LABOUR MARKET PROFILE

2015 Tunisia

LO/FTF Council’s Analytical Unit
Copenhagen, Denmark
PREFACE

The LO/FTF Council presents this Labour Market Profile as a yearly updated report that provides an overview of the labour market’s situation.

This country profile presents the recent main developments and is not an in-depth analysis. Nevertheless, it shows a wide range of data in a reader-friendly style. Certain key findings of this report can be found on the Executive Summary.

The report is divided in 11 thematic sections, which includes trade unions, employers’ organizations, tripartite structures, national labour legislation, violations of trade union rights, working conditions, situation of the workforce (with subsections such as unemployment, sectoral employment, migration, informal economy, child labour, gender, and youth), education (with subsection vocational training), social protection, general economic performance, and trade. Additionally, the reader may find an appendix including a list of the ratified ILO Conventions.

As indicated, the report is driven by statistical data selection from international databanks, surveys and reports (e.g. the International Labour Organization (ILO), the International Trade Union Confederation (ITUC), the World Bank, WageIndicator Foundation, the Africa Labour Research & Educational Institute (ALREI), etc.) as well as national statistical institutions and ministries, and others. Moreover, narrative inputs are collected from international news sources (e.g. The Economist, the British Broadcasting Corporation (BBC), LabourStart, The Guardian, etc.) together with local sources such as trade unions centers, NGOs, local news, the LO/FTF Council’s Sub-Regional Office, among others.

This report also collects references from several indexes, e.g. Global Rights Index, Doing Business Index, the Governance Indicators, and the Human Development Index. The indexes’ methodologies and the data quality can be followed by the sources websites.

All sources, indicators and/or narrative inputs that are used are available by links through footnotes.

It is noteworthy to highlight that although most of the statistical data is available, there were some problems with availability and reliability of the data. In particular, the data collection of trade union membership, Collective Bargaining Agreements (CBAs), women’s trade union membership and occupational health and safety (OHS) committees are a challenge. Therefore, used data from these abovementioned indicators should be interpreted with some reservations.

ACKNOWLEDGMENT

This Labour Market Profile is prepared by the LO/FTF Council’s Analytical Unit in Copenhagen with support from our sub-Regional Office in Tunisia as well as our local partners in terms of data collection of trade union membership.

All other labour market profiles of the countries where LO/FTF Council operates are available at our website: http://www.ulandssekretariatet.dk/content/landeanalyser

Should you have questions about the profiles you can contact Kasper Andersen (kan@lofft.dk), Manager of the Analytical Unit.

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Tunisia

Labour Market Profile

EXECUTIVE SUMMARY

Tunisia experienced political progress after the wave of demonstrations and protest, also known as the ‘Arab Spring’ during 2011. As a consequence, a new constitution was adopted in 2014. Correspondingly, tripartite bodies between the government, the trade union movement and employers’ organization have been established.

The International Trade Union Confederation (ITUC) has registered a wide range of restrictions on the labour legislations and systematic violations of trade union rights in present.

The economic growth remains unstable and the workforce is marred by high unemployment rates. Following political and economic reforms, both the governance and the private business climate in Tunisia have been affected by some uncertain social changes. Both the capital formation and foreign direct investment have been feeble in recent years, which have weakened the creating of more decent jobs in the formal sector.

Noticeably, a higher middle-class is swiftly growing and relatively few are considered as working poor in Tunisia. The real minimum wage has increased steadily from 3 percent to 5 percent per year since 2000, while the average real wage has experienced a lower growth. But, in practice, the minimum wage regulation has an inadequate enforcement, particularly in the ‘non-unionized’ sectors.

Wage and salaried workers’ status of employment have been on a stable trend and it is significant higher than the self-employed workers. However, the effects of the ‘Arab Spring’ wave gave rise to the share of vulnerable employment.

Indicators associated with Tunisia’s economy illustrate an increasing informal economy coupled with prevailing labour violations. This is an effect caused by the formal sector’s inability to create sufficient jobs. Among other concerns is the expansion of casual employment, which has caused a negative impact in the social protection system. Moreover, the employment regulations have a dichotomy between fixed-term and open-ended contracts that enhance both job insecurity and higher informality.

Tunisia has a high inactivity rate on the labour market which is contrasted by a low employment rate. The former is extremely high among women, which is related to many Tunisian families are still embedded by cultural gender roles. Under those circumstances, a gender gap also prevails in the private sector since men evidently earn higher wages than women. Additionally, due to skills mismatch between job requirements and qualification there is some incidence of over-education in terms of job creation and qualifications, but it is much more current among under-educated.

Tunisia’s labour productivity was relatively high before 2009. Thereafter, a low economic growth and a declining employment rate caused a stall of the labour productivity.

Regarding education, Tunisia records impressive school enrolment rates, especially in secondary and tertiary levels. Noteworthy to mention, women demonstrate very high enrolment rates. A better education does not ensure a better job in Tunisia, though. For example, data reveal that the higher educated workers tend to be more unemployed than lower educated workers. Moreover, vocational training has not followed the high secondary school enrolment evolution. This is related to a barrier between the private sector’s vocational training and the public system is ongoing.

Mutual trust from the society to the state remains fragile. But the Tunisian National Dialogue Quartet set a platform in the beginning of 2015 to advance on the social and economic front. A draft National Council of Social Dialogue was approved in June 2015. However, hard work remains to make the tripartite structures work in practice.

The trade union movement has experienced changes in recent years. New trade unions have been created and their membership continues to rise even though they still possess a weak bargaining power. Tunisia’s trade union density stands at 39 percent among wage and salaried workers.
COUNTRY MAP

Source: The CIA World Factbook
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TRADE UNIONS

According to sources, the Labour Code provides workers with the right to organize, to form and join unions, and protects the right to bargain collectively. The right to strike extended to civil servants, with the exception of workers in ‘essential services’. An official decree that clarifies the list of these ‘essential services’ is not published, though. On the other hand, unions rarely sought advance approval to strike, e.g. strikes not authorized by union management were common during 2014.¹ There have been an upsurge of ‘wildcat’ strikes and social tensions continue to be present in Tunisia’s society after the ‘Arab Spring’ that surged in 2011, and also known as the ‘2011 Revolution’.

Tunisia has a relatively high trade union density at 39 percent of wage workers; and covers a 25 percent of the labour force. A 47 percent of the members are women (this covers only the Tunisian General Labour Union [UGTT]) (Table 1).

Table 1: Trade unions’ status in Tunisia, 2014²

<table>
<thead>
<tr>
<th>Number of trade unions</th>
<th>64</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dues (standard)</td>
<td>N/A</td>
</tr>
<tr>
<td>Members of trade unions</td>
<td>980,000</td>
</tr>
<tr>
<td>Trade union members share of labour force</td>
<td>25 %</td>
</tr>
<tr>
<td>Trade union members to waged workers (2012)</td>
<td>39 %</td>
</tr>
<tr>
<td>Women member share of trade unions (UGTT)</td>
<td>47 %</td>
</tr>
<tr>
<td>Members of affiliated trade unions from the informal economy</td>
<td>N/A</td>
</tr>
<tr>
<td>Number of CBAs (2004)</td>
<td>42</td>
</tr>
<tr>
<td>Workers covered by CBAs (industries in the private sector) (2004)</td>
<td>80 % *</td>
</tr>
<tr>
<td>Share of workers covered by CBA</td>
<td>N/a</td>
</tr>
<tr>
<td>Labour force (2015)</td>
<td>4,112,000</td>
</tr>
</tbody>
</table>

¹ The above-mentioned outdated registered coverage of CBAs in industries in the private sector appears to be overestimated. As an indication, a recent study from 2015 argued that CBA coverage was roughly estimated at 20 percent from the Textile, Garment, Shoes and Leather Worker Federation in 2014.²

² Based on data limitations regarding Collective Bargaining Agreements (CBAs), there was registered that 42 CBAs set standards for industries in the private sector. This was estimation to cover of around 80 percent of the private sector workforce.

In November 2015, the Tunisian General Labour Union (UGTT) and the Tunisian Union for Agriculture and Fisheries (UTAP) signed a collective agreement framework governing labour relations in the agricultural sector. This was interpreted as a breakthrough after 42 years where labour relations in the agricultural sector were only governed by the Labour Code. This has opened agricultural workers to craft CBAs that protects them.

Another issue is that many of articles within CBAs are often not applied and the degree of compliance to the CBA differs from one company to another. On the same token, many workers are often not aware of how their wages are calculated or the wages are paid later than legally specified.

There are registered 64 trade unions and a majority is affiliated to the main trade union centre, UGTT. There are three other federations. A registered total trade union membership has been noted as close to 1 million workers (Table 2). This number appears to be an underestimation due to limitations of available data. On the other hand, due to campaigns against subcontracting labors has increased the number of union members.

