



TUNISIA:
RENEWED
DYNAMIC, NEW
OPPORTUNITIES



KEY FEATURES



Capital
Tunis



Official language
Arabic



Other common languages
French, English and Italian



Currency
Tunisian Dinar (TND)



Average exchange rate
1 TND = 0.296 Euro = 0.333 USD
(as of 2025)



Time zone
GMT + 1



Weather
Mediterranean climate,
12° C in winter, 30° C in summer
(on average)



Urban population
71 % (2025)



Population
11 973 446 inhabitants
(January 2025)



Human Development Index
(HDI between 0.7 and 0.8 : high) *
0.746

Source : Central Bank of Tunisia, 2026
National Institute of Statistics, 2026
* United Nations Development Program 2025



ECONOMIC AGGREGATES 2025

Gross Domestic Product
(at constant 2015 prices)
98 887 MTND

GFCF (% of GDP)
15.2

WAGE DATA

Guaranteed Minimum Inter-Professional
Wage (SMIG)*
470.251 TND
(40 hour-scheme) ≈ 139.652 €

TRADE FLOWS 2025

Exports (at current prices)
63 695.1 M TND

Imports (at current prices)
85 495.4 M TND

74.5 %
Coverage ratio

Main clients
France, Italy, Germany, Spain and Libya

Main suppliers
China, Italy, France, Germany and Algeria

Source: National Institute
of Statistics, 2026

Guaranteed Minimum Agricultural Wage (SMAG) **
(daily wage – skilled worker) ≈ 6.336 €
21.336 TND

Source: * Decree No. 66-2026 dated 30 April 2026
** Decree No. 67-2026 dated 30 April 2026

STRONG REGIONAL INTEGRATION

FREE TRADE AGREEMENTS

To date, Tunisia has signed 58 double taxation agreements aimed at avoiding double taxation and combating tax evasion. It has also signed more than 60 bilateral agreements on the promotion and protection of investments, including:

- **A bilateral agreement** establishing a free-trade area with Turkey,
- **A free trade area agreement** with EFTA countries,
- **The Agadir Free Trade Agreement** between Jordan, Egypt, Morocco and Tunisia,
- **A bilateral free trade area** agreements with Libya, Egypt, Morocco, Jordan and Iraq,
- **An agreement establishing the Pan Arab Free Trade Area** with 18 countries of the League of Arab States.
- **Accession to the COMESA trade agreement** (member since 2018, ratified in 2020).

ADVANCED PARTNER WITH EUROPE



- **Tunisia is the first country in the southern Mediterranean** to have signed an Association and Free Trade Agreement with the European Union
- Tunisia also has the status of **Advanced Partner** with the European Union. This status is set to strengthen trade liberalisation and economic integration
- The signing of a **Deep and Comprehensive Free Trade Agreement** (DCFTA) is underway to ensure the progressive integration of Tunisia into the EU internal market and the construction of a Common Economic Space.



AGREEMENT ON THE AfCFTA

Tunisia's accession to the African Continental Free Trade Area (AfCFTA) represents a major strategic lever for strengthening its economic integration into the African continent and repositioning its production base within new regional value chains.

By providing preferential access to a market of more than 1.4 billion consumers, the AfCFTA opens up significant opportunities for trade diversification, industrial expansion and outreach to fast-growing sub-Saharan markets. This momentum is particularly promising for high value-added sectors such as automotive components, the pharmaceutical industry, agri-food, digital services and renewable energy.

A long-standing partner of the **OECD** since 2012, notably through its adherence to the Declaration on **International Investment** and **Multinational Enterprises**, Tunisia guarantees a **transparent** business environment that **complies** with **international standards** on foreign investment.



