

The background is a complex geometric composition. It features a dark teal upper section with a white triangle and a teal arrow pointing right. Below this is a large, light blue triangular area containing a pattern of binary code (0s and 1s) that appears to be receding into the distance, creating a sense of depth. The bottom right corner is a solid white area. A teal arrow points left from the white area into the light blue triangle.

Offshoring in Tunisia

Invest in Tunisia

The background of the image is a blue-tinted photograph of an industrial facility, possibly a refinery or chemical plant, featuring complex piping, structural steel, and storage tanks. Overlaid on this image is a pattern of binary code (0s and 1s) in a light blue color, which is more prominent in the upper right and fades towards the bottom left.

Invest **in**
TUNISIA

TUNISIA, A COMPETITIVE OFFSHORING LOCATION

Offshoring in Tunisia shows **excellent performance**. It is divided into three strategic segments, namely:

Business
Process
Outsourcing
(BPO) voice
and data

Information
Technology
Outsourcing
(ITO)

R&D and KPO
(Knowledge
Process
Outsourcing)

The offshoring sector in Tunisia features:

- **about 300** foreign companies,
- more than **34 000** jobs.

Offshoring is undoubtedly one of the most vibrant sectors in Tunisia. This dynamism is largely due to the performance of activities in ICT (Information and Communication Technologies).

ICT sector features:

- **about 1 800** companies.
- **200 University degrees** in ICT-related fields.

The digital economy accounts for **7% of GDP**.

Tunisia's ICT development index "IDI" recorded an **increase of more than 30%** between 2010 and 2015. It is **above the world average** (about 23% between 2010 and 2015).

Tunisia is ranked
2nd in Africa
according to the E-Government
Development Index.

E-government Development
Index, United Nations
Organisation, 2016

**Tunis tops world ranking of
emerging cities in terms of cost
efficiency.**

Global Cities Awards, FDI Global Cities of
the Future 2014/2015

MULTI-SKILLED HUMAN RESOURCES

The education system in Tunisia delivers profiles that have advanced **linguistic**, **technical**, **communication** and **behavioural skills**, which are essential for offshoring professions.

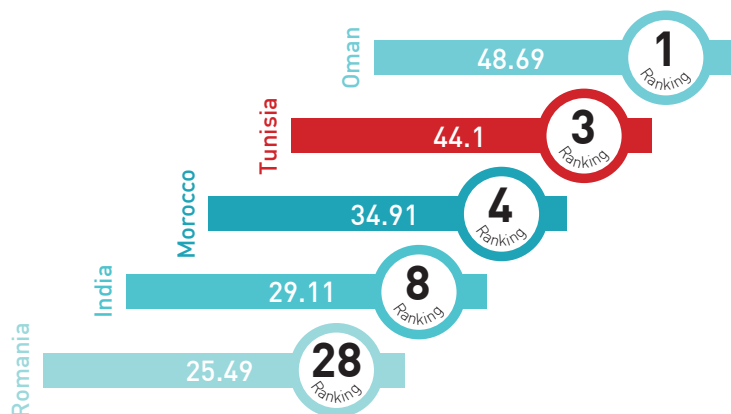
In order to constitute their teams, investors can rely on a pool of skills consisting of:

- **60 000 multilingual** university graduates,
- **9138** graduates in **ICT sections** (computer science and multimedia) in 2015,
- about **6 000** graduates a year in engineering sections.

Tunisia has
**the highest
concentration
of researchers**
among Arab and
African countries.

