



# NUMOV Round Table\_ Tunisia

13<sup>th</sup> April, 2021

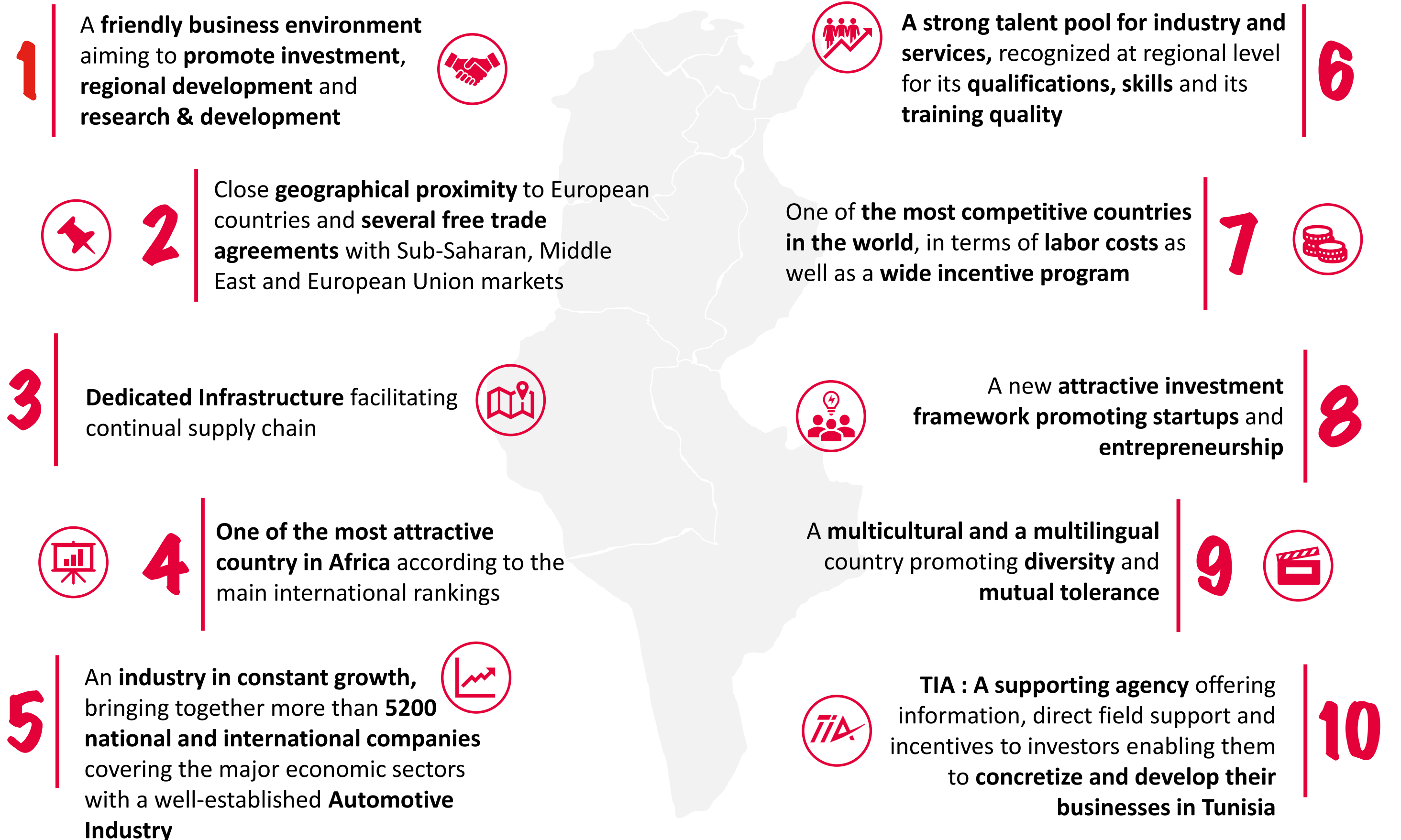
Investment Support & facilitation in Tunisia: TIA's mission and support services

Mr. Beligh Ben Soltane – Chairman



الهيئة التونسية للاستثمار  
TUNISIA INVESTMENT AUTHORITY

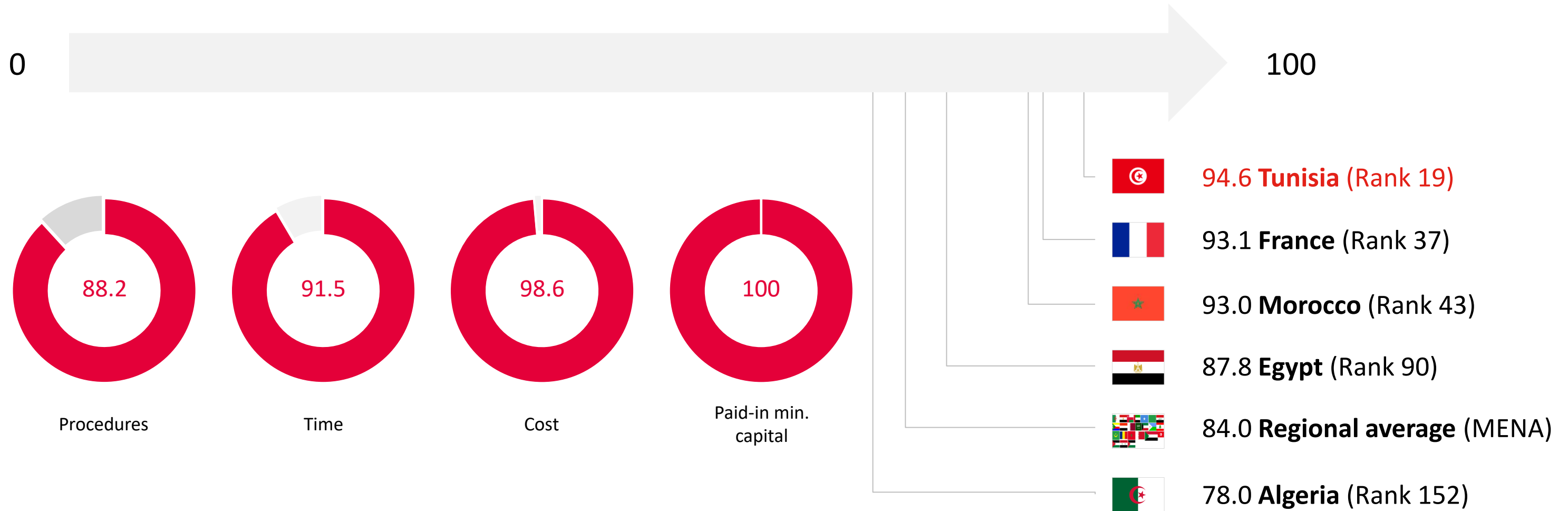
# Why Tunisia ?



## A FRIENDLY BUSINESS ENVIRONMENT

The country is aiming to facilitate investment through improved and simplified procedures as well as comprehensive and fair investment framework

### STARTING A BUSINESS IN TUNISIA



Equal Fair treatment  
for local and foreign  
investors



Protection of  
intellectual property



Freedom to transfer  
funds (profits,  
dividends and  
assets) abroad.



