



INVESTMENT & BUSINESS OPPORTUNITIES IN **TUNISIA**

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Summary



- **TUNISIA : A confirmed Investment Destination**
- **Promising Sectors for Investment and Business**



TUNISIA : A Confirmed Investment Destination

TUNISIA

A Confirmed Investment Destination

Stock of FDI (2018)

3 455

Foreign companies

22 121 MTND

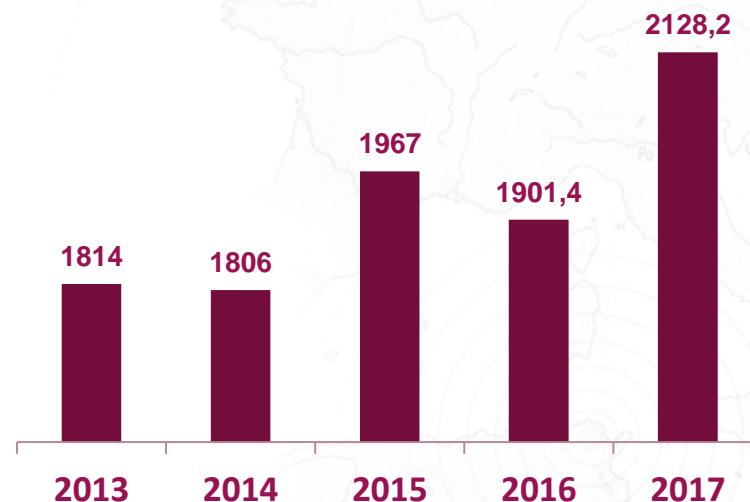
376 471 jobs

Almost 75% of foreign companies are wholly exporting

FDI FLOW IN 2018

2 866 ,2 MTND

Growing FDI flows



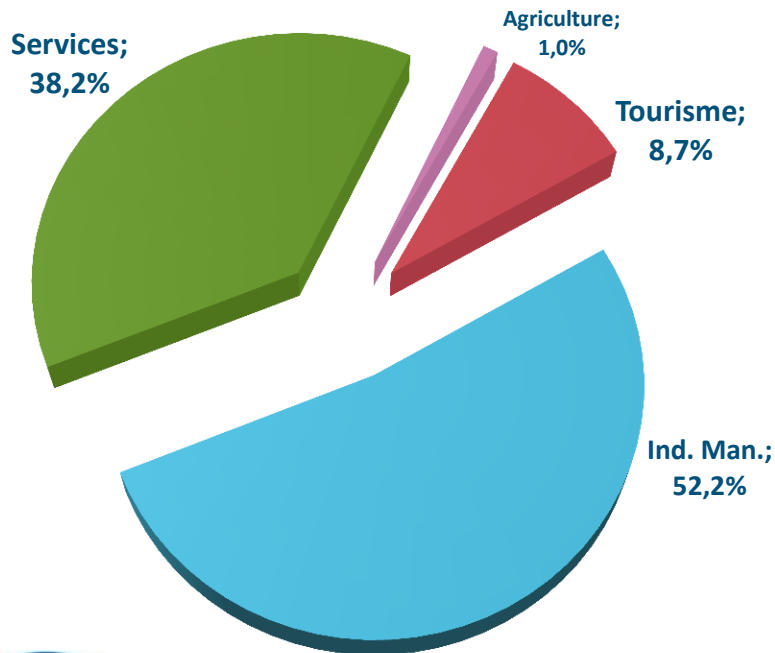
FDI Flow during 2017 recorded a 12 % increase comparing to 2016

FDI constant increase for expansions (about 85% as average annual flow) showing more trust in Tunisia

TUNISIA

A Confirmed Investment Destination

Sectorial Distribution of FDIs



The evolution of FDI in the manufacturing sector is driven by the mechanical, electrical and electronics industry and automotive components





Promising Sectors for Investment and Business in **TUNISIA**



TUNISIA

AN ATTRACTIVE DESTINATION FOR AUTOMOTIVE INDUSTRY



THE AUTOMOTIVE COMPONENTS INDUSTRY IN **TUNISIA** IS...