PRIME POSITIONING

Tunisia ranks

1st

in North Africa in
terms of:

- **Alignment between graduate skills and business needs**

Global Talent Competitiveness Index 2025, INSEAD

- **Readiness for the energy transition and clean industries**

Energy Transition Index 2025, WEF

- **Graduates in Science, Technology, Engineering and Mathematics (STEM) programs**

Global Innovation Index 2025, WIPO

- **Innovation and scientific research (ecosystem of laboratories and R&D centers)**

Global Knowledge Index 2025, UNDP

- **Regulatory compliance (international standards and policy compliance) aligned with international standards**

Global Opportunity Index 2025, Milken Institute

- **AI talent development (skills, training and infrastructure)**

AI Talent Readiness Index 2025, Qubit Hub & Qhala

ON A BROADER AFRICAN SCALE, TUNISIA'S POSITION IS NOTEWORTHY IN SEVERAL KEY AREAS:

- **Concrete improvement in the business climate** and its ability to provide an environment conducive to companies creation and growth.

Business Ready 2025, World Bank

- **Attractiveness driven by the education level** of its population and its human capital

Global Cities Index 2025, Oxford Economics

- **Digital evolution** (infrastructure, institutions, supply, demand) **and overall digital positioning**

Digital Evolution Index 2025, Fletcher Institute

- **Governance quality**, rule of law and sustainable development

Index of African Governance 2025, Mo Ibrahim Foundation

- **Global cognitive abilities**, capacity for complex problem-solving, and learning potential

Global IQ Ranking 2025, IQ International

- **Stability of image, the "Tunisia" brand is increasingly recognized positively by international opinion leaders**

Global Soft Power Index 2026, Brand Finance

In 2025, Tunisia ranks

1st



world exporter of dates
(in terms of value)

