2 Overview of the tourism sector

This chapter provides an economic overview of the tourism sector in Tunisia, identifying the key national institutions issuing sectoral regulation and the main applicable legal instruments. Tourism is one of the most important parts of the Tunisian economy, directly contributing 4.5% of gross domestic product (GDP) and accounting for 4.4% of formal employment in 2019. The Ministry of Tourism and Handicrafts plays a central role in regulating the sector. Several legal instruments – laws, decrees and ministerial orders – are applicable, at different levels, to tourism sub-sectors, including legislation applicable to accommodation, travel agencies and several sports and leisure activities. This chapter provides a review of the legal texts within the scope of this project that affect tourism in Tunisia at a horizontal level as well as those affecting selected transport and food and beverage services.

2.1. Definition and scope of the sector

Tourism as a demand-side phenomenon involves purchases of goods and services by visitors. It can also be viewed from the supply side as a set of productive activities that cater mainly to visitors (OECD; EUROSTAT; UNWTO, 2010[1]). In this report, the scope of analysis consists of the main components of the Tourism Satellite Account (TSA), which represents the official and internationally recognised conceptual framework for a comprehensive reconciliation of tourism data related to supply and demand (Box 2.1). It includes the following tourism activities, as identified in the statistical classification codes from the 2009 *Nomenclature d'Activités Tunisiennes* (NAT), or Tunisian Nomenclature of Activities (INS, 2009[2]):

- Accommodation services (Code 55), including:
  - Hotels and similar accommodation (Code 55.10)
  - Holiday and other short-stay accommodation (Code 55.20)
  - Camping grounds, recreational vehicle parks and trailer parks (Code 55.30)
  - Other accommodation (Code 55.90).
- Food and beverage service (Code 56), including:
  - Restaurants (Code 56.11)
  - Mobile food service (Code 56.12)
  - Beverage service (Code 56.32).
- Transport services (Code 49 and 77), including:
  - Urban and suburban passenger land transport (Code 43.31)
  - Taxi and *louage* (minibus) operation (Code 43.32)
  - Other passenger land transport (Code 43.39)
  - Renting and leasing of cars and light motor vehicles (Code 77.11)
  - Renting and leasing of recreational and sports goods (Code 77.21).
- Travel agency, tour operator reservation services and related activities (Code 79), including:
  - Travel agency activities (Code 79.1)
  - Tourist guides (Code 79.9).
- Sports and recreational services (Code 91 and 93), including:
  - Museum activities (Code 91.02)
  - Operation of historical sites/buildings and similar visitor attractions (Code 91.03).
  - Sports activities (Code 93.1)
  - Amusement and recreation activities (Code 93.2).

Box 2.1. The TSA

The TSA is a standard statistical framework and the main tool for the economic measurement of tourism. It was developed by the World Tourism Organisation (UNWTO), the OECD, the Statistical Office of the European Communities (Eurostat) and the United Nations Statistics Division. The Tourism Satellite Account: Recommended Methodological Framework 2008 (RMF 2008) provides the updated common conceptual framework for constructing a TSA. It adopts the basic system of concepts, classifications, definitions, tables and aggregates of the System of National Accounts 2008 (SNA 2008), the international standard for systematic summaries of national economic activity, from a functional perspective.

The TSA reconciles tourism data related to supply and demand. Tourism measurement and analysis require a classification of products, mainly those belonging to tourism expenditure, and productive activities that are the basis for defining tourism sectors. A tourism sector represents a grouping of establishments whose main activity is the same. The TSA-RMF 2008 provides a typology of tourism consumption products and activities.

Table 2.1. Tourism consumption products and activities

Tourism consumption products	Tourism activities (tourism sectors)
Accommodation services for visitors	Accommodation for visitors
Food & beverage service	Food& beverage service activities
Railway passenger transport services	Railway passenger transport
Road passenger transport services	Road passenger transport
Water passenger transport services	Water passenger transport
Air passenger transport services	Air passenger transport
Transport equipment rental services	Transport equipment rental
Travel agencies and other reservation services	Travel agencies and other reservation services activities
Cultural services	Cultural activities
Sports and recreational services	Sports and recreational activities
Country-specific tourism goods	Retail trade involving country-specific tourism goods
Country-specific tourism services	Other country-specific tourism activities

Source: Adapted from OECD et al. (2010[1]), Tourism Satellite Account: Recommended Methodological Framework 2008, https://doi.org/10.1787/9789264274105-en.

2.2. Economic overview

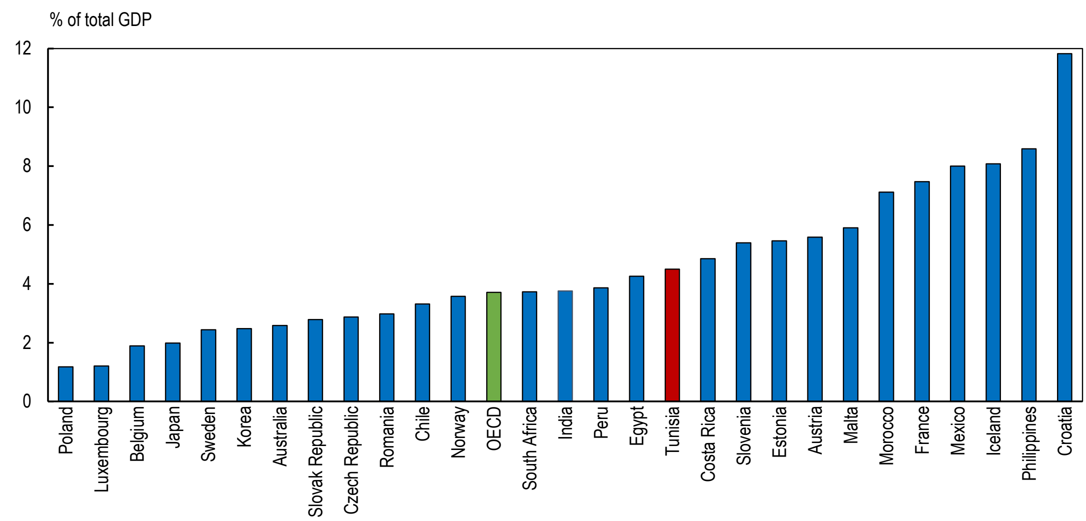
The tourism sector has long been an important pillar of the Tunisian economy. The sector has experienced diverse shocks, with the 2011 revolution and especially the 2015 terrorist attacks in Bardo and Sousse hitting it very hard. More recently, the COVID-19 pandemic has worsened matters. Although the sector has recovered from such shocks, it faces structural problems that have put strain on its financial viability, its ability to create jobs, and its capacity to innovate in terms of products, as discussed in this report. This overview provides an economic analysis of the sector, showing its weight in the Tunisian economy as a whole, as well as the determinants of demand and the characteristics of supply.

2.2.1. Contribution of the tourism sector to the national economy

Tourism value added

The TSA was developed for the first time in Tunisia for the years 2018-21. The data considered for this section is from 2019, the latest consistent year before the COVID-19 pandemic outbreak. According to the TSA methodology, tourism GDP amounted to TND 5.5 billion in 2019, representing 4.5% of national GDP (INS, 2022[3]) (see Figure 2.1). Depending on the source, there are significant differences in the calculation of tourism value added.[1] The TSA methodology stipulates that only goods and services produced specifically for tourism and directly consumed by tourists should be considered tourism value added (OECD; EUROSTAT; UNWTO, 2010[1]).

Figure 2.1. Direct GDP from tourism



Note: Data are from 2019 or are the latest available data prior to 2019.
Source: OECD OECD.Stat Metadata Viewer, (INS, 2022[3]).

In addition to direct tourism value added, the tourism sector generates extra activity for other sectors of the economy. According to Bouzaiene and Chibani (2021[4]), tourism has a multiple of gross value added (GVA) of 0.98 (see Table 2.1), measured as a ratio of indirect value added from tourism to direct value added. The multiple of 0.98 indicates that the indirect contribution of upstream industries to tourism is almost equivalent to the GVA generated directly by the tourism sector itself. These figures confirm the cross-cutting nature of tourism and its importance in the Tunisian economy. Domestic tourism consumption, including consumption of goods not specifically produced for tourism, was worth TND 11.8 billion in 2018, the vast majority of which (78.8%) is attributable to non-resident visitors (INS, 2022[3]).