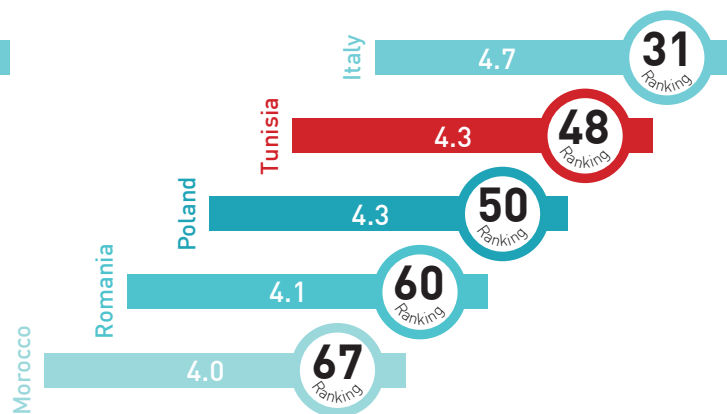
Bloomberg Innovation
Index, 2016

Graduates in Science and Engineering
Tertiary graduates in science, engineering,
manufacturing and construction
[% of total tertiary graduates]



The Global Innovation Index, 2016

**Availability of Scientists and
Engineers**



The Global Competitiveness Index, 2016-2017



Annual gross wages in Tunisia (in Euros)

Hotline (BPO)

5 385
Euros

Graduate engineer

8 975
Euros

Senior/ Group leader

17 955
Euros

Manager

31 418
Euros

Smart Tunisia

Tunisia is ranked **1st** in North Africa in terms of **redundancy costs** (in weeks of salary).

The Global Competitiveness Report
2016-2017

Many international companies have competence centres in Tunisia employing several hundreds of Tunisian engineers and executives:

KROMBERG & SCHUBERT, ALCATEL-LUCENT,
SAGEMCOM, SIEMENS, MICROSOFT...

“The **level of education** in Tunisian universities, engineering schools is **without any doubt unparalleled at present** ... The Tunisian subsidiary of SOFRECOM has one of **the best customer satisfaction rates** and it is indeed **a real success.**”

Mr. Jacques MOULIN
Managing Director, SOFRECOM Group
June 2015

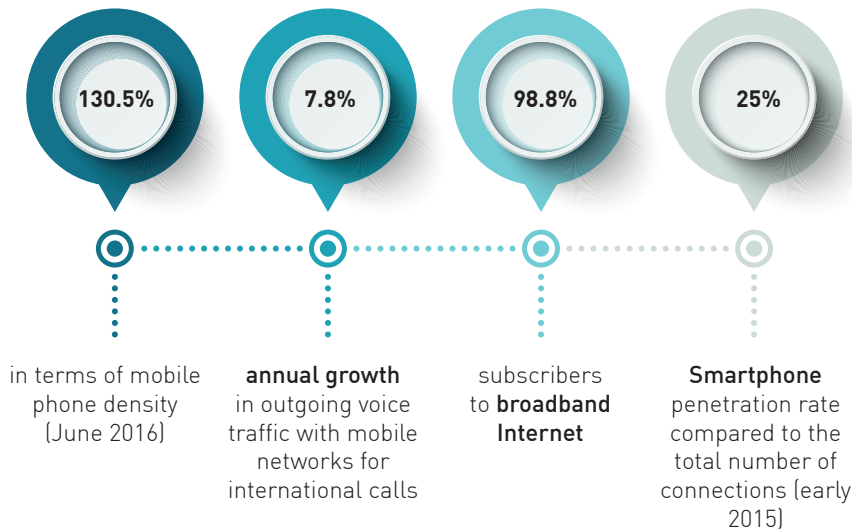
A PERFORMING INFRASTRUCTURE OFFER

Tunisia has one of the most modern broadband infrastructures in the Mediterranean basin with high-speed land and undersea networks and an international bandwidth at around **180 Gb/s**.



THE BIGGEST DATA CENTER IN AFRICA
“DATAZION” IS BASED IN TUNISIA.

The network has:



The average rental cost of a **ready-to-use area** (pre-wired, air-conditioned, modular) is approximately **6.5 € / m² / month**.

Tunis is the **7th best city around the world** to launch a Start-up.

Forbes, November 2015

Tunisia also has **Class A** areas and offices dedicated to different offshoring activities. These areas are equipped with high-end **communication equipment and systems**.

TECHNOPARKS, CLUSTERS DEDICATED TO OFFSHORING

Tunisia has:

3

equipped and
ICT oriented

Technoparks

18 **cyber
parks** -

for training and
scientific and
technological research

Tunisia is the
1st innovating
economy in Africa.

Bloomberg Innovation
Index, 2016

Elgazala Technopark

It is one of the largest technology parks in Africa. It has an area of 65 hectares and hosts more than **100 companies** operating in **Information and Communication Technologies**, including Alcatel-Lucent, Siemens, HP, Huawei, ST Microelectronics ...

Located in Elgazala technopark, **Microsoft** stands out for **innovation** with its Microsoft Innovation Centre «**MIC**». **First of its kind in North Africa**, it is part of the national strategy to make Tunisia a **Euro-Mediterranean platform for technology**

The mission of the MIC is to assist in graduation projects, to support innovative companies and to **certify every year** hundreds of students in Tunisia.

Sfax Technopark

Dedicated to **Information Technologies** and **Multimedia**, it hosts an area of **10 500 sqm** for the activities of the hosted companies alongside with an **R&D** and transfer **centre** in IT, Multimedia & Digital Data Processing. It is an integrated space intended to host activities in the fields of :

- academic **training** and **research**,
- technological **innovation** and **transfer**,
- **production** and Development (Business Park).

Sousse Technopark

Sousse Technopark covers a total area of 60 ha and hosts **65** companies. It includes, among other things, a **business incubator**, **relay workshops**, a **technological research centre**, ...

Three laboratories are operational in the technopark :

- a laboratory of microelectronic systems,
- a laboratory of advanced materials and nano-physics,
- a laboratory of physical, chemical and biological weapons' micro-systems.

A FAVOURABLE LEGAL AND FISCAL FRAMEWORK

Setting up an offshoring company in Tunisia entitles businesses to benefit from **double taxation treaties** and very advantageous tax incentives. Legislation and specific procedures govern the **intellectual property right**. In addition, a law on **the protection of personal data** does exist (Law n° 2004-63 of 27 July 2004).

The new investment law passed in April 1st 2017, offers the following advantages:

- Free foreign ownership for offshore companies,
- Freedom of access to **land ownership** for the project implementation,
- Freedom to transfer funds (profits, dividends and assets) abroad,
- **Premiums** for intangible investment and research and development expenditures,
- **State subsidy** of the employer's contribution to the social security scheme,
- **Subsidies** for of the cost of training programs with certification,
- The possibility to recruit **up to 30%** of foreign executives,
- An **investment premium** granted to priority sectors and for ICT companies located in regional development zones,
- A tax **rate** on profits **reduced to 10%** for totally exporting companies,
- A **total exemption** from VAT and customs duties on the inputs of the products to be re-exported.

Tunisia has a National Strategic Plan "Tunisie Digitale 2020" which includes **SMART TUNISIA**, a program devoted to the development and promotion of offshoring.

This program offers multiple incentives for operators investing in this sector.