1st



**World organic producer of
organic olive oil**

1st



**provider of health services
in Africa**
(in terms of quality)

1st



**African exporter of the "Made
in Africa» technological
products**
(capacity to export high value-added
products)

2nd

**exporter of health care
services in Africa**

2nd

**worldwide in
thalassotherapy**

2nd

**African producer of
automotive components**



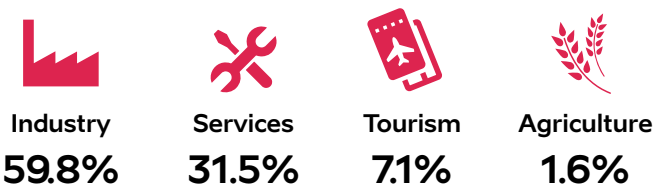
SUSTAINABLE ATTRACTIVENESS

2025 FDI STOCK



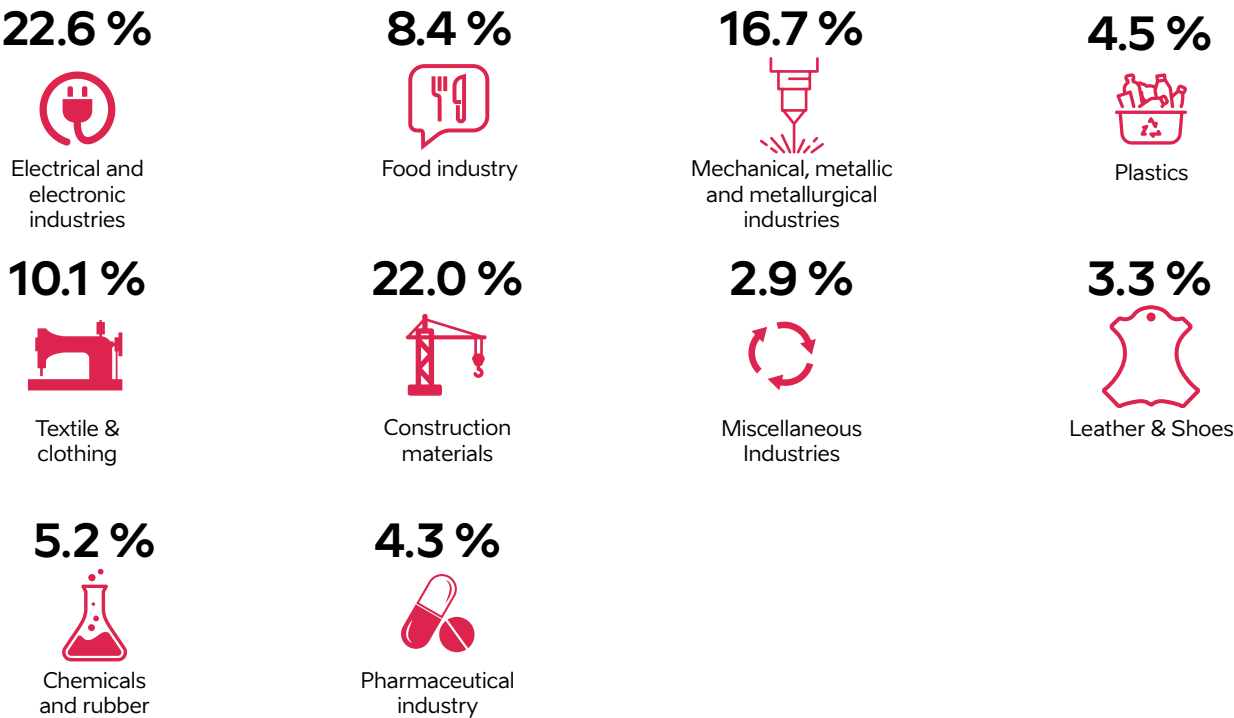
FIPA-Tunisia, 2026

FDI STOCK DISTRIBUTION BY SECTOR (EXCLUDING ENERGY)



Source : FIPA-Tunisia, 2026

FDI STOCK DISTRIBUTION BY SECTOR IN THE INDUSTRIAL SECTOR



Source : FIPA-Tunisia, 2026

MASSIVE FOREIGN PRESENCE

ADP • AIRBUS ATLANTIC • AKZONOBEL
• ALCATEL-LUCENT • AMPERE (RENAULT
GROUP) • ASTEELFLASH • AUTOLIV •
AUTOELECTRIC GROUP • BENETTON •
BIC • BNP • CAPGEMINI ENGINEERING •
CLOUD TEMPLE • CONCENTRIX • DANONE •
DRÄXLMAIER • DESERT JOY • ELECTROLUX •
FORVIA • FRAM • GATTEFOSSE • GENERAL
ELECTRIC • GROUPE 3SI • GROUPE BPCE
• HAIER • HAMELIN • HEINEKEN • HENKEL
• HUAWEI • HUTCHINSON • IBM • KAPIT
• KASCHKE KG • KBE ELEKTROTECHNIK
• KROMBERG & SCHUBERT • LACROIX
ELECTRONICS • LAPP • LATECOERE • LEONI
• LINEDATA • MIROGLIO • NESTLE • ODDO
BHF • ORANGE • PFIZER • PHILIPS • PROXYM
• RIEKER • SAGEMCOM • SAFRAN • SANOFI
• SANLUCAR • SCANIA • SELT MARINE •
SIEMENS • SIOEN • SOCIETE GENERALE •
SOFRECOM • SOMFY • SOPRA HR Software
• SARTORIUS • ST MICROELECTRONICS •
SUMITOMO • TALAN • TELEPERFORMANCE
• TOTAL • UNILEVER • VALEO • VAN DE
VELDE • VAN LAACK • VISTEON • WEWIRE
• YAMAICHI ELECTRONICS • YAZAKI • YURA
CORPORATION...



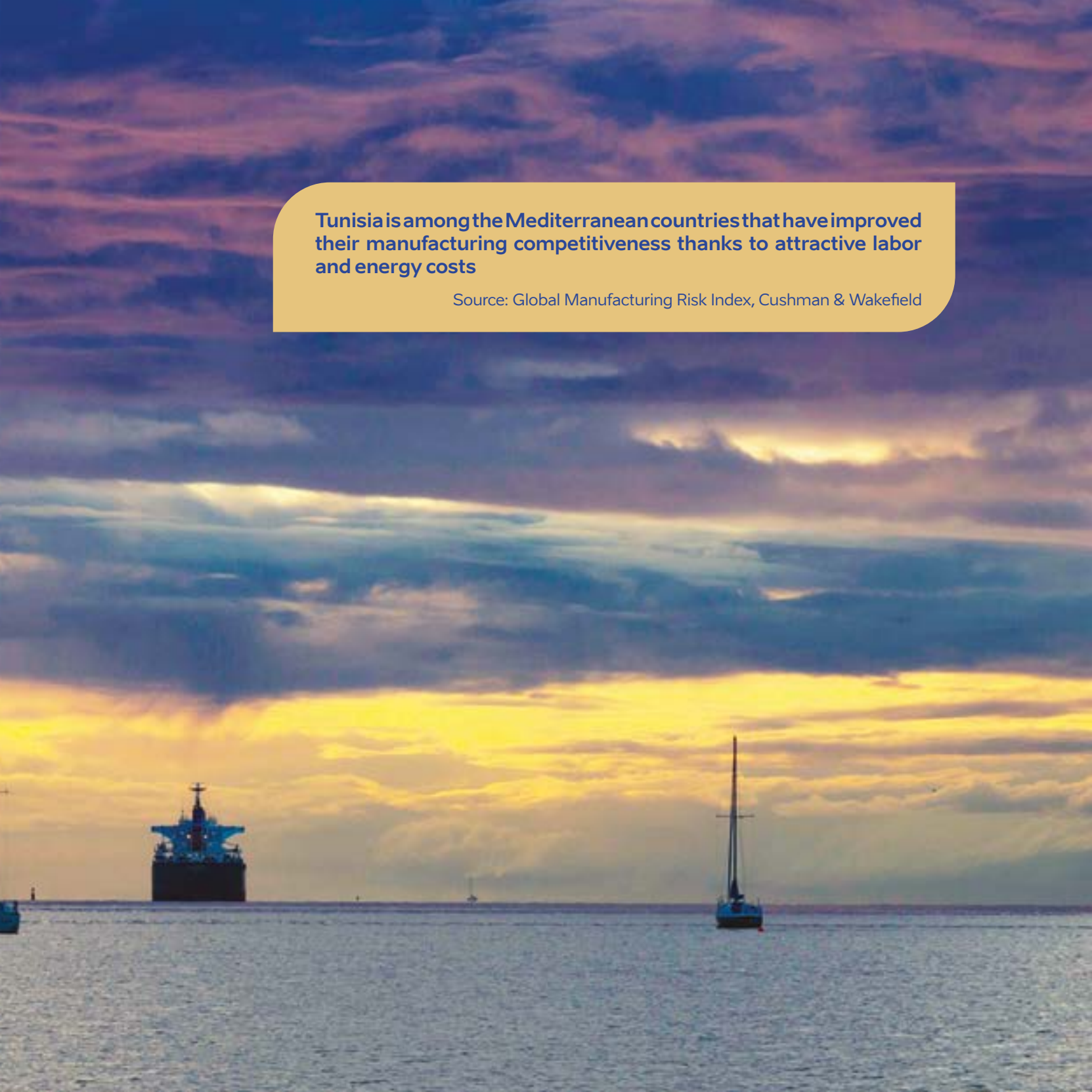
COMPETITIVE COSTS

UTILITY COSTS

Industrial gas (m ³)	Ranking
0.21	1
Water (m ³)	Ranking
0.36	1
Fixed broadband subscription	Ranking
37.71	1
Prepaid mobile line (1 min.)	Ranking
0.008	1

Post-paid rates for mobile broadband	Ranking
32.04	1
Subscription to a telephone service	Ranking
35.91	1
Electricity (kWh)	Ranking
0.10	2
Fixed-line call charges (1 min.)	Ranking
0.01	1

All costs in Euro. Benchmark with 7 countries: France, Germany, Italy, Morocco, Romania, Spain and Turkey.
Source : fDi Benchmark, the Financial Times Limited May2026. All rights reserved.