More than 260 companies
of which 65% are totally exporting

Nearly 80,000 direct and indirect
jobs

9 Assembling Units

An average annual production
growth of 12%

Main partners : Germany, France,
Italy and Japan

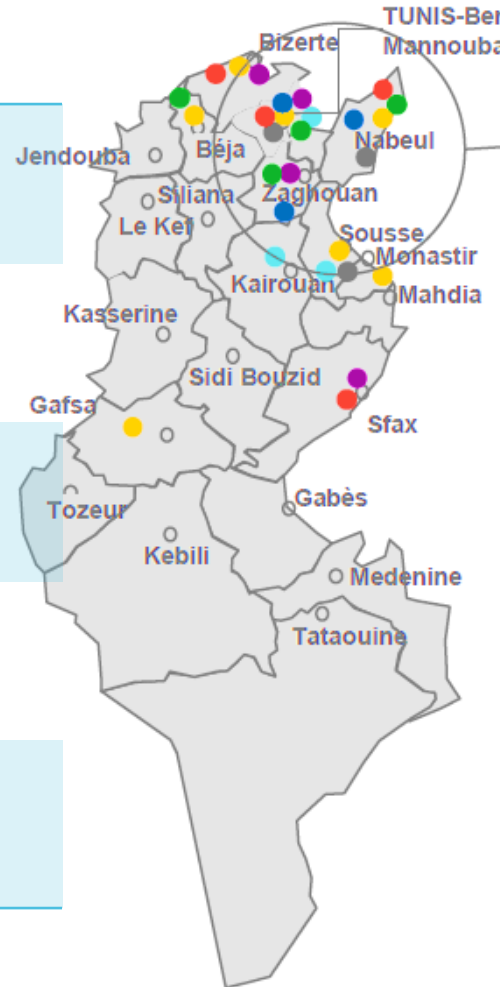
Exports: 2.4 Billion €

Tunisia is the only African country having international companies operating worldwide recognized, such as: Coficab, Cofat, MISFAT, Telnet...

TUNISIA an attractive Destination For Automotive industry

Geographical location of companies

Rank	Country	Companies	Employees
1	Germany	29	29948
2	France	25	16668
3	Japan	4	6178
4	USA	5	2757
5	Italy	5	1313



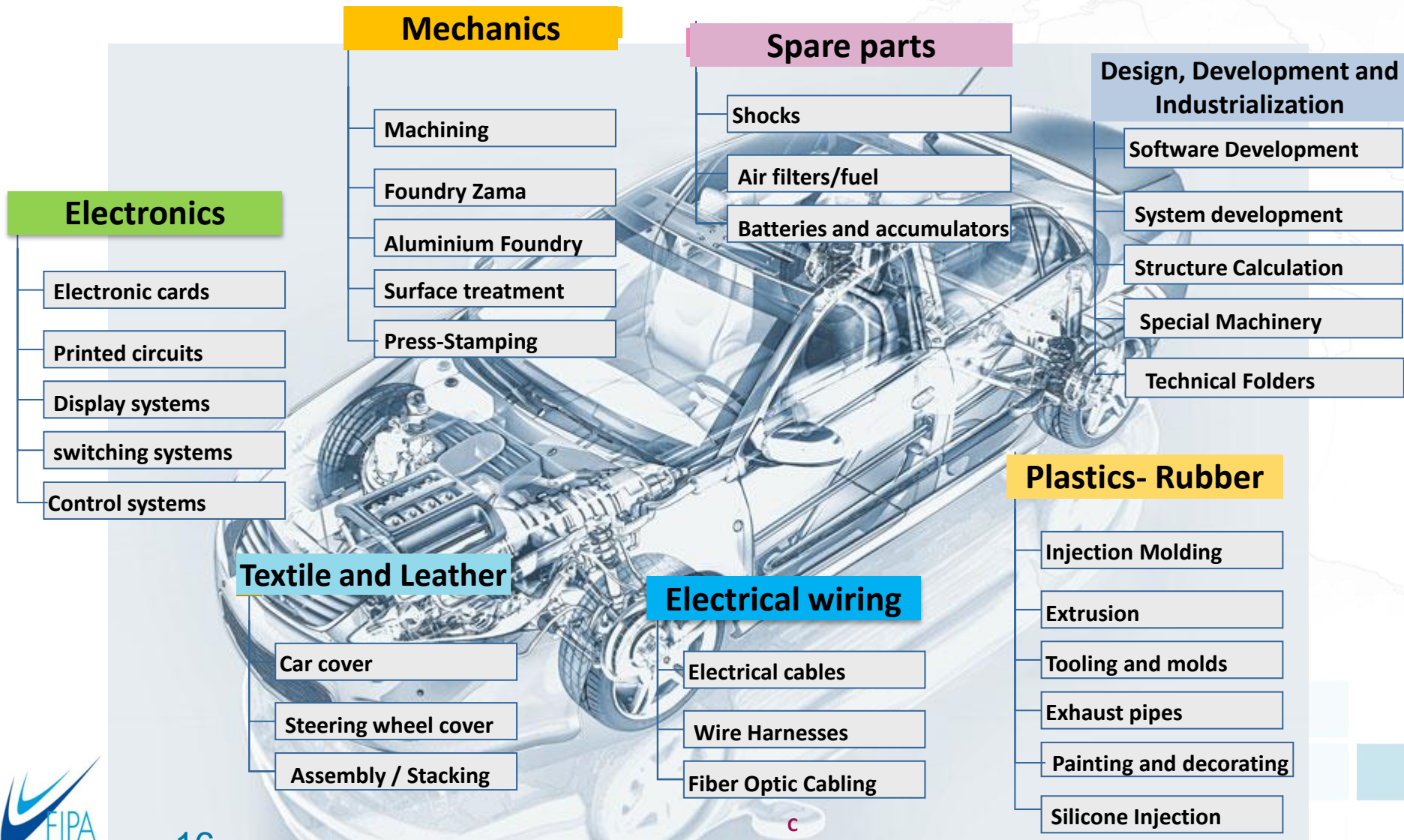
70% of active companies are established in the North-Eastern region

- Automotive wiring harness & connectors
- Vehicle assembly
- Electronic components, Software , engineering
- Mechanical components
- Plastics processing
- Manufacturing of trailers and cabs
- Leather & textile

They are already succeeding in **TUNISIA**



Segments existing in TUNISIA ...



THE AUTOMOTIVE COMPONENTS INDUSTRY IN **TUNISIA** IS...