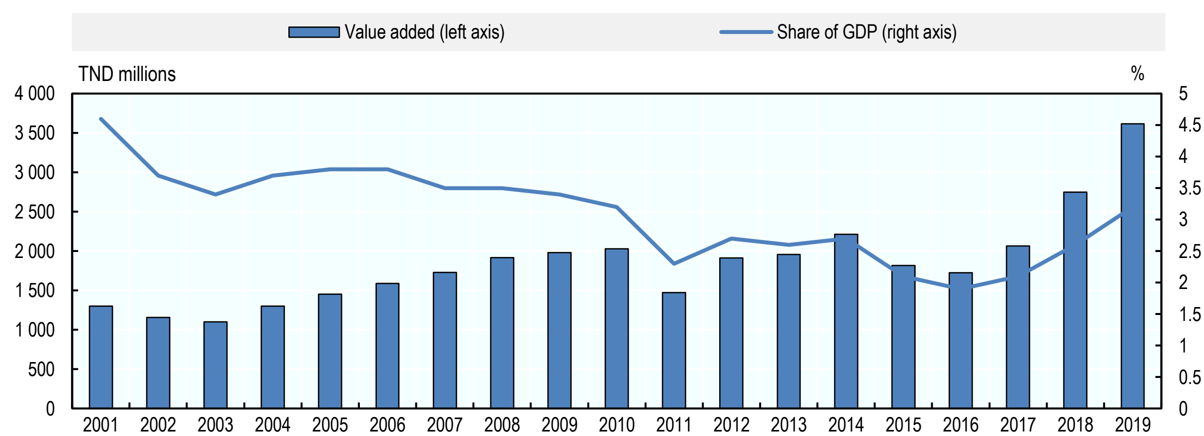
Tourism in Tunisia has been on a rising trend long term, although it has not grown as fast as it could have (see Figure 2.2). According to data from the *Office National Du Tourisme Tunisien* (ONTT), or Tunisian National Tourism Office, which provides longer time series data, the share of tourism[2] in Tunisia's economy as a whole fell between 2000 and 2016 due to growth in overall activity exceeding that of tourism. The share of tourism recovered after the 2015 terrorist attacks, with activity growing significantly to reach TND 3.5 billion in 2019, a growth rate of 110% compared with 2016. However, it was significantly affected by the COVID-19 crisis, with tourism direct GDP falling 64.6% in 2020 (INS, 2022[3]), compared with a decline of 8.8% in total GDP in the same year.

Table 2.2. Direct and indirect contribution of tourism by sector, 2018

	Direct GVA	Indirect GVA	Total GVA	Share
		(in TND million)		(%)
Accommodation and catering services	1 698	18	1 716	19.3
Transportation and storage services	1 228	189	1 416	15.9
Other market services	260	517	777	8.7
Trade, maintenance and repairs	396	136	532	6.0
Other tourism-related services	636	13	649	7.3
Other activities	276	3 515	3 791	42.5
Total	4 494	4 387	8 881	100

Source: Bouzaiene and Chibani (2021[4]), Poids économique du tourisme: points de vue des comptes nationaux.

Figure 2.2. Tourism activity in Tunisia



Source: ONTT (2019[5]), Rapport Annuel, https://www.ontt.tn/sites/default/files/inline-files/rapport2019.pdf.

Tourism employment

Tourism is an important generator of employment. According to the INS, it accounted for around 267 000 jobs in 2018, including 144 000 corresponding to direct GDP and 123 000 corresponding to indirect GDP, representing 7.6% of total employment (INS, 2022[3]). These statistics differ by source and definition; according to the ONTT, employment related to the tourist sector (as defined by the ONTT) totalled 95 000 people in 2018.

The sector is characterised by a high degree of informality.[3] INS statistics reveal that the informality rate in the hospitality sector was 46% in the second quarter of 2019 (see Table 2.3). Furthermore, marked seasonality accentuates variations in informal employment, as activity increases from June to September, which does not allow the same level of stable employment to be maintained throughout the year. In addition, the sector suffers from a certain level of disorganisation, with more than 4 000 *sociétés de service*, or service companies, reportedly operating in the parallel market, which is completely informal (Espace Manager, 2021[6]).

Table 2.3. Share of informal employment in Tunisia's hospitality sector, 2019

	Q2		Q3		Q4	
	In thousands	Share	In thousands	Share	In thousands	Share
Hospitality	70.2	46.0%	76.4	48.1%	70.3	44.4%

Source: INS (2019[7]) Employment survey, http://www.ins.tn/sites/default/files/publication/pdf/Note:2520emploi%2520informel%25202019.pdf.

2.2.2. The demand perspective: tourism revenues and entries

Analysing the tourism sector requires both quantitative and qualitative analyses of consumer behaviour, distinguishing between resident and non-resident customers when data permit. The level of attraction for tourists can be assessed using three key parameters: tourism revenues; total overnight stays; and inbound arrivals. Tourism revenues give a general idea of trends in the sector. Total overnight stays include tourism-related stays by both resident and non-resident tourists. Inbound arrivals highlight changes in the country's attractiveness to international visitors.

As noted by Khlif (2004[8]), tourism is characterised by high levels of uncertainty and volatility, related mainly to consumer confidence. As such, the sector is sensitive to exogenous shocks both within Tunisia and elsewhere.

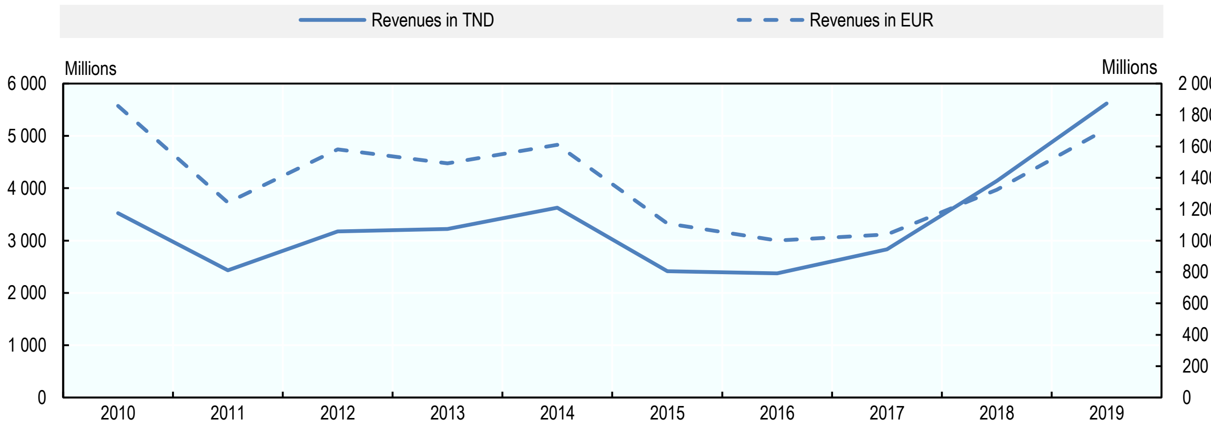
The evolution of tourism revenues

In Tunisia, the evolution of revenues has fluctuated, marked by political and social events that have caused significant drops and subsequent recoveries. Following the Tunisian Revolution in 2011 and the terrorist attacks in 2015, revenue levels recovered (rising 46% in 2018 and 35% in 2019) to reach TND 5.6 billion in 2019 (see Figure 2.3), which is explained by the gradual return of tourists to the country. Tourism revenues represented 10% of goods and services exports in 2019, recovering from a low of 6.6% in 2016, but were still far below the levels of the 2000s (18.8% in 2005). This shows that tourism has not grown as fast as the overall economy during the past decade.

Revenues expressed in euros remained below levels prior to the revolution and the terrorist attacks (see Figure 2.3). The depreciation of the dinar, which fell from TND/EUR 1.9 in 2010 to 3.2 in 2019, explains the sluggish growth in nominal tourism revenues in euros, while the decline in prices of Tunisian tourism products, reflecting the depreciation, has not contributed enough to rekindle tourism demand in Tunisia's favour. Indeed, the recovery in volume terms has not progressed as would have been expected given the depreciation of the dinar, as the price elasticity of demand for Tunisian tourism is considered to be relatively high (see Section 1.4). This likely reflects some lingering uncertainty following the shocks perceived by foreign tourists, but the structural weakness of the tourism sector may also have weighed down a full recovery.

Tunisia is among the world's least expensive tourist destinations. This reflects the difficulties of upgrading the sector in order to position it better globally. In 2019, individual tourists' average per-stay expenditure was around EUR 395 [EUR 190 for flights, EUR 7 for hotel transfers and the remainder for the cost of the stay; (Espace Manager, 2021[6])]. Also, Tunisia receives 0.6% of the world's tourists but collects only 0.2% of global tourism revenue (Galtier, 2019[9]). These figures suggest that Tunisia's tourism sector, while recovering fully from the shocks of the revolution and the attacks, would benefit from structural reforms to help it expand durably while diversifying its products.