Land ownership for  
the implementation  
of investment  
projects



Possibility to recruit  
30% of foreign  
executives during  
the first 3 years

## A KEY GEOGRAPHICAL POSITION

**Tunisia gives investors preferential market access through several trade agreements to more than 100 countries with nearly 1,85 billion consumers**

### A GATEWAY TO EUROPE AND SUB-SAHARAN AFRICA

**Flexible capabilities to serve the European market**



#### European Union

All industrial products exchanges with the European Union are exempt from all customs duties



#### Common Market of East and Southern Africa (COMESA)

All industrial and agricultural products, fishery products and handicrafts **exported to COMESA markets\*** are totally exempt from all customs duties and other charges and taxes



Trade agreement with Tunisia  
Future Trade agreement with Tunisia

#### Greater Arab Free Trade Area (GAFTA)

For the **18 Arab countries** in the MENA region, all products, both agricultural and industrial are traded freely and are exempt from all customs duties\*

#### African Continental Free Trade Area (ZLECAF)

The African Continental Free Trade Area (ZLECA, ZLEC or Zlecaf) is a free trade area project currently being implemented across the **entire African continent**. The ZLECAF will be launched by January 2021. Tunisia has already approved its membership and will benefit from future trade advantages and exemptions with the ZLECAF members



#### Arab-Mediterranean Free Trade Agreement (AGADIR)

All agricultural and industrial products are freely traded and are exempt from all customs duties between **Tunisia, Jordan, Morocco and Egypt**

Except for goods exported to Eritrea, Ethiopia, Eswatini, the Democratic Republic of Congo and Uganda that includes specific treatments as follows - [http://www.commerce.gov.tn/Fr/union-europeenne\\_11\\_224#?](http://www.commerce.gov.tn/Fr/union-europeenne_11_224#?)

Except of a common Arab list of prohibited products excluded from the application of this for reasons of safety, health, religion or environmental protection - [http://www.commerce.gov.tn/Fr/convention-de-facilitation-et-de-developpement-des-echanges-commerciaux-inter-arabes-grande-zone-de-libre-echange-arabe\\_11\\_227](http://www.commerce.gov.tn/Fr/convention-de-facilitation-et-de-developpement-des-echanges-commerciaux-inter-arabes-grande-zone-de-libre-echange-arabe_11_227)

## DEDICATED INFRASTRUCTURE

**Combined with secure trade corridors and gateways, our infrastructure facilitates continual supply chain and business operations**

Located at the junction of the eastern and western basin of the Mediterranean, and only **140 km from Europe**

**9 international airports** providing more than **2,000 weekly flights** and serving about **50 foreign cities** - Within less than **three hours flying time from European capitals** and **major cities of the Middle East**

Tunisia

**A central position in the EUROMED zone**

**Multiple maritime connection to Europe** from the 4 major commercial harbors in Tunisia with a monthly frequency of more than **60 regular lines**

The **major international containers' companies** present such as MSC, MERSK, CMA CGM, BOLORE, STE CHINA SHIPPING and COSCO etc..

## TUNISIA, ONE OF THE MOST ATTRACTIVE COUNTRIES IN AFRICA

Tunisia ranks first in Africa in the most prestigious international index about entrepreneurship, innovation, technology capabilities and skills

**1<sup>st</sup>** in North Africa in the **Global Innovation Index** that measures innovation capabilities within Institutions, Human capital and research, Infrastructure, Market sophistication, and Business sophistication (Global Innovation Index 2020)

**1<sup>st</sup>** in the MENA region & Africa and 23<sup>rd</sup> worldwide in the **Startup Visa Attractiveness Index** that measures Business Environment and Ecosystem Maturity (Startup Visa Program 2020)

**1<sup>st</sup>** in North Africa in the **Global Competitiveness Index “Skills indicator”** that measures, among others, the Extent of staff training, the Quality of vocational training, the Skillset of graduates, the Digital skills and the Ease of finding skilled employees (GCI 2019\*)

**1<sup>st</sup>** in North Africa in **High-technology exports** % of manufactured exports for products with high R&D intensity, such as in aerospace, computers, pharmaceuticals, scientific instruments, and electrical machinery (World Bank 2019\*)

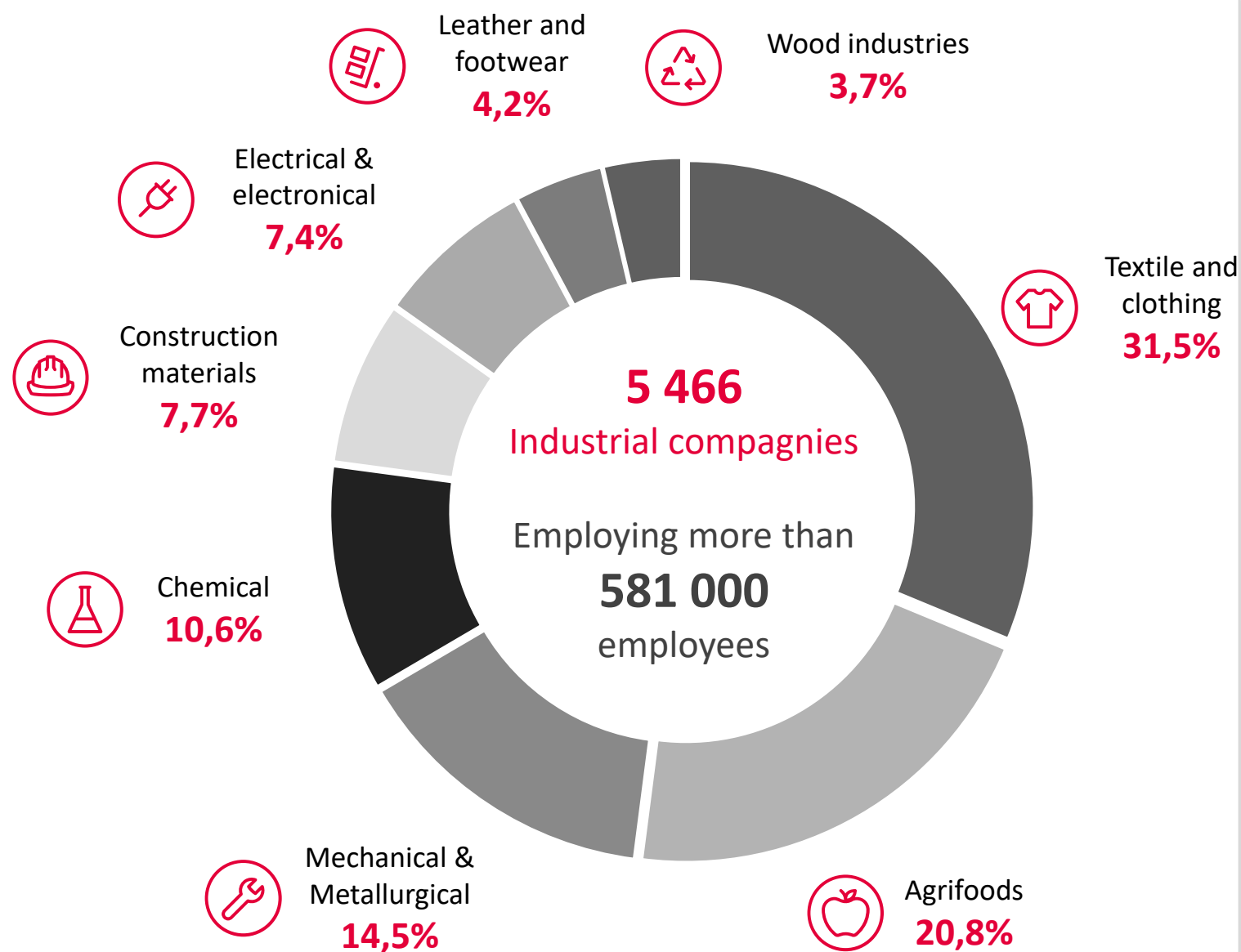
**1<sup>st</sup>** in Africa and 2<sup>nd</sup> in MENA for **Researchers in R&D** 1,772 per million people engaged in the conception or creation of new knowledge, products, processes, methods and systems (World Bank 2018\*)



