

CLUSTER

**advanCing youth and women social inclUSion in The mEditerRanean
(C_A.3.1_0014) - WP3 (O.3.1)**

Market needs analysis form [Tunisia]

CGDR (PP7)

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Introduction

The governorate of Nabeul, was selected to take part in “CLUSTER «project, mainly because it fits with the targets of the project in the 4 specific sectors focused on.

With only 4% of the agricultural lands of the country, Nabeul is participating up to 15% of the national agricultural production value.

The main activities related to circular economy are in three following fields :

- Recycling waste water : potentially 27.7 million M3 of recycled quantities of water, actually only 5 million are used for irrigation of golf field, public gardens, and rarely used in agriculture.
- Recycling household waste with more economic efficiency. Actually, 0% of collected quantities are recycled; all is directly buried in public dumps.
- Industrial scrap recycling, glass recycling and spoiled electronic equipment.

In sustainable agriculture, the governorate counts 1458 ha of certified bio agricultural productions, most of them are in olive oil production and aromatic produce from flowers distillation. The governorate counts 5 biological olive oil mills, 7 units producing biological aromatic, 6 shops selling biological products.

The governorate is actively participating to blue economy, with 4 harbours fishing its contribution and with 716 boats (for coastal and deep sea fishing) is up to 17% of national fish production creating 3000 jobs, recently 5 aquaculture fish producing with capacity of 653 tons (sea bream and sea bass) are implemented.

Nabeul is also internationally known for the touristic activity, it counts 158 hotels offering 52 000 beds capacity, representing 22% of national touristic capacity and 80000 direct and indirect jobs.

Project target sectors

Green economy is a system of economic activities connected with the production, distribution, and consumption of goods and services that results in better human wellbeing in the long term to avoid exposing future generations to significant environmental risks and the ecologic shortage.

Circular economy refers to strategies that limit the environmental impact and waste of resources and increase efficiency at all product economy stages.

Blue economy encompasses all industries and sectors related to oceans, seas and coasts, whether they are based directly in the marine environment (e.g. shipping, seafood, energy generation) or on land (e.g. ports, shipyards, coastal infrastructures).

Sustainable agriculture is a type of agriculture that focuses on producing long-term crops and livestock while having minimal effects on the environment, trying at the same time, to find a good balance between the need for food production and the preservation of the ecological system within the environment.

Market Needs Analysis

Blue Economy

<p>Skills and competencies young people should have to work within the sector</p>	<ul style="list-style-type: none"> - The first skill to have is the devotion of the young person to work in this field. - To have a complete idea about all the activities related to blue economy and how are clusters working together inside this sector. - To know that Blue economy is not only activities on the shore, some connection with activities on land far away from the sea are related to blue economy. - Getting a clear idea about the natural and potential resources such as fish stocks available, alternative potentials such as aquaculture, seaweed cultivation and process. - Alternative actions to be adopted in case of limitation of some resources, such as pleasure tourism, diving sport.. - National strategies for the blue economy, in all related activities (transport, tourism, management of fish stock and especially fish rest strategies. - Possibilities of training (the governorate of Nabeul disposes of a sectorial training center in naval mechanics) - To be familiar with multi country programs existing such as ONUDI blue economy, Westmed, green funds, world bank programs.
<p>Needs of the SMEs operating within the sector</p>	<ul style="list-style-type: none"> - To be informed about National strategies already available for several activities related to blue economy - Possibilities to benefit from financial subsidies, immaterial benefits according to fiscal advantages and workforce recruitment mentioned in the investment code. - Local, regional and national opportunities related to activities in blue economy - Regulation measures that guide the activities related to blue economy - Working together in clusters in different fields connected to blue economy - New measures to protect natural resources both in the coastal activities and on earth in order to respect them and act in consequence such as over exploitation of fish stocks, submarine and coastal erosion. - Better coordination with administrative and technical authorities to facilitate the activities of SME, in terms of respect of normative classification of the activities according to regulation orders.