Figure 2.3. Tunisia's tourism revenues

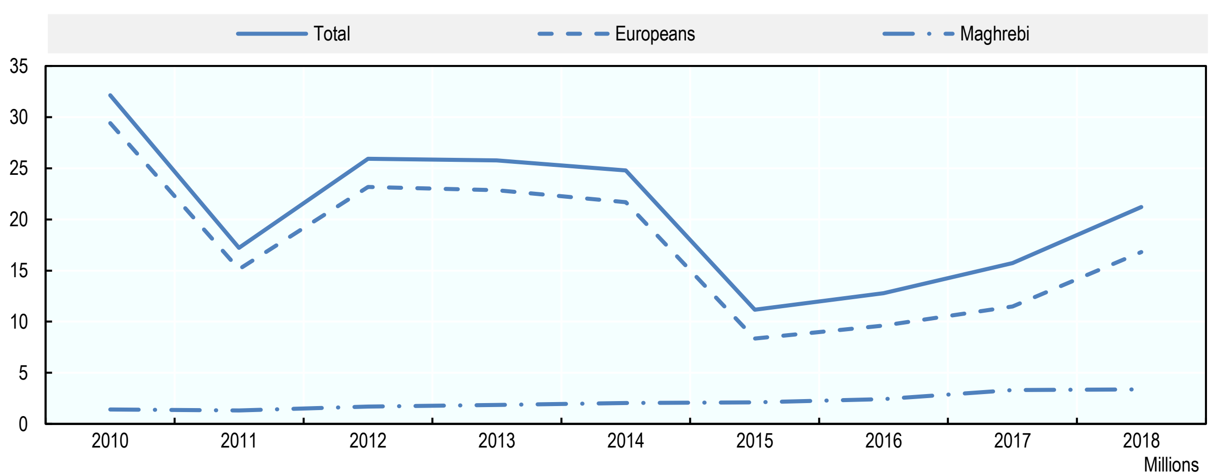


Source ONTT (2019[5]), Rapport Annuel, https://www.ontt.tn/sites/default/files/inline-files/rapport2019.pdf.

Number of overnight stays and tourist entries

The number of overnight stays by tourists fell significantly between 2010 and 2016. Despite a recovery that began in 2016, these figures have not yet returned to 2010 levels (see Figure 2.4). European tourists are far ahead of other groups by the number of overnight stays. The number of overnight stays by Maghrebi tourists, meanwhile, has increased since 2014.

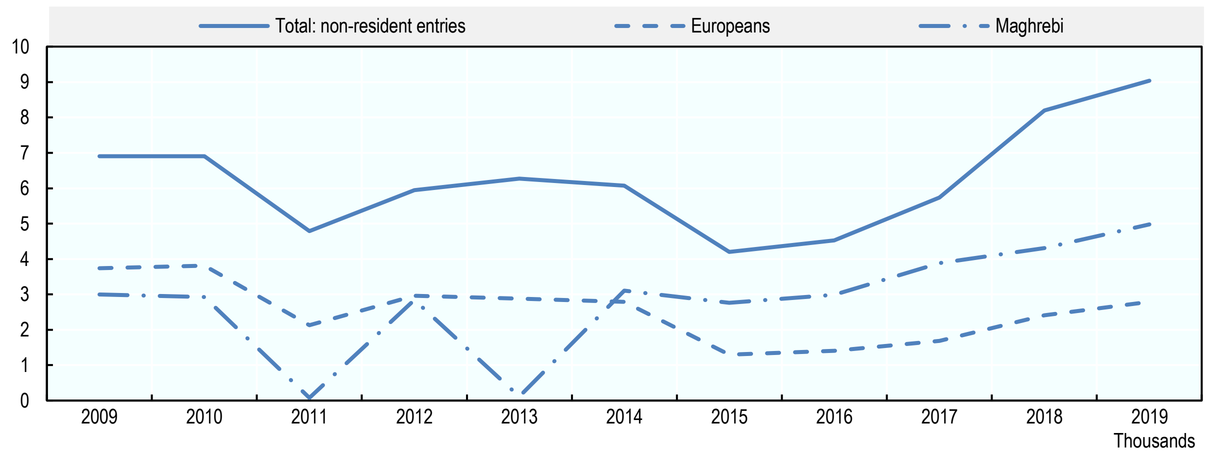
Figure 2.4. Number of overnight stays by non-residents



Source: ONTT (2019[5]), Rapport Annuel, https://www.ontt.tn/sites/default/files/inline-files/rapport2019.pdf.

Tourist arrival numbers showed an overall upward trend over the 2010-19 period, marked by drops in 2011 and 2015 (see Figure 2.5). Since 2015, Maghrebi tourists have been ahead of Europeans in terms of entries to the country, contrasting with figures recorded on the number of overnight stays. One explanation for this is that Maghrebi tourists do not necessarily opt for hotel accommodation but instead consider renting from private individuals (Othmani and Benhacine, 2021[10]).

Figure 2.5. Entries of non-residents by nationality



Source: ONTT (2019[5]), Rapport Annuel, https://www.ontt.tn/sites/default/files/inline-files/rapport2019.pdf.

A performance gap exists between the number of entries, which has exceeded 2010 levels since 2018, and the number of overnight stays, which has not returned to 2010 levels. This can be explained by the rise in the number of Maghrebi tourists, who are more likely to rent from private hosts, and whose stays are thus not counted as overnight stays in hotels. In addition, the average length of stay in Tunisia has decreased, according to data from the ONTT, dropping from five days in 2010 to three in 2018.

Origin of foreign-currency revenues

Statistics from the ONTT and the Central Bank of Tunisia for 2019 allow us to distinguish between three main origins of non-resident tourists:

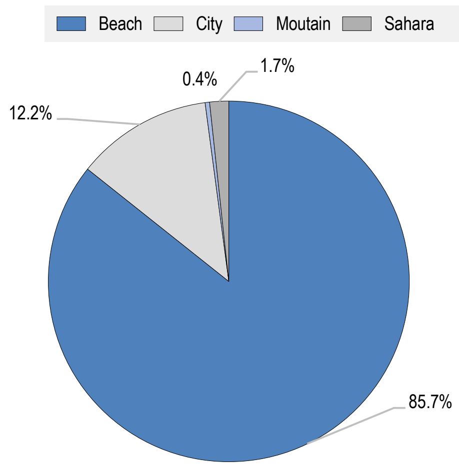
- Europe (TND 3.6 billion), in particular France (TND 1.04 billion), Germany (TND 640 million) and the United Kingdom (TND 325 million)
- Arab Maghreb countries (TND 1.73 billion), split almost equally between Algeria and Libya
- Russia (TND 792 million).

The six countries mentioned above account for 80% of Tunisia's foreign currency tourism revenue.

Reasons for choosing Tunisia as tourism destination

It is essential to understand the factors that attract tourists to Tunisia in order to draw attention to the diversification of Tunisian tourism products and the need to better develop the country's natural, cultural and historical offering. Tunisia's tourism sector has often been criticised for a lack of product diversification, as it focuses primarily on beach tourism, being the only thing attracting 85.7% of visitors to the country (see Figure 2.6). The strong predominance of beaches, which, as noted by Khlif (2004[8]), seem better developed than other attractions (such as thalassotherapy, golf, cultural attractions, desert tours, sailing, cruising and business), has sometimes earned Tunisia the reputation of being more of a "hotel" destination than a tourist one.

Figure 2.6. Distribution of overnight stays by destination



Source: ONTT (2019[5]), Rapport Annuel, https://www.ontt.tn/sites/default/files/inline-files/rapport2019.pdf.

2.2.3. The supply perspective: characteristics of the tourism industry

Accommodation

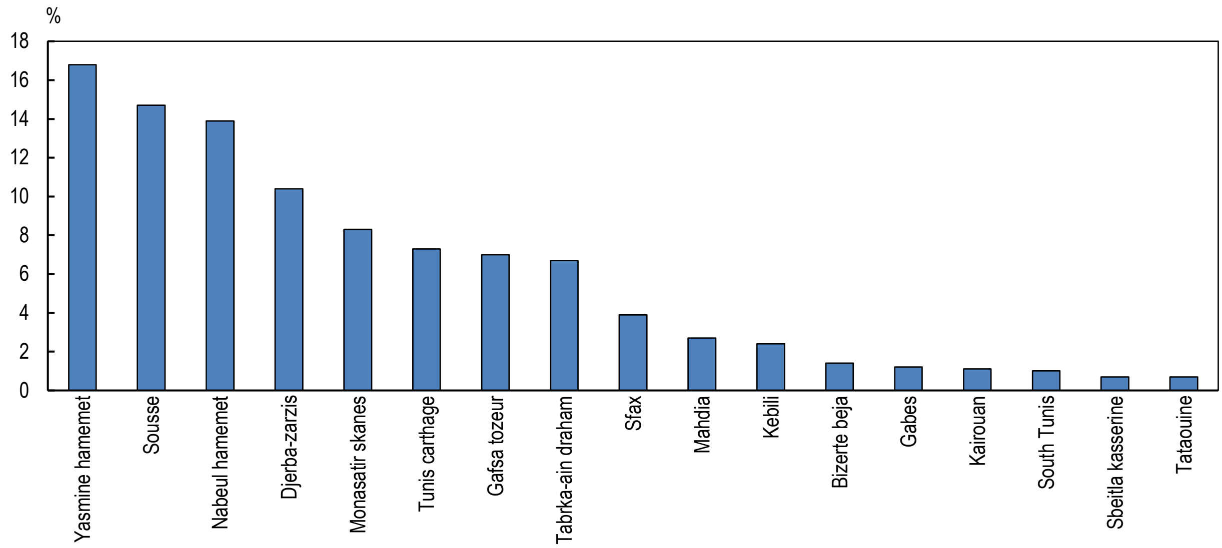
The number of tourist facilities in Tunisia has remained relatively stable since 2010 and stood at 876 in 2019 (see Table 2.3). In terms of the number of overnight stays, classified hotels account for 94.5% of the total, while other categories of accommodation (such as non-classified hotels, apart-hotels and *vacance villages*, or holiday villages) account for 5.5% (ONTT, 2019[5]). The classification of hotels ranges from one star to five stars. Among classified hotels, around half are classified as four-star (51.9% of all classified hotels), followed by three-star (22.5%), five-star (18.7%), two-star (5.4%) and one-star [1.4%; (ONTT, 2019[5])]. Accommodation infrastructure in Tunisia is concentrated in the country's coastal areas (see Figure 2.7). The distribution of hotel guests by region highlights the attractiveness of the coastal areas of Nabeul-Hammamet, Sousse and Djerba, which alone accommodate 56% of all hotel guests.

Table 2.4. Numbers of tourist facilities

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Number of tourist facilities	856	861	846	847	848	862	824	848	868	876
Variation	-	1%	-2%	0%	0%	2%	-4%	3%	2%	1%
Tourism investment (in TND millions)	376	208	240	298	242	200	261	447	216	196

Source: ONTT (2019[5]), Rapport Annuel, https://www.ontt.tn/sites/default/files/inline-files/rapport2019.pdf.

Figure 2.7. Distribution of hotel guests by region, 2019



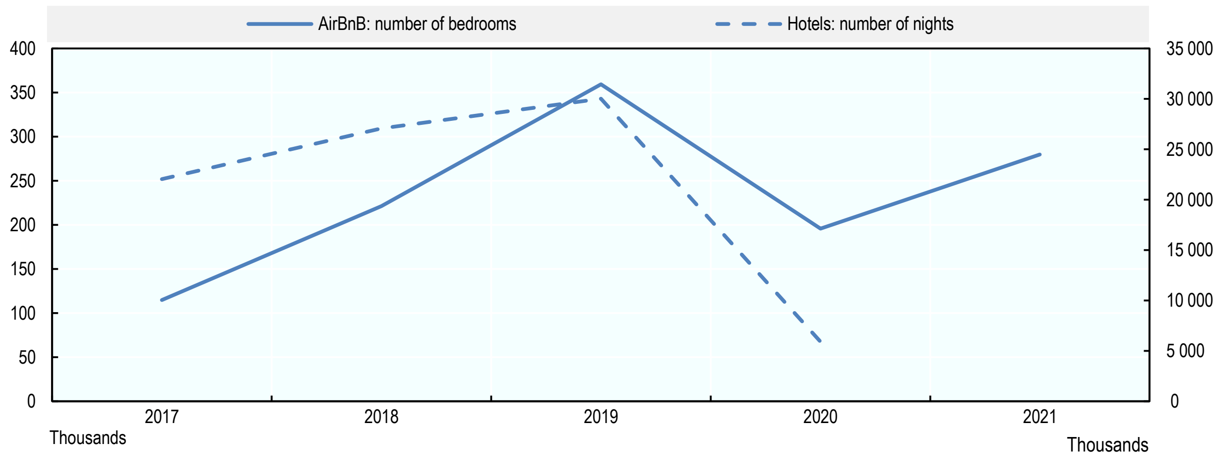
Source: ONTT (2019[5]), Rapport Annuel, https://www.ontt.tn/sites/default/files/inline-files/rapport2019.pdf.

The majority of tourists stay in classic hotel resorts (three-, four- or five-star hotels). This confirms the predominance of mass tourism, which is often based on large resorts, the number of which has risen sharply since the 1970s and whose strategy is often based on all-inclusive package deals.[4] To maintain profit margins, hoteliers hire seasonal workers and cut back on services. This practice may have contributed to the decline of tourism revenue per bed, which fell from TND 11 360 to TND 4 593 between 2005 and 2015. This type of package, which is becoming the most common in Tunisia, may result in a decrease in the quality of services provided.

The sluggish demand for overnight hotel stays coincides with the emergence of alternative forms of accommodation, of which Airbnb, which offers vacation rental properties online, is a notable example. According to vacation rental market data aggregator AllTheRooms, Airbnb generated gross revenue from accommodation services in Tunisia of around TND 25.4 million in 2021. This segment of the market is still small compared with the remainder of the accommodation sector (tourism direct GDP in the accommodation sector was TND 1.08 billion in 2018). However, it is expanding rapidly, almost trebling in size between 2017, when it was worth TND 8.5 million, and 2021. The number of overnight stays at Airbnb-listed properties has increased similarly. Although this market segment, like the others, was hit by the COVID-19 crisis in 2020, the damage was less extensive than in the traditional accommodation sector, and activity quickly recovered in 2021 (see Figure 2.8).[5] The development of such alternative accommodation suggests that the traditional accommodation sector will face increased competitive pressures, providing a further reason for rationalising inefficient regulations to ensure it remains competitive. Stakeholders also note that the majority of such alternative accommodation operates informally (see Chapter 3).

Figure 2.8. Overnight stays in alternative accommodation facilities

Number of room nights* booked at Airbnb-listed properties in Tunisia



*Airbnb shows the number of room nights booked, which is the number of nights booked adjusted by the number of beds. Hotels shows the number of overnight stays at accommodation facilities as reported by the ONTT (2019; 2020).
Source: AllTheRooms; ONTT (2020[11]), Rapport Annuel, https://www.ontt.tn/sites/default/files/inline-files/Rapport%20ONTT%202020.pdf. ONTT (2019[5]), Rapport Annuel, https://www.ontt.tn/sites/default/files/inline-files/rapport2019.pdf.

Travel agencies

Travel agencies play a key role in promoting the tourism industry. Tunisia was home to 1 354 travel agencies in 2019, up from 1 220 in 2018 (ONTT, 2019[5]). Agencies are located mostly in Tunis and in the regions where hotels are concentrated, particularly Nabeul-Hammamet, Sousse and Djerba, which with the capital are where 75% of all travel agencies are sited. Travel agencies are classified as Category-A or Category-B. Tunisia had 1 031 Category-A agencies and 323 Category-B agencies in 2019. Certain activities are supposed to be carried out only by Category-A agencies, which are subject to stricter licensing requirements than Category-B agencies. According to a survey by the Arab Institute of Business Leaders and the *Fédération Tunisienne des Agences de Voyages et de Tourisme* (FTAV), or Tunisian Federation of Travel Agencies), travel agencies generated nearly 20 000 jobs in Tunisia in 2021.

The COVID-19 pandemic and resulting lockdowns greatly affected travel agencies' activity, resulting in a 28% reduction in jobs as of June 2020 (Tunisie.co, 2021[12]). Some agencies specialising in Hajj pilgrimages to Mecca stopped operating due to the closure of Saudi Arabia's borders. However, it should be noted that such agencies work not only to promote Tunisia as a destination, but also operate tourist trips abroad.

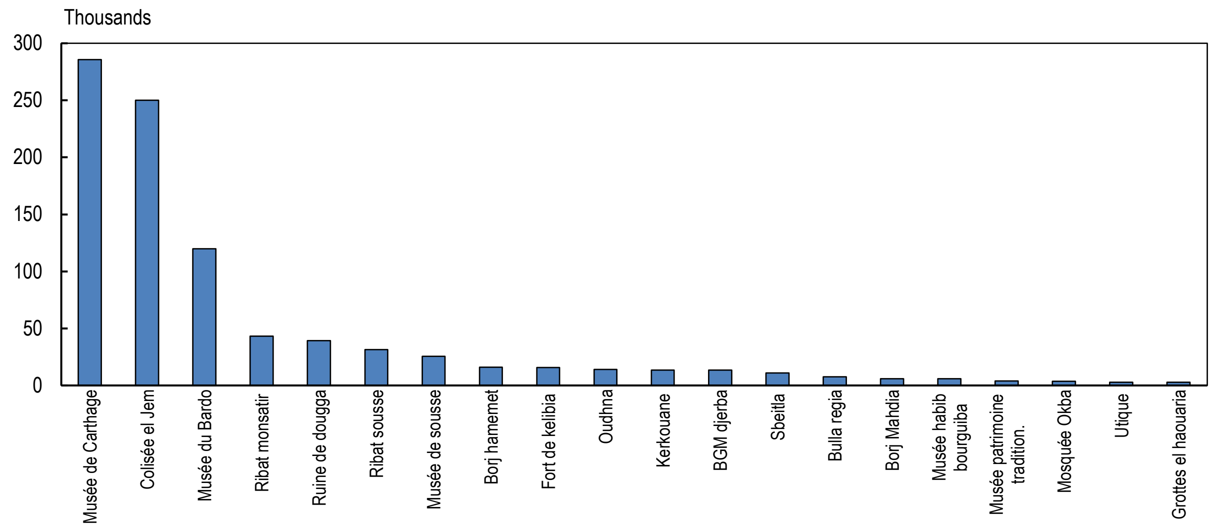
Recreational services

Making the most of its geographical position, since the mid-1990s, Tunisia has tried to take advantage of cruise tourism to increase the number of inbound visitors and tourist activity overall. Concentrated in the port of La Goulette, the cruise segment enjoyed sustained and even exponential growth until 2011, before slowing sharply and then stopping completely after the 2015 terrorist attacks. After a seven-year hiatus, activity gradually restarted in 2022 with an estimated 40 cruises expected over the year, well below the 400 cruises and 1 million visitors seen in 2010.

Analysis of the main monuments visited (see Figure 2.9) highlights the fact that the full potential of Tunisia's cultural, natural and historical capital is not being reached. Only three monuments attracted a significant number of tourists in 2019: the Carthage National Museum received 285 000 visits; the Amphitheatre of El

Jem recorded 250 000 visits (by comparison, Rome's Colosseum attracts 6.5 million visitors annually); and the Bardo Museum saw 120 000 visits. Many monuments do not receive visitors due to a lack of communication about them and the absence of well-established, well-structured routes for tourists to take from the country's main cities.

Figure 2.9. Number of visits to Tunisia's main monuments and museums, 2019



Source: ONTT (2019[5]), Rapport Annuel, https://www.ontt.tn/sites/default/files/inline-files/rapport2019.pdf.

As Khlif (2004[8]) points out, museum offerings are dated, cultural sites are not maintained, infrastructure to provide minimum services such as catering and sanitation is lacking, and itineraries are monotonous and unoriginal, a situation that has persisted since those observations were made. In addition, guides are rarely trained in history, languages or art, and most certified guides are professors affiliated to universities, according to ONTT (2019[5]). Finally, a lack of signage and tourist information, and the poor design of signs where they exist, means that routes are not intuitive. As a result, tourists do not get to know the country and struggle to find their way around.

Food and beverage service

In Tunisia, tourist restaurants are distinguished from standard restaurants mainly because the consumption of alcoholic drinks is permitted in the former. Tunisia had 374 tourist restaurants in 2019, concentrated mostly in coastal areas, with 79% located in Tunis, Nabeul-Hammamet, Sousse and Djerba.

Tourist restaurants are subject to the *fourchette*, or fork, restaurant classification system. The *Fédération Tunisienne de l'Hotellerie* (FTH), or Tunisian Hotel Federation, and the FTAV have voting rights in the classification process, while the *Fédération Tunisienne Des Restaurants Touristiques*, or Tunisian Federation of Tourist Restaurants, has only a consultative role. In the classification process, administrative issues such as consumer protection are also scrutinised. Classifications are made in descending order according to the number of *fourchettes*: three *fourchettes* luxury (four restaurants); three *fourchettes* (38 restaurants); two *fourchettes* (185 restaurants); and one *fourchette* (147 restaurants). Restaurants classified as three *fourchettes* luxury exist only in Tunis, as do the vast majority of three-*fourchettes* restaurants.

Car rental services

Car rental agencies are major players in Tunisia's tourism industry. In 2019, the country had 468 car rental agencies with a combined turnover of around TND 1 billion, of which 70% was from tourism, employing some 10 000 people (Webmanagercenter, 2020[13]).

Like the tourism sector as a whole, the car rental business suffers from the existence of a parallel informal market that has a fleet of approximately 52 000 vehicles, dwarfing its pool of around 20 000. According to the chair of the *Chambre Syndicale des Loueurs de Voitures*, or Association of Car Rental Companies, the informal market costs the state TND 150 million annually in the form of losses related to road tax, other taxes and customs duties (Destination Tunisie, 2021[14]).

The sector has also suffered from the negative impact of the COVID-19 crisis. Closures of 33 car rental agencies and 1 800 employee layoffs occurred following the imposition of lockdown measures between March and December 2020 (Destination Tunisie, 2021[14]). Although turnover in the sector is largely dependent on tourism, the agencies are under the supervision of a different department, namely the Ministry of Transport, which can make institutional co-ordination more difficult.

Tourism investment

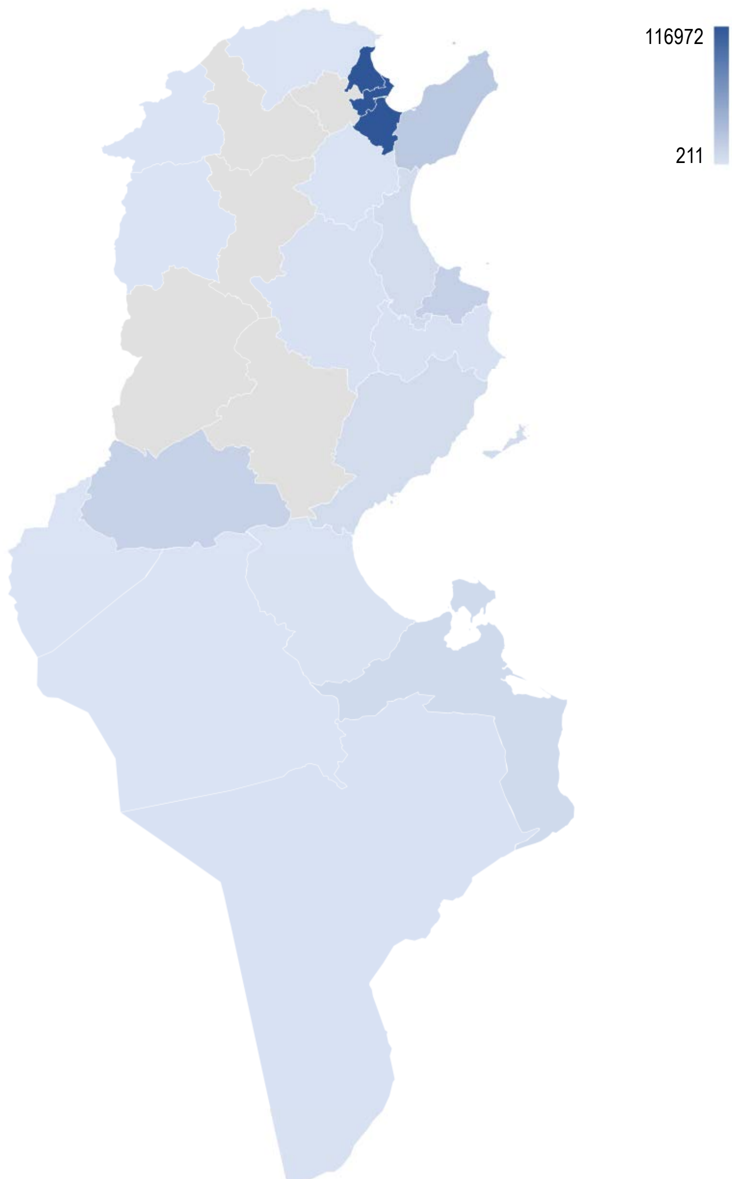
Investment in Tunisia's tourism industry has been cyclical, reflecting investors' lack of confidence and uncertainty about the national and regional context since the 2011 revolution. In addition to experiencing huge fluctuations, tourism investment is unevenly distributed throughout the country and focused mainly on accommodation, to the detriment of entertainment facilities. According to ONTT statistics for 2019, 60% of all investment was associated with the Tunis governorate, a share that rises to around 90% if Nabeul-Hammamet and Djerba are included (Figure 2.10). In terms of investment categories in the tourism sector, 88% of all investment is focused on accommodation and the remainder on entertainment and recreational services.

Aware of the outdated state and limited modernisation of a significant number of hotel facilities, in 2006, the government set up the *Programme de Mise à Niveau des Établissements Hôteliers*, or Hotel Facility Upgrade Programme, which aimed to:[6]

- improve the quality of services
- boost the performance of the hotel business, and strengthen its competitiveness and ability to withstand external risks
- consolidate the position of the Tunisian tourism sector on a global scale.

According to the latest figures, 322 facilities have benefitted from programme spending of a total of TND 592 million. The coverage of the programme remains limited, particularly with regard to its intangible investment component, according to a government report.

Figure 2.10. Tourism investment by region



Source: ONTT (2019[5]), Rapport Annuel, https://www.ontt.tn/sites/default/files/inline-files/rapport2019.pdf

2.3. Institutional overview

The Tunisian tourism sector's institutional framework is formed by the public administration and a number of other public and semi-public entities over which the Tunisian state has a significant influence.

2.3.1. Public institutions

The primary institution is the Ministry of Tourism and Handicrafts,[7] which is in charge of applying the legal framework for accommodation, travel agencies, recreational services and elements of F&B service. Its work involves the adoption of ministerial orders that develop general rules established by laws and decrees, and which sometimes involves other ministries (the Ministry of Transport, for example, in the case of tourist transport and marinas).