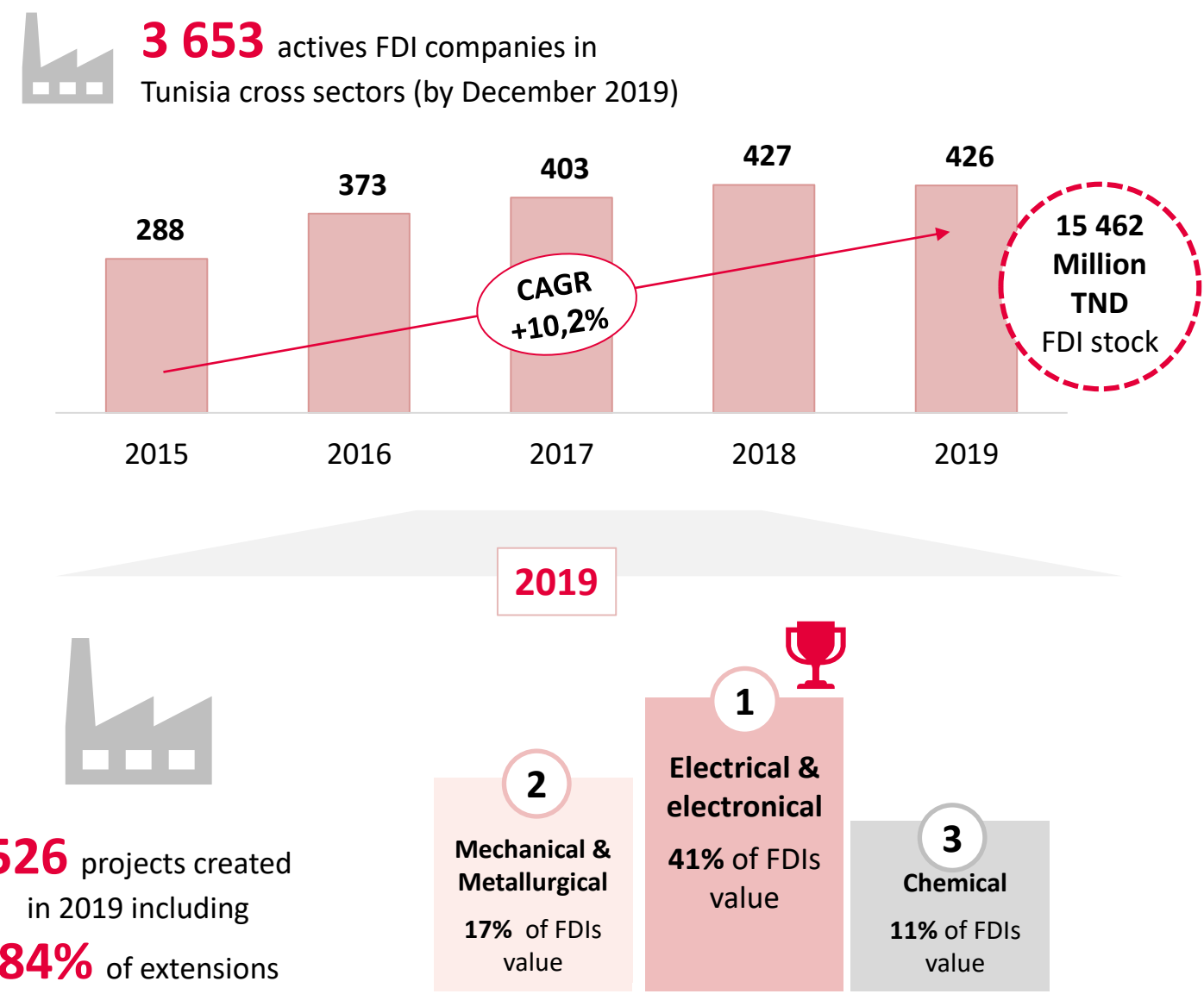
## A SOLID AND DIVERSIFIED INDUSTRIAL ECOSYSTEM

With a diversified and a wide industrial sector, employing more than 580,000 employees, Tunisia has always been a privileged destination for FDIs and host today more than 3,650 active companies with foreign capital

### Industrial companies mapping – 2020



### Breakdown of inwards FDI\* per year in industry sector (2015 – 2019) in M USD



**526** projects created in 2019 including **84%** of extensions

Source : <http://www.tunisieindustrie.nat.tn/fr/conjoncture.asp> / <http://www.tunisieindustrie.nat.tn/fr/zoom.asp> / [https://www.bct.gov.tn/bct/siteprod/tableau\\_statistique\\_a.jsp?params=PL212010](https://www.bct.gov.tn/bct/siteprod/tableau_statistique_a.jsp?params=PL212010)

\* Industrial companies employing more than 10 employees

## Automotive Sector : Tunisia, the third largest manufacturer of Auto parts in Africa

**Tunisia, a leading regional production platform with very strong growth**



### KEY FIGURES

**300 companies** operating in the sector in 2020 with more than **20 international nationalities**

**65%** operating exclusively on **international markets**, with **UE** as a destination for **70%** of the total exports



**Over 90 000 employees** - ~**66%** of Electronics and Electric industry

**28%** of total Tunisian exports - over **Euro 2.4 billion** with an annual **growth rate of 12%**, contributing to **4%** of the national **GDP**









Tunisia ranks among the **Top 3 exporters** of automotive components in Africa



## Automotive Sector: recent investments

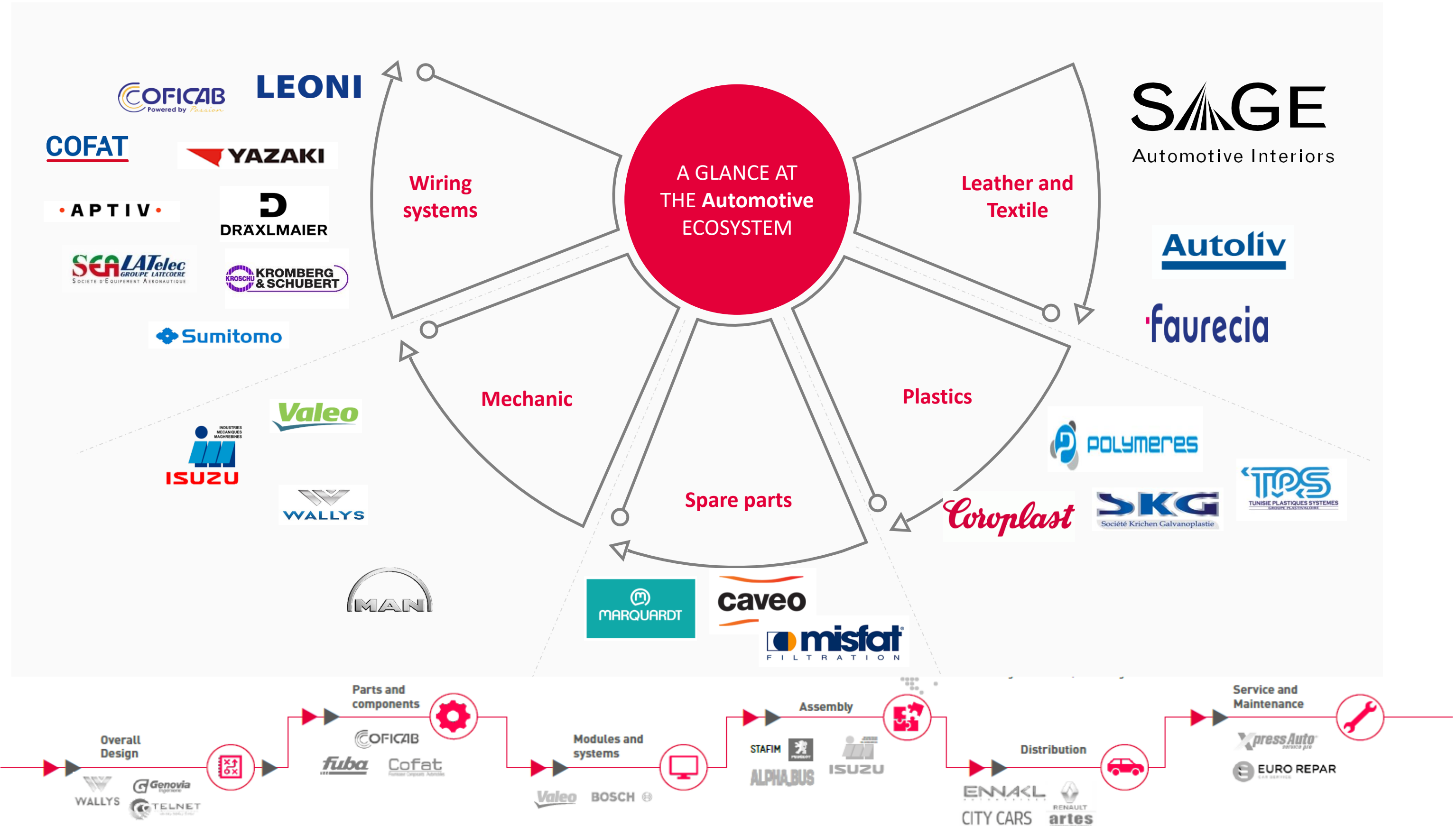
The automotive sector in Tunisia have seen several new investments during the last two years despite the pandemic's impact on the sector worldwide

