

# REvitalization of Sustainable Tourism Across Regions in The MEDiterranean

## **RESTART MED!**

**A retrospective of Tunisian Tourism policies and  
challenges of mainstreaming sustainability**

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## Abstract

In the framework of Restart Med project “[Policy reviews for the mainstreaming of sustainability in tourism](#)”, this document provide a desk research on tourism policies developed in Tunisia in the last two decades. The objective of the research is to gain a comprehensive understanding of the underlying logic behind the strategies implemented, the key areas of development for tourism in Tunisia, the role of sustainability in these strategic areas, the various actors involved in the strategic planning of tourism, as well as the consideration of environmental, socio-cultural, and economic aspects of tourism. By exploring these topics, the research aims to provide insights into the strengths and weaknesses of current tourism strategies in Tunisