9% of females intended to migrate.

Age

The younger the potential migrants were, the stronger their intention to migrate. Some 74.4% of those aged 18–24 said they were seriously considering migration, compared to 31.2% of those aged 35–40

Educational level

There was no statistically significant correlation between the level of education and the intention to migrate. Regardless of the level of education, the majority of the respondents wanted to go abroad; this is linked to the fact that macroeconomic growth is not translated into sufficient and better employment opportunities. The survey shows that the respondent's field of study is a factor that influences the decision to migrate. Those who studied humanities or sciences were more prone to migrate than respondents with diplomas in other fields.

Employment status

Those who were unemployed were also more likely to be thinking of migrating (69.5%) than those who had a job (58%). Among those who were employed, casual workers were most likely to migrate, while employers and the self-employed were the least likely to migrate. In terms of skills, unskilled workers were more likely to migrate than skilled workers, professionals or managers. It is interesting to note that a majority of high-level managers said they want to migrate. Among respondents who were employed, those who were earning lower salaries and working in less skilled jobs were more likely to state that they were thinking about migrating³⁴. Almost all (95.6%) of the potential migrants thought that migration would improve their financial situation.

Socioeconomic conditions

Several parameters referring to socioeconomic conditions appeared to be associated with the intention to migrate. Respondents who had hot water, a washing machine or a car, rental income, or interest from savings were much less likely to consider migration.

Region of origin

There was little regional differentiation in the intention to migrate, with the exception of respondents in the eastern coastal region (Mahdia, Monastir, Sfax and Sousse), where there are fewer potential migrants because of a better economic situation resulting from tourism.

Family and household factors

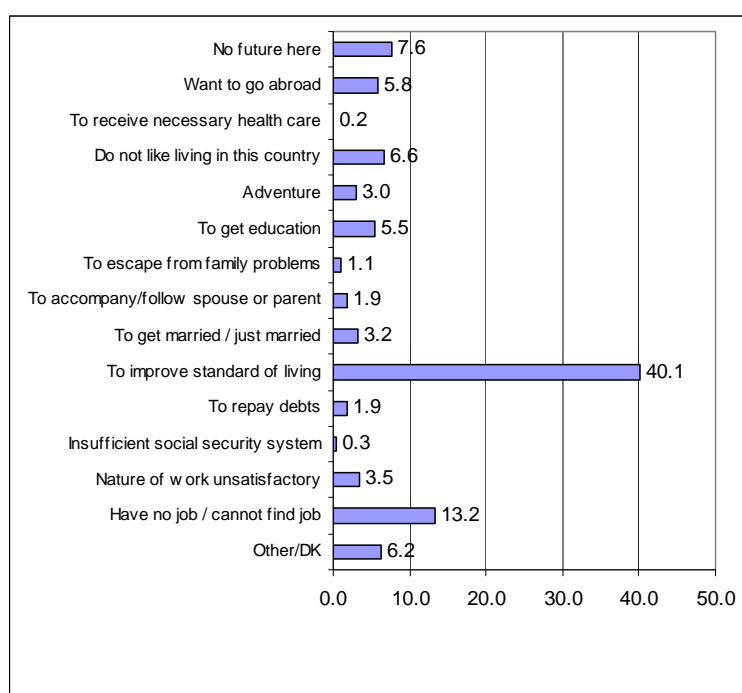
Unmarried respondents and those without children were more likely to migrate than married respondents with children. In general, the higher the number of people living in the household, the more likely a respondent was to say he/she was considering migration. This perhaps reflects the difficult financial and social situation faced by larger households, particularly those with many dependants.

³⁴ According to the survey, the average salary of those who reported they were thinking of migrating was TND321.19/month, compared to an average salary of almost twice as much (TND617.16/month) among those who were not thinking of migrating.

Among potential migrants, 80.1% of respondents stated that the decision to migrate would be taken by them alone; 16.8% said they would take the decision with other people, and 1.3% said someone else would take the decision for them. Among those who would not take the decision alone, the majority would take the decision with their parents and with their spouses. In line with Tunisia's sociocultural context, women were much less likely to take the decision to emigrate independently. However, there are some indications, based on anecdotal evidence, that the number of females who want to migrate on their own is increasing. According to the ETF survey, the decision to migrate was to be personally taken by 83% of men and by 52.4% of women³⁵.

Figure 13 shows that the main reasons for migrating were economic, but education, marriage, and a general desire to leave also appeared to be significant push factors.

Figure 13: Main reasons for migrating



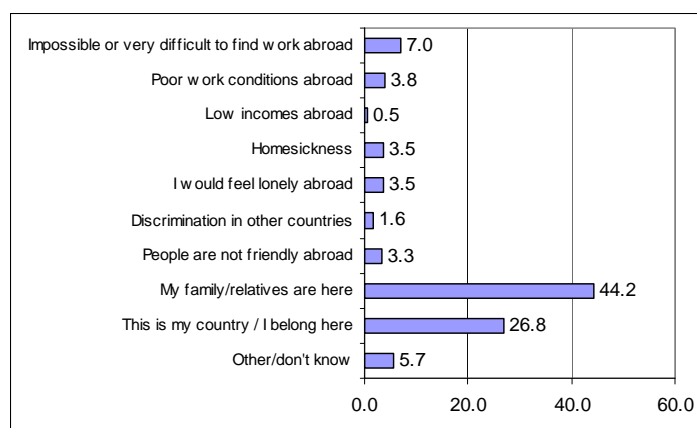
Sample: 634 respondents thinking seriously of moving abroad to live and work

Who did not want to migrate from Tunisia and why?

The respondents who were not thinking of migrating indicated two types of reasons: those related to the country of origin, and those related to the country of destination (see Figure 14). Two thirds of them reported that they do not want to migrate because they belong in Tunisia, or because their families are there. The main reasons relating to the destination country include difficulties in finding employment, poor work conditions, potential loneliness and difficulties in integrating, including fear of discrimination.

³⁵ The survey provides some preliminary indications that women who have a medium or high level of education, and who are mainly from urban areas, increasingly want to migrate on their own. This seems to be the case in Tunis, Sfax and Ben Arous, all urban areas of Grand Tunis. But this trend cannot be generalised on the basis of this survey because of the low answer rates.

Figure 14. Main reasons why respondents do not want to leave Tunisia



Sample: 369 respondents who were not thinking at the time of moving abroad to live and work

According to the survey, 57.6% of the respondents who do not want to migrate said that returning migrants are better off, or much better off, than those who did not migrate. This is an interesting result, and it shows that even among those who prefer to remain in Tunisia, migration is still seen as an opportunity to improve living standards.

The perception of the usefulness of migration does not vary according to the educational level of the respondents. This shows that returns from migration are expected to be high for everyone, irrespective of their level of education.

The wives of male heads of households were the group that was most opposed to emigration; 78.6% of them said they would not go abroad.

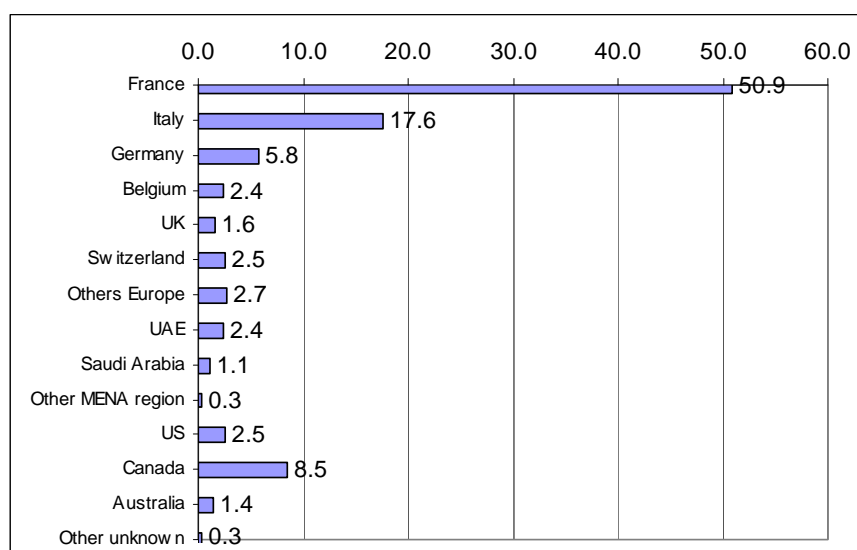
3.4. Potential migrants' expectations

Most likely destinations

Half of the potential migrants (50.9%) said that their most likely destination was France, followed by Italy (17.6%) and Germany (5.8%). The figures are in line with official data on the present distribution of Tunisians abroad (see Figure 15). The Gulf States were not a preferred destination for most Tunisian potential migrants, but the United Arab Emirates was the most likely destination in that region. This is linked to several factors, including the efforts of the Gulf States to 'nationalise' their labour force and decrease their dependency on migrants, and competition from cheaper Asian labour, as well as Egyptian and Jordanian labour. In addition, the salary level offered to highly qualified migrants in the Gulf States is rather low in relation to Tunisian living standards³⁶.

³⁶ D. Giubilaro, *Migration from the Maghreb and migration pressures: current situation and future prospects*, ILO, 1997, Annex a.8.1., p.73. Available at: <http://www.ilo.org/public/english/protection/migrant/download/imp/imp15e.pdf>

Figure 15. Most likely destinations of potential migrants



Sample: 635 respondents who were seriously considering leaving Tunisia

The most common factors that influenced the choice of destination were job opportunities in the country of destination and the opportunity to save money, followed by the presence of friends or relatives there. The presence of relatives was a more common factor for those planning to go to Europe. Only 5.5% of the potential migrants said they had chosen their destination because of the opportunity to study, and only six potential migrants (1.0%) said it was because illegal access was easy. Age and gender were not significant in influencing the choice of the destination.

The choice of destination appeared in part to be associated with the level of education, since 54.5% of those planning to migrate outside the EU had completed a university education, compared to just 31% of those planning to move to the EU. Those with post-secondary and university qualifications were more likely to be considering migration to Canada and the US. This may reflect the influence of the Canadian points system, in which university education is an important factor in securing entry.

The region of origin also has an influence on the choice of the destination country. France and Italy were the most likely destinations for migrants from most of the governorates, but potential migrants from Ariana preferred Canada; almost all potential migrants from this area wanted to go to Canada and were highly educated, which confirmed the trend noted above.

Fluency in the official language of the most likely destination country influenced the choice of destination country, except for Italy and Germany. Mastery of the language of the country of destination appears to be linked to the education level of the potential migrants: the higher the education level, the higher the language proficiency.

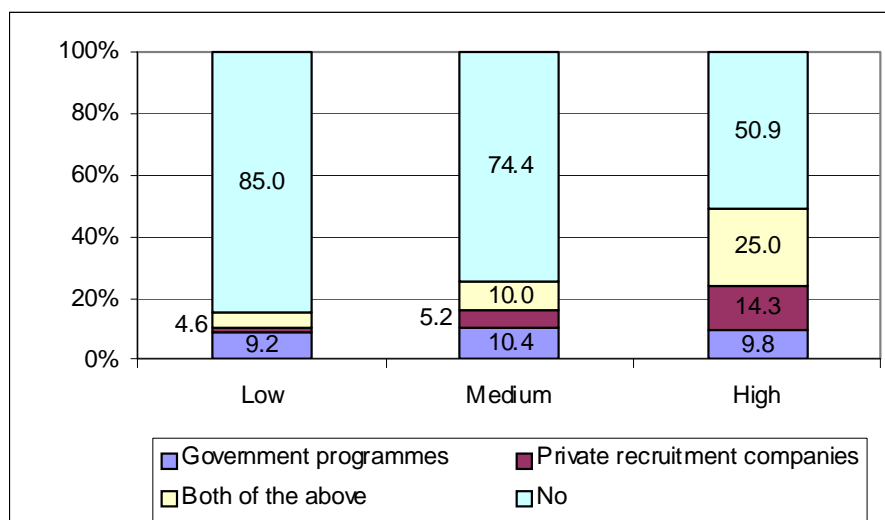
Preparation for migration

In responses concerning financing the cost of migration, 53.5% of potential migrants said that they were able to bear the cost of their migration project, but 23.1% said that they were not able to do so. The remaining 23.4% were not sure that they had sufficient resources.

Some 9.8% of the potential migrants said they were aware of government migration schemes; 7.4% were aware of private recruiting programmes and 13.9% were aware of both. In contrast, 68.9% did not know about any such programmes.

Potential migrants who were more highly educated were more likely to be aware of migration schemes or private recruitment companies that assist people in finding work abroad (see Figure 16).

Figure 16. Awareness of official migration schemes or private companies that help people find work abroad, by education level



Sample: respondents who were thinking of moving abroad to live and work

Those who knew about a recruitment programme but did not intend to use it were asked to state their reasons³⁷. More than half (59.2%) of the respondents said that such programmes were not transparent enough, 22.4% said that they were costly, and 28.5% felt that such programmes were not appropriate for them. In addition, 18.4% of respondents said they felt they did not possess the qualifications required for participating in such programmes. The data suggest that the scope for developing 'managed migration' through official programmes may be limited by obstacles that go beyond a lack of appropriate skills among potential migrants³⁸.

Among potential migrants, 60.5% felt that they had sufficient information about their preferred country of destination. The primary source of information for these respondents was family and friends in the country of destination, which perhaps explains why the majority of potential migrants wanted to go to countries such as France, Italy, and Germany, where many Tunisians already reside. Others reported also using the Internet, television and radio, or having already travelled to the country they wished to move to.

Interestingly, those who were most sure of leaving had the least familiarity with official emigration programmes, while those who said it was very unlikely they would leave were better informed about these programmes. (Among potential migrants, 85.2% were absolutely sure of leaving but were totally unaware of such programmes.) This might be explained by the fact that those respondents who were sure they would leave had already found another way to emigrate, and so they did not pay attention to the programmes, while those who were less certain that they would leave thought that if they did decide to leave, they would have to resort to official recruitment programmes and institutions.

When asked if they intended to undertake any training in Tunisia prior to working abroad, only 28.5% said they would do so; 44.2% said they would not and the remainder replied that they did not know. Of those who said they would undertake training, the most popular type of training was a language course, followed by vocational training and university studies.

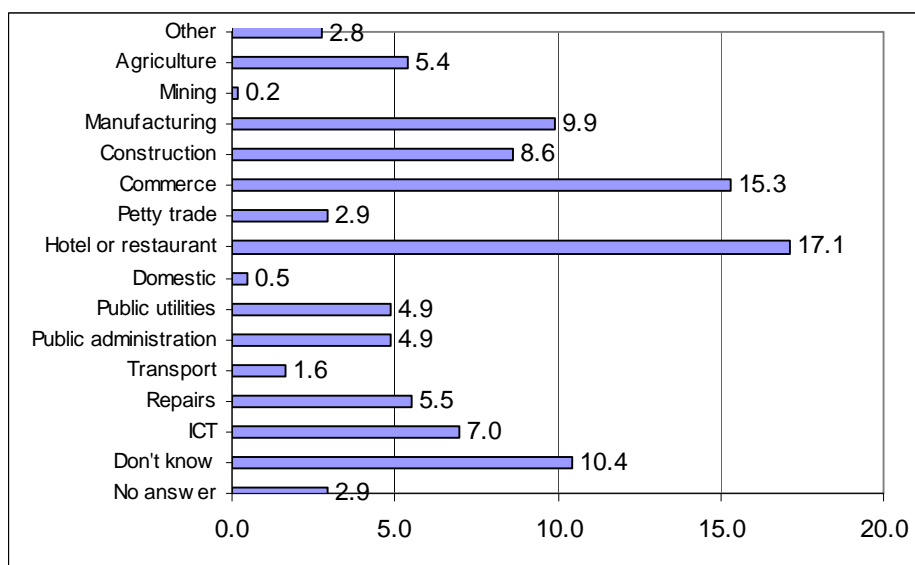
Employment in the host country

The most common types of employment that potential migrants said they expected to undertake while abroad were in hospitality and catering, commerce, manufacturing and construction. A significant 10.4% said that they did not know (see Figure 17).

³⁷ The percentages add up to more than 100 because respondents were allowed to give two main reasons.

³⁸ This information is based on a limited number of cases (49).

Figure 17. Most likely employment sectors abroad



Sample: 614 respondents who were seriously considering leaving Tunisia

The largest proportion (35%) thought that they would be employed as skilled (blue-collar) workers, 15.8% as unskilled workers, 14.4% as middle managers, 12.2% as high-level managers, and 7.7% as professionals. Those who did not know, those who did not intend to work abroad and 'other answers' accounted for 14.9%.

In general, those employed as skilled workers in their home country expected to continue to work abroad at the same level or higher, and only 9.9% expected that abroad they would be employed as unskilled workers. Nearly half (47.4%) of those employed as unskilled workers expected to be employed as skilled workers when they moved abroad. This shows a high level of aspiration regarding overseas employment, but does not necessarily paint an accurate picture of the work that was actually to be undertaken.

The same trend is observed when expected employment abroad is confronted with educational level. Almost half (48.9%) of the potential migrants with a university diploma wanted to work abroad as middle or high-level managers, 11.1% as professionals and 21.2% as skilled or unskilled workers. The remaining 18.8% said they did not know.

Expected duration of migration

When asked about the duration of their projected migration, a surprisingly high number (37.9%) of potential migrants said they planned to remain abroad permanently. A total of 39.6% of potential migrants thought they would stay abroad between two and ten years. In contrast, just 2.5% of respondents said they were thinking of remaining abroad for less than two years³⁹, which calls into question the value of short-term 'temporary labour schemes' in the Tunisian context.

Remittances

It is estimated that remittances amounted to more than EUR1.1 billion (TND1.8 billion) in 2004. Flows by country show that more than 90%⁴⁰ of the transfers (EUR950 million) came from EU countries, and approximately 58% (EUR558 million) of the total flows originated in France (EIB 2005).

³⁹ The remaining 20% is for the answer 'over 10 years but not forever'.

⁴⁰ Office des Tunisiens à l'étranger, 2004.

These transfers have increased during the past decade and constitute one of Tunisia's principal sources of foreign exchange, contributing significantly to the economy. Remittances occupy third place in terms of foreign exchange, after the textile and tourism sectors. Overall, remittances represented approximately 4.9% of GDP, almost two thirds (64.4%) of debt service and 23.8% of national savings in 2003⁴¹. Remittance transfers are often considered higher than foreign direct investment (FDI)⁴². The purpose and use of remittances depends on the migration cycle. Initially money is sent home to support family members, and afterwards for purchasing real estate and for productive investments. This is confirmed by the results of the ETF survey on returning migrants.

According to the ETF survey, potential migrants indicated that they intended to send money home while they were abroad, and 73.8% replied that they would do so. Most of the potential migrants said that they expected that their remittances would be spent for the living expenses of their family back home; most of the remainder of respondents said they would buy property. Only four potential migrants said they thought they would invest in a business, and two of them were respondents who also said they thought it was very unlikely that they would leave anyway. This might be linked to the fact that most of the potential migrants were in the 18–24 age group and were at the start of their working experience, and lacked the necessary skills and financial resources for starting a business.

⁴¹ Musette Mohamed Saïb, *Maghreb: transfert des migrants*, Réunion d'expert du groupe 5+5, Algiers, June 2005, p. 9.

⁴² According to official sources (Tunisian Central Bank, at <http://www.bct.gov.tn>), in 2006 FDI represented 10.7% of GDP and remittances were estimated at 5.4% of GDP. Nevertheless, the former data refer to officially reported remittances. The real amount of remittances, including unrecorded flows (through formal and informal channels) is believed to be higher (see <http://siteresources.worldbank.org/INTPROSPECTS/Resources/334934-1181678518183/Tunisia.pdf>).

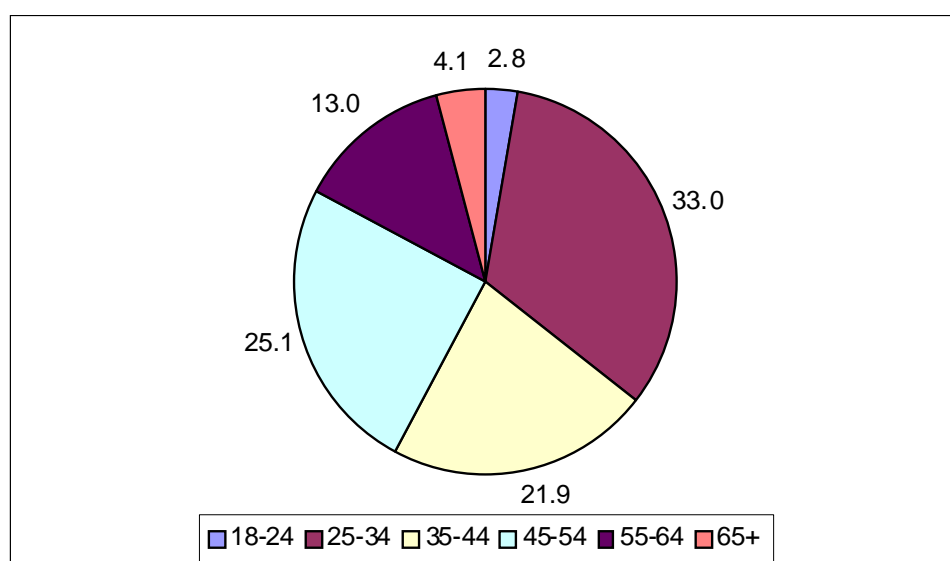
4 FINDINGS OF THE RETURNING MIGRANTS SURVEY

4.1 Socio-demographic and educational characteristics

Age and gender

The sample's age and gender distribution shows that respondents had an average age of 41.8, and that 94.6% of them were male. Distribution by age is shown in Figure 18.

Figure 18. Age distribution of sample population of returning migrants



Sample: 999 respondents

As indicated in Figure 18, the vast majority of the returning migrant respondents was still of working age. Because of the low proportion of women respondents among returning migrants, desegregation of findings by gender is difficult in this section of the report.

Civil status and family composition

The majority (56.5%) of respondents were married, but a significant minority (31%) were single; 7% said they were engaged and 5.5% were widowed or divorced. Most of those who were married were heads of household and had three children on average.

Language

In addition to Arabic, which was their mother tongue, returning migrants said they had a good knowledge of French, English or Italian.

Level of education

As shown in Table 4, the returning migrants interviewed were generally better educated than the Tunisian population as a whole; almost half had completed some form of secondary education, and an additional 15% had completed higher education. However, the survey for returning migrants did not

follow a random methodology (see Chapter 2). Because of difficulties in finding returning migrants, 'snowball' methods⁴³ were allowed. For this reason, data related to the educational level of returning migrants cannot be inferred for the whole population.

Table 4: Educational level of returning migrants and of the Tunisian population as a whole

	Educational level of Tunisian returning migrants (%)	Educational level of Tunisian population (%)
Non educated	2.6	22.0
Primary Education (less than primary, and Primary)	34.1	36.5
Secondary Education (Post-primary, Secondary General and secondary Vocational)	48.3	33.1
Higher Education (University and post-secondary)	15.0	8.4
Total	100.0	100.0

Source: Field survey, 2006; Les indicateurs de l'éducation, Ministère de l'Éducation et de la Formation

The study areas most frequently found in returning migrants with higher education were social sciences, business and law. Those who had completed secondary vocational education were more likely to have studied engineering, manufacturing or construction.

The choice of an area of study was influenced by personal interest in the majority of cases. The majority (82.2%) of those surveyed agreed that education increased an individual's standard of living, and 74.8% agreed that it was important to invest in education. Only among those respondents who had never attended school were there significant numbers who felt education does not improve standards of living or who were not sure about that affirmation. The results match those reported for potential immigrants and demonstrate the sociocultural importance given to education in Tunisia.

4.2 Migration history

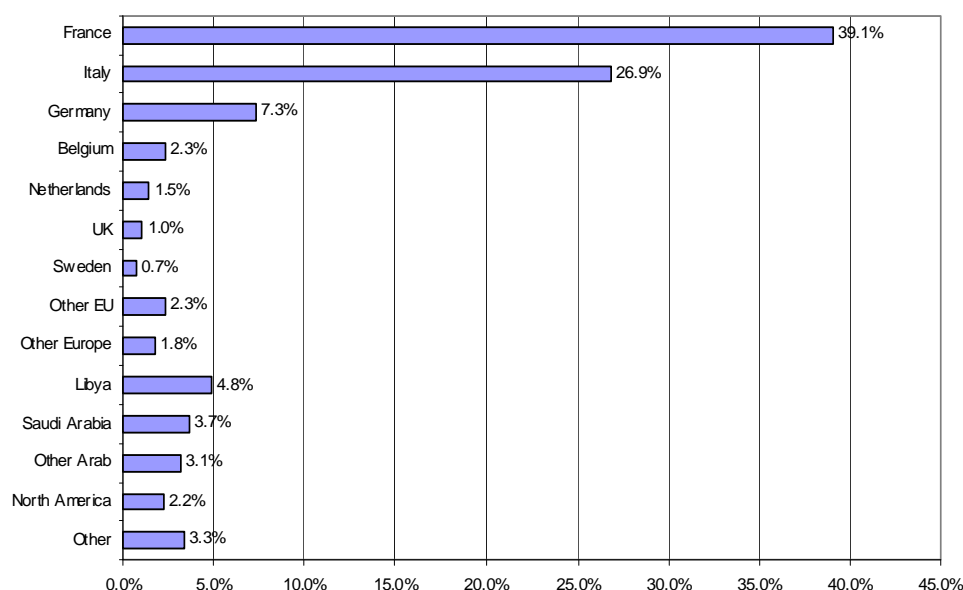
On average, the returning migrants interviewed had been abroad for 11.6 years, and had returned 3.6 years previously on average. A majority of those who were married at the time of the survey were not accompanied by their spouses when they first left Tunisia to go abroad.

Their main destination countries were overwhelmingly (81.1%) within the EU⁴⁴, which mirrors the pattern for Tunisia as a whole and for potential migrants, as reported in the previous section (see Figure 19). However, a smaller proportion (39.1%) of respondents among returning migrants had been in France, which was the principal destination for Tunisian migrants. Returning migrants had spent time in quite a few other EU countries, including Belgium, the Netherlands, UK and Sweden. Some 4.6% of returning migrants had been in Libya, and 3.5% in Saudi Arabia. Perhaps unsurprisingly, there were very few returnees from Canada.

⁴³ A method whereby interview subjects for a statistical study are obtained from subjects already interviewed for that study.

⁴⁴ When abroad, very few returning migrants (7.2%) moved to another country. One third of them arrived first in Italy, followed by France and Belgium. When the migrants moved, they went to France, Italy or Germany. There was a high stability in terms of destination countries. None may be considered as a 'bridge' to other destinations. This stability explains why we refer here to the main destination country only.

Figure 19: Main destination country of returning migrants



Sample: 956 respondents

The majority of returning migrants had spent 10 or more years abroad. Those who went to Italy as their main destination were likely to have spent a shorter period of time abroad; just 30.4% had spent more than 10 years in the country. In contrast, those who spent most time in France and Germany had stayed there longer; 58.8% and 62.9% respectively of those groups had spent more than 10 years in their destination country. Those who had less education had also spent a longer time abroad, as had those who were married with children.

When asked to give their main reason for going abroad, nearly one third of respondents (32.7%) said it was to improve their living conditions, while 21.9% said it was because they could not find employment at home. However, a correlation between the reason for leaving and educational level shows that the main reason for leaving for respondents with a low level of education was to improve their living standards. Returning migrants with a higher level of education said that their main reason was 'to get an education', which ranked above 'improving standards of living' and difficulties encountered in finding a job. The higher the educational level, the greater the lack of satisfaction with the job in the home country before leaving.

Almost one quarter of respondents with a university diploma mentioned the possibility of obtaining further education as one of their main reasons for migrating. The preferred destination of these returning migrants was France, followed by Italy and Germany. They remained significantly less time abroad (7 years on average) than those who did not migrate for educational reasons (11.9 years on average).

Once in the host country, most of them (66.7%) were able to receive education or training, mainly at university level (92%). Among returning migrants who said education was one of the reasons to migrate, 76.9% worked abroad, mainly in the hospitality (40%) or manufacturing (26.7%) sectors as salaried (51.6%) or casual workers (41.9%). More than one quarter (27.7%) of these migrants obtained a first job abroad as professionals or as middle or high-level managers. Most of them (71%) remained in this job until they returned to Tunisia, but those who changed jobs abroad improved their employment conditions in terms of level of responsibility and skills required⁴⁵. This means that migration for study may have opened the door for work abroad, even though the returning migrants were generally over-qualified for the jobs they had to accept⁴⁶.

⁴⁵ These data on respondents who mentioned education as one of their reasons to migrate are based on few cases (39). As a result, the margin of error of this information is very high and information about these trends has to be regarded with due caution.

⁴⁶ This is not only the case of Tunisian migrants, but also of the young European population in general. See European Commission-Eurostat-Eurydice (2002): Key Data on Education in Europe 2005. Brussels: 2005, pp.45-47.

As with potential migrants, when asked if the decision to leave had been taken by themselves or by other people, a large majority (79.3%) of the respondents answered that they had taken the decision alone. Those who went abroad on their own said that from the financial point of view it was better to leave the family home.

When asked if they had received any training to prepare them to live or work abroad, the majority of respondents (81%) said they had received no training, while 8.4% said they had received vocational training, 4% language training and 0.2% some form of cultural awareness training. And 6.1% said they had completed university studies. The higher the educational level, the higher the percentage of respondents who had received training. Indeed, the majority of returning migrants with a diploma of higher education said they had received training before their departure.

Among those who had some kind of training prior to departure, 84.1% stated that this training gave them a diploma or a certificate, 86.7% said the training was useful, and 83.4% said it was necessary in order to get a job abroad. Vocational training was the most common type of training for returning migrants with low and medium levels of education, while those with a high level of education said they attended university courses.

In relation to returning migrants' education levels, migrants to the EU countries had a lower level of education, while those who migrated to Saudi Arabia or North America had medium to high educational levels. In Saudi Arabia, nearly 80% of respondents had middle to high education levels. This can be explained by the fact that Saudi Arabia is the first country in importance to deal with the ATCT. Saudi Arabia and other Gulf States go through this agency to recruit qualified personnel (middle and high-level management), mainly in the fields of health care, teaching and engineering. ATCT has signed agreements to recruit personnel mainly with Arab countries of the Persian Gulf. At the same time the (temporary) migration of Tunisian doctors, engineers and teachers is considered by Tunisian authorities as an acceptable solution for the surplus in those professions produced by the Tunisian education system. It also appears that Tunisian expatriates installed in Gulf States carry out significant transfers of money, creating a 'double advantage'. In contrast, ATCT does not deal to a great extent with EU countries.

When asked what their main motivation was in choosing their destination country, 41.5% answered that the country offered employment opportunities, 17.7% said that living in the country allowed them to build up savings, and 14.4% stated that they had friends or relatives who had already settled in the country. Instead, reasons related to the possibility of receiving training (such as further studies) in the destination country, and prior knowledge of the country did not influence the respondents in their choices. Similarly, and perhaps contrary to what might have been expected, factors such as ability to reach the country easily, to gain illegal entry, or to get a visa easily were not reported as playing an important role in the choice of destination.

When respondents were asked if they were aware at the time of their departure of government or private programmes that assist people who want to work abroad, a large majority (75.9%) said they were not. However, more than two thirds of the migrants returning from the Gulf States were informed of such programmes for that area.

Among the respondents who were aware of assistance programmes related to work abroad, namely in the Gulf States, the majority (54.3%) took part in governmental programmes, 6.5% dealt with private recruiting agencies, and 37.1% said they did not use such programmes, although they were aware that they existed. Respondents in this last category explained that such programmes were either not adapted to their needs or were badly run, or that the respondent was not sufficiently qualified to benefit from such programmes, or that the services offered by such programmes were financially too costly. The data are nevertheless based on relatively few cases and must be taken with due caution.

These results can be explained by the fact that the principal organized migration programme existing in Tunisia is the programme managed by the Tunisian Technical Cooperation Agency, which mainly addresses highly qualified candidates. Statistical analysis of data collected shows that there was a positive and significant correlation between awareness and/or participation in assistance programmes and the level of education of returning migrants. Indeed, the higher a migrant's educational level, the more he tended to be aware of this kind of programme and tended to take part in it.

Experiences while abroad

The majority (72.1%) of the returning migrants reported that they had not received any further training while abroad. However, those with a higher educational level were more likely to have received some training. The majority of those who received training received it from their employer; they were followed by those who pursued university studies. Just 7.1%, representing under 2% of the overall sample, reported that they attended a course on 'integration'.

A comparative analysis related to the principal receiving countries leads to the following observations.

In order of importance, Germany (nearly 50%), France (nearly 40%) and Saudi Arabia (nearly 35%) have the highest proportion of respondents who received training while abroad.

Less than 20% of migrants returning from Italy or Belgium said they received training, while none of those returning from Libya said they had received training.

It was mainly the migrants returning from Germany and Belgium who had received language training, which is readily explained by the fact that Tunisians do not generally know German or Flemish, as compared to French or Italian.

Those who had pursued university studies were mainly migrants returning from France or Italy, and the language factor, as well as geographical proximity and the presence of networks (friends and relatives) in these countries might explain this result.

The majority of migrants who stated that they received training in cultural orientation were those returning from Saudi Arabia. This could be explained by the fact that those who migrated to Saudi Arabia did so through the qualified manpower procedures managed by the ATCT, which provides orientation training.

In terms of the first type of employment for migrants in the host country, the principal sector was construction, followed by hospitality and catering, manufacturing, commerce and trade, and agriculture (see Table 5). The data also show that later there was some mobility in terms of sectors of employment, with a smaller proportion working in construction or hospitality and catering as their main job, and a slight increase in the proportion of employers, self-employed, and managers and professionals. Overall, however, the division by sector and level of employment remained remarkably constant between 'first job' and 'main job' in the country/ies of destination.

Table 5: First and main employment sector of migrants while abroad

Employment Sector		
Construction	26.7	25.2
Hotel or restaurant	15.9	13.5
Manufacturing	15.1	16.5
Commerce/trade	11.6	12.9
Agriculture	11.5	11.7
Other/no answer	19.2	20.2
Total	100	100
Employment Type		
Salaried work	66.8	66.9
Casual work	27.4	24.1
Employer	2.9	4.6
Self-employed	2.3	3.7
Other/No answer	0.6	0.7
Total	100	100
Employment level		

Skilled (blue collar)	56	51.8
Unskilled	28.6	29.9
Middle management	7.1	7.4
Professional	3.8	6.4
High management	2.2	2.6
Other/No answer	2.2	1.9
Total	100	100

There were some variations in this pattern by main country of destination.

- The proportion of returning migrants that had worked in construction was highest in Libya, followed by Italy and France.
- Migrants returning from Germany were twice as likely to have worked in manufacturing, compared to the average for all countries.
- Some 92.2% of the migrants who worked in agriculture while abroad had returned from Italy or France.
- Most of the returning migrants who reported working in casual employment came from France and Italy.
- Only in Saudi Arabia was there a significant proportion of migrants working in the public sector (mainly in health care and education), and 59.4% of all returning migrants from Saudi Arabia had been employed in professional or management positions.

In relation to the duration of their first working positions abroad, respondents stated that their first employment lasted 8.8 years on average. Half of all respondents had remained in their first job for more than five years, while a quarter of them had stayed in their first job for more than 14 years. This, combined with the fact that 68.8% had never changed jobs abroad, helps to explain both the relatively long periods that returning migrants spent in one employment position, and the apparent lack of professional mobility. The difficulty of finding employment abroad is reflected in the fact that 59.8% of respondents said that they had at some stage been unemployed, and that the period of unemployment lasted on average 7.7 months.

Some 35.1% of those with a high level of education had experienced a period of unemployment abroad, compared to 52.5% of those with a medium level of education and 68.5% of those with a low level of education. This is consistent with the findings of studies undertaken in France⁴⁷, which suggest that the Tunisian migrant community overall has a better capacity to integrate professionally and socially, essentially because of its higher educational level compared to other communities. Migrants returning from Belgium and Italy were most likely to have experienced a period of unemployment, while those returning from Libya and Saudi Arabia were least likely to have been unemployed, which reflects the existence of organized placements. About half of all respondents reported working more than 40 hours per week, and 12.5% said they worked 60 hours or more per week.

Almost all (95.6%) of the returning migrants said that they kept in contact with Tunisia during their stay abroad. Just over one third (37.2%) reported visiting Tunisia at least once a year, but 27.7% had not visited Tunisia at all while they were abroad.

When asked if they sent money to Tunisia when abroad, just over two thirds of respondents (67.6%) said that they did, and 78.4% sent money home at least once a year. Migrants in Libya and Saudi Arabia were more likely to have sent remittances than those returning from European countries. There was no difference related to destination country in the frequency of sending remittances. Remittances were sent generally to the migrant's parents or spouse, and they were used mainly to cover living expenses; to buy property, furniture or household goods; and to accumulate savings. Migrants

⁴⁷ Recensement de la population de 1999, De plus en plus de femmes immigrées sur le marché du travail, INSEE première, No. 791, July 2001.

returning from Saudi Arabia were slightly more likely to have used their remittances to buy property or to accumulate savings.

Returning migrants' experiences

The survey found that migrants said they returned for three main reasons. The most common reason (20.3%) was that the individual was 'sent away by the authorities' of the destination country. The second reason (11.8%) was that the migrant had saved enough money and the third reason (9.9%) was retirement. Migrants returning from Italy were most likely to say that they were sent home, while this was not a common response among those returning from Libya or the Gulf States. Compared to the average for all respondents, those returning from Germany were twice as likely to say they returned to retire, while those returning from Belgium were more than three times as likely to say they returned to establish a business in Tunisia.

Official return assistance programmes helping migrants who want to return did not appear to be very important; only 11.9% of respondents were aware of them, and only 24% of this group said that they benefited from them. This might be explained by the fact that few programmes actually exist at the European level or in the Gulf States to assist migrants in their projects to return home.

Some 68.7% of the returning migrants reported that they brought back savings. When asked about the three main uses of savings, they replied that their savings were used to cover living expenses, to buy property and to invest in a business (mainly commerce and petty trade). There appears to be little difference among respondents regarding the use of savings when compared by educational level or type of employment abroad. Highly educated returning migrants were not among those who invested mainly in a business activity; instead, they preferred to buy property.

According to the results of the Migration de retour au Maghreb (MIREM) project⁴⁸, the total number of Tunisia's returning migrants between 1999 and 2004 was 17 766 (10 046 male and 7 720 female). For most of them, the countries of former residence were France, Italy, Saudi Arabia and Libya. This is also confirmed by the results of the ETF survey. Over this period, 19% of business investment by returning migrants was in industry, 35% in services and 46% in agriculture. The ETF survey results indicate that the main sectors of investment of migrants' savings are commerce, petty trade and agriculture

After returning to Tunisia, 51.9% of respondents worked, and they spent on average six months to find employment. The proportion of those who worked upon return was much higher for those returning from Saudi Arabia and Libya than those returning from EU countries such as France. The employment positions of the highly skilled migrants who go the Gulf States are retained for them while they are abroad. Highly skilled migrants working abroad in managerial or professional jobs were also more likely to find employment upon return.

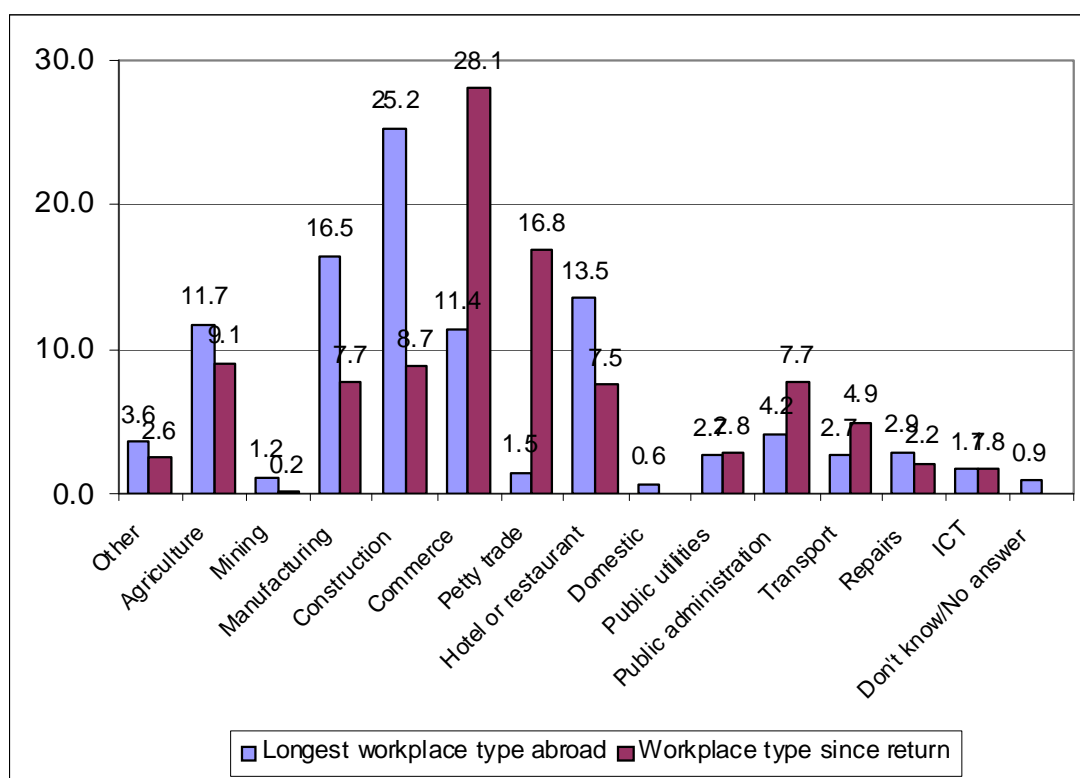
The likelihood of finding a job upon return is linked to the sector in which the migrant worked abroad. For instance, those who worked abroad in the public administration, ICT, repairs or manufacturing were more likely to find a job upon their return than those who worked in mining, petty trade, hospitality or construction.

Only 16.7% of returning migrants work in Tunisia in the same sector as they did abroad (see Figure 20). About half of those who worked in manufacturing or hospitality abroad did the same kind of work upon return. In contrast, the proportion of those who worked abroad in commerce or petty trade increased upon return.

Figure 21 sheds additional light on this phenomenon. It shows that a high percentage of those who worked as salaried and casual workers abroad became employers and self-employed at home. This suggests that returning migrants often create enterprises, and this is confirmed by the high business investment rate (24.3% of returning migrants invested their savings in businesses).

⁴⁸ *Action collective de soutien à la réintégration des migrants de retour dans leur pays d'origine* (2005). Available at : www.mirem.eu

Figure 20. Main sectors of activity abroad and upon return



Sample: 938 respondents for the main workplace abroad and 506 respondents for the workplace since return

Figure 21. Main work types abroad and since return



Sample: 928 respondents for the main work type abroad and 507 respondents for the workplace since return

These businesses were often family-owned retail enterprises. General experience acquired abroad was used in entrepreneurship activities, which in some cases meant job creation, and which were economically positive for development. The entrepreneurship activities were more closely linked to the general experience of being abroad than to a concrete skill acquired on the job. This was confirmed by the fact that the returning migrants changed the economic sector in which they worked upon return. This was further emphasised by the fact that returning migrants indicated that their most useful experience abroad was the general experience of being exposed to new ways of doing things.

Only 37% of the respondents said they were receiving pension benefits or any kind of social revenue from abroad. The majority had not contributed to any benefit scheme or had not worked long enough to be eligible for benefits. Less than 1% of the overall sample – just eight migrants – said they had contributed to a social insurance or pension scheme but the benefits were not transferable.

When asked how they considered their personal situation, compared to before they left for abroad, 66% felt that it was better or much better, 24.4% felt that it was the same, while only 9.6% felt that their situation was worse or much worse.

Future intentions

When asked if they were thinking seriously about emigrating again, 24.1% of returning migrants said that they were interested in going abroad again. Those respondents who were younger, unmarried, did not have children and did not have consumer items such as a refrigerator, washing machine, oven or radio, were more prone to emigrate again. Those who had previously been in Belgium or Italy were also more likely to be thinking of going abroad again, while those who had been in Libya or Saudi Arabia were much less likely to think of it. As might be expected, casual and unskilled workers were the most likely to emigrate again.

However, the main reason for emigrating again seemed to be the failure of the previous migration project. About half (51.6%) of those who intended to migrate again had been sent away by the authorities of the host country, and almost 10% had been unable to find a job abroad or had been laid off by their employer. The other reasons for returning (including retirement, sufficient savings and family problems) show lower percentages.

Among the reasons for emigrating again, economic factors appear to be the most important ones. For those not intending to emigrate again, as among potential migrants, the main reasons that they expressed were related to their commitment (or attachment) to their country and their family.

5 CONCLUSIONS AND POLICY RECOMMENDATIONS

The conclusions and policy recommendations of this report are based on the ETF survey results, discussions with the national stakeholders involved in migration policy and the donor community, and extensive literature review. There has been much research done on migration issues and there have been many donors' interventions. But the sustainability level has been low, which means that the good practices have not been transferred to system level. Migration research has not focused enough on issues related to the human resources development of migrants, and this study is an attempt to fill part of this knowledge gap.

In response to the potential labour and skill shortages experienced in some EU Member States, a gradual policy change is taking place, towards legal recruitment of migrants according to European labour market needs. This is a step closer to the policies of traditional immigrant recruiting countries (such as the 'selective immigration' practised in the US, Canada and Australia). In this new selective (and possibly temporary) immigration policy, a reference to a responsible and ethical recruitment principle is always explicitly made to meet the 'brain drain' concerns of sending countries⁴⁹.

The external assistance programmes of Instrument for Pre-accession (IPA) and European Neighbour Policy Instrument (ENPI) are contributing to improvements in the quality of skills in neighbouring and pre-accession countries through reforms in the national education and training systems. The thematic programme on Migration and Asylum for the period 2007-2013 is aimed at improving institutional capacity of third countries in migration management (including legal and illegal migration). Such instruments have the capacity to promote a win-win scenario in which migrants are able to provide skills in short supply in Member States and transfer know-how acquired in host countries on return to their country. The return of migrants can contribute to the faster transfer of knowledge and skills to their country of origin, thus speeding the development process.

In this context, ETF considers that knowledge of the skill composition of the migration flows becomes extremely important (as related to both returning and potential migrants). Availability of information on the local labour market needs of sending countries in different sectors (structural and temporary), occupations or geographical regions is crucial for ethical recruitment. Therefore, a new type of knowledge on the skills available in partner countries at all levels (low, medium and high skills) is required, together with an impact assessment on local labour market needs in order to prevent brain drain. Education and training systems of partner countries in terms of structure, levels, content and quality also need to be known in detail, and policies and/or tools for transparency and recognition of qualifications would become an important issue (both for the EU and partner countries).

For the above reasons, ETF undertook field surveys to collect primary data on the issue in an attempt to analyse the skills composition of potential and returning migrants. The ETF research has provided the following evidence to be considered in future policy making:

- input to knowledge-building and information for the development of EU migration policies and future programming of the EC in developing instruments to support circular and return migration;
- input for the design of successful Return Action Programmes by EU Member States;
- input for future legislative measures⁵⁰ planned by the EC on labour immigration, in line with the Lisbon Agenda and demographic trends in the EU;
- input to policy measures on mitigating the adverse effect of brain drain, and identification of priority areas in the field of education and vocational training in the sending countries;
- Input to policy measures on recognition of qualifications and the use of transparency tools for the skills of migrants that have been acquired at home and abroad;
- active contribution to national and donor-driven projects on local development of the sending countries;

⁴⁹ See the Communication on EU strategy for action on the crisis in human resources for health in developing countries, COM(2005) 642 final, 12.12.2005; and EC Communication on *migration and development : some concrete orientations*, COM (2005) 390 final.

⁵⁰ Communication from the Commission on Policy Plan on Legal Migration, COM (2005) 669 final.

- better understanding of how remittances can be used to foster local development, and relevant policy measures in the sending and receiving countries;
- input for fostering institutional partnership in the field of migration between the EU and the sending countries.

Conclusions and learning points

Tunisia has been a traditional source of migrant labour for Europe and it has already developed an institutional framework to deal with the phenomenon. The existing capacity should be further strengthened in order to transform the migratory process into a win-win-win situation (for migrants, Tunisia and the receiving countries).

Tunisia has a system of collecting information on migration through the Tunisian consular offices, but this does not give a complete picture of the phenomenon. A field survey on return migration was conducted in 1987 by OTE and the Arab League and covered the period 1974-1986⁵¹. Over the past 10 years, no in-depth surveys have been carried out on this subject. Therefore, there is a need to collect on a regular basis more detailed migration data based on commonly agreed definitions. It is also important to gather data on the level of education (ISCED)⁵² of the migrants and professional profiles (ISCO)⁵³, to the extent possible and by gender. In particular, data should be collected also on skill overflows and shortages in the Tunisian labour market, which then can be taken into consideration when designing measures on managed and/or circular migration and on prevention of brain drain, and in negotiations of new bilateral labour agreements. In terms of indicators, employment and unemployment rates by occupation in both Tunisia and receiving countries should be compared with the composition of the migrant flows. The possibility of creating a 'migration observatory' to cover the above data collection should be considered.

The ETF survey results in general confirmed the findings of the 1987 survey, implying that the reasons for migration remain the same. They are mainly economic, though education, marriage, and a general desire to leave also continue to be significant push factors.

Tunisia has made progress towards achieving macro-economic stability. However, the business climate still needs to be improved in relation to ensuring greater labour market flexibility, which can create a conducive environment for job creation and encourage efficient reallocation of labour⁵⁴. The structural composition of employment has changed with the shrinking of the public sector, while the private sector has failed to create enough jobs for new labour market entries and for the already unemployed. The informal sector has been growing, and this growth is further facilitated by the heavy regulatory burden on entrepreneurs⁵⁵. In addition, the Free Trade Zone with the EU, which will enter into force in 2008, will translate into increased competitive pressures on the Tunisian economy. The challenge remains to make trade liberalization translate into more jobs. This complex economic picture results in continued high unemployment rates and migratory pressures.

Migratory pressures are particularly high among young people, a fact confirmed by the ETF results. The younger the potential migrants, the stronger the intention to migrate. This is a result of the very difficult transition from school to work. The Tunisian government has invested considerably in reforming and upgrading its human resources development policies and education system. However, both the VET and higher education systems continue to face serious challenges. In the case of VET the following issues remain⁵⁶:

- insufficient human and financial resources allocated to the VET system, which affects the quality of delivery;

⁵¹ H. Checkir, 'Migration and development aid, the case of Tunisia'. Presented at the OECD Conference, Madrid, March 1993.

⁵² UNESCO International Standard Classification of Education (ISCED).

⁵³ International Standard Classification of Occupations (ISCO).

⁵⁴ <http://www.imf.org/external/np/ms/2005/022405.htm>

⁵⁵ The World Bank: Doing Business 2008, Tunisia. www.doingbusiness.org/Documents/CountryProfiles/TUN.pdf page 13.

⁵⁶ European Training Foundation (ETF) (2006) Employment policy reforms in the Middle East and North Africa: selected issues on the functioning of the labour market. Italy, B. Ummuhan, H. Huitfeldt and J. Wahba. p. 57.

- lack of involvement of the private sector in the governance, funding and delivery of VET;
- lack of consideration of gender-sensitive issues and the dominance of traditional gender roles in the VET system.
- lack of career guidance and lack of promotion of selection of the field of study on the basis of labour market demand.

In addition, VET needs to be given higher status and relevance in order to shift the focus of the education system from the exclusive focus on higher education, which currently results in an overproduction of university graduates. This is not to say that there should be no further investment in higher education. The issue is that this investment should be accompanied by the creation of an adequate number of high-skill jobs, which for the moment remain limited.

VET delivery is not attuned to the needs of both the domestic and international labour markets. This does not mean that the VET system should be reformed to prepare migrants but to equip the Tunisian labour force with updated skills, which can be used both at home and abroad. The world economy is becoming increasingly globalised, and so are the skills that are in demand. Talent is a scarce commodity on the market, and having a well-trained labour force would be of benefit for Tunisia's own domestic growth and development, and for increasing individuals' return to education, also.

In this context, the portability of qualifications is an important issue. Learning from the European experience could be of great interest. The issue of qualification recognition is acquiring new significance in the context of the growing attractiveness of the EU as a migration destination. Recognition of qualifications before and after migration remains a concern and involves in particular the validation of previous non-formal and informal learning. There is, therefore, scope for considering the Bologna Process and the common European instruments as an inspiration for supporting transparency of skills and recognition of learning (through, for example, the European Qualification Framework - EQF, common principles on validation of non-formal and informal learning, a learning outcomes approach, Europass and certificate and diploma supplements).

Since the EU is the main migration destination at present, European skill needs are not systematically considered in the migration decision. Also, the learning benefits of working and living in a EU country are not systematically captured, and the experience is largely random. There are few (if any) programmes for EU-oriented migration, and where programmes may exist, they are not being used. Little or no training is available to migrants prior to departure to the EU but, if used, VET and language training are rated as most useful.

The return of migrants, even temporary or virtual, can play a useful role in fostering the transfer of skills, together with other forms of brain circulation. Official return assistance programmes to help migrants who wanted to return did not appear to be very important. Only 11.9% of respondents were aware of them, and only 24% of this group said that they benefited from them. This might be explained by the fact that few programmes actually exist at the European level or in the Gulf States to assist migrants in their return projects. The few existing return schemes should be better targeted and new initiatives should be undertaken to valorise the capital and skills that are coming back home.

The number of returning migrants who become employers and/or self-employed is still limited; 24.3% of those who returned with savings invested in business. The best way to encourage return migration is a combination of sensible government policies and a vibrant economy at home. In order to promote the role of returning migrants for local development, policymakers need to develop specific measures that can facilitate business activities and job creation. Presently, these types of measures are rarely available and are rarely used. In addition, mobilisation of the diaspora to contribute to development efforts in Tunisia, both through remittances and the transfer of competences and technology, should be encouraged.

One interesting trend that was reported during the fact-finding and validation is that an increasing number of 'educated females' wanted to migrate on their own, mainly in urban areas. Some indications from the ETF survey confirm this; however, the trend cannot be generalized because of the low answer rates. The trend is probably linked to the overall development process, which includes better education, more urbanisation and increased female participation in the labour market. However, further research should be conducted on this topic before final conclusions are drawn.

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For any additional information, please contact:

ETF Communication Unit
European Training Foundation
viale Settimio Severo 65
I - 10133 Torino
E: info@etf.europa.eu
T: +39 011 630 2222
F: +39 011 630 2200