### / Main automotive investments (2019 – 2020)

 Company	 Project Type	 Job creation	 Year of investment
<b>Rosenberger</b>	Greenfield project	570	2020
 <b>DRAXLMAIER</b>	Greenfield project	2300	2019
 <b>Sumitomo</b>	Greenfield project	1622	2019
 <b>YAZAKI</b>	Expansion project	1200	2020
	Expansion project	811	2020

# Automotive Sector : A WIDELY DEVELOPED ECOSYSTEM

A wide range of national and international companies operating in the various segments of the Automotive value chain



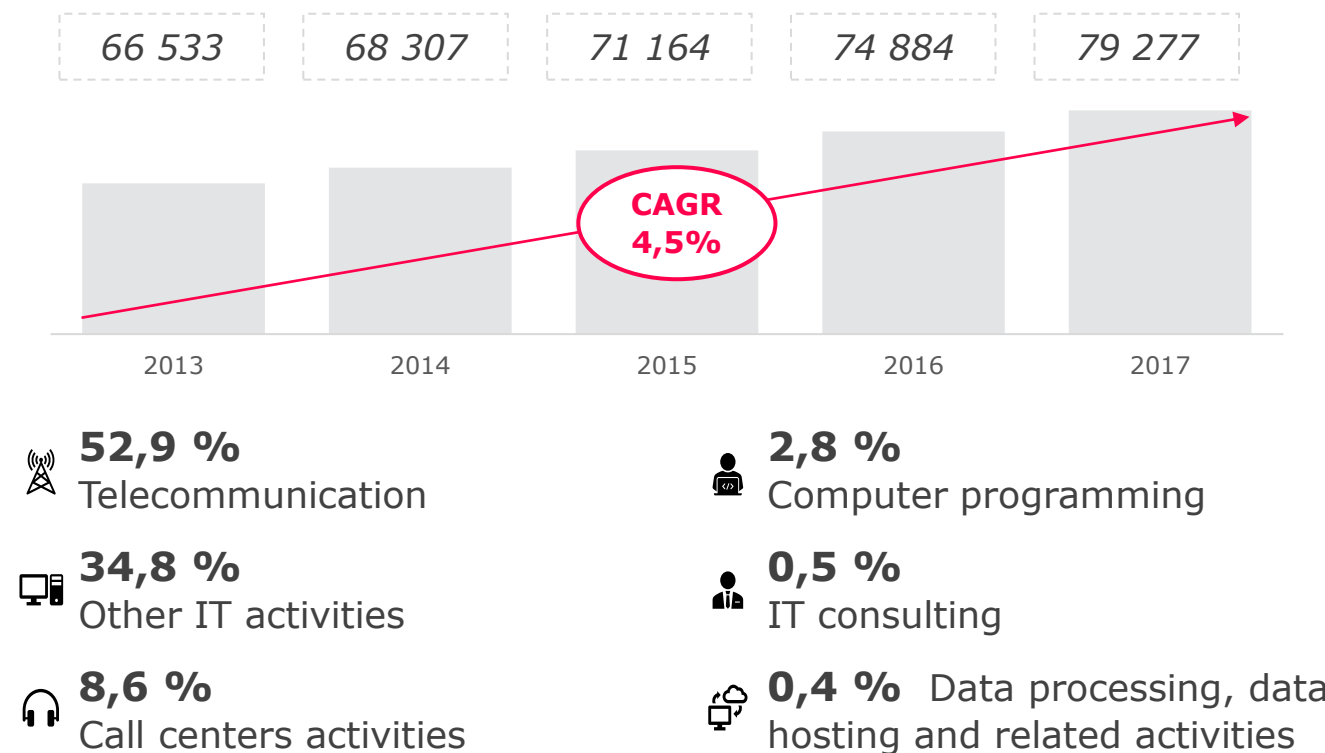
## ICT SECTOR : A priority sector

ICT ecosystem consists of more than **1.800 companies** spread mainly over the Greater Tunis area and the coastal cities and employs nearly **80.000 people**.

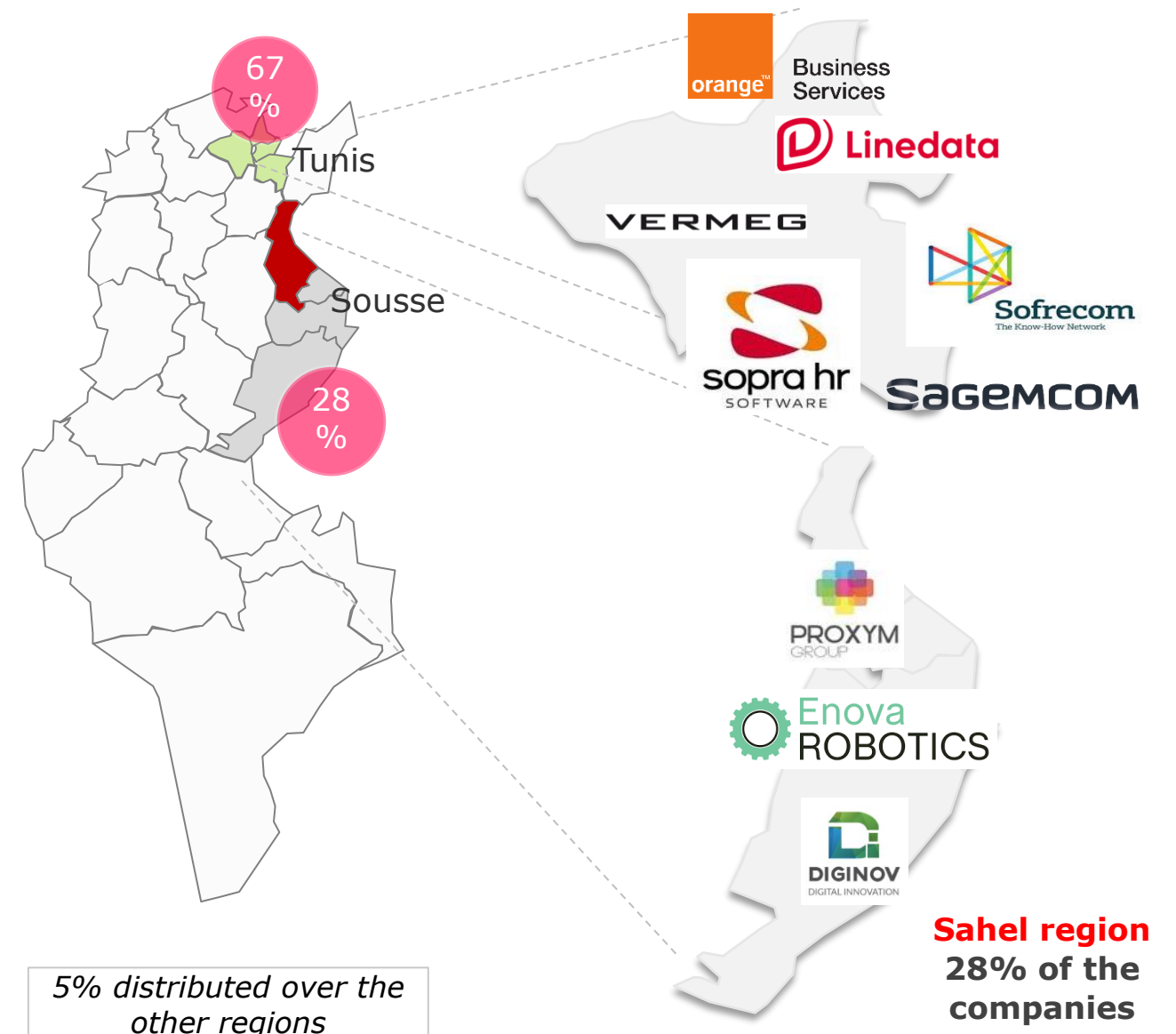
### DEVELOPMENT OF THE NUMBER OF ICT COMPANIES