Tunisia is among the Mediterranean countries that have improved their manufacturing competitiveness thanks to attractive labor and energy costs

Source: Global Manufacturing Risk Index, Cushman & Wakefield

DIVERSE HUMAN CAPITAL



82.7 %

literacy rate



+7 880

educational institutions
(about 1 500 private
schools)



+310

universities
including 90 private
institutions



About **2 000**

vocational training
centres

Tunisia ranks **7th** worldwide on the *Digital Skills* indicator, confirming the competitiveness of its human capital in the digital economy.

Source: Global Talent Competitiveness
Index 2025, INSEAD

Tunisia ranks **17th** in the world for the **development of scientific and technical papers**.

Source: Global Innovation Index 2025, WIPO

Tunisia is one of the first countries in North Africa and in the Arab world to engage in **e-Learning**.

Tunisia is regarded as a **talent pool** in the Mediterranean region, thanks to:

- **More than 52 000** new graduates
- **About 40 %** of the graduates in STEM fields (Science, Technology, Engineering, Mathematics)
- **About 324 000** registered university students.



A CONTINUOUSLY IMPROVING INFRASTRUCTURE

Transport infrastructure

- **9** international airports operating **more than 2 000 weekly flights** serving about **50 cities around the world**
- **7** commercial ports and **1** oil terminal with a monthly frequency of **62 regular lines**
- **1** deep-water port under construction
- A railway network serving the main cities of the country
- A road network of nearly **20 000 km** of roads and close to **930 km** of motorways, connecting all Tunisian cities (186 km under construction)

Technological infrastructure

- **+ 10** sector-specific techno parks spread over several regions
- **2** business parks in Bizerte and Zarzis
- A **park** exclusively dedicated to **aerospace industry** in El Mghira
- **188** developed industrial zones spread across the country
- Premium, Class A office spaces meeting the most demanding international standards.



Digital infrastructure

Elevated to the status of a strategic priority, digital technology is now the driving force behind the Tunisian economy. Supported by a vibrant innovation ecosystem and world-class entrepreneurship support programs, the country offers first-rate digital infrastructure. Investing in Tunisia means leveraging a mature technology hub that is ready to propel international ambitions.

Starting in 2026, Tunisia will implement its sovereign G-Cloud infrastructure for the full digitalization of public services. This technological leap under the 2026-2030 Plan will simplify operations and reduce time to market, while ensuring secure data exchanges through institutional transparency that meets global standards.

Number of digital transformation projects launched:

192

Source : Ministry of Communication Technologies and Digital Economy of Tunisia, March 2026

- **60 incubators/accelerators** supporting entrepreneurs at the very start of their ideas and offering a wide range of services.
- **19 cyber parks** entirely dedicated to innovative start-ups.
- **90 Coworking spaces/ Fablabs** providing access to digital production tools.



ICT in Tunisia is more than just an industry, it is a catalyst for success. Thanks to a bold national policy and a growing number of support structures, the country has built a fertile environment for digital entrepreneurship. Digital infrastructure indicators for 2026 demonstrate the country's significant capacity to host and scale the most demanding tech projects.

Tunisia is consolidating its position among the top African countries in terms of significant progress in **the development of digital infrastructure, connectivity rates, and the affordability of broadband services.**

Source : The ICT Development Index, 2025

Tunisia is *the Top Regional Performer* among African leaders for the **sophistication of its online public services** (Online Service Index), and ranks among the top-performing nations in Africa and the Arab world for the **availability and quality of digital public services.**

Source : Global Innovation Index 2025, WIPO

Energy infrastructure

Tunisia offers **easy access** to electricity primarily used by the **industrial sector**. Tunisia focuses its renewable energy production on wind energy, solar energy, bioenergy and geothermal energy.



Firmly committed to a bold energy transition, Tunisia has made the *National Energy Strategy 2035* a top priority, aiming to raise the share of renewable energy to 35% of its electricity production by 2030. This strategic shift is underpinned by an incentive-based regulatory framework that supports concession agreements, self-generation, and the export of green electricity to Europe via the ELMED submarine interconnection.