<p>Potential in terms of business development and job creation</p>	<ul style="list-style-type: none"> - Potential activities may be developed in Nabeul, to create alternatives economic activities allowing job creation. Among these potential activities we can enumerate : - Alternative tourism in different manners such as diving sports and producing special equipments, tourism of pleasure related to Marina of Hammamet, culinary activities around the specific local agricultural production, marine sports competition in the mediterranean including other marina in Tunisia (Monastir, Bizerte, sidi bousaid, Jerba) - Fry production and fish food supporting the activities of aquaculture that are actually in progressive implementation - Mechanical activities related to boat mechanical and electronic equipments repairing, in order to improve the potential training center in Kelibia in this field and the existing fish port in Kelibia and all the other fish ports along the coast. - Seaweed cultivation and processing as an alternative activity that support the tourism health and body care (Hammamet touristic station) and other touristic stations along the coast and on land.
<p>Impact of the Covid-19 pandemic on the sector</p>	<p>The pandemic has impacted all activities related to blue economy, especially touristic services since that all the country is locked up with prevention measures in 2020 to slow down the pandemic transmission. The most impacted activities are :</p> <ul style="list-style-type: none"> - Touristic jobs in direct and indirect activities related to the sector such as, commercial and selling hand made items which impacted all the jobs related (inputs and outputs). - Transport activities - Craft production, and especially in Nabeul known for pottery arts and stone works
<p>Policies adopted concerning the development of the sector</p>	<ul style="list-style-type: none"> - Effective regulation securing the coastal domain (DPM domaine public maritime), - Legislation protecting stock fish (rest period) and technical specification about seasonarity for fish species capture, material and equipments including fishing nets qualities and coastal and deep sea fishing standards. - Legislation concerning transport maritime concerted in the framework of bilateral needs with the European Union (three dimensions : security in harbors-safety of the boat traffic and preservation of the marine ecosystem. - Protection of the coastal area by sewage treatment plants to preserve important cities along the coast.

<p>Any other observation relating with the sector at the country, regional or Mediterranean level</p>	<p>The climate change is impacting all the ecosystems around the mediterranean, and espeially cities close to the shore.</p> <ul style="list-style-type: none"> - The majority of people is living in cities close to the sea, industriel activities and residence pollution may intensify damage caused to coasts and submerine biodiversity. -Naturel resources and mainly waterin good quality is becoming a big problem for people living in cities. The gap between resources available and exploitation is widening. <p>So a coordinated action in terms of saving the sea from pollution and desertification is urgently needed.</p>
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Green Economy

<p>Skills and competencies young people should have to work within the sector</p>	<ul style="list-style-type: none"> - The meaning of this economic activity and the extensions to all economic sectors in connection. - To be devoted to wok in this field. - Getting a clear idea about the natural and potencil resources related to green economy such water, soil, forestry, green energy, household garbidge management. - To be convinced of the utility of these activities on general well being of the population and natural resources . - Economic project evaluation procedure, and business model to present in the case of circular economy - National strategies dedicated to green economy, in all related activities (transport, agriculture, industries and especially in global economic transitions strategies in energy and ecological fields. - All legislation organizing the green economy in all sectors related to this topic. - Official administrative structures dealing with green economy and how to obtain perticular certificates needed allowing to act in this economy. - Possibilities of training in public sectoral centers specialized in green economy in Tunisia. - To have a complete idea about all the activities related to green economy and how are clusters working together inside this sector. - To know that green economy cover activities in other environmental sectors, green tourism and general human beings. - Getting a clear idea about the actual threats of common agriculture praticies on natural resources, biodiversity and health <p>To get information about any other projects implemented locally or at national level concerning green economy</p>
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<p>Needs of the SMEs operating within the sector</p>	<ul style="list-style-type: none"> - To be informed about real opportunities to work in the green economy sector . - National strategies concerning green economy in different fields related to this economic sector. - Guideline for projects to be implemented in the field. - Official guidelines organizing the mutual relationship between enterprises to work or already working in this sector and the public administration for real transparency. - Possibilities to benefit from financial subsidies, immaterial benefits according to fiscal advantages and workforce recruitment mentioned in the investment code. - Regulation measures that guide the activities related to green economy - Working together in clusters in specific fields related to green economy <p>New measures to protect natural resources in order to respect them and act in consequence.</p>
<p>Potential in terms of business development and job creation</p>	<p>We can mention 4 large potential activities that can be developed in this green economy :</p> <ul style="list-style-type: none"> - Activities related to safeguarding potentiel national resources, especially water, soil, coastal resources, biodiversity, targeting ecotourism as alternative to beach tourism. - energy upgrading of industries in the gouvernorate(water, enrgy, clean technologies) and develop wind power energy to step up actual projects in this field. - Adopt agricultural activities preserving the usage of chemical fertilizers (to be substituted by ecological fertilizers by integration of livestock in the agricultural rotation),pesticides (to be substituted by biological material) and promote label certification of green products <p>Managing urban activities (household, industrial and trading wastes) and develop economic projects permetting to save human wellbeing and create jobs.</p>
<p>Impact of the Covid-19 pandemic on the sector</p>	<p>The pandamic has impacted all activities related to green economy, from shortage obseved in getting inputs due to stopping all activities in general and mainly transport since that all the country is locked up with prevention measeres in 2020 to slow down the pandimic transmission. The most impacted activities are :</p> <ul style="list-style-type: none"> - Household wastes were not removed in time, consequence ofLandfills locking and all Waste collection and transfer system. - reduced supply of shops and workers mobility due to locking of transport <p>Some positive impacts observed related to decrease in water consumption, air pollution in urban areas related to car traffic reduction.</p>



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<p>Policies adopted concerning the development of the sector</p>	<p>[Policies have gradually evolved, in line with international and national developments.</p> <ul style="list-style-type: none"> - Since the 1960s, policies were focused on preserving natural resources especially water, soil and forest. - From the 1970s, several agencies and institutions were created (such as national sanitation office in 1973, national agency for environmental protection in 1988, national agency for coastal protection in 1988, international center for environmental technologies in 1996, national bank of genesa in 2003, national waste management agency in 2005 - very strict legislation in favor of the protection of the environment and ecology. <p>Specific funds to promote activities in green economy such as energy transition fund, specific subsidies to encourage irrigation water economy, implementation of the Tunisian solar plan</p>
<p>Any other observation relating with the sector at the country, regional or Mediterranean level</p>	<p>Many efforts are made in order to promote green economy concerning legislation level, financial level and technical level.</p> <ul style="list-style-type: none"> - We consider that the implementation of these strategies are still insufficient. Prices of biological products in agriculture are so high and this kind of agriculture is in small scale (family level). - The implementation of energy transition national programs is not quite as the ambitions (for solar or wind energy), even though Tunisia is among the countries whose energetic balance is negative and progressing continually. <p>The climate changes has severe consequences on managing natural resources. This is in addition to observed movement of population to live on crowded coastal urban cities where pressure on natural weak resources are to be aggravated</p>

Circular Economy

<p>Skills and competencies young people should have to work within the sector</p>	<ul style="list-style-type: none"> - The meaning of this economic activity and the extensions to all economic sectors in connection. - To be devoted to work in this field. - Getting a clear idea about the natural and potential resources such as residuals from industry activities, spoiled spare machines, household garbage. Engraving material from building, recycling asphalt, all kind of spinoff from agricultural activities . - To be convinced of the utility of these activities on general well being of the population and natural resources - Economic project evaluation procedure, and business model to present in the case of circular economy - National strategies elaborates for circular economy, in all related activities (transport, agriculture, industries and especially in global economic transitions strategies in energy and ecological fields. - Possibilities of training in sectoral centers in Tunisia - To be familiar with multi country programs existing such as ONUDI blue economy, Westmed, green funds, world bank programs.
<p>Needs of the SMEs operating within the sector</p>	<ul style="list-style-type: none"> - To be informed about National strategies already available for several activities related to circular . - Listing of project opportunities in the fields related to this topic - Guideline for projects to be implemented in the field. - Possibilities to benefit from financial subsidies, immaterial benefits according to fiscal advantages and workforce recruitment mentioned in the investment code. - Regulation measures that guide the activities related to circular economy - Working together in clusters in different fields connected to circular economy - New measures to protect natural resources in order to respect them and act in consequence. - Better coordination between administration, technical authorities and enterprises to facilitate the activities of SME, in terms of respect of normative classification of the activities according to regulation orders.
<p>Potential in terms of business development and job creation</p>	<ul style="list-style-type: none"> • A large Potential activities can be developed in circular economy such as: • Recycling of many spoiled industrial machines. • Recycling of garbage households • Recycling waste material residual of building activities. • Recycling of asphalt and side walk materials. • Recycling all by products of agriculture activities. • Glass, paper, cardboard, steel, plastic, coming from industrial and commercial activities.

	<ul style="list-style-type: none"> • Fabric scrap from sewing factories, Tunisian industry is mainly based on this activity. • Recycling to tires and spoiled old car parts. • Producing gas and energy from household garbage • Recycling of medical and dangerous spoiled equipments (actually, hard difficulties to manipulate these waste.
<p>Impact of the Covid-19 pandemic on the sector</p>	<p>The pandemic has impacted all activities related to circular economy, from collecting raw materials, industrial stop activities in general and mainly recycling enterprises since that all the country is locked up with prevention measures in 2020 to slow down the pandemic transmission. The most impacted activities are :</p> <ul style="list-style-type: none"> - Activities related to collect all spoiled materials. - Landfills and all projects related to Waste collection and transfer system - Transport activities related to this industry - Recycling activities in units who in short of inputs of raw material
<p>Policies adopted concerning the development of the sector</p>	<ul style="list-style-type: none"> - Since 1992, with the instauration of the ministry in charge with the environmental challenges, so many institutions and committees have been created (ANGED national agency for waste management, APAL agency for coast protection, Agenda 21 calling for all municipalities to adopt an environmental strategy with consultation of citizens and administrative authorities. - Industrial units upgrade program including management of by production and spoiled material. This strategy is in not implemented yet due to the fact that the industrial landfill programmed is not active until now. - Special legislation for energy-saving housing. The implementation of this law is not usually respected due to the consequences on higher prices of housing.
<p>Any other observation relating with the sector at the country, regional or Mediterranean level</p>	<p>Numerous projects ideas to be implemented in the circular economy are proposed by private sector or social associations. citizens, industrial managers and municipalities are claiming solutions for recycling and treating waste, spoiled machines and by productions in different economic sectors; unfortunately bureaucracy and short financial involvement are limiting these ambitious projects.</p>

Sustainable Agriculture

<p>Skills and competencies young people should have to work within the sector</p>	<ul style="list-style-type: none"> - The meaning of sustainable agriculture and the extensions to all economic sectors in connection, and especially green economy. - To most important for young people is his devotion to work in this field. - Getting a clear idea about sustainable resources, the know how to practice a non conventional agriculture rules, the environment of activities and enterprises working in sustainable agriculture. - To be convinced of the utility of this kind of agriculture in general well being of the population and natural resources to be protected (water,soil, forests, biodiversity). - Economic project evaluation procedure, and business model to develop and present to financial instances in the case of sustainable agriculture - National strategies elaborated for sustainable economy, such as water and irrigation economy, soil protection, using local seeds to avoid the usage of chemical fertilizers pesticides and the agriculture machinery cropping - Possibilities of training in special sectoral centers in Tunisia -To be familiar with subsidies and allowances to encourage this agriculture. -To have clear idea about commercialization of products issued from sustainable agriculture
<p>Needs of the SMEs operating within the sector</p>	<ul style="list-style-type: none"> - To be informed about National strategies already available about water mobilization and its economy, mapping of agriculture activities according to climatic and natural resources available - Listing of project opportunities in the fields related to this topic - Guideline for potential agricultural activities with respect of land, water possibilities - Know how related to innovation in the sustainable agriculture activities. - Possibilities to benefit from financial subsidies, immaterial benefits according to fiscal advantages and workforce recruitment mentioned in the investment code dedicated to sustainable agriculture - The need to working together in clusters in different fields related to sustainable agriculture in order to fit the needs of this kind of agriculture (doing the same as neighbors) to minimize costs and find out large possibilities to sell the products.

	<ul style="list-style-type: none"> - New measures to protect natural resources in order to respect them and act in consequence, especially for crop mechnary - Better coordination between administration, technical authorities and enterprises to facilitate the activities of SME, in terms of respect of normative classification of the activities according to reglementation orders.
<p>Potential in terms of business development and job creation</p>	<p>Regarding the climate changes on all over the world and its impact on agriculture, large opportunities can be hold to encourage sustainble agriculture, among them :</p> <ul style="list-style-type: none"> - Recover local seeds more resilient to ecologic factors on the country. - Widespread technological research results on local seeds productivity - Minimize usage of intensive mechanical cropping devastating the soil quality - Develop new strategy to mobilize rainfull resources and limit overexploitation of underground water. - Encourage integrated husbandry in agriculture activities to ameliorate land productivity and use less fertilizers. - Protect lands from urbanism invasion and impliment restrictions according to mapping agricultural activities
<p>Impact of the Covid-19 pandemic on the sector</p>	<p>The impact of Covid pandemic is affecting all economic sector and has increased the unemployment figures. But sustainble agriculture is affected more over by climate changes than pandemic. In this sens, the over exploitation of water resources has started decades before; the usage of intensive chemical fertilizers and pesticides, and seeds sensitive to local climate, all these factors affected sustainble agriculture from decades and is continuing despite the efforts made to reduce these effects.</p>
<p>Policies adopted concerning the development of the sector</p>	<p>The most policy decisions for sustainble agriculture are :</p> <ul style="list-style-type: none"> - A Gene bank for local seeds is created but for vommercial and economic reasons, coming back in sue of these seeds is actually not benefit. - Mapping of agriculture activities according to specific local conditions, but the implementation of this decision is so limited, if it is not respected. - Decade strategies from 1990s to mobilize rainfull and build more dams where conditions allow. Actually more than 85% of rainfull is collected in dams, and an integrated system of managment of these resources is in use by the connection of dams in the North of the country. The region of Nabeul, known for diversity of its agriculture activities is suffering from shortage of local water resources balance,



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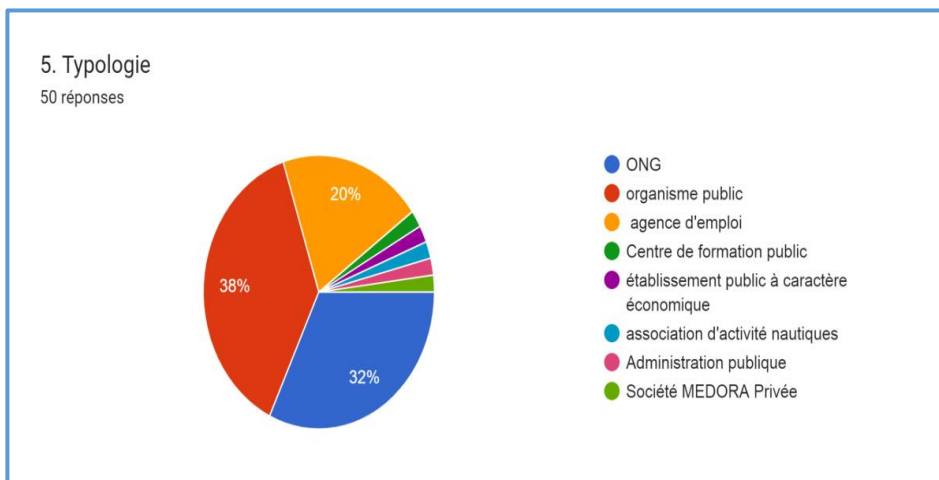
	<p>and actually it benefits from irrigation compensation by a chanal from dams in the North.</p> <p>- Stragies for soil consevation concerning the most affected lands, especially in the North, in order to protect dams from silting.</p> <p>Financial insentives and subsidies to economy of irrigation technics.</p>
<p>Any other observation relating with the sector at the country, regional or Mediterranean level</p>	<p>Sustainble agriculture is a high challange, considering the more and more intensive effect of climate changes. The coastal regions, so crowded due to the fact that it's a region of intense economic activity. People come to live in and it is attractive also for touristic activities.</p> <p>But theses regions, and the gouvernorate of Nabeul is highly affected in this sens,are seeing their local potential resources areover exploited. More over groundwater is subject to seawater infiltration pressure. This phenomena is common to all coastal regions around the mediterranean.</p>

Results and data of the A 3.2.1 – Sectors Needs Analysis – SEAs profiling

In order to know the needs of social economic actors in the region of Nabeul, a specific questionnaire was delivered to the most active social partners, concerned with the unemployment in general and particularly with NEETS. We kept in mind to get a variety of opinions, so that the questionnaire has touched a large several social actors.

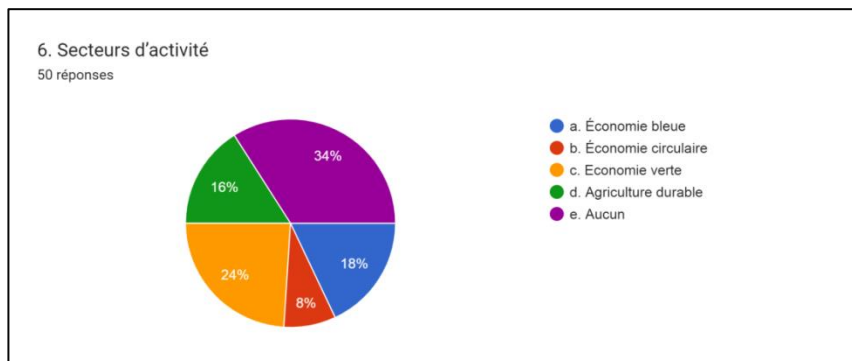
We got answers from 50 entities active in the region from 60 questionnaires delivered. The results are commented as follow :

Typology



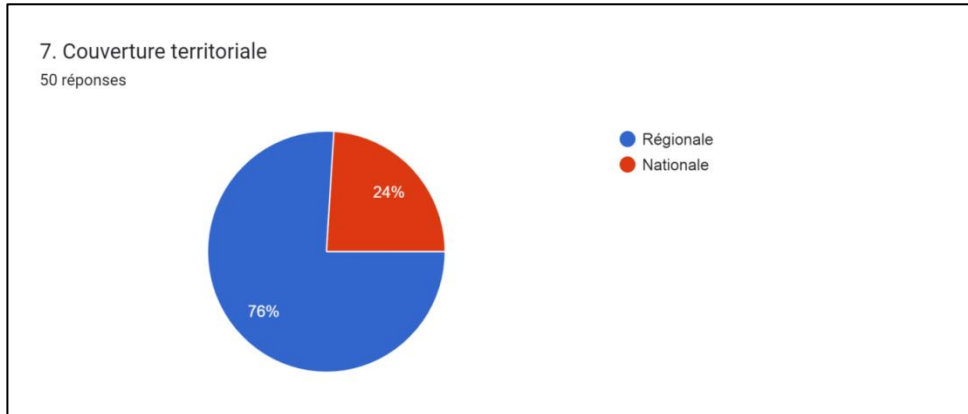
Targeting the profile of various social economic entities concerned by youth employment in general and particularly in the 4 economic sectors related to blue, green, circular economies and sustainable agriculture; we were able to reach 50 SEAs, who answered the questionnaire. Most of them are in social public administration representing 38% of the answers, the NGOs representing 32%, which we consider high degree of this category involved in economic sector. Even though these NGOs are recently created and need longer experience. In total administrative actors, NGOs and employment agencies represent 90% of answers.

Activity sector

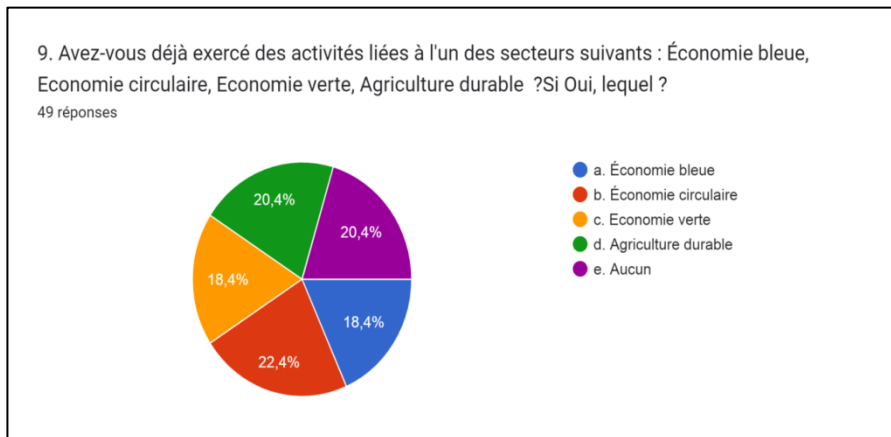


The majority of the social actors consider themselves acting neither in blue, green, circular economies nor in sustainable agriculture, even though the 4 the selected sectors are represented in the answers with 24% in green economy, 18% in blue economy, 18% in sustainable agriculture and 8% in circular economy. Meanwhile, this sector is under represented, the concept is recent and activities in this sector are not so clear in terms of limits with other sectors.

Territorial reference



Three quarters of the SEAs participating in the investigation are acting in the regional area. The others are representation of national entities.



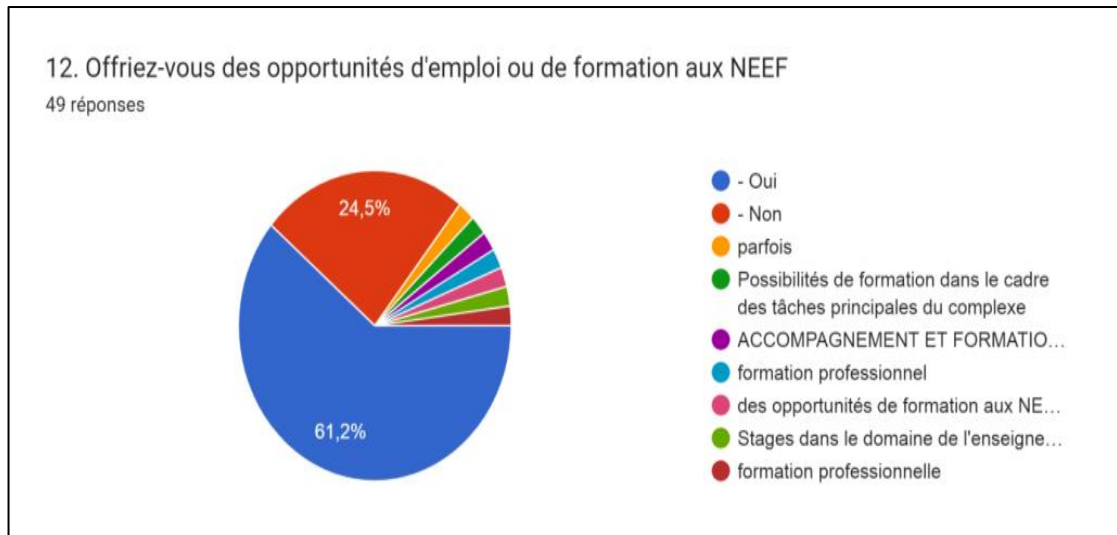
The majority of SEAs have declared already practiced activities related to the 4 economic targeted (79.6%), with roughly in same proportions. But considering the relationship with questionnaire delivered to NEETs profiling, we noted that so few young people were already familiar with these sectors. This would lead to the lack in spreading out the activities of SEAs to large public.

To the question: " Which economic sectors are required by the local labor market ?", the reactions are as follows :



It is clear that all economic sectors are solicited, due to the specific diversity that characterizes the governorate.

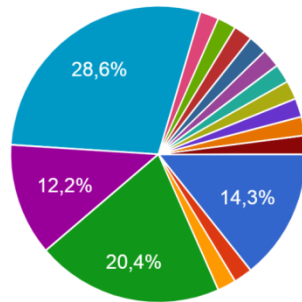
Employment and training opportunities



The answers registered for possibilities of employment or training opportunity appear to be positive (61.2% declare offering employment or training possibilities) for the next step of the project, concluding contracts for several NEETS identified to get a job or training possibility. But this should be carefully examined when combined with answers to activities that the enterprise can participate to in the project. So few answers would participate in training or employment possibilities. This may due

13. À votre avis, quels sont les défis auxquels sont confrontés les NEEF et les femmes pour trouver un emploi aujourd'hui ?

49 réponses

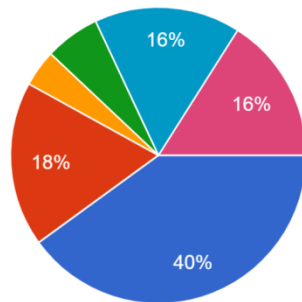


- a. Manque d'opportunités
- b. Age
- c. Genre
- d. Qualifications
- e. Écart de compétences
- f. Manque d'opportunités
- manque de volonté
- Manque d'expérience - Genre - Qualifi...

▲ 1/2 ▼

À laquelle de ces activités pensez-vous que votre entreprise serait plus intéressée à participer ?

50 réponses



- Ateliers avec d'autres entreprises/organisations : groupes de discussion...
- Soutien en tant qu'expert dans la conception de contenu parcours de fo...
- Accueil de candidats aux stages dans votre entreprise
- Ateliers pédagogiques de formation
- Impliquer les travailleurs en tant qu...
- Soutien aux formateurs pour amélio...
- Partager les offres d'emploi suscept...

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