- The **ICT sector** contributes to more than **7.5% of the national GDP** and has recorded an annual growth rate of more than 7% over the period 2014 – 2017
- **Over 1,800 companies** operate in the sector, **12%** of which have 100% foreign capitalization

### DEVELOPMENT OF THE SECTOR'S EMPLOYABILITY



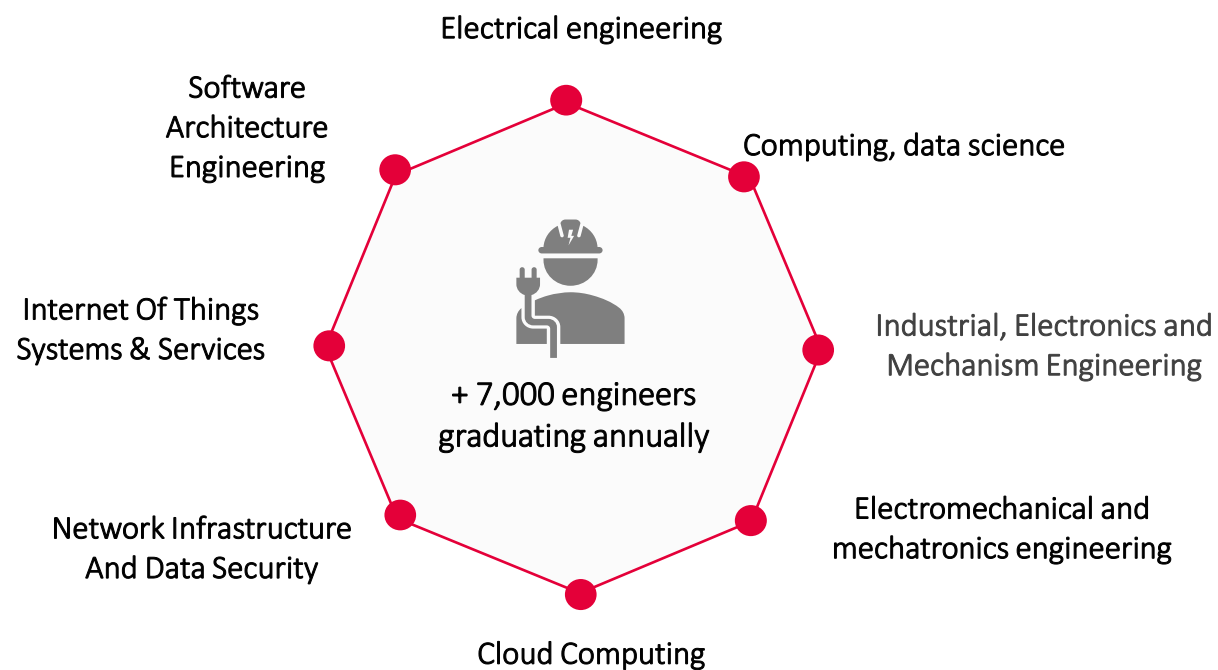
### ICT TERRITORIAL NETWORK OF ICT COMPANIES



## SKILLED POOL OF TALENT AND RENOWN EDUCATION

The country harness its large highly skilled pool of talents of more than 7000 engineers graduating annually to address the need of the industry

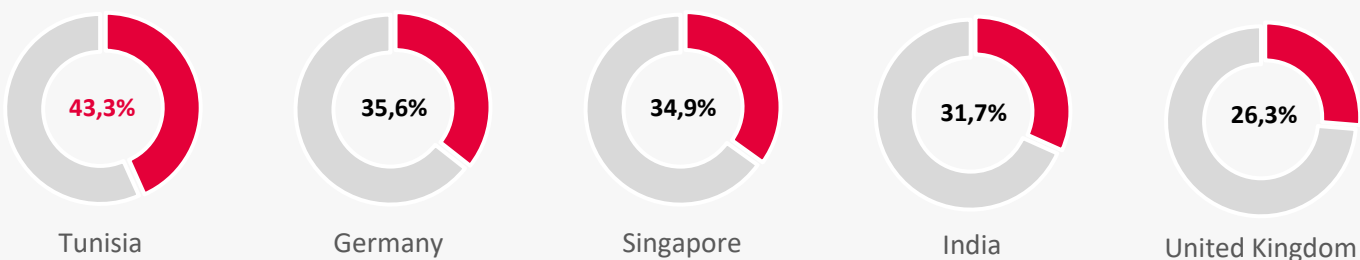
### / HIGHLY SKILLED TALENT



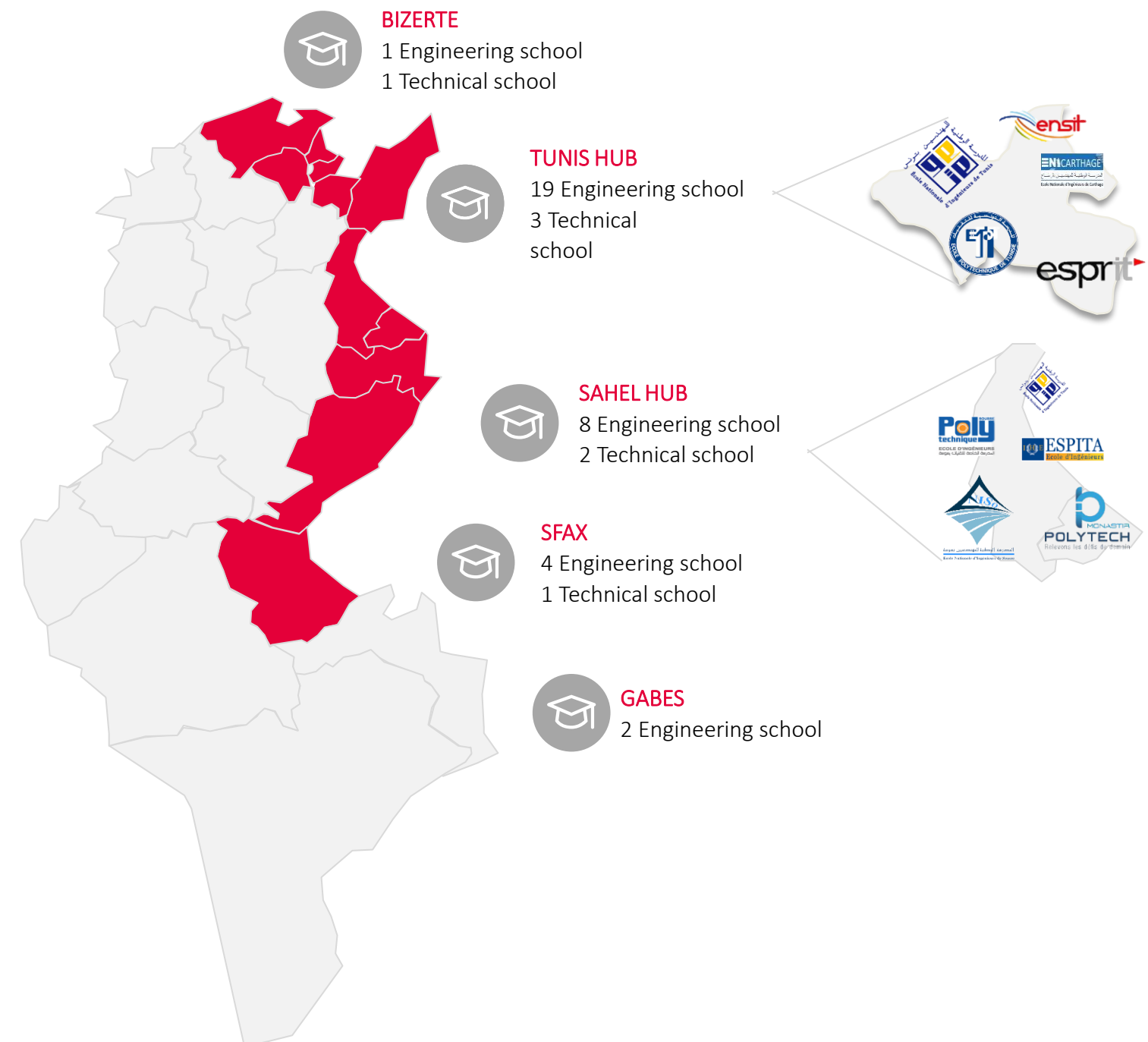
More than **260,000** students enrolled in universities in 2019 including **+54,000** in engineering and technical fields