By capitalizing on its exceptional solar and wind resources, as well as the development of a high-potential Green Hydrogen sector, Tunisia now offers industrial investors a decarbonized ecosystem, guaranteeing competitive, sustainable energy that complies with the requirements of the future *European Carbon Border Adjustment Mechanism*.

Tunisia ranks **1st in North Africa** in terms of energy transition readiness (Transition Readiness), thanks to a clear strategic vision and a well-established regulatory framework aimed at integrating clean energy.

Source : Energy Transition Index 2025, WEF





INVESTMENT-FRIENDLY REGULATIONS



- **Total freedom** of foreign equity participation for offshore companies,
- **Reduction** in the number of **authorisations** and **review of specifications**,
- Free access to **land ownership** for investment purposes,
- **Guarantees** of **fair and equitable treatment** and the protection of **industrial and intellectual property** for investors,
- **Freedom** to transfer funds (profits, dividends and assets) abroad.

TAX AND FINANCIAL INCENTIVES:

- **Total exemption** from VAT and customs duties on the inputs of the products to be re-exported,
- **Total exemption of profits** for up to 10 years for companies located in regional development zones, followed by a reduced rate of 10% after the exemption period,
- **Premium** of up to **30% of the investment cost**, capped at 3 million TND for companies located in regional development zones,
- **Premium** for intangible investment and research and development expenditure of up to **50% of costs**, capped at TND 500 000 and TND 300 000 respectively,
- **Investment premium** of **15% of the costs**, capped at 1 MTND, granted for priority sectors and economic sectors,
- **Subsidy** of the employer's statutory contribution during the first 3 years of effective activity for employees of Tunisian nationality,
- **Subsidy** of the cost of training programmes leading to certification representing **up to 70%** of the cost of the initial training and capped at 20 000 TND.



The 2026 Finance Act enhances the profitability of strategic investments in Tunisia thanks to key measures: an exemption from social security contributions (up to 100%) for the hiring of university graduates and the state's coverage of interest rates on investment loans.



Specific regulations and procedures govern intellectual property rights. They are consolidated by the law on the protection of personal data.

Tunisia is a member of **ICSID** (International Centre for Settlement of Investment Disputes).

A PLEASANT LIVING ENVIRONMENT

Combining history and modern culture, Tunisia naturally offers a harmony of both urban and rural environments, as well as respect for the common good and daily well-being.

10
sites

inscribed on the
UNESCO World
Heritage List

10
practices

inscribed on the Intangible
Cultural Heritage list,
placing Tunisia among the
leading countries in the
Arab and African regions