**Top 3 producer of Automotive Components In Africa
Among the 10 main suppliers of wire harnesses to the EU**

Main products manufactured in Tunisia

Wire and cables for cars

Chassis and bodywork

Engines and engines components

Painting and others

Suspensions and brakes

Other electrical components for cars

Transmissions

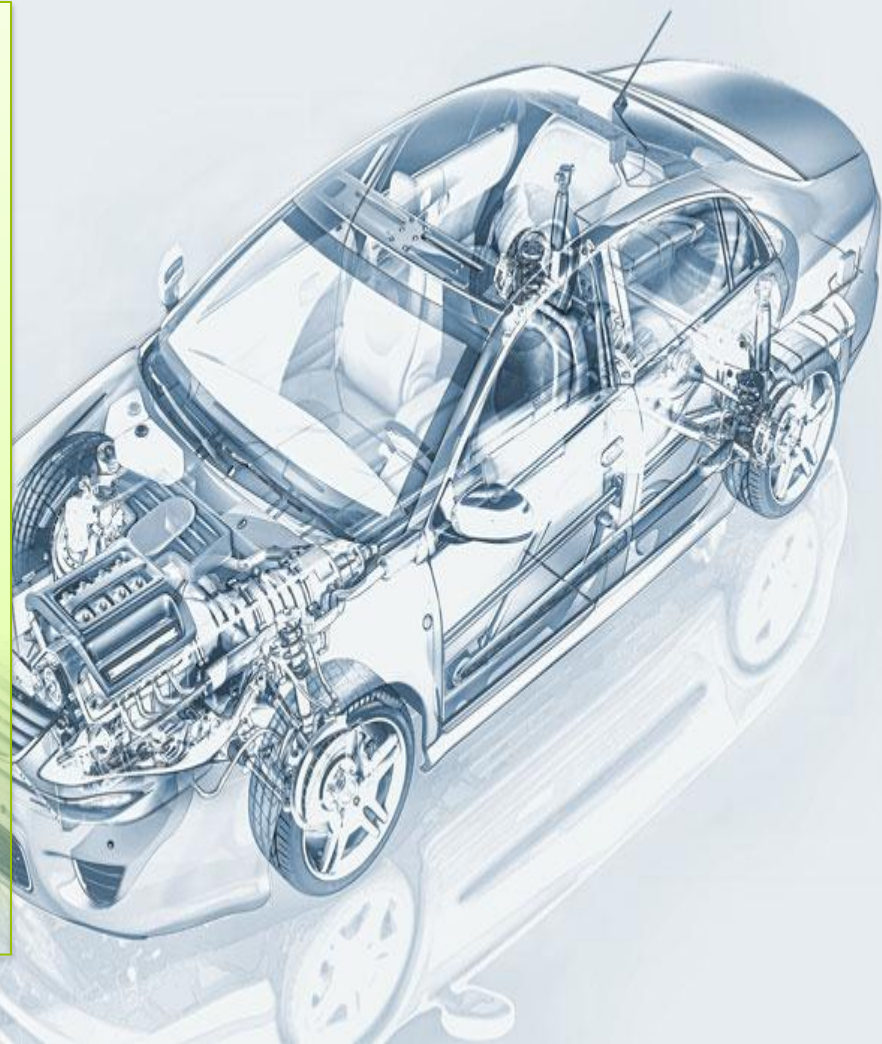
THE AUTOMOTIVE COMPONENTS

Main Branches

The branch of Electrical Automotive Components (IEE)

The branch of **Electrical Automotive Components** leads Tunisian Automotive industry with over **100** companies employing alone more than **50,000** people.

More than **95 %** of these companies are **totally exporting**.



THE AUTOMOTIVE COMPONENTS

Main Branches

Mechanical Automotive Components branch (IMM)



+90 companies
employing more than
+11.000 people.

More than **60 %** of
these companies **are**
totally exporting.

Chemical Automotive components branch (ICH)



+40 companies,
employing nearly
+5.000 people.

More than **50%** of
these companies are
totally exporting.

Textile Automotive Components branch (ITH)



10 companies
employing about
2.500 people.

TUNISIA's Major Assets

Proximity & free access

- ✓ A geostrategic position in the Med Area
At just an hour flight to Europe and less than three hours flight from Middle East Cities
- ✓ An advanced partner status with the European Union
trade advantages, priority to Tunisian exports to the European markets
- ✓ A regional and international Integration
52 agreements on double taxation and 54 bilateral agreements to promote and protect investments



Tunisia's Major Assets

A HUB for export

The port of Rades is the 1st container terminal in Tunisia.

The port is designed and equipped for the transit and treatment of ships, car ferries, cruise ships, RoRo, container ships... It ensures the passage of all types of goods under the best conditions of time, cost and safety.