### / QUALIFIED POOL OF TALENT WITH STEM FOCUS

According to the UNESCO Institute for Statistics, tertiary students in **Tunisia are most likely to graduate in a STEM field** (science, technology, engineering mathematics), with **more than 43%** students receiving a degree in those subjects



### / EDUCATIONAL HUBS

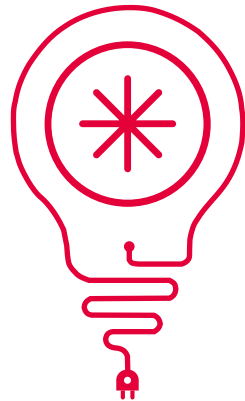


**+60** Technical and Vocational Education and Training spread over the whole country addressing industry needs

## AN ECOSYSTEM FAVORABLE TO INNOVATION & ENTREPRENEURSHIP

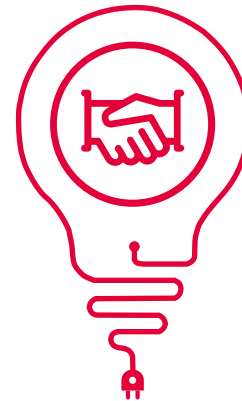
Tunisia is growing to become an innovative and vibrant market for startups thanks to a newly implemented legal framework for startups as well as synergetic and vibrant supporting environment

### TALENT DRIVING REAL INNOVATION



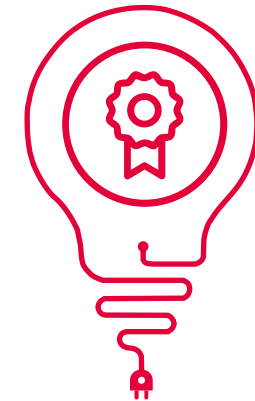
Tunisia is considered one of the **most innovative countries in Africa and the Arab world**, ranking **52nd globally** in **Bloomberg Innovation Index** and **23<sup>rd</sup> worldwide** in the **Startup Visa Program Attractiveness Index (2020)**

### SUPPORTING ENVIRONMENT



A **sybiotic environment** between startups, corporates, government and investors creating an **active community driving policy change** and **supporting startups from incubation to global upscaling**

### ENABLING FRAMEWORK



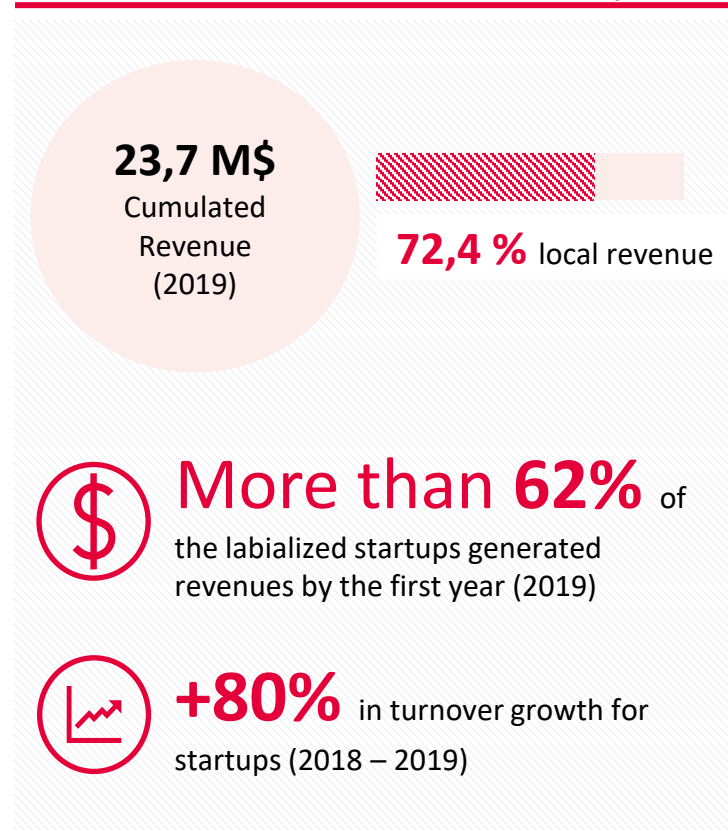
A unique **legal framework** promoting startups including **series of advantages and incentives** for entrepreneurs, startups and investors and enabling **talent upscaling, innovation clustering** and **access to markets**



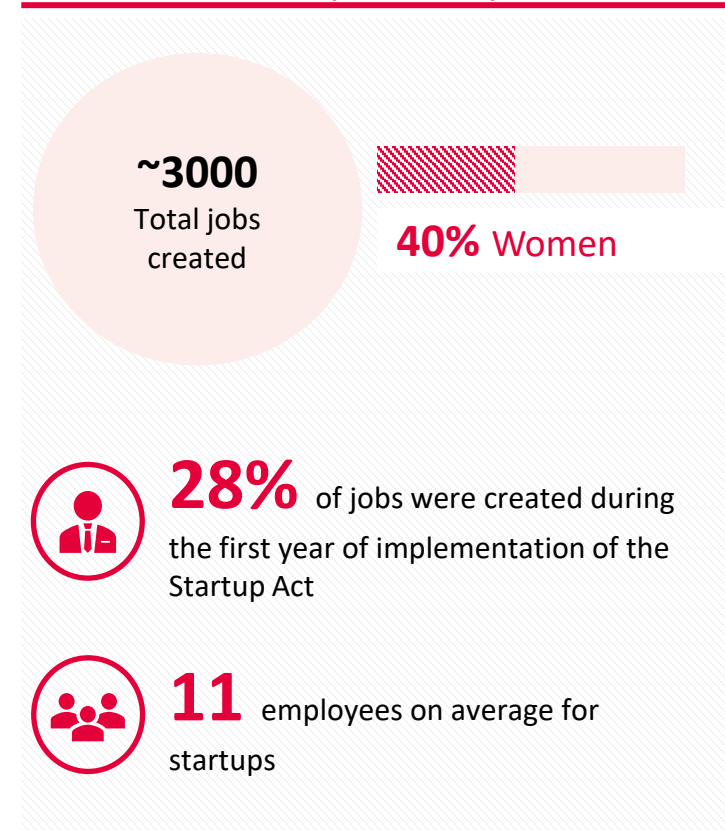
# INNOVATION & ENTREPRENEURSHIP

In March 2021, Tunisia registered more than 450 labeled new innovative startups within the new “Startup Act” framework – top entrepreneurs' sectors are Software Big Data & Analytics, e-Commerce & Marketplace and Media, Gaming & other creative content