INVESTMENT OPPORTUNITIES

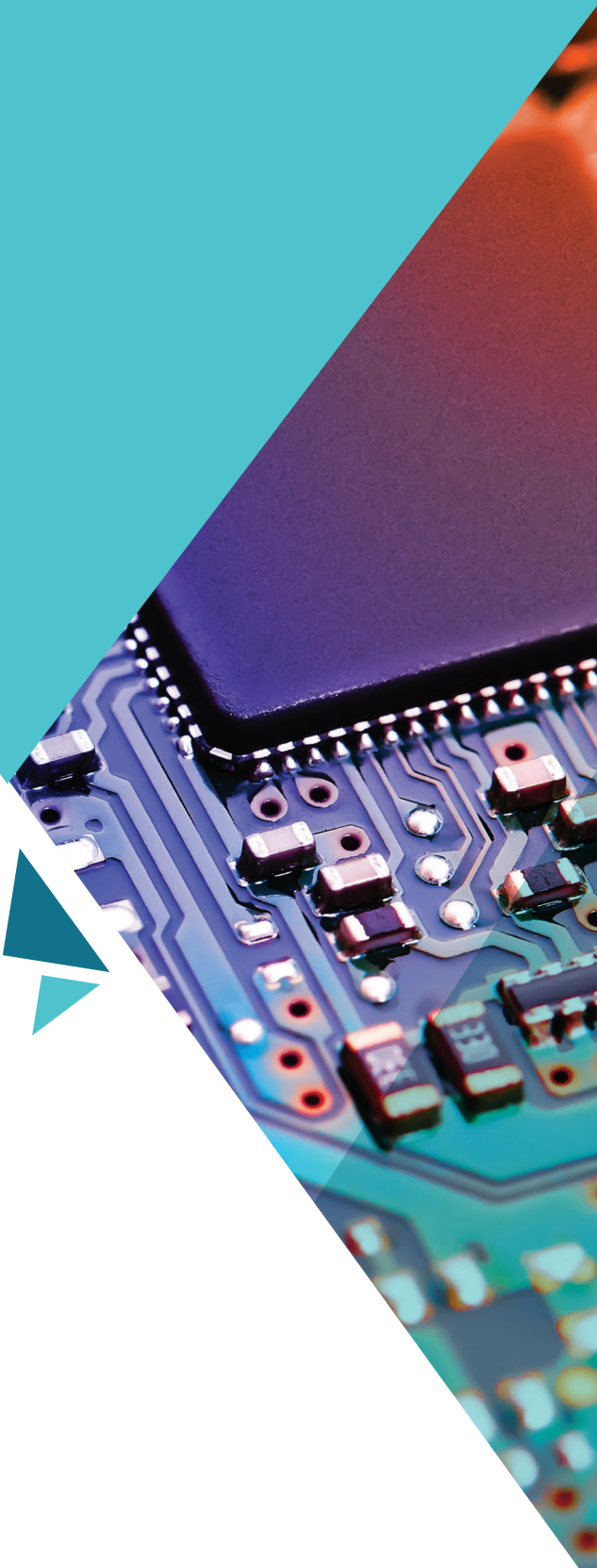
In Tunisia, offshoring is a very attractive global market that covers hundreds of sectors.

It provides a number of investment opportunities, including the following:

- **ITO activities** including the **development of software programs**, the design and development of web and mobile applications, testing and validation of software programs, creative industries.
- The development of **Voice BPO activities** in the fields of sales, customer relations, after-sale services.
- **Data BPO activities** including the management and analysis of financial data and transactions.
- **Advanced research** of information, technical and analytical services and processes of evaluation and decision-making (KPO), product R&D, engineering services and embedded systems.

Voice and data BPO activities represent **45%** of the present potential and can grow **four folds** by **2020**.

ITO and R&D / KPO represent each **20% to 30%** of the market's potential.



SUPPORT INSTITUTIONS

- Foreign Investment Promotion Agency “**FIPA-Tunisia**”
- Tunisia Investment Authority “**ITI**”
- Agency for the Promotion of Industry and Innovation “**APII**”
- National Agency for Computer Security “**ANSI**”
- National Institute for Standardization & Industrial Property “**INNORPI**”
- Elgazela Technopark
- Tunisian Association for Communication Technology “**TACT**”
- “**GET'IT**” cluster
- National Association of Service Providers and Computing Engineering Services “**INFOTICA**”

Companies located in Tunisia:

BPO (Voice and Data)	3 SUISSES, ADP, CONVERGYS, OWLIANCE, PROTEGYS, SOFRECOM, TELEPERFORMANCE, TRANSCOM, VISTAPRINT
ITO	CISCO, EDS, SOPRA HR, HUAWEI, IBM, LINAGORA, MICROSOFT, SIEMENS, FIS (ex- SUNGARD), ZTE
R&D and KPO	ALTRAN, ACTIA, CAPTAIN DASH, KROMBERG & SCHUBERT, LEONI, ALCATEL-LUCENT, ODDO, SAGEMCOM, ST MICROELECTRONICS, BUSINESS & DECISION



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