Destination	Costs
 Marseille	550 US /40'Dry
 Barcelone	700 US/40'Dry
 Istanbul	650 US/ 40'Dry



TUNISIA's Major Assets

A pool of talents



A performing education system



99 % of young Tunisians are at school



337 000 students
(62.3% girls)



+200 higher education Institutions



More than 1,000 vocational training centers

Pool of graduates with high level



Over 60,000 new graduates each year



An exceptionally high Multilingualism

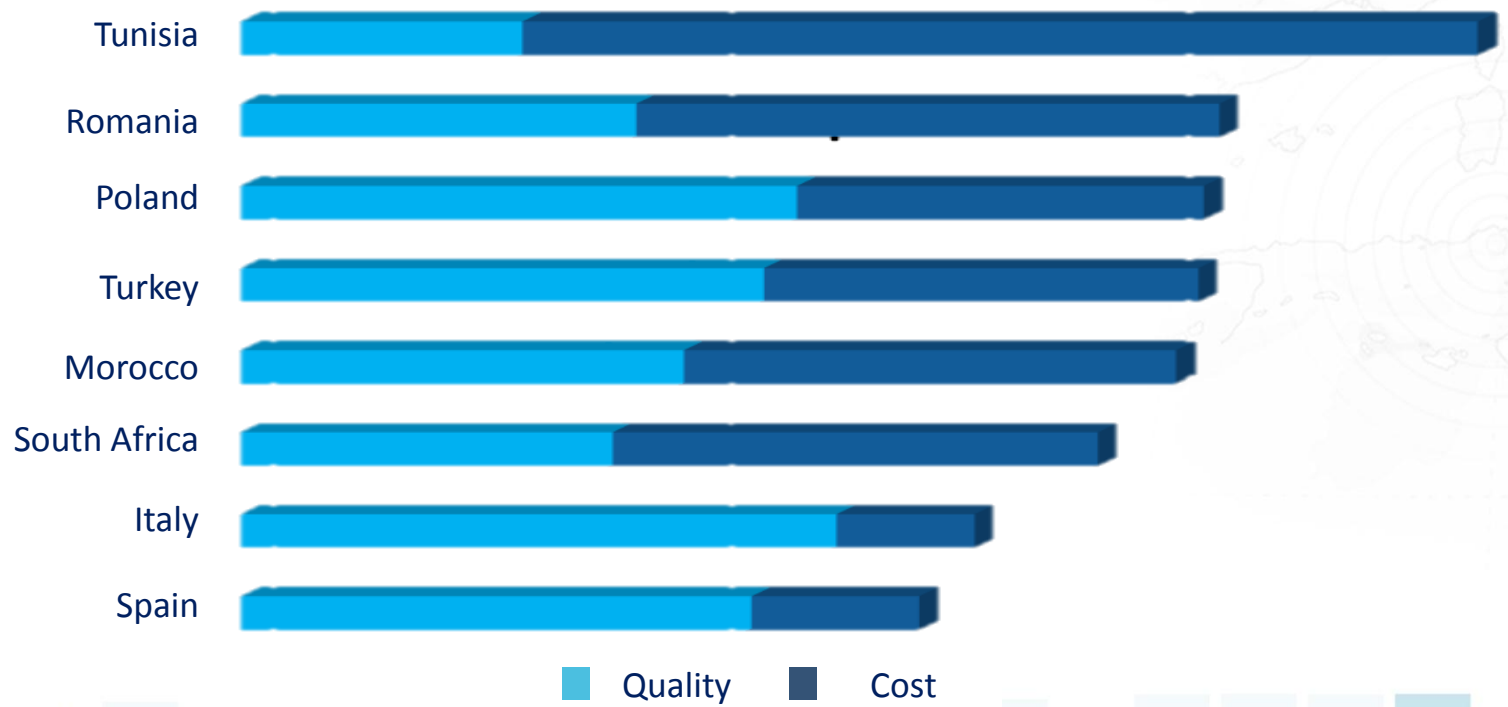


35% of graduates specialize in fields of engineering, computer science, communications & other technical fields

TUNISIA an attractive Destination For Automotive industry

#1

Tunisia is ranked as the most attractive FDI destination for an automotive components plant compared to key competitors
(Source: fDi Benchmark, Financial Times Limited)