## Economic activities of startups

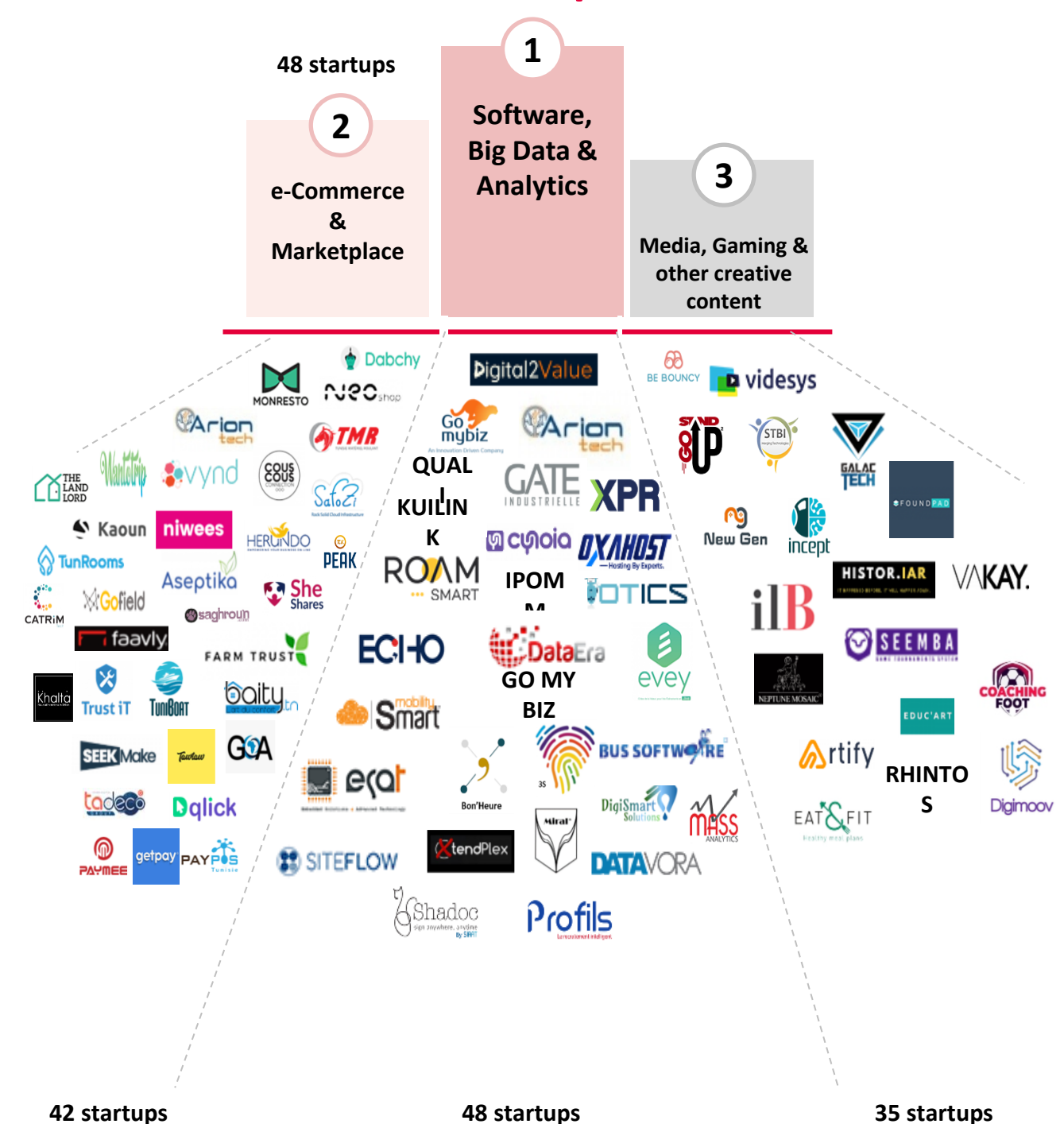


## Jobs created by startups

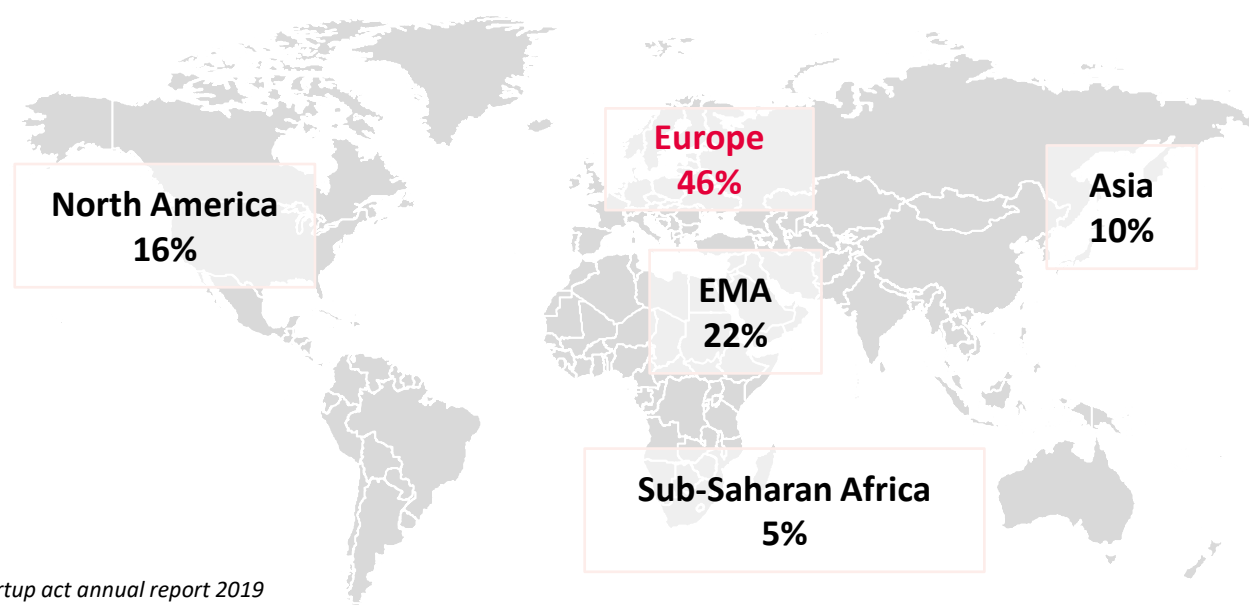


## Breakdown of startups by sector of activity

### 450 labelled startups by March 2021



## Markets addressed by the Tunisian startups







الهيئة التونسية للاستثمار  
TUNISIA INVESTMENT AUTHORITY

# TUNISIA INVESTMENT AUTHORITY

We facilitate the success of your investment



## SINGLE POINT OF CONTACT

TIA will support you from the start of your business set-up in Tunisia, assisting you with all **administrative procedures**, your **site location & due diligence** up to the **incentives' request & payment**.



## NETWORK OF EXPERTS

We bring together a **team of local experts with deep knowledge of the Tunisian investment ecosystem**. Our team will assist you with your **data request and market studies** to **bring more insight for your business set-up in Tunisia**.

## DIRECT SUPPORT FROM THE GOVERNMENT

**TIA is the sole coordinator** with the **“Higher Investment Council”** in Tunisia. We can promptly raise your concerns to the Higher Investment Council, in order to **quickly address your needs**.



## OUR VISION

We are the **reference partner** for investors and will support them through a **transparent, engaging and trustful approach**.



## OUR MISSION

We are the **Single Point of Contact** for **local and international investors**. With our network of partners, we act as a **facilitator for the completion of your investment project** through **reliable information, simple procedures and bespoke support**.

# TUNISIA INVESTMENT AUTHORITY

We assist you through the lifespan of your project



## Market Intelligence

Before you decide on a new investment in Tunisia, we can address all your relevant questions related to market(s) and sectors, benchmarks and countries competitive positioning as well as business environment and opportunities.



## Site Selection

Together with your stakeholders, we team up to fully apprehend the details of your project. Then, based on your location factors, we identify and present potential sites, so you can select the best fitted option for your project.



## Business Incorporation

We assist you to remotely carry out all necessary formalities to complete your company's Legal Incorporation.



## Incentives

We provide details and assist you with your request for obtaining incentives such as regional development, R&D incentives, and incentives for national interest projects.