Table 2: Trade Union Centre in Tunisia³

<table>
<thead>
<tr>
<th>Trade Union Centre</th>
<th>Total Members</th>
<th>Female Members</th>
</tr>
</thead>
<tbody>
<tr>
<td>UGTT - Union Générale Tunisienne du Travail</td>
<td>900,000</td>
<td>47%</td>
</tr>
<tr>
<td>CGTT - Confédération Générale Tunisienne du Travail</td>
<td>30,000</td>
<td>-</td>
</tr>
<tr>
<td>UTT - Union des travailleurs tunisiens</td>
<td>50,000</td>
<td>-</td>
</tr>
<tr>
<td>UTFF - Organisation tunisienne du travail</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>

³ It has been noted that the government holds organized collective social negotiations only with the UGTT. Among others, representatives from the General Confederation of Tunisian Labor (CGTT) and the Union of Tunisian Labour (UTT) have complained that their labour organizations had been ignored and excluded from tripartite negotiations.

Tunisian General Labour Union (UGTT)³

UGTT (Union Générale Tunisienne du Travail) was established in 1946 and participated in the fight for independence from France. UGTT is a strong organization in the Tunisian society, being the only civil society body with a significant presence in all the regions of the country. The organization represents workers and retired workers in 24 regional unions, 19
sectoral federations and 21 general unions. UGTT has around 900,000 members, drawn predominantly from the public sector, and gained 200,000 new members after the ‘2011 Revolution’.6

The UGTT is affiliated with the International Trade Union Confederation (ITUC) and the International Confederation of Arab Trade Unions (ICATU).

After the 2011 Revolution, the UGTT went through a process of internal reform. During the Congress in December 2011 a new leadership was elected with 10 new members and three from the former leadership; a list referred to as the “consensus list” elaborated by 17 regions and 15 sectors.

UGTT’s relationship with the former interim government was somewhat strained, notably with the former government parties Ennahdha and the Congress for the Republic (CPR). The former interim technocrat government was inserted after a national dialogue process, in which UGTT was one of the driving forces. The working relationship between this government and UGTT improved. Several bipartite and tripartite working bodies were reactivated since the technocrat government took over. Some internal rifts of UGTT have been present as some members of the organization reject holding strikes against the government while others disagree.7

After more than four years after the revolution in January 2011, the UGTT’s initiated the national council in July 2015 to debate future policy in a changed political landscape. Some of the key issues are the upsurge of the above-mentioned ‘wildcat’ strikes that ignore the usual procedure for having their strikes endorsed by the UGTT hierarchy. It has questioned if the organization’s historical legitimacy has been weakened. Moreover, the transparency of UGTT’s funding sources has been suggested to be revised.8

During August 2015, UGTT and the government initiated to examine the possibility to delay deduction of strikers’ wages.

As part of the Tunisian National Dialogue Quartet, UGTT’s Secretary General, Mr. Hassine Abassi, was awarded the Nobel Peace Prize in December 2015 for the decisive contribution to the building of a pluralistic democracy in Tunisia in the wake of the ‘Revolution of 2011’.9

**Tunisian General Confederation of Labour (CGTT) & Tunisian Workers’ Union (UTT)**

According to the Bertelsmann Stiftung, two new trade union centres have been established after the 2011 revolution: CGTT (Confédération générale tunisienne du travail) and the UTT (Union des travailleurs tunisiens). At the beginning of 2013, CGTT and UTT had around 10,000 members, but the organisations are growing and represented between 30,000 and 50,000 members, respectively, in the end of 2013.

Both organizations advocate trade union pluralism, and their general secretaries are both former leaders of the UGTT. CGTT had been awaiting registration since 2006 and both CGTT and UTT began operating in 2011.

It has been observed that the two unions still have less bargaining power than UGTT.10 And, according to ITUC, CGTT experienced internal division.11

**Tunisian Labour Organisation (OTT)**

On August 26, 2013, a fourth trade union center was established, the pro-Islamist Tunisian Labour Organization (OTT). Part of the new trade union center was a UGTT-dissident group. The new center partially justified its establishment as a counterpoint to UGTT, which it criticized for not serving the country’s interests and for lack of transparency.

In September 2014 the organization’s president and some of its activists held a hunger strike to protest the claimed negligence of the government in dealing exclusively with UGTT as the representative of organized labour.

It was registered that the OTT and World Federation of Trade Unions (WFTU) exchanged views in 2014 for the strengthening of their relations and mutual cooperation as well as for common activities in Tunisia.

**EMPLOYERS’ ORGANISATIONS**

**Union of Industry, Commerce and Artisans (UTICA)**

The main representative of the private sector and employers’ organisation in Tunisia, UTICA (Union Tunisiène de l’Industrie du Commerce et de l’Artisanat), had close ties with the Ben Ali regime (1987-2011). Based on the limitations of updated data availability, UTICA has a membership of 6,000-7,000 mainly large companies;12 and a structured in 17 federations, 24 regional unions, 216 local unions, 370 national union chambers and 1,700 regional union chambers.13
After the ‘2011 Revolution’, the working relations between UGTT and UTICA has ameliorated profoundly. There are many examples of a constructive working relationship between the two organisations, but also examples of the contrary.

After the 2011 revolution, UTICA has been going through an internal reform process. At the congress in January 2013, the new president was elected. With the emergence of “labour union pluralism” during the last years, employers complained that negotiating bargaining agreements had become more complicated.

The previously mentioned ‘wildcat’ strikes have been criticized by the UTICA. This organization argues that social dialogue can only be achieved by enforcing the law and by going through the negotiation stages before deciding to go on strike.

Confederation of Tunisian Citizen Enterprises (CONECT)
In September 2011, UTICA saw a competing employers’ association emerge with the formation of the CONECT (Confédération des Entreprises Citoyennes de Tunisie), which was said to be closer to the first interim government.14

CONECT in collaboration with the Tunisian Entrepreneurship Network (TEN), the Tunisian Solidarity Bank and the Bank of Financing Small and Medium Sized Enterprises (BFPME) signed in November 2015 a co-operation agreement as part of a project funded by the Qatari Friendship Fund (QFF) called ‘Tninit’. This agreement aims to facilitate granting of funds and mentoring of young entrepreneurs, besides the creation of an efficient system to increase the success rate of projects.

CENTRAL TRIPARTITE STRUCTURES

Mediation and Arbitration15
Individual labour disputes are handled by industrial tribunals. Collective labour disputes are first handled by a Consultative Commission. If that fails it is attempted to be conciliated. Depending on the geographical extend of the dispute, a regional or central tripartite Arbitration board will then decide on the case if the disputes is agreed to be arbitrated.

Tripartite bodies established by the Labour Code16
The Labour Code requires several tripartite bodies to be established. These fulfill functions such as regulate and give advice on labour policy, minimum wages, occupational safety and health and social dialogue:

- Conseil de la formation professionnelle (Council for vocational training)
- Comité supérieur de l’emploi (High committee for employment)
- Comité du travail (Labour Committee)
- Comité de santé et de sécurité au travail (Occupational Safety and Health Committee)
- Commission nationale du dialogue social (National commission on social dialogue)
- Commission régionale ou à la commission centrale de contrôle du licenciement (Regional or central commission for control of dismissals)
- Commission consultative des conventions collectives (Consultative commission on collective bargaining agreements)
- Commission centrale des salaires et des commissions locales de salaires (Central or local Commission for salaries)

A number of bi- and tripartite commissions have been established. They are regrouping representatives from the government and UGTT; regrouping representatives from UGTT and UTICA; or regrouping representatives from the three parties, for discussions on a number of areas, such as pressing socioeconomic issues, concluded social agreements, and wage negotiations.

In addition, five tripartite commissions / sub-commissions have been created to concretize the ambitions of the Social Contract (see the section National Labour Legislation). Observers generally registered the commissions as effective, although details on resources available to the commission were unavailable.17

The Social Contract asserts the intention of establishing a National Council for Social Dialogue. A law draft of the statutes of this council has been developed by the tripartite commission charged with the overall lines of the social contract, and the draft has been submitted to the presidency of the government for examination.

Other bi/tripartite organs
- Board of the Tunisian National Social Security Fund (Caisse Nationale de Sécurité Sociale, CNSS)
- Board of the National Health Insurance Fund (Caisse Nationale d’Assurance Maladie, CNAM)
Financial deficits of the social funds continue to increase and this constitutes a significant challenge of their sustainability.

**NATIONAL LABOUR LEGISLATION**

**Constitution**

After the fall of the ex-president Ben Ali in January 2011, the drafting of a new constitution was one of the milestones in Tunisia's democratic transition. A National Constitution Assembly (ANC) was elected in November 2011. After two years of debate between Islamists and secularists, the parliament adopted a new constitution in January 2014.

Amongst others, the new constitution protects: the right to organize and to strike, equality of women, and freedom of expression.

International bodies and heads of state have praised the completion of the new constitution. Among these, the International Trade Union Confederation's (ITUC) General Secretary has called the adoption of the new Constitution as a "historic moment for the country and the region as a whole."18

Despite the new constitution is applauded by many, the final result has also many critics. For example, some are disappointed that the Islamic-oriented majority of the ANC did not secure a more Islamic-oriented constitution, while others criticize the constitution for being too Islamic-oriented and for including ambiguous and contradicitious paragraphs, leaving too much leeway for the interpretation.

**Code du Travail**19

The Labour Code from 1966 with several amending regulations working hours, overtime, leave, salary, occupational safety and health, foreign employees, vocational training, apprenticeships, and protection of women workers. It also prohibits child labour, and subterranean and night work for workers under 18 years.

By the same token, it establishes an employment agency, the labour inspectorate and industrial tribunals. And it regulates strikes, lock-outs, trade unions, individual and collective labour disputes. Strikes must be approved by the central trade union, i.e. UGTT. Although the labour code covers temporary workers, enforcement efforts are weaker than for permanent workers.

The International Labour Office's (ILO) Committee of Experts has pointed out that the minimum age for joining a trade union should be the same as the age for admission to employment as determined in the Labour Code and that there should be no requirement for authorization by parents or guardians. Thus, the Government was requested to amend section 242 of the Labour Code to that effect.20

Several other legislations exist which regulates and sets standards and restrictions for the labour market.21 In addition, a status of Tunisia's ratified ILO Conventions is available on Table 23.

The International Trade Union Confederation's (ITUC) has registered a wide range of restrictions and flaws of the labour legislations in Tunisia. Some examples are: i) restrictions on trade unions' right to establish branches, federation and confederation or to affiliate with national and international organizations; ii) absence of recourse to an independent body responsible for declaring whether an organization may negotiate or not, and iii) restrictions with respect to type of strike action.22

**Social Contract**23

After seven months of negotiations, the Government, UGTT and UTICA signed a Social Contract on 14 January 2013 on the second anniversary of Ben Ali's resignation. The Social Contract includes statements of intent to improve the country's situation. Initially its implementation had a slow pace, which was related to the establishment of new institutions.

This included an establishment of a National Council for Social Dialogue. Also the following tripartite subcommittees were following four areas: i) the review of the fiscal policy, ii) a reform of the education system in order to better adapt it to the needs of the economy in terms of skills and qualifications, iii) the implementation of a national strategy for employment, improvement of the labor legislation, the creation of a system of insurance for loss of employment, and iv) the revision of social security systems. The social contract also guarantees the right to strike and lockout.
The work of the subcommittees was officially launched in April 2014. Several of the subcommittees are progressing. However, the mutual trust between the civil society and the state has been weak; and stakeholders have always been suspicious of each other.

A draft law on the National Council of Social Dialogue was launched in January 2015. This initiative was coordinated by the Tunisian National Dialogue Quartet - UGTT, UTICA, the Tunisian Human Rights League, and the Tunisian Order of Lawyers. This Quartet set a platform to advance on the social and economic front: the National Council of Social Dialogue, a tripartite entity designed to bring together the government, labour in the form of the UGTT, and the private sector via UTICA. The cabinet approved the draft law on the Council in June 2015. The actual membership remains uncertain.  

Overall, despite the significant improvements on the national dialogue structures in Tunisia, it has been observed that much work is still pending, especially on the social and economic front.

In October 2015 the Nobel Peace Prize was awarded to the Quartet and given for its “…decisive contribution to the building of a pluralistic democracy in Tunisia in the wake of the Jasmine Revolution of 2011.”

**TRADE UNION RIGHTS VIOLATIONS**

The ITUC’s Global Rights Index 2015 has registered systematic violations of rights in Tunisia and placed at a cluster 4 out of 5 (see below).

<table>
<thead>
<tr>
<th>Table 3: Tunisia: Global Rights Index, 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>4 out of 5+</strong></td>
</tr>
<tr>
<td>o Systematic violation of rights.</td>
</tr>
<tr>
<td>o Unions in country with the rating of 4 have reported systematic violations against workers. The government and/or companies are engaged in a serious effort to crush the collective voice of workers putting fundamental rights under continuous threat.</td>
</tr>
</tbody>
</table>

Note: Five clusters in total with ratings from 1 to 5. A country is assigned the rating 5+ by default, if the rule of law has completely broken down.

This is related to two cases in 2014/2015. The first is based on workers from a biscuit factory that walked out for three days to demand the implementation of agreements signed with management in March 2014. This included to demanding permanent employment for contract workers operating in the company for over four years and overtime payment for drivers. The strike was announced after talks broke down on 12 June 2014.

The second was due to phone threats to UGTT during January 2015: i) threatening to assassinate its General Secretary and trigger a bomb in Mohammed Ali Square outside the UGTT headquarters; and ii) the UGTT received another threat to detonate a car bomb during the secretary general’s motorcade. The UGTT had seen a recent rise in attacks and threats against its organization. The threats came just after it endorsed a transport strike that paralyzed public transport in Tunis for 4 days.

According to the U.S. Annual Human Rights Report, strikes were often not authorized by union management occurred throughout 2014. Some strikes and sit-ins were by sector-based unions, such as those of education, sanitation, and health professionals. Even if not authorized, the Ministry of Interior tolerated many strikes if confined to a limited area.

This Annual Human Rights Report also noted that the UGTT alleged antunion practices among private sector employers, including firing union activists and using temporary workers to deter unionization.

ILO has two active cases in the Committee of Freedom of Association. The cases are confidential and were filed in June 2012 by CGTT and in June 2014 by OTT, respectively.

<table>
<thead>
<tr>
<th>Table 4: ILO Complaints Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Freedom of Association cases, 2015</td>
</tr>
<tr>
<td>Active</td>
</tr>
<tr>
<td>Follow-up</td>
</tr>
<tr>
<td>Closed</td>
</tr>
</tbody>
</table>

**WORKING CONDITIONS**

In 2014 the monthly minimum wage for non-agricultural workers was increased to 348 dinars per month (US$205), while the daily minimum wage for agricultural sector workers was increased to 12.3 dinars (US$6.8).

Despite Tunisia is under pressure from international lenders to reduce public spending and cut the deficit to help economic growth, there have been negotiations of
a public sector wage hike during 2015. An agreement has still not been concluded (August).

The government has not adequately enforced the minimum wage law, particularly in nonunionized sectors of the economy. In addition, the prohibition against excessive compulsory overtime is not always enforced.\textsuperscript{30}

<table>
<thead>
<tr>
<th>Table 5: Wages and earnings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monthly average, median and legal minimum wages</td>
</tr>
<tr>
<td>Source</td>
</tr>
<tr>
<td>Minimum wage Non-agriculture (2014)</td>
</tr>
<tr>
<td>Minimum wage Private sector (2014)</td>
</tr>
<tr>
<td>Minimum wage for a 19-year-old worker or an apprentice (2014)</td>
</tr>
<tr>
<td>Ratio of minimum wage to value added per worker (2014)</td>
</tr>
<tr>
<td>Growth of real average wage (2006-2013)</td>
</tr>
<tr>
<td>Growth of real minimum wage (2000-2012)</td>
</tr>
</tbody>
</table>

The real minimum wage trend has steadily increased between 3 percent and 5 percent since 2000. The real average wage has a lower growth trend, though (Figure 1).

![Figure 1: Wage trend in Tunisia](image)

Research has demonstrated a remarkable difference in earnings between men and women in the private sector, particularly as salaries increase.\textsuperscript{35}

The Ministry of Social Affairs is responsible for enforcing health and safety standards in the workplace. Under the law all workers, including those in the informal economy, are afforded the same occupational safety and health protections. Enforcement of these measures was often inadequate.

There has been increases in labour inspectors and has around 500 labor inspectors and conciliators and 58 doctor inspectors of labour. The prohibition against excessive compulsory overtime is not always enforced, though. With reference to the 500 labour inspectors it equals 1 per 8,038 workers in the labour force. The ILO recommends 1 inspector per 10,000 workers in industrial market economies and 1 per 20,000 workers in transition economies.\textsuperscript{36}

According to the U.S. Annual Human Rights Report also assessed that working conditions and standards generally are better in export-oriented firms, which are mostly foreign-owned, than in those firms producing exclusively for the domestic market. More than 500,000 persons, the majority of whom are women, worked in the informal economy. The labor laws do not cover this segment and in which labour violations are reportedly more prevalent.

The labour market operated by eased hiring regulations. A new study has argued that a dichotomy between fixed-term and open-ended contracts is present. The use of fixed-term contracts became the standard mechanism to hire workers, given rigidities with open-ended contracts, which could promote unnecessary labor turn-over. In terms of the Labour Code, the fixed-term contract can be concluded upon agreement between employer and employee, provided that its duration does not exceed four years including renewals. In order to keep the staff beyond four years, firms need to enter into an open-ended contract, which causes significant firing rigidity. In order to avoid cumbersome and expensive procedures on layoffs, many employers hire workers only on fixed-term contracts. Lay-off the workers and hire new workers prior to the expiry of the cumulative four-year limit, thus promoting unnecessary job turn-over and giving wrong incentives to convert workers into open-ended contracts.\textsuperscript{37}
In practice, this affected negatively the job quality by large-scale usage of more flexible temporary contracts, with more informality, lower salaries, and little or no social security and job insecurity. A study showed a significant increase of these more flexible conditions during the 2000s.38

With this in mind, temporary contract laborers complained not accorded to the same protections as permanent employees. Efforts to end subcontracting concluded with success in terms of banning subcontracting agencies and subcontracted workers in the public sector in 2013. Around 60,000 workers were able to move into standard employment. Many of the subcontracted workers were women and the UGTT’s National Women’s Committee played an important role in the organization that makes strides to equalize pay.

Similarly campaigns also led to a drop in temporary contract laborers in the private sector, but it is still not benefiting fully from the modifications. Notwithstanding, many still complain they are not afforded the same protections as permanent employees.

A fast overview of the working conditions in Tunisia is available on Table 6.

### Table 6: Working Conditions in Tunisia, 2012

<table>
<thead>
<tr>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Normal weekly hours limit</td>
<td>48 hours</td>
</tr>
<tr>
<td>Overtime limit</td>
<td>60 hours per week (including overtime)</td>
</tr>
<tr>
<td>Maximum weekly hours limit</td>
<td>60 hours</td>
</tr>
<tr>
<td>Minimum mandatory overtime premium/time off in lieu of overtime wages</td>
<td>75% increase (48 hours workweek); no universal national entitlement to compensatory time off</td>
</tr>
<tr>
<td>Minimum annual leave</td>
<td>12 days</td>
</tr>
<tr>
<td>Duration of Maternity Leave</td>
<td>30 days</td>
</tr>
<tr>
<td>Amount of maternity leave benefits</td>
<td>66% of daily wage</td>
</tr>
<tr>
<td>Source of maternity leave benefits</td>
<td>Social security</td>
</tr>
</tbody>
</table>

**WORKFORCE**

The total population in Tunisia is 10.9 million people out of which 4.1 million workers are in employment. At 41 percent, Tunisia reflects very low employment rate (Table 7). It is on average for the Middle East and North Africa, though. This low rate in Tunisia is mainly related to that relatively few women are in employment and many young (15-24 years old) people are in education or fall under the inactivity group.

<table>
<thead>
<tr>
<th>Sex</th>
<th>Age</th>
<th>Employment rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Men &amp; women</td>
<td>Total</td>
<td>15+</td>
</tr>
<tr>
<td></td>
<td>Youth</td>
<td>15-24</td>
</tr>
<tr>
<td></td>
<td>Adult</td>
<td>25+</td>
</tr>
<tr>
<td>Male</td>
<td>Total</td>
<td>15+</td>
</tr>
<tr>
<td></td>
<td>Youth</td>
<td>15-24</td>
</tr>
<tr>
<td></td>
<td>Adult</td>
<td>25+</td>
</tr>
<tr>
<td>Female</td>
<td>Total</td>
<td>15+</td>
</tr>
<tr>
<td></td>
<td>Youth</td>
<td>15-24</td>
</tr>
<tr>
<td></td>
<td>Adult</td>
<td>25+</td>
</tr>
</tbody>
</table>

It is noteworthy to mention that the youth employment rate declined significantly during the 2000s reaching 22 percent in 2013. In contrast the total working population stayed flat at around 40 percent on average (Figure 2).

**Figure 2: Employment participation and inactivity in Tunisia, 1991-2013, Total & youth, %**

Instead the youth inactivity rate steadily increased during the 2000s peaking at 69 percent in 2013, while total inactivity stayed flat at 52 percent. Very large gender gaps are present (Figure 2 & Table 8).

<table>
<thead>
<tr>
<th>Sex</th>
<th>Total</th>
<th>Male</th>
<th>Women</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inactivity rate</td>
<td>52 %</td>
<td>29 %</td>
<td>75 %</td>
</tr>
<tr>
<td>Inactivity rate, youth</td>
<td>69 %</td>
<td>28 %</td>
<td>80 %</td>
</tr>
</tbody>
</table>

Skill mismatches between job requirements and qualifications is also present in Tunisia. Estimations
suggest that skills mismatches are mainly affected by the 33 percent of under-education and women (40 percent) higher incidence than men (31 percent). Over-education is less present, but should not be underestimated (Table 9).

Table 9: Skills mismatches between job requirements and qualifications in Tunisia*42

<table>
<thead>
<tr>
<th>Year</th>
<th>Male</th>
<th>Women</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>16 %</td>
<td>17 %</td>
</tr>
</tbody>
</table>

The labour productivity has experienced a low growth since 2009. It was affected during the upsurge of the 2011 Revolution, declining capital formation, weak employment evolution and insufficient new decent jobs are available. It remains with higher labour productivity than both the North Africa’s and the World’s averages, though.

Figure 3: Labour productivity*43, 1991-2013

As a share of growth in GDP per capita due to labour productivity (GDP per worker) and due to growth in the employment rate show that it reached 0.9 percent in the period 2004-2013. The period went through a relatively high labour productivity (1.8 percent), but during the period 2009-2013 it stayed flat at 0 percent. It is also noteworthy to mention that the employment rate fell at -0.2 percent during the 2009-2013 in comparison with the working age population (WAP). Thus, Tunisia experienced a relatively positive period, but the trend changed significantly due to slower GDP and employment growth (Table 10).

Table 10: Comparative average growth of GDP per capita, employment and WAP in Tunisia*44

<table>
<thead>
<tr>
<th>Years</th>
<th>GDP/ employment</th>
<th>GDP/ WAP</th>
<th>Employment/ WAP</th>
</tr>
</thead>
<tbody>
<tr>
<td>2004-08</td>
<td>1.8 %</td>
<td>2.3 %</td>
<td>0.5 %</td>
</tr>
<tr>
<td>2009-13</td>
<td>0.0 %</td>
<td>-0.2 %</td>
<td>-0.2 %</td>
</tr>
<tr>
<td>2004-13</td>
<td>0.9 %</td>
<td>1.1 %</td>
<td>0.2 %</td>
</tr>
</tbody>
</table>

Unemployment

The high presence of unemployment was a major cause for the ‘Arab Spring’ wave of 2011. The protesters were often young and highly educated citizens who lack a job that were primarily affected by the weak economic development, low private sector investment that faced a weak business environment.

ILO’s estimations highlight Tunisia’s unemployment rate to be at 13 percent in 2013 and with youth unemployment reaching a three times higher rate of 39 percent. Subsequently, the National Institute of Statistics (INS) has signaled that the unemployment rate in Tunisia reached 15 percent in 2015 that is still gradually increasing. Both sources’ data can diverge slightly. Still this reveals that it is particularly problematic to find jobs in Tunisia, especially for youth and undoubtedly troubling for women (Table 11 & Figure 4). Similarly, for the North African Arab countries, unemployment is recently affecting the better educated groups.

Other data show that about 39 percent of the unemployed have been without a job for more than a year.*45

Table 11: Unemployment Facts*46

<table>
<thead>
<tr>
<th>Education Level</th>
<th>Total</th>
<th>Men</th>
<th>Women</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>13 %</td>
<td>7.4 %</td>
<td>29 %</td>
</tr>
<tr>
<td>Youth unemployment</td>
<td>39 %</td>
<td>26 %</td>
<td>71 %</td>
</tr>
<tr>
<td>No Schooling*</td>
<td>8.0 %</td>
<td>5.3 %</td>
<td>14 %</td>
</tr>
<tr>
<td>Primary*</td>
<td>12 %</td>
<td>11 %</td>
<td>19 %</td>
</tr>
<tr>
<td>Secondary Education*</td>
<td>21 %</td>
<td>20 %</td>
<td>24 %</td>
</tr>
<tr>
<td>Tertiary education*</td>
<td>29 %</td>
<td>19 %</td>
<td>42 %</td>
</tr>
</tbody>
</table>

* Year 2011
In Tunisia there are also regional divergences of the unemployment. For example, in the central west of the country, the unemployment rate stands at 29 percent; 27 percent in the southwest; 25 percent in the southeast; while it is 11 percent in the central east. These disparities, which were part of the Tunisian 2011 revolution, continued to increase in the past few years.

The country’s high unemployment rates demonstrate that the labour market has faced a deficiency in creating jobs. From 2004 to 2007 (before the crisis 2007-2008), 77,000 net jobs, mainly unskilled, were created, which was far less than the growth in the labour force at 190,000 during the same period.47

Public work programs, known as the ‘chantier’ system, are one of the previous government’s responses to the demand for jobs. This system was expanded after the revolution. It provides unskilled jobs for those accepted into the program. About 8 percent of the employed labour force were in both ‘Construction and Chantier’ employment. However the high demand for these positions has bred corruption.48

The unemployment trends reflect a structural mismatch between the demand for labor, tilted toward the unskilled, and a growing supply of skilled labor. These high rates of unemployment, as well the low quality of available jobs, underpin the great discontent which has been expressed by Tunisia’s youth in mass social movements.49

There has been an expansion of public recruitment programs. So far the ILO statistical data do not register decreasing unemployment rates, but on national data there has been a slight drop. To point out, there has been an inflated wage bill and swelling budget deficit. To implement the policies and control the pressing macro-economic unbalance, Tunisia borrowed US$16 billion, including a Stand-By Arrangement (SBA) of US$1.75 billion that was signed with the International Monetary Fund (IMF) in 2013. Based on the SBA there have been introduced scale-back public employment expansions and froze public sector wages.50

Current regulations to protect workers from unemployment might also constrain labor mobility and productivity growth. An inadequate system of income protection in the case of loss of job has evolved, in parallel, with rigid regulations on dismissals.

Interpretation of the open-unemployment and employment rates as indicators of a well-functioning labour market is problematic in developing countries. When unemployment is not an option where a person can survive, work of some sort has to be found, often casual and informal work. Unemployment should therefore be understood in relation to the strength of social safety nets, the prevalence of informal employment and how much of informal employment is underemployment due to few formal employment possibilities.51

### Sectoral Employment

The public sector has the highest employment rate at 20 percent in Tunisia, followed by the manufacturing sector by 19 percent; the trade and restaurant & hotel section by 17 percent and then 15 percent workers in the agricultural sector. Some of the most significant changes on the sectoral employment is the reduction from the agricultural sector from 26 percent in 1989 to the mention 15 percent in 2014. In contrast, the public sector increased from 9 percent to 20 percent during the same period. These two latter mentioned sectors have a relatively low GDP share (Table 12).

### Table 12: Employment distribution (2014) & GDP share per sector (2013)

<table>
<thead>
<tr>
<th>Sector</th>
<th>Employment</th>
<th>GDP share per sector</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mining &amp; quarrying</td>
<td>1.2 %</td>
<td>7.2 %</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>19 %</td>
<td>16 %</td>
</tr>
<tr>
<td>Electricity, gas &amp; water</td>
<td>N/a</td>
<td>1.5 %</td>
</tr>
<tr>
<td>Construction</td>
<td>13 %</td>
<td>4.5 %</td>
</tr>
<tr>
<td>Trade, restaurants &amp; hotels</td>
<td>17 %</td>
<td>15 %</td>
</tr>
<tr>
<td>Transport &amp; communication</td>
<td>5.8 %</td>
<td>12 %</td>
</tr>
<tr>
<td>Finance, real estate &amp; business services</td>
<td>6.3 %</td>
<td>14 %</td>
</tr>
</tbody>
</table>
Danish Trade Council for International Development and Cooperation
Labour Market Profile 2015

| Public administration, education & health | 20 % | 11 % |
| Other services | 4.0 % | 9.9 % |
| Agriculture | 15 % | 9.2 % |

Note: The column of employment is calculated as percentage of the total employment.

Estimations suggest a significant gender gap is present in the agricultural sector, with men’s employment of 26 percent and women’s at 43 percent.

Overall, most workers are employed in the service sector (52 percent), followed by the industry (34%), and fewest in agriculture (15%). Tunisia is therefore a well industrialised economy where agriculture only plays a smaller role. Sector share trends also show that there have been very minimal shifts in sector shares from the agricultural, industry and service sectors (Figure 5).

![Figure 5: Sectors' Share in Tunisia 2000-2013, % of GDP](image)

The labour market’s movement from low-productivity to higher-productivity jobs is limited. The Table 6 shows that the status of wage & salaried workers experienced has fast increase in the beginning of the 2000s that peaked at 76 percent in 2004, but fell back at around 70 percent during the rest of the 2000s. Since 2010 this trend is slowly increasing again and reached 72 percent in 2013. Instead own-account workers are declining significantly just as the number of contributing family workers is slowly decreasing. Stated differently little group of workers moved from vulnerable and more informal employment into formal jobs. A previously mentioned study of Labor Policy to Promote Good Jobs in Tunisia showed that each year only 11 percent of informal wage employees and 8 percent of the self-employed move to a formal job in the private sector. It is interesting to note that employers are on a fast increase (Figure 6).

![Figure 6: Status of employment in Tunisia, 1993-2013, %](image)

Based on the available data, there was a slow increase of wage and salaried workers after 2007, but it was on a slight decrease in 2011, which is related to the 2011 revolution. The self-employment stayed more or less stable, but the self-employed share of vulnerable employment increased fast.

Another issue is that job seekers prioritize the public sector due to higher average wages and fringe benefits than in the private sector. For example, estimations suggest that within the public sector, a worker with secondary education earns around 50 percent more in the public sector than in the private sector. University graduates earn, on average, 30 percent more. Benefits such as pensions and other entitlements are also considerably more generous in the public sector.

Migration

With a net migration rate of one per every 1,602 inhabitant, fewer emigrated from Tunisia than the average for developing countries in the Middle Eastern and North African (MENA) region. The net migration was higher in the decade before. Remittances play an important role in the economy, though; and almost double as high as MENA’s average.

<table>
<thead>
<tr>
<th>Table 13: Migration Facts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net migration (2008-2012)</td>
</tr>
<tr>
<td>Net migration to average population per year (2008-2012)</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Remittances received, % of GDP (2012)</td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>
With an equivalent to roughly 1.2 million Tunisians living abroad since 2012, they are considered a prime emigration country in the Mediterranean region. After the Libyan civil war in 2011, Tunisia has had a large influx of an estimated 600,000 and 1 million refugees, a third being returning Tunisians. This has only exacerbated the unemployment problem in Tunisia.

**Figure 7: Net migration trend** (1998-2012), Net migration to average population

Unemployment and the deficit of decent work have been strong push factors for Tunisian emigration. The Tunisian revolution in 2011 also increased emigration. Tunisia has also been described as an important transit country for mostly irregular migrants from Sub-Saharan Africa to Europe.

The internal movements from low-earnings regions to higher-earnings regions are not common, i.e. only 2 percent of workers in the south-west region and 5 percent from the southeast region move to Grand Tunis each year.

In June 2014 the Italian Labour Union (UIL) and UGTT signed a cooperation protocol, which includes collaboration to promote legal migration and to assist migrant workers.

**Informal Economy**

Few reliable estimates of the informal economy exist. According to a U.S. Annual Human Rights Report, more than half a million workers were informally employed (15% of the employed), and the vast majority were women. Labor laws do not cover workers from the informal economy where labour violations are reportedly more prevalent. This is related to that the inspectors do not cover this ‘sector’.

Some indications prove that the informal economy is growing. Tunisia’s informal economy rose sharply from 30 percent in 2010 to 38 percent at the end of 2013. Collected data proves that the effects of this sharp rise were due to a widening gap between income generated from the formal and informal sectors.

Own-account workers represent 24 percent of the agricultural sector while 52 percent represent workers in the service and trade sector; the latter largely meaning street vendors. Of contributing family workers, 60 percent are in the agricultural sector and 26 percent are in the service and trade sector.

A 2013 survey of the informal workers, proved that only 5.2 percent of informal employees have a different vocational activity in addition to those currently exercised. Moreover, almost 98 percent of the informal employees lack an employment contract and 80 percent are not informed about social security. Even though nearly 12 percent of workers are aware of the procedures and steps to join the social security program only 7 percent of informal workers have a national health care card (‘white’ card). And, those who have insurance through the CNAM (with a yellow/private card) represent 10 percent.

Since the workers in the formal sector (i.e. wage & salaried workers) are more present in Tunisia, as previously mentioned, the informal employment in Tunisia is therefore relatively very low in comparison with many other countries in Africa, especially in the Sub-Saharan Africa where the informal employment could range between 85 percent and 95 percent. This suggests that the labour market tends to be more formal in Tunisia. Instead the labour market dysfunctionality and decent work deficits are better reflected in the unemployment rate, which, as demonstrated, is very high.

**Child Labour**

Around 2.6 percent of children under 15 years old are working, but this figure does not include children who work in the informal economy. Children tend to work in rural areas or as vendor in urban areas, mainly during the school vacation. Child labour is in the informal sector often as handicraft, mechanics or street vendors. Girls tend to work as domestic servants.

On occasion, labor inspectors coordinated spot checks with the UGTT and the Ministry of Education. However, the country lacks a list of hazardous work forbidden to children, and child labour law enforcement is on a decline.
New progressive legal protections for children were included in the newly approved Constitution. Moreover, implementation of a National Plan of Action to Combat Child Labour was initiated. Labor inspectors were trained on child labour-related issues, and identified 53 violations of child labour rights during 2013. In general, the enforcement does not seem to have been prioritized by government authorities.

Despite insufficient statistics, the problem of child labor in Tunisia appears to become more pervasive and visible in the aftermath of the Tunisian 2011 Revolution.

**Gender**

Tunisia’s long featured activism among women that fight for equal rights in Tunisian society has inspired other countries in the region. Today, Tunisia is known for its modern legislation on women’s rights. This can be reflected in the 2012’s post-constitutional gender parity where the new constitution reflected women to hold a complementarity role rather than an equal role to men. As a result, it caused an upheaval where thousands of women marched in protest. After having stirred an international debate, these formulations were removed in the new electoral law of 2014. The law adoption is indeed a milestone in the democratic transition process of Tunisia, where the new ruling forces are indeed receptive to both national and international women’s movements pressure and international institutions in general.

Despite progress in legislation to reduce gender inequality, this report has already shown that women in Tunisia still have a quite low participation rate on the labour market. Not to mention more are unemployed than employed, which is a rare and grave situation.

Both men and women have also higher unemployment rates among the better educated, but women are particularly hard hit, i.e. 42 percent of women with tertiary or university education are unemployed. Women also have lower levels of education, but their enrolment rates into secondary and tertiary schools are higher than men’s. Tertiary or university enrolment have increased drastically for women over the last decade, and vastly outpaced men's (see also Figure 11).

Women in employment are concentrated in certain sectors, particularly in agriculture. They are often not considered being economically active due to falling under domestic work.

Deeply entrenched gender roles within the family also have an adverse effect on women’s labor market participation. Tunisian women take more responsibility in the household and have a greater workload than men regardless of their professional situation. There is also a lack in social services, making women strongly attached to their traditional domestic roles. Other groups, such as unemployed youth or women in the countryside, remain poorly organized.

With reference to the most recent Enterprise Survey, Tunisia has a relatively high rate of firms with women ownership in comparison with the MENA and all countries’ average. The country remains to have higher participation in terms of top management and permanent full-time workers in comparison with MENA, but is ended lower than all countries' average (Figure 8).

![Figure 8: Enterprise Survey in Tunisia](image)

**Youth**

It was the younger generation that sparked changes in Tunisia as well as across the Middle East and North Africa Region in 2011. Aspirations remain unmet. Many youth think they have been unable to secure a role in decision making and feel that they are not consulted on issues that directly affect them.

The Government is funding and managing a special program that provides wage earning trade apprenticeships to the youth population (15 to 20 years of age). This program grants an alternative to exploitative child labor.

The youth unemployment rate faces an upward trend higher than what the North Africa’s average holds. By 2011, youth unemployment rates skyrocketed for both men and women at the age of 15 to 20 years.
genders, primarily as an impact of the 2011 Revolution. Nevertheless, both men and women encompassed a swift return to the unemployment rates in relative terms. This does not leave behind that fact that the overall youth unemployment rate did not diminish. Generally speaking, young unemployed workers increased while the youth labour force fell, in absolute terms.

The share of youth unemployment within total unemployment has astonishingly declined from 74 percent in 2005 to 57 percent in 2013 (Figure 9). Although this decline may be attributed to more job availabilities for youngsters, caution must be taken since there might also be a possibility that they are either entering educational institutions or they are simply becoming inactive.

Presently, a National Youth Policy is not available in the country, but according to the current government, they are under formulation. As previously mentioned, the regional disparities, an educational system that requires reform and a restricted labor market are all contributing factors to the problems faced by young people in Tunisia.

A significant milestone for Tunisia’s history occurred when the first transparent elections were held in October 2011 yet only 17 percent of youth (18 to 25-year olds) were registered to vote. According to a Youth Perception Study from 2013, youth expressed that the leadership is not listening to the youth aspirations.

One of the most pressing barriers for youth inclusion is the large share of the education, employment, or training (NEET). Tunisia currently has one of the highest NEET rates in the Middle East and North Africa Region, estimated at approximately 33 percent of the total number of young people aged 15–29 years. NEET rates display significant gender and regional disparities, and in rural areas more than two out of five youth are NEET, compared with almost one in three in urban Tunisia (Figure 10).

In addition, more than four out of five rural and one out of two urban young people do not complete secondary schooling. It is this group that comprises the bulk of NEETs.

**EDUCATION**

As part of the Middle East and North Africa (MENA), Tunisia holds a medium level of education. Over 40 percent of Tunisian’s possess a level of secondary education and a level of university education. In the case of women, they possess lower levels of education in both kinds of education. In fact, many have no schooling enrolment at all (see also Table 14 shows the educational attainment of all Tunisians above 25 years, which gives a glance of the human capital of the labour force).

<table>
<thead>
<tr>
<th>Highest Level Attained</th>
<th>Total</th>
<th>Women</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Schooling</td>
<td>27 %</td>
<td>38 %</td>
</tr>
<tr>
<td>Primary</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Begun</td>
<td>14 %</td>
<td>12 %</td>
</tr>
<tr>
<td>Completed</td>
<td>18 %</td>
<td>16 %</td>
</tr>
<tr>
<td>Secondary</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Begun</td>
<td>16 %</td>
<td>12 %</td>
</tr>
<tr>
<td>Completed</td>
<td>15 %</td>
<td>13 %</td>
</tr>
<tr>
<td>Tertiary</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Begun</td>
<td>3.4 %</td>
<td>3.0 %</td>
</tr>
<tr>
<td>Completed</td>
<td>6.2 %</td>
<td>5.1 %</td>
</tr>
<tr>
<td>Average year of total schooling</td>
<td>6.5 years</td>
<td>5.5 years</td>
</tr>
</tbody>
</table>

Note: Primary, secondary and tertiary is the internationally defined distinction of education. In Denmark these corresponds to grundskole, gymnasium & university.
Enrolment rates into schools are higher in Tunisia, than the average for the MENA. Notably more women than men enrol in secondary and tertiary schools and women’s enrolment into universities have increased much more than men over the last decade (Figure 11).

School-to-work transition is difficult. And it has been especially hard for university graduates. According to estimations it takes an average of six years for university graduates to find a stable job. Notwithstanding, results from a study of Tunisian men suggest that education increases employment, but that this increase is concentrated either in relatively low skill white collar occupations or in managerial jobs in the public sector. And clientelism is prevalent as often as the only realistic alternative may be an inefficient and unequitable allocation of jobs based on patronage.

Vocational training

The vocational training system is controlled by centralized government agencies that manage the system without the involvement of social partners. While the funding of VET centers predominantly occurs via public budget allocations, student fees are usually limited and only cover administrative costs. The Social Contract from 2013 covers employment and vocational training policy.

The rate of students in vocational training stood at 6.8 percent in ages 15 to 24, a lower rate than other Northern Africa region counterparts. On the other hand, the ratio of vocational training rate in terms of secondary education level is slightly higher than the MENA average (see also Table 15).

Data show that Tunisia experienced a steep decline with pupils in vocational training from 2011 to 2013. The country has now a lower ratio in vocational training to all pupils in secondary education than MENA’s average. It is also noteworthy that Tunisia has a lower participation of women in vocational training.

Table 15: Vocational Training

<table>
<thead>
<tr>
<th>Pupils in vocational training (2013)</th>
<th>Tunisia</th>
<th>99,345</th>
</tr>
</thead>
<tbody>
<tr>
<td>Secondary education, vocational pupils (% women)</td>
<td>Tunisia</td>
<td>32 %</td>
</tr>
<tr>
<td></td>
<td>MENA</td>
<td>40 %</td>
</tr>
<tr>
<td>Ratio of pupils in vocational student to all pupils in secondary education</td>
<td>Tunisia</td>
<td>12 % *</td>
</tr>
<tr>
<td></td>
<td>MENA</td>
<td>11 % *</td>
</tr>
<tr>
<td>Ratio of pupils in vocational training out of 15-24 year olds</td>
<td>Tunisia</td>
<td>6.8 % *</td>
</tr>
<tr>
<td></td>
<td>Northern Africa</td>
<td>8.5 % *</td>
</tr>
</tbody>
</table>

*) Ratios are based on 2009-2013 averages.

Vocational training system in Tunisia includes three levels: 1) Certificat d’aptitude professionelle (CAP),

Figure 11: Enrolment in Primary, Secondary and Tertiary schools

Figure 12: Pupils in vocational training to all pupils in secondary education in Tunisia and MENA

Note: Net enrolment is the ratio of children of official school age, who are enrolled in school to the population of the corresponding official school age. Gross enrolment is the ratio of total enrolment, regardless of age, to the population of the corresponding official school age.
2) Brevet de technicien professional (BTP), and 3) Brevet de technicien supérieur (BTS). There are 136 Vocational Education & Training (VET) centers.

The government launched a VET reform planned for the years 2014-2018. Some concrete measures have been taken: i) an inter-institutional body to coordinate VET with general education and higher education to be set up by the end of 2014; ii) the law on qualifications framework from 2008 has been put in practice creating first pathways between vocational and higher education; and iii) training centres are to be equipped with observatories of local labour market to respond better to local needs.

Before the Arab Spring in 2011, Tunisia was infamous of not being willing to evaluate public policies. It has now been improved. A recent impact study of Tunisian vocational training programs on employment and wages estimated that vocational training in Tunisia has a positive treatment effect on the probability of employment and on wage. Results showed that assignment to the programs depended on both observable and unobservable characteristics of the individual, e.g. due to individual and family obstacles, the individual perseveres to get a job and works hard to improve wage.81

The private sector also plays a role in supporting the vocational training system, mostly for entrepreneurship. Many of the training centres teach with a system that provides training to students directly in companies. The private sector also has a role in providing training and support services where the market demands them.

However, the private sector and the education sector tend to operate in isolation within the TVET. An issue is that the education and training system lacks the information necessary to become responsive to the needs of the private sector, just as the private sector lacks knowledge and clarification of its role in a demand-driven skill development system. This is a barrier to expanding business in Tunisia and ensuring that the skills acquired are relevant for access to the labor market.82

SOCIAL PROTECTION

Tunisia is known as good example of how social protection was universalized by extending social security coverage to all socio-professional groups. But the system has flaws.

The government runs most social security systems in Tunisia. The two main contributory social security schemes are: i) the National Social Security Fund (Caisse Nationale de Sécurité Sociale, CNSS) for the private sector, and ii) the National Pension and Social Contingency Fund (Caisse Nationale de Retraite et de Prévoyance Sociale, CNRPS) for the public sector.83 The two schemes provide family allowances, family supplements and nursery school subsidy, pensions for old age, disability and survivors, as well as benefits for sickness and maternity leave. In addition, the National Medical Insurance Fund (Caisse Nationale d’Assurance Maladie, CNAM) provides medical insurance.

A vast majority of the working population in employment are covered by the CNSS. Around 80 percent of the population had health coverage, which is particular high for a middle income country and among other North African countries. Several groups of workers are not covered; though. These include casual and seasonal agricultural workers, workers on construction sites, household workers, religious officials and the unemployed. Self-employed are also not covered by the CNSS. Some of these have alternative means of protection.84

The government expenditure in health has experienced a growing trend at 4.5 percent per year in the period 2007-2011 (Table 16).

Table 16: Public spending on social protection schemes85

<table>
<thead>
<tr>
<th>Category</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public social protection expenditure, excl. health</td>
<td>Tunisian Dinar 5.8 billion</td>
</tr>
<tr>
<td></td>
<td>US$ 4.1 billion</td>
</tr>
<tr>
<td></td>
<td>% of GDP 8.9 %</td>
</tr>
<tr>
<td></td>
<td>per capita 388 US$</td>
</tr>
<tr>
<td></td>
<td>% of government expenditure 50 %</td>
</tr>
<tr>
<td>Public health care</td>
<td>% of GDP 1.5 %</td>
</tr>
<tr>
<td>Health social protection coverage</td>
<td>% of population 80 %</td>
</tr>
<tr>
<td>Trends in government expenditure in health</td>
<td>% changes per year (2007-2011) 4.5 %</td>
</tr>
</tbody>
</table>

Also the pensionable (60+) age receiving an old age pension has been estimated at 69 percent, while the active contributors to a pension scheme has been estimated at 42 percent (Table 17). The latter is almost double as high as the North Africa’s average, which was assessed at 24 percent.
**Table 17: Benefits, coverage and contributions to pension schemes**, 2011

<table>
<thead>
<tr>
<th>Social benefits for the active age</th>
<th>% of GDP</th>
<th>3.5%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pensionable (60+) age receiving an old age pension</td>
<td>Proportion of total</td>
<td>69%</td>
</tr>
<tr>
<td>Old-age effective coverage: Active contributors to a pension scheme</td>
<td>15-64 years</td>
<td>15-64 years</td>
</tr>
</tbody>
</table>

The Figure 13 also show that the total health-care expenditure not financed by private household’s out-of-pocket payments has stayed flat at around 60 percent in the period 2005-2011. It hoovers above the Egypt and the Morocco’s payments, but significant lower that the Algeria’s average.

**Figure 13: Total health-care expenditure not financed by private household’s out-of-pocket payments 1995-2011, %**

![Graph showing health-care expenditure](image)

An unemployment law was established in 1997, and covers non-agricultural salaried employees. The benefits are at a maximum of the national minimum wage, paid for up to a year. There is also a temporary scheme, where recent graduates can receive unemployment benefits. Employers and employees pay different contributions depending on the benefit type.

A wide range of active policy of employment geared of enrolment and integration programs for youth. Currently the Government promotes pilot Active Labor Market Programs (ALMPs), which includes a consolidation process to establish a unified social protection information system.87

Some key challenges with the social insurance system (pensions, health, unemployment) are ad-hoc financing mechanisms and redistributive arrangements that increase labor costs - notably through a high tax wedge, which is the difference between the total cost of labor, take-home pay, and the valuation of social insurance benefits - making the systems financially unsustainable and inequitable.88

The trade union movement has raised concerns about the massive expansion of casual employment’s impact in the social protection. This is related to precarious employment not only weakens the interests of the workers and the financial equilibrium of the social security system. It also undermines the whole national economy, e.g. weakening of solvent domestic demand and absence of productivity gains.89

**GENERAL ECONOMIC PERFORMANCE**

The economic growth entered a slowdown already in 2007 (Table 18 & Figure 14), which was related to the global financial crisis (2007-2008). The decline accelerated fast in 2010 due to political turmoil that ended in the 2011 revolution. There has been registered that especially the agricultural production, the oil and gas sector as well as manufacturing stagnated.90 In the upcoming years, slower growth will test Tunisia's stability.

**Table 18: General Economic Performance Key Fact**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>48.6 billion US$</td>
<td>2.3%</td>
<td>60 of 189 countries</td>
<td>0.721</td>
<td>40.0</td>
</tr>
<tr>
<td>48.6 billion US$</td>
<td>2.3%</td>
<td>96 of 187 countries</td>
<td>0.721</td>
<td>59 of 141 countries</td>
</tr>
</tbody>
</table>

**A high ranking on the Ease of Doing Business Index means the regulatory environment is more conducive to the start-up and operation of a local firm.**93

The Human Development Index (HDI) measures the average of a long and healthy life, access to knowledge, and a decent standard of living.

A Gini Index of 0 represents perfect equality, while an index of 100 implies perfect inequality.

The GDP per capita growth in Tunisia peaked by 5.2 percent in 2007. Since then it declined fast and plummeted to -2 percent in 2011. It fast recovered and it currently stayed at 1.5 percent. In addition, the country’s GDP growth per capita is slightly higher than the MENA region’s average (Figure 14).
Tunisia is going through economic reforms that are linked up by curbing heavy public spending and cut a budget deficit by reforming subsidies ranging from basic food goods to fuel. As already indicated, this has, so far, not supported a higher economic growth. Boosting jobs will not be easy in a country reliant on an affected tourism sector, with few natural resources, and high unemployment.

A slight increasing economic gap started to expand in 2010 between Tunisia and MENA. It has only very slowly been curbed (Figure 15). In terms of the GDP growth per capita, Tunisia is ranked as number 128 out of 230 countries.

Tunisia has had a fast growing upper middle-class in comparison with the MENA region’s average. In contrast, the lower middle-class has decreased. Taken into consideration the relatively few working poor, this suggests that lower middle-class workers are moving upward. It could also be interpreted as more and more workers are having higher income levels (Figure 16).

The inflation rate has been controlled on around 5-6 percent. There has been implemented more tightening monetary policies as well as more moderate commodity prices have allowed for a slowdown in consumer price inflation (Figure 17).
Both the 2011 Revolution and the European economic recession as an impact of the global financial crisis have affected the continued decrease on the capital formation. Tunisia has now a lower trend than the MENA region’s average (Figure 18).

The Doing Business ranks Tunisia on a medium-high level that illustrates a position of 60 out of 189 countries. Since 2014, Tunisia has experienced a decline in most of its indicators with a decreased ranking by four levels in the index (Table 18).

However, the indicators score quite high on getting electricity, trading across borders, and trading across borders. Still it is not easy to obtain credit, especially with insufficient legal rights and lack of credit bureau coverage. Starting a business has also a relatively low ranking which is related to cumbersome procedures (Table 20).

### Table 20: Ease of Doing Business

<table>
<thead>
<tr>
<th>Topics</th>
<th>2015</th>
<th>2014</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Starting a Business</td>
<td>100</td>
<td>89</td>
<td>-11</td>
</tr>
<tr>
<td>Dealing with Construction Permits</td>
<td>85</td>
<td>85</td>
<td>No change</td>
</tr>
<tr>
<td>Getting Electricity</td>
<td>38</td>
<td>38</td>
<td>No change</td>
</tr>
</tbody>
</table>

Overall, the governance environment has been on a relatively medium level. What was especially observe was the increasing political instability during the period 2008-2013. This was related to the social unrest and economic turmoil, which has already been explained in this report. This weighed on the business climate and the economy. Also the rule of law, governance effectiveness and regulatory quality was affected, but they remain on a more medium stance (Table 21).

Equally important there have been some improvements. In particularly the voice and accountability (i.e. the country’s citizens are able to participate in selecting their government) increased significantly. This is based on the democratic transition that initiated in 2011 where women and youth began to have increasingly voiced concerns over their concerns.

### Table 21: Tunisia’s Governance Indicators

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Year 2008</th>
<th>Year 2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice &amp; Accountability</td>
<td>-1.29 / 11%</td>
<td>-0.11 / 45%</td>
</tr>
<tr>
<td>Political Stability</td>
<td>0.12 / 49%</td>
<td>-0.91 / 19%</td>
</tr>
<tr>
<td>Government Effectiveness</td>
<td>0.31 / 66%</td>
<td>0.00 / 55%</td>
</tr>
<tr>
<td>Regulatory Quality</td>
<td>0.07 / 55%</td>
<td>-0.35 / 40%</td>
</tr>
<tr>
<td>Rule of Law</td>
<td>0.14 / 58%</td>
<td>-0.20 / 49%</td>
</tr>
<tr>
<td>Control of Corruption</td>
<td>-0.18 / 53%</td>
<td>-0.15 / 54%</td>
</tr>
</tbody>
</table>

Note: The Governance Indicators score from -2.5 to 2.5 while the percentiles rank from 0 (lowest) to 100 (highest).
Trade plays an important role in Tunisia’s economy. Both export share of GDP, Foreign Direct Investments (FDI) stock are some of the highest among North African countries (Table 22 & Figure 19). Imports are higher than exports; the balance of trade is slightly offset.

Table 22: Trade and Foreign Direct Investment in Tunisia 2014 est.

<table>
<thead>
<tr>
<th>Exports</th>
<th>Imports</th>
<th>FDI flow 2009-13, av.</th>
<th>FDI Stock</th>
</tr>
</thead>
<tbody>
<tr>
<td>16.1 billion US$</td>
<td>23.4 billion US$</td>
<td>1.2 billion US$</td>
<td>35.5 billion USD</td>
</tr>
<tr>
<td>34% of GDP</td>
<td>48% of GDP</td>
<td>1.2% of GDP</td>
<td>73% of GDP</td>
</tr>
</tbody>
</table>

Smuggling in Tunisia has become an endemic problem and affects the economy. Among others, there is a wide variety of illegally imported products in the country, e.g. televisions, food products, cigarettes and gasoline. With rising prices and the high cost of living, more and more people are consuming smuggled products. Estimations suggest that the losses incurred by the Tunisian state due to the parallel trade amounted to US$650 million, of which an estimated US$271 million were lost in customs duties.105

FDI has declined in recent years due to the persistent political uncertainty, and foreign exchange reserves have gradually decreased. Net FDI flows are therefore estimated to have declined to US$1 billion in 2013, compared to the US$1.6 billion reached in 2012.

Trade Agreements
Part of the Greater Arab Free Trade, Tunisia became associated to them in 1998. It includes 16 other member states of the Arab League.

Tunisia also sustains bilateral trade agreements with countries like Morocco, Jordan, Senegal, Egypt, Algeria, Libya, Mauritania, Turkey, EFTA, and the European Union (EU).

Most of Tunisia’s exports and imports are directly made with the EU, particularly France and Spain. The country participates in EUROMED, As for example in the southern part of the European Neighbourhood Policy. It is a long term policy of tying these countries closer to the EU. This includes support for business developments and civil society organizations. These are coupled with financial support, with projects coordinated through the European Neighbourhood Partnership Instrument,108 as well as trade benefits, with the goal of establishing a free trade area.109 The cooperation is being expanded with an action plan for 2013-2017.110
Tunisia’s integration into global value chains is being stimulated by free-trade agreements with the EU, but it is challenged by various obstacles such as trade and investment policies, the business climate, logistics, transport, regional imbalances, and technology transfers.\textsuperscript{111}

Tunisia benefits from the United States’ Generalised System of Preferences (GSP). These are unilateral trade benefits from the U.S. government, allowing duty and quota free access for some product. A country can be removed if it is violating or do not take steps to uphold the ILO Core Labour Standards. Each country is reviewed annually, by the U.S. government.\textsuperscript{112}

Export Processing Zones (EPZ)

According to an ILO survey from 2007,\textsuperscript{113} Tunisia has two EPZ, employing around 260,000 workers and export comprising 52 percent of total exports.

The EPZ programs are frequently cited as examples of robust, job-creating programs that have remained enclaves with few linkages to their host economies. The EPZ share of manufactured exports has more than doubled since 1990.\textsuperscript{114}

Workers in export processing zones are excluded from the right to bargain collectively.\textsuperscript{115}
# APPENDIX: ADDITIONAL DATA

## Table 23: Ratified ILO Conventions

<table>
<thead>
<tr>
<th>Subject and/or Right</th>
<th>Convention</th>
<th>Ratification Date</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Fundamental Conventions</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>C098 - Right to Organise and Collective Bargaining Convention, 1949</td>
<td>1957</td>
</tr>
<tr>
<td>Elimination of all forms of forced labour</td>
<td>C029 - Forced Labour Convention, 1930</td>
<td>1962</td>
</tr>
<tr>
<td></td>
<td>C105 - Abolition of Forced Labour Convention, 1957</td>
<td>1959</td>
</tr>
<tr>
<td>Effective abolition of child labour</td>
<td>C138 - Minimum Age Convention, 1973</td>
<td>1995</td>
</tr>
<tr>
<td></td>
<td>C182 - Worst Forms of Child Labour Convention, 1999</td>
<td>2000</td>
</tr>
<tr>
<td>Elimination of discrimination in employment</td>
<td>C100 - Equal Remuneration Convention, 1951</td>
<td>1968</td>
</tr>
<tr>
<td></td>
<td>C111 - Discrimination (Employment and Occupation) Convention, 1958</td>
<td>1959</td>
</tr>
<tr>
<td><strong>Governance Conventions</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Labour inspection</td>
<td>C081 - Labour Inspection Convention, 1947</td>
<td>1957</td>
</tr>
<tr>
<td></td>
<td>C129 - Labour Inspection (Agriculture) Convention, 1969</td>
<td>Not ratified</td>
</tr>
<tr>
<td>Employment policy</td>
<td>C122 - Employment Policy Convention, 1964</td>
<td>1966</td>
</tr>
<tr>
<td>Tripartism</td>
<td>C144 - Tripartite Consultation (International Labour Standards) Convention, 1976</td>
<td>2014</td>
</tr>
<tr>
<td><strong>Up-to-date Conventions</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Protection of children and young persons</td>
<td>C077 - Medical Examination of Young Persons (Industry) Convention, 1946</td>
<td>1970</td>
</tr>
<tr>
<td></td>
<td>C124 - Medical Examination of Young Persons (Underground Work) Convention, 1965</td>
<td>1967</td>
</tr>
<tr>
<td>Wages</td>
<td>C095 - Protection of Wages Convention, 1949</td>
<td>1958</td>
</tr>
<tr>
<td>Working time</td>
<td>C106 - Weekly Rest (Commerce and Offices) Convention, 1957</td>
<td>1958</td>
</tr>
<tr>
<td>Social Security</td>
<td>C118 - Equality of Treatment (Social Security) Convention, 1962</td>
<td>1965</td>
</tr>
<tr>
<td>OSH</td>
<td>C120 - Hygiene (Commerce and Offices) Convention, 1964</td>
<td>1970</td>
</tr>
<tr>
<td>Industrial Relations</td>
<td>C135 - Workers' Representatives Convention, 1971</td>
<td>2007</td>
</tr>
<tr>
<td></td>
<td>C151 - Labour Relations (Public Service) Convention, 1978</td>
<td>2014</td>
</tr>
<tr>
<td>Vocational Training</td>
<td>C142 - Human Resources Development Convention, 1975</td>
<td>1989</td>
</tr>
<tr>
<td>Labour Administration</td>
<td>C150 - Labour Administration Convention, 1978</td>
<td>1988</td>
</tr>
<tr>
<td>Employment policy and promotion</td>
<td>C159 - Vocational Rehabilitation and Employment (Disabled Persons) Convention, 1983</td>
<td>1989</td>
</tr>
</tbody>
</table>

Fundamental Conventions are the eight most important ILO conventions that cover four fundamental principles and rights at work. Equivalent to basic human rights at work.

Governance Conventions are four conventions that the ILO has designated as important to building national institutions and capacities that serve to promote employment. In other words, conventions that promote a well-regulated and well-functioning labour market.

In addition, there are 71 conventions, which ILO considers “up-to-date” and actively promotes.

Out of 61 Conventions ratified by Tunisia, 53 conventions are in force, 6 conventions have been denounced; and 3 have been ratified in the past 12 months.
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