**residential
areas**

Modern, high
standard
residential areas at
competitive costs

**Numerous
shopping
centres**

and malls with
international
brands

**Foreign
schools:**

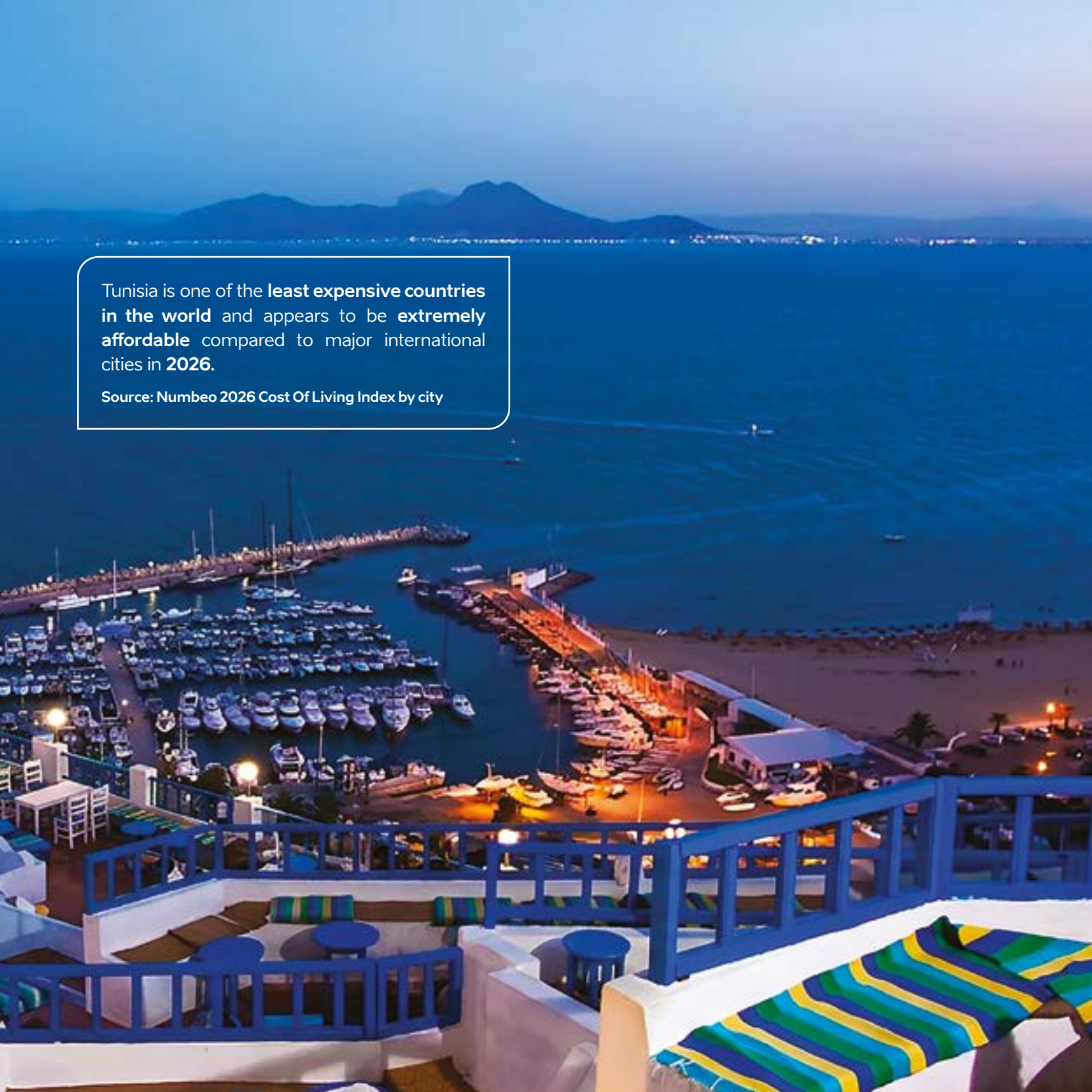
French, American,
Canadian, Russian,
English, Italian...

**A varied and
developed
infrastructure**

in tourism, leisure
and sports

**Highly
developed
medical
services**

in terms of medical skills
and health infrastructure to
international standards



Tunisia is one of the **least expensive countries in the world** and appears to be **extremely affordable** compared to major international cities in **2026**.

Source: Numbeo 2026 Cost Of Living Index by city

RESPONSIBLE COMMITMENT——

Tunisia has designed a sustainable development policy inspired by the United Nations' sustainable development roadmap, which includes a set of 17 global goals to be achieved by 2030.

In order to accelerate its development, Tunisia has defined 10 priority goals aimed at promoting inclusive, sustainable and job-creating growth, while reducing inequalities, ensuring access to essential services such as healthcare, education and drinking water, encouraging decent work, and strengthening efforts to combat climate change.

Corporate Social Responsibility was expressly incorporated into the country's legal framework by law in June 2018, which made it an obligation incumbent on businesses and other institutions.

Tunisia ranks **1st in North Africa** in terms of women's education, civil rights and female representation in a number of public institutions.

Source : Global Gender Gap Index 2025, WEF

Targeting high-growth projects and the digital or green transition, new incentives under the **2026 Finance Act** drastically reduce various operational costs. With the widespread adoption of electronic invoicing, Tunisia guarantees foreign investors an ecosystem that combines transparency, legal certainty, and tax competitiveness.





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