## Customer care services

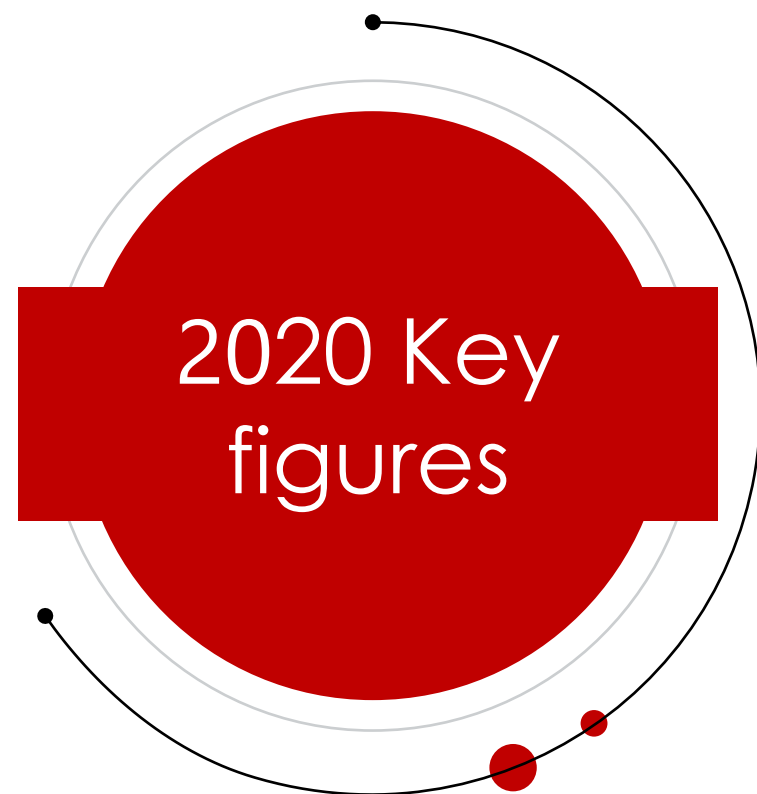
We follow up on your project and support your company after the completion and inauguration of your project in Tunisia, as well as during the ramp up of your operations.

# TUNISIA INVESTMENT AUTHORITY

## TIA 2020 Key figures



A particular attention was given to national and international investors. Understanding their concerns and needs helped us better supporting them and facilitating their investment journey in Tunisia.



**58**

Investment  
projets



**2.8TND  
billion**

Investment  
amount



**+ 13 000**

Jobs



# TUNISIA INVESTMENT AUTHORITY

## German investment breakdown: 2019-2020

Number of Projects

11

Investment Amount (MDT)

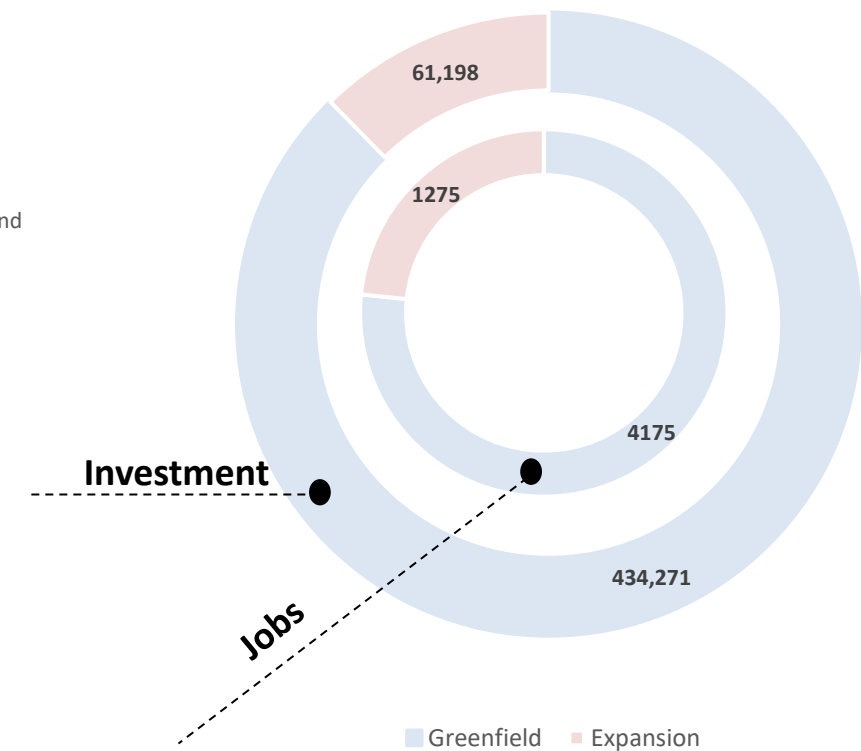
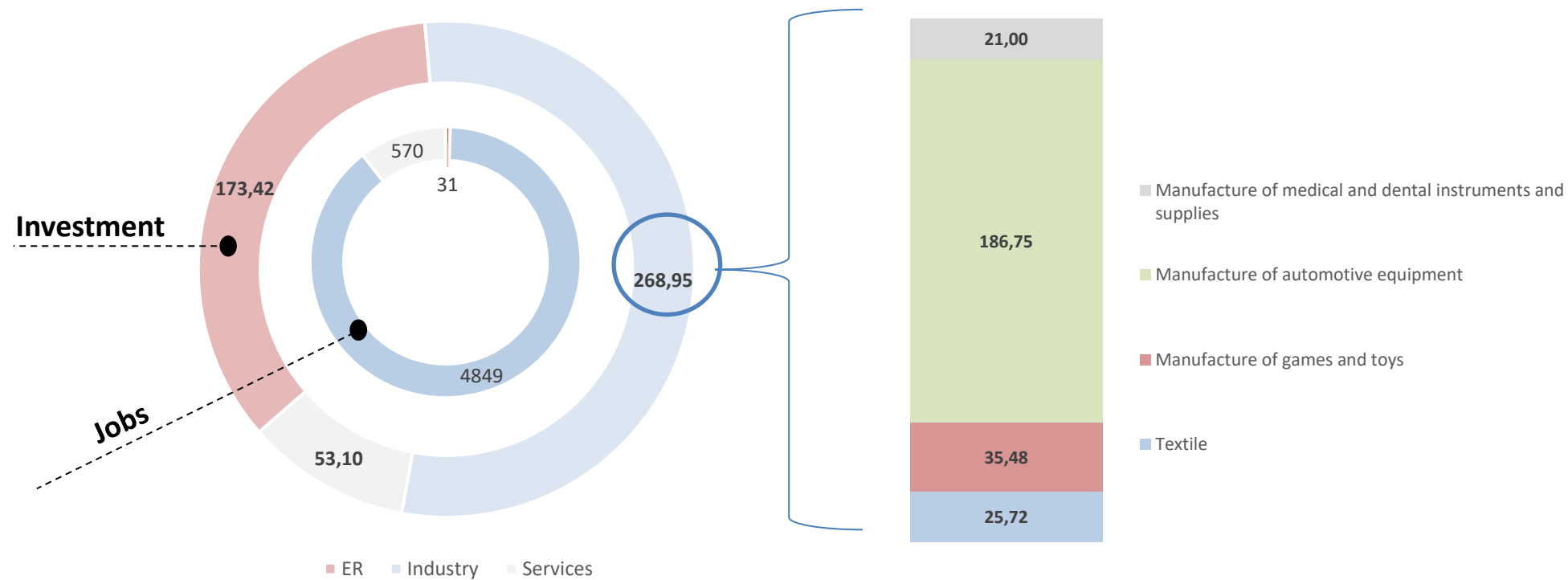
495,47

Job creation

5450

Investment breakdown by sectors

Investment breakdown by Project nature



## Tunisia Investment Authority



Rue du Lac Huron, Les Berges du Lac 1, 1053 Tunis



[www.tia.gov.tn](http://www.tia.gov.tn)



+216 70 248 148



[contact@tia.gov.tn](mailto:contact@tia.gov.tn)



الهيئة التونسية للاستثمار  
TUNISIA INVESTMENT AUTHORITY