The Ministry of Tourism undertakes several roles relating to the sector, such as encouraging investment in tourism and tourist recreation, and supervising projects, overseeing the quality of tourist services and creating tourism promotion programmes. It is also in charge of the enforcement of regulation and hosts several committees and commissions, including:

- **The *Commission de Classement et de Révision de Classement***, or Classification[8] and Reclassification[9] Commission, which is responsible for the licensing and classification of tourist establishments providing accommodation services and revisions to these, and for the classification and reclassification of tourist restaurants. It brings together representatives of the administration (the Ministry of Tourism and the ONTT) and two of the country's main tourism federations (the FTH and the FTAV).
- **The *Fonds de Développement de la Compétitivité (FODEC)*[10]** whose objective, among others, is to finance advertising, as well as sectoral and strategic studies proposed by the management committee for advertising and promotional programmes, and a steering committee for the upgrading of hotel establishments and any activities involving the upgrading and promotion of the tourism sector. It has the same membership as the Classification and Reclassification Commission, in addition to a representative of the Ministry of Finance and the national airline, Tunisair.
- **The *Conseil National des Ports de Plaisance***, or National Council of Marinas,[11] which is responsible for the development of port infrastructure and its maintenance, the operation and management of the public areas of ports, tools and port equipment, safety, security, health, cleanliness and environmental protection rules, and activity at maritime pleasure ports.

The Ministry of Tourism supervises several public institutions, including two of the most important organisations in the tourism sector:

- **The ONTT**,**[12]** which is tasked with promoting tourism and overseeing tourist activity. The ONTT ensures the development of professional competence and quality control and maintenance, as well as the promotion of investment in the tourism sector. This includes the branding of tourist investment and the delivery of related pre-project and final project approvals. The ONTT is represented through several offices in different countries, including Algeria, Austria, Belgium, France, Germany, Libya and Sweden.
- **The *Agence Foncière Touristique*** (AFT), or Tourism Real Estate Agency,[13] which is a key actor in zoning policy. It is tasked with acquiring land in tourism zones, developing plans and infrastructure in them, selling and completing projects, and ensuring appropriate real estate conditions within these zones. The AFT is represented by delegations in different regions in Tunisia.

In addition to the Ministry of Tourism, several other public institutions supervise specific activities. The Ministry of Health, through the *Office National du Thermalisme et de l'Hydrothérapie* (ONTH), or National Office of Thermalism and Hydrotherapy,[14] is the main regulator of well-being activities. The ONTH is in charge of allocating concessions and authorisations for thalassotherapy, thermal cures and spas, and for monitoring the implementation of programmes to upgrade hydrotherapy, setting up quality systems, and carrying out technical, economic and financial studies, among other things.

The Ministry of Culture, through the *Institut National du Patrimoine* (INP), or National Heritage Institute,[15] and the *Agence de Mise en Valeur du Patrimoine et de Promotion Culturelle* (AMVPPC) Agency for Heritage Development and Cultural Promotion,[16] plays a central role in cultural services. Both institutions are involved in heritage concessions and in authorisation processes for private museums, galleries and arts and crafts workshops.

The Ministry of Transport regulates all passenger transport services except tourist transport, which is regulated by the Ministry of Tourism through the *cahier des charges*, or set of specifications, for travel agencies. The Department of Land Transport is the main actor when it comes to issues related to car rental or taxi services.[17] The Ministry of Transport also hosts the *Conseil Supérieur des Ports Maritimes*, or Supreme Council of Maritime Ports, which is responsible for issuing opinions on general guidelines and sectoral policies for maritime ports and programmes for their upgrading and development.[18] The Ministry of Transport's *Office de la Marine Marchande et des Ports* (OMMP), or Office of the Merchant Marine and Ports, is the main authority involved in licensing pleasure boats and granting permits for paid maritime passenger transport.[19]

The Ministry of Interior is the main authority regulating alcohol licences, including for hotels and tourist restaurants, which are processed in consultation with local authorities such as municipalities and territorially competent governors.[20]

The Ministry of National Defence chairs the *Commission Nationale de Plongée*, or National Diving Commission.[21] The commission plays an essential role in authorising the establishment and operation of dive centres and makes decisions on a number of matters related to diving, including medical and technical aptitude conditions and the criteria for engaging in such activity, as well as requests for recognition and equivalence for foreign diving qualifications.

Under the supervision of the Presidency of the government, the *Instance Générale de Partenariat Public Privé* (IGPPP), or General Public-Private Partnership Authority, and the *Secrétariat Général des Affaires Maritimes* (SGAM), or General Secretariat for Maritime Affairs, are also involved in some of the tourism activities examined in this study. The IGPPP is an important stakeholder in heritage and marina concessions, and the SGAM oversees co-ordination between various entities involved in maritime affairs, such as maritime security, the protection of underwater cultural heritage, yachting, and diving and underwater activities. [22]

Local authorities also play a significant role in sports and recreational activities, since most of the related authorisations are granted by territorially competent governors. This is the case, for example, for authorisations to establish and operate dive and water sports centres (see Sections 8.5 and 8.6) as well as for taxis and similar for-hire vehicles (see Section 5.4). Restaurants, traditional fast-food restaurants and street food are also regulated at the municipal level (see Section 4.3).

It is worth mentioning that despite the multiple actors involved in tourism, a robust co-ordination mechanism to ensure swift and efficient co-ordination among tourism programmes and projects is lacking, creating a significant burden for investors and in some cases acting as a barrier to market entry.

Box 2.2. Co-ordination mechanisms for tourism: country approaches

In **France**, an Inter-Ministerial Tourism Council chaired by the prime minister was established in 2017 to co-ordinate action across six key priority areas for the development of tourism in the country: improving hospitality, security and service standards at border crossings; the modernisation and promotion of the *Qualité Tourisme* label; co-ordinating the tourism offer to encourage international tourists to visit many different parts of France, with government support for new investment in products and quality through the France Tourism Development Fund; providing skills training to improve service quality and help to combat unemployment; continued support for digitalising the sector; and improving access to holidays, especially for people with disabilities.

Tourism Forum **Switzerland** was developed to provide a platform for dialogue, co-ordination and co-operation across the sector. Working groups consisting of representatives of the private sector, cantons, municipalities, the national government and subject matter experts, as required, meet regularly, often on a temporary basis. At the forum's main event in November each year, the results of its working groups are presented and steps for the following year are discussed.

In the **United States**, the Tourism Policy Council is an inter-agency body established by law for the purpose of ensuring that the nation's tourism interests are considered in federal decision-making. Its main function is to co-ordinate the national policies and programmes of federal agencies that have significant effects on international travel and tourism, recreation and national heritage resources. In addition, the Travel and Tourism Advisory Board is composed of industry representatives appointed by the secretary of commerce to advise on travel and tourism issues on an ongoing basis.

In **Finland**: A High-Level Working Group on Tourism was established in September 2021. Chaired by the Ministry of Economic Affairs and Employment, it comprises ministries, regional councils, state administrations, regional tourism organisations, travel companies, and research and educational institutions and organisations. The group will serve as an expert advisory body on strategy related to tourism development through 2028. It will also monitor and assess the sector's operating environment and current phenomena, and support the preparation of tourism policy measures.

Sources: OECD (2020[15]), OECD Tourism Trends and Policies 2020, https://doi.org/10.1787/6b47b985-en; OECD (2022[16]), OECD Tourism Trends and Policies 2022, https://doi.org/10.1787/a8dd3019-en.

Tunisia's *Conseil de la Concurrence*, or Competition Council, is an independent administrative authority with an advisory and jurisdictional role in all industries, including tourism. With the *Direction Générale de la Concurrence et des Enquêtes Économiques* (DGCEE), or General Directorate for Competition and Economic Investigations, at the Ministry of Trade and Export Development, the council is responsible for implementing competition rules and regulations in the country.

Tunisia has several consumer rights associations, the main one of which is the *Organisation Tunisienne de Défense du Consommateur* (ODC), or Tunisian Consumer Defence Organisation. It was established in 1989 and has a seat on several boards and commissions dealing with many sectors, although is not part of any commission dealing with the tourism sector.

2.3.2. Federations and industry unions

Federations play a central role in the tourism industry. The FTH is the main actor in the accommodation sector. Created in 1961, it groups members into several regional federations and has around 400 members.[23] The alternative and small-scale tourist accommodation sectors are represented mainly by the *Association Edhiafa*, or Edhiafa Association.[24] The FTAV was created in 1964 as the first professional body to represent travel agencies. It has 720 member agencies and 12 regional offices.[25] Tourist guides are represented mainly by two bodies: the *Fédération Tunisienne des Guides Touristiques*, or Tunisian Federation for Tourist Guides,[26] and the *Association des Guides de Tourisme de Croisière*, or Association of Cruise Tourism Guides.[27] The *Fédération Interprofessionnelle du Tourisme Tunisien* (Fi2T), or Inter-professional Federation of Tunisian Tourism, was founded in 2016 as independent union that brings together various stakeholders such as legal entities, individuals and NGOs working in the tourism industry in travel agencies, sports and recreational activities.[28]

The main association involved in food and beverage service is the *Fédération Tunisienne des Restaurants Touristiques* (FTRT), or Tunisian Federation of Tourist Restaurants, which promotes Tunisian cuisine as a focus for tourism development and supports its membership of classified tourist restaurants.