TUNISIA's Major Assets

A Competitive Location

A competitive wage costs in manufacturing industries
(average in Euro/month)

Operator	250
Qualified worker	400
Higher technician	600
Engineer	800

*Low cost labour does
not mean low quality*

Rapid delivery time thanks to Tunisia's central position

Short lead times (shipping time to mainland Europe: 2 to 3 days)

Better quality in shorter lead-times at lower costs

TUNISIA, a Reference Site for the Automotive sector thanks to :

Cost competitiveness

Experienced workforce able to easily adapt at a competitive cost.

Availability of highly-skilled engineers and superior technicians able to easily adapt.

Availability of Technical Centers, Engineering Schools and Universities

A strong reputation, particularly in Europe



TUNISIA

Your ICT Destination



ICT in TUNISIA

Key figures



34 000 Jobs
in ICT activities



1 800 companies
+300 Foreign



1st Innovative
Economy in Africa

Bloomberg Innovation Index - 2016



14% Growth
for the ICT sector

7% Contribution
of ICT to GDP



Tunis 7th best
City to launch your
Start-Up

Forbes : 10 Top Cities Around The World To Launch Your
Startup - 2016

TUNISIA's Major Assets

A pool of talents

1. A performing educational system



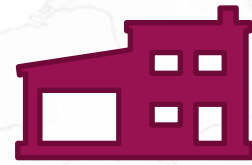
School enrollment:
99%



337 000 students
Of which **61%** are
women



+ 200
University



+ 1 000 professional
training centre

2. Pool of graduates with high level



+ 65 000 new
graduate per year



High levels
of **multilingualism**



35 % of graduates are in
engineering and ICT fields



Tunisia is ranked **3rd** country in the world in terms of **Graduates in Science and Engineering** (% of total tertiary graduates)

Source: The Global Innovation Index 2017

TUNISIA's Major Assets

A pool of talents



- ✓ About **24 000** student in engineering fields
- ✓ **+ 7500** graduated engineer per year
- ✓ More than **12 000** IT graduates per year

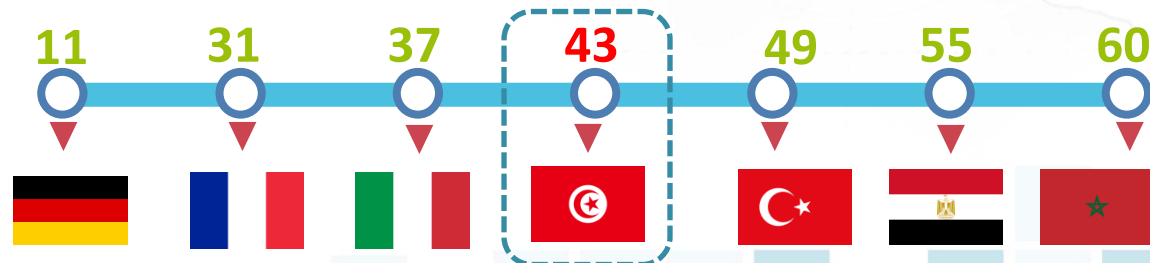


- ✓ **29,2 %** unemployment rate among higher education graduates



Tunisia is ranked **43rd** country in terms of availability of Scientifics and Engineers

Global competitiveness Report (2017- 2018)



TUNISIA's Major Assets

World-Class Infrastructure



TUNISIA :

DESTINATION FOR LEADING INTERNATIONAL CORPORATIONS

ITO



ITO Jobs:

- Software Development
- Web & Mobile applications
- Security systems
- Software maintenance and testing
- Software integration
- Infrastructure hosting and network
- Web design & graphic design

« Tunisia represents all the attractive characteristics that SOFRECOM Group is looking for, namely : The academic training of very good quality provided by the Engineering Schools and Universities ».

Mr. Laurent Blain, General Manager of SOFRECOM-Tunisia

TUNISIA :

DESTINATION FOR LEADING INTERNATIONAL CORPORATIONS

BPO
voice & Data



Teleperformance

3 SUISSES

CONVERGY'S

Transcom



Almaviva

orange™

mezzō
Customer Care

GRUPE
owliance

BPO Jobs:

- Help Desk
- Telemarketing
- After-sales services
- Debt recovery
- Prospecting
- Payroll processing
- Data entry and processing

« We found in Tunisia young graduates with a good command of the language but have above all a great willingness to learn and a great ease in the human relationship and especially in the ability to provide this level of service ».

Mr Bertrand DERAZEY , Deputy CEO of
Teleperformance Tunisia

TUNISIA :

DESTINATION FOR LEADING INTERNATIONAL CORPORATIONS

R&D



SAGEMCOM



ODDO&CIE



ALTRAN



Alcatel-Lucent



LEONI
Wire · Cable · Wiring Systems

R&D Jobs:

- Embedded systems
- Product Design
- R&D products
- Engineering
- KPO (Knowledge Process Outsourcing/Offshoring)

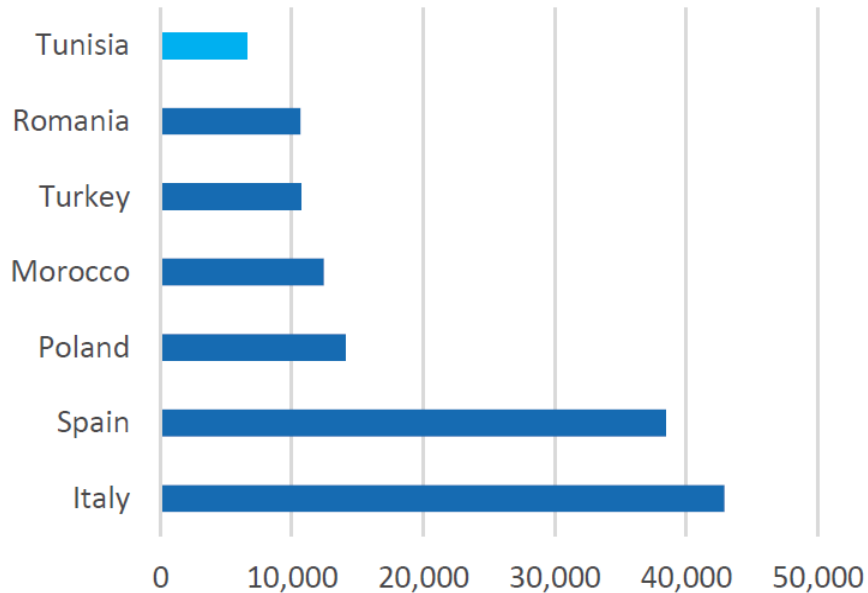
« ARDIA in Tunisia represents one of the main R&D centers of our ACTIA group. It is a center where our new products will be developed thanks to the local engineering. It is a centralized base in Tunisia to serve other subsidiaries located in France and more widely in Europe, or even the U.S. and China. Today it is a great success with view to our development »

Cyril Rochard, General Manager ARDIA

TUNISIA :

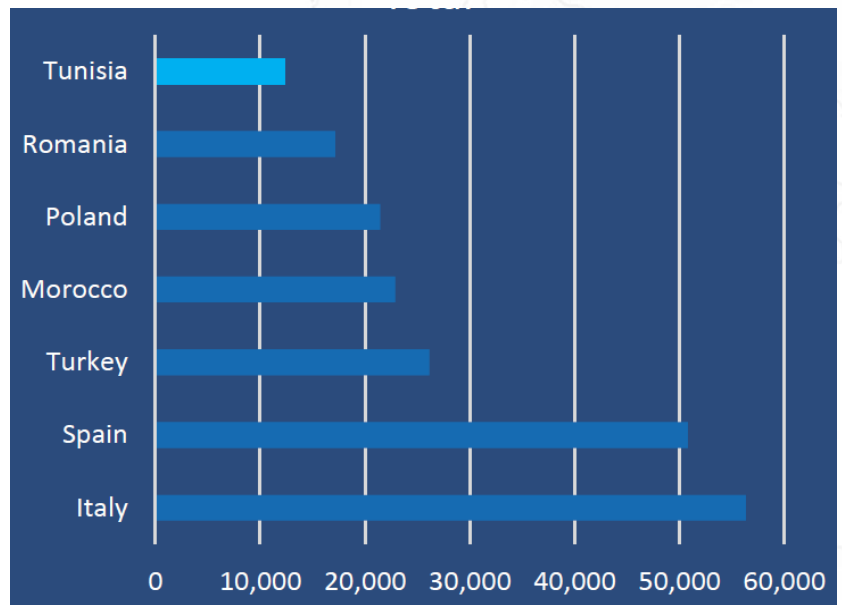
A very competitive ICT Destination

Lowest cost location for a **BPO** or **IT** Operation in the Europe/North Africa Region



Labour costs for a customer services representative, 2016 (US\$)

Lowest cost location for a **software programmer** in the Europe/North Africa Region



Labour costs for a software programmer, 2016 (US\$)

Source: fDi Benchmark, Financial Times Limited



TUNISIA

Energy and Renewable energy: An Evolving Sector



Energy and Renewable Energy in **TUNISIA**

The national Energy Balance is characterized by:

- 1- A structural energy deficit
- 2- A strong dependence on gas supplies from Algeria
- 3- An electricity mix based 97% on Gaz

➔ 2015: a National Development Strategy of Renewable Energy

➔ 12% renewable energy produced in **2020**

➔ 30% d'électricité produite par ER en **2030**

Total investment of 4 B€ by 2030

Energy and Renewable Energy in TUNISIA

Implementing legislation of the RE Law

1

12th May 2015:
Law on production of
electricity from RE

3

January 2017:
Notification 2017-2020

5

11th May 2017:
- Procedures Manual
- **1st Call for projects**

2

24th August 2016:
Decree of application
of the Law n°2015-12

4

09th February 2017:
- Grid- codes
- PPA contract

69 request:

- 10 Wind Energy
- 40 photovoltaic energy 10 MW
- 20 photovoltaic energy 1 MW

New Opportunities

Renewable Energies

Environment: waste treatment...

Tourism: medical, cultural, residential ...

**Services dedicated to companies : Logistics,
Consultancy, Training**

**Infrastructure projects : Telecom, Road Networks,
Railways**

Financial sector

TEXTILES AND CLOTHING

TUNISIA

A Nice Place to Be



Internationally reputed **educational system**

- 10 French education institution
- Access to Canadian, Britain, American, and Italian education systems



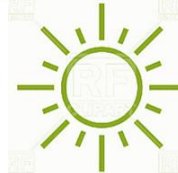
Developed **healthcare services**

- 2nd African destination for medical tourism (after South Africa)
- 26 doctors for 1 000 inhabitant



A unique **cultural heritage**

- 8 Tunisian sites recognized by UNESCO as a World Heritage Site



Mediterranean **climate** and a diverse nature

- 250 sunny days per year
- More than 1 400 km of beaches and diverse landscapes
- Average temperature: 18,1°



Emancipation of individual **liberties**

- 1st African and Arab country regarding press freedom and civil liberties
- 1st African and Muslim country regarding gender equality



One of the least expensive **cost of living**

- Tunis is the least expensive city in Africa and Mediterranean basin for expatriates

Save the Date



 **TUNISIA**
INVESTMENT
FORUM

INVEST IN **TUNISIA**
THE NEXT OPPORTUNITY

JOIN US IN TUNIS

20 - 21 JUNE 2019



 **TUNISIA**
INVESTMENT
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www.tunisiainvestmentforum.tn

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THANK YOU FOR ATTENTION

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