Important federations and unions involved in passenger transport activities include the *Chambre Syndicale du Transport Touristique*, or National Syndicate for Tourist Transport,[29] which began operations in 2020, bringing together professionals in the tourist transport sector such as travel agencies, hotels and other service providers,[30] as well as the *Chambre Syndicale des Loueurs de Voitures*, or National Syndicate for Vehicle Rentals (FNLV) which was created in 1976. It is part of the *Union Tunisienne de l'Industrie, du Commerce et de l'Artisanat* (UTICA), or Tunisian Industry, Trade and Crafts Union, and has 231 members.[31]

Finally, several federations are active in maritime tourism activities. The *Fédération Tunisienne des Activités du Tourisme Nautique*, or Tunisian Federation of Nautical Tourism Activities, was created in 2018 as an independent professional union encompassing a wide range of nautical tourism activities, including dive centres, marinas, water sports centres, cruises and other sea transport, equipment manufacturers and sellers of boats and fittings, maintenance services and recreational vessel makers. The *Fédération Tunisienne des Activités Subaquatiques et de Sauvetage Aquatique* (FAST), or Tunisian Federation of Underwater Activities and Aquatic Lifesaving, was established in 1989 with the aim of developing underwater activities, mainly diving.[32] Other federations have been founded to enhance and promote marinas and yachting, such as the *Association Tunisienne des Activités Nautiques et de Plaisance*, or Tunisian Association of Nautical Pleasure Activities (ATANP) and the *Chambre Nationale des Gestionnaires des Ports de Plaisance*, or National Trade Union Chamber of Marina Managers, which was founded in 2020 as part of UTICA.

2.4. Overview of the legislation

The OECD has identified 163 pieces of legislation related to the tourism activities included in the scope of this assessment. The main legislative items affecting the hotels and accommodation services sector are:

- Decree No. 2007-457, completed by Decree No. 2016-335, which sets out classification procedures and requirements for tourist accommodation.
- The Orders of the Minister of Tourism of 29 July 2013 and 1 October 2013, which set minimum standards for the classification of guest houses and *gîtes rural*, or rural lodges, respectively. Decree No. 2018-191 competes the latter and details the conditions and procedures for authorisation of the development of rural lodges and agricultural tourist areas. The Order of the Minister of Commerce of 25 September 1978 sets similar standards for tourist campsites.
- Law No. 2008-33 on timeshares, as amended by Law No. 2019-47 on improving the investment climate, and Decree No. 2009-1935 set conditions for obtaining authorisation to offer timeshares. A joint decree by the ministers of tourism and finance of 16 June 2009 sets the value of bank guarantees provided by timeshare companies and conditions for their management.

- Law No. 2016-71 on investment, as amended by Law No. 2019-47, seeking to improve the investment climate, and Law No. 90-21 promulgating the investment code (only articles 3, 5, 6, 7 and 8 remain in force) include key provisions related to tourism investment.
- Presidential Decree No. 2022-317, which amends Decree No. 2018-417 on the publication of the list of economic activities subject to authorisation and the list of administrative authorisations for projects, provisions relating to them and their simplification.
- Decree No. 94-822, which lists municipal tourist areas.[33]
- Decree No. 73-216, as modified by Decree No. 82-1017, on the organisation and functioning of the AFT. Decree No. 2005-2124, which sets rules for the organisation, functioning and intervention of the FODEC.
- Decree No. 2006-2215, which approves qualifications for directors of tourist accommodation. The Order of the Minister of Tourism of 9 November 2006, which details specifications for tourist accommodation.

The main pieces of legislation dealing with well-being services include:

- Law No. 1975-58 on the creation of the ONTH, as amended by Law No. 1989-120 and Decree-Law No. 2011-52 on the authorisation of hydrotherapy activities by the ONTH.
- Decree No. 2006-3174, which sets standards for thalassotherapy centres.
- The Order of the Minister of Tourism of 24 August 1999, which approves a *cahier de charge* setting standards for thermal wellness establishments.

Food and beverage service operations are subject to several regulations at the central and local levels, including:

- Decree No. 89-432, relating to the classification of tourist restaurants, and the Order of the Ministry of Tourism of 31 March 1989, which sets out size and layout requirements, and management standards for tourist restaurants.
- Order of the Minister of Interior and Local Development of 17 August 2004, which approves the *cahier de charge* on conditions for business premises compliance. This order is completed by several municipal regulations dealing with size, layout and sanitary considerations.
- Decree No. 2009-1934, which classifies musical tourist entertainment venues. The Order of the Minister of Tourism of 10 June 2009 lays down minimum standards for the classification of such venues.

The main pieces of legislation dealing with passenger transport services are:

- Law No. 1999-71, promulgating the *Code de la Route*, or the Rules of the Road, and Law No. 2004-33 on land transport, as amended by Law No. 2006-55, provide a general framework for passenger transport.
- Decree No. 2004-2410, which governs the composition and functioning of the regional consultative commission provided for in Article 24 of Law No. 2004-33.
- Decree No. 2007-4101, which details conditions for granting professional licences for public and tourist transport.
- Decree No. 2007-2202, as amended by Decree No. 2012-3128, which includes provisions on non-regular public road passenger transport.
- Decree No. 2006-2118, which establishes nationality-related and professional qualification requirements for individuals intending to carry out any of the activities set out in articles 22, 25, 28, 30 and 33 of Law No. 2004-33.

- The Order of the Minister of Transport of 22 January 2010, as amended by orders of 31 May 2012 and of 30 June 2014, which sets a maximum age and technical specifications for automobiles used for non-regular passenger transport.

Travel agencies and tourist guide services are regulated mainly by:

- Decree-Law No. 1973-13 on travel agencies, as amended by Law No. 2006-33 on simplifying procedures for authorisations in the sector.
- The Order of the Minister of Tourism of 9 August 2007, which sets out rules for online travel agencies.
- Orders of the Minister of Tourism of 9 November 2006, which detail specifications for Category-A and Category-B travel agencies.
- Decree-Law No. 1973-5, which sets out conditions for tourist guides, and Decree No. 74-580, which defines tourist guides' rights and obligations.

The main pieces of legislation affecting cultural services are:

- Law No. 1994-35, relating to the archaeological heritage code, and Law No. 1988-11, creating a national agency for the development of archaeological and historical heritage, as amended by Law No. 1997-16.
- Law No. 2008-23, relating to the concessions system, as amended by Law No. 2019-47, which is the main reference for heritage concessions.
- Orders of the Minister of Culture of 2 January 2001 and 10 July 2001 that approve specifications relating to the creation of private museums and specifications relating to the creation of private galleries for exhibiting and selling of works of three-dimensional art.

Finally, sports and recreational services are subject to myriad laws and regulations, including:

- Presidential Decree No. 2022-579, which establishes conditions and criteria for the construction and operation of golf courses.
- Law No. 2009-48, promulgating a code for maritime ports and defining marinas. Decree No. 2013-1808, which establishes the composition of, and operating procedures for, the National Council of Marinas.
- Law No. 1995-73 on maritime public areas, as amended by Law No. 2005-33 and Decree No. 2014-1847 on the temporary occupation of maritime public areas, sets out conditions and the private uses of maritime public areas.
- Law No. 1990-80, which governs paid maritime passenger transport. Decree No. 90-942, which establishes safety rules for vessels and recreational maritime transport. The Order of the Minister of Transport of 27 April 1994, which provides more detail related to general safety conditions and rules for marinas and water sports centres
- Law No. 2005-89, which governs diving, and Decree No. 2006-1017, which establishes the prerogatives, composition and operating rules of the National Diving Commission.

The OECD's assessment reveals that a number of implementing regulations have been pending for several years, notably those relating to marinas and tourist transport. Certain rules and regulations in legislation reviewed are redundant, since they have been rendered obsolete either by everyday practice or by more recent legislation but have not been explicitly repealed. This is the case for some provisions of Law No. 1990-21, related to tourism investment.

Some rules set out in specific legislation have been altered by other pieces of legislation, but legislation overall has not been amended to reflect the changes. This is the case for provisions relating to the pre-approval of certain types of tourist investment detailed in Presidential Decree No. 2022-317.

The assessment also reveals a lack of harmonisation and contradictory provisions such as those relating to the duration of concessions for marinas and the need for authorisations to establish thalassotherapy centres.

Outdated, obsolete legislation should be explicitly abolished or amended to reduce uncertainty and create a more predictable and attractive investment environment. Other issues related to the overall quality of regulation and enforcement are treated in more detail in Chapter 9.

Countries have differing legislative frameworks for tourism, but there is a general trend in favour of simplifying complex legislation for the industry (OECD, 2022[16]). The OECD is currently supporting such initiatives, including in Croatia, where a new tourism law is being developed to respond to a new policy framework established in 2022 by the country's Sustainable Tourism Development Strategy 2030.

Box 2.3. Croatia's new tourism law

The Ministry of Tourism and Sport is in the process of developing a new tourism law to respond to the new policy framework established in 2022 by the Sustainable Tourism Development Strategy 2030, which was adopted by parliament on 16 December 2022. The new law will focus on three subjects considered integral to overcoming challenges, namely: 1) destination management organisations; 2) standards to ensure the sustainability of tourism; and 3) incentives to promote sustainable tourism development. It will also ensure, where possible, the success of a new approach to performance management that will build on enhanced tourism data and statistics, including through the development of Tourism Satellite Accounts that integrate sustainability.

The ongoing work, with the support of the OECD, lays out a number of issues and identifies key priorities that Croatia may wish to consider as it approaches the finalisation of the draft new tourism law and enters the consultation phase. Key considerations in this context include:

- To what extent can a new law facilitate delivery of strategic objectives? To what extent is are revisions of existing law required?
- Which legislative approach will be most effective for the new tourism law: broad instruments or detailed law?
- How should destination management responsibilities be enhanced to deliver Croatia's new strategy, locally or regionally or both? Is a differentiated approach required to respond to local and regional circumstances?
- Which resources, services and facilities are key focuses in order to ensure the sustainability of tourism?
- Are current incentives of the type, scale and scope to promote sustainable tourism development sufficient? If not, what else is needed, and how targeted could they be?

Source: OECD (Forthcoming[17]), Guidance report for strengthening Croatia's legal framework to enhance the resilience, sustainability, monitoring and management of the tourism sector.

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Notes

[1] This is mainly due to the lack of a universal approach to the precise definition of the sector in order to identify tourist consumption and take into account many informal activities.

[2] Total value added, thus not limited to goods and services consumed effectively by tourists, in a number of sectors defined as tourist-related by the ONTT.

[3] Informal employees are those not covered by the social security system in the private sector.

[4] All-inclusive packages include the entire trip (flights, hotel transfers, hotel accommodation, meals, drinks, entertainment, access to sports and relaxation facilities, and other goods and services).

[5] Airbnb is just one company in the fast-growing B&B, or homestay/alternative accommodation, segment. According to FiT2, there are 78 guest houses and rural *gites*, or holiday homes, with official licences in Tunisia, but the number in the market is 10 times that.

[6] In 2005, the ONTT had already estimated that 50% of hotels were completely outdated and that 25% needed urgent refurbishment (Khlif, 2004[8]).

[7] The Ministry of Tourism was established through Decree No. 2015-2761 (modifying Decree No. 2005-2122). Through this decree and its amendments, the ministry is mandated to carry out the following: (1) research and studies related to tourism and tourist recreation; (2) proposing legislation in areas relating to tourism; (3) suggesting and implementing programs and projects; and (4) implementing decisions undertaken by the government relating to tourism.

[8] Article 15 of Decree No. 2007-457 (completed by Decree No. 2016-335) provides that the commission is chaired by the director general of the ONTT or their representative, and is composed of a representative of the Ministry of Tourism, a representative of the ONTT, a representative of the FTH and a representative of the FTAV.

[9] Article 18 provides for a similar composition of the commission for the revision of tourist establishments providing accommodation services, which is chaired by the minister of tourism or their representative, and is composed of a representative of the Ministry of Tourism, the director general of the ONTT, the president of the FTH and the president of the FTAV.

[10] The FODEC was established by Article 58 of Law No. 95-109 of 25 December 1995. Article 8 of Decree No. 2005-2124 stipulates that its board is composed of the minister in charge of tourism or their representative as president, a representative of the Ministry of Finance as a member, the director general of the ONTT as a member, the president of the FTH as a member, the president of the FTAV as a member,

a representative of the FTRT of professional restaurant owners and managers as a member, and a representative of Tunisair as a member.

[11] Decree No. 2013-1808 sets out the composition and operating methods of the National Council of Marinas.

[12] The ONTT was created by Law No. 70-66 to operate as a public institution with non-administrative status and a civic personality. It is financially autonomous. It is managed through a board of directors headed by a general manager. The latter is tasked with managing the ONTT administratively, technically and financially, aided by an assistant general manager.

[13] The AFT is a civil public institution with financial autonomy. It was created in 1973 after a study undertaken in the 1970s revealed a need to adequately develop and manage tourist attractions, which led to the creation of tourism zones and the AFT.

[14] After being supervised by the Ministry of Health for decades since the promulgation of law No. 75-58, the ONTH was placed under the supervision of the Ministry of Tourism by Law No. 89-102 of 11 December 1989, modifying Law No. 75-58, and Decree No. 91-597 modifying Decree No. 75-655, related to the administrative and financial organisation of the ONTH. However, in August 2008, Decree No. 2008-2864 handed supervision of the ONTH back to the Ministry of Health.

[15] Other administrative institutions include the National Library of Tunisia, the National Centre of Cultural Communication, the Tunisian Superior Institute of Music and the National Institute of Popular Music and Art.

[16] Other non-administrative institutions include: The National Museum of Modern and Contemporary Art; The Centre of Arab and Mediterranean Music; The Tunisian Organisation for Authors' Rights and Neighbouring Rights; The National Theatre of Tunisia; The National Centre for Translation; The National Establishment for the Promotion of Festivals and Cultural and Artistic Events; The International Cultural Centre of Hammamet; The National Centre for Cinema and Image; The Opera Theatre; the Tunis Centre for Digital Cultural Economy; and the Palace of Literature and Arts (the Happy Palace).

[17] Decree No. 2014-409 sets out the role of the Ministry of Transport.

[18] Article 124 of Law No. 2009-48 promulgated the Maritime Ports Code.

[19] Paid maritime transport between ports and coastal sites is subject to an authorisation delivered by the OMMP. Law No. 90-80 sets out conditions and rules for recreational vessels.

[20] This is Article 7 of Law No. 59-147, regulating drinking establishments and similar establishments (modified by Law No. 61-55, Decree-Law No. 74-23, Law No. 93-18, Law No. 2001-27 and Law No. 2004-75).

[21] The commission is chaired by the minister of national defence or their representative. It is composed of other members including a doctor specialising in diving and hyperbaric medicine, an occupational physician, an engineer qualified in hyperbaric systems, a specialist in labour law, a specialist in maritime affairs, three specialists in the fields of diving, a representative of the FAST or federation of underwater activities of Tunisia, and a representative of the *Union Tunisienne de l'Agriculture et de la Pêche*, or Tunisian Union of Agriculture and Fisheries. The commission meets at least once every three months or

whenever deemed necessary. Its deliberations are valid only in the presence of at least a majority of its members.

[22] The general secretariat is tasked with: 1) following up on the implementation of the commitments of the Tunisian state in the maritime domain; 2) the study of issues related to maritime delimitation with neighbouring countries and maritime areas in general; 3) the monitoring of external relations relating to the sea and the activities of regional and international organisations and bodies working in the field of the sea, in co-ordination with the Ministry of Foreign Affairs; 4) the issuance of opinions on drafts of legal texts related to maritime affairs submitted by the ministries concerned and formulating all proposals likely to develop them; 5) the adaptation of national legislation in the maritime field with ratified international conventions; 6) the formulation of all proposals likely to promote and develop the maritime training sector and monitoring their implementation; 7) the issuance of opinions on the economic and development projects presented by ministries and related to the maritime domain; 8) the development of studies and research concerning maritime plans and policies, in co-ordination, where appropriate, with the *Institut Tunisien des Études Stratégiques*, or Tunisian Institute for Strategic Studies, and specialised research centres and institutions at the national level; and 9) the monitoring of the implementation of the decisions of the Ministerial Commission for Maritime Affairs.

[23] See https://www.hotellerie-tunisie.com/

[24] See https://iddeco.info/lassociation-edhiafa-la-tunisie-autrement/

[25] See https://www.ftav.org/

[26] See https://www.facebook.com/FpercentageC3%A9dpercentageC3%A9ration-tunisienne-des-guides-agrpercentageC3%A9%C3%A9s-de-tourisme-254230045528287/

[27] See https://tourisminfo.com.tn/2021/02/les-guides-de-croisiere-celebrent-la-journee-internationale-des-guides-touristiques/#:~:text=L'Association%20des%20Guides%20de%20Tourisme%20de%20CroisipercentageC3%A8re%20a%20vu,l'agence%20Hope%20Travel).

[28] See https://www.fit-tunisie.org/en/

[29] See https://www.espacemanager.com/creation-de-la-chambre-syndicale-du-transport-touristique.html

[30] See https://tunisie.co/article/14364/actus/acces-et-transport/chambre-syndicale-du-transport-touristique-453108

[31] See https://www.fnlv.fr/

[32] See The International Lifesaving Federation (ILS) website. http://www.ilsf.org/ils-history/.

[33] This decree was completed by Decree No. 96-1474, Decree No. 97-1989, Decree No. 99-659, Decree No. 99-2810, Decree No. 2001-2510, Decree No. 2010-479, Decree No. 2012-483, Decree No. 2016-895, Decree No. 2017-663, Decree No. 2017-969 and Decree No. 2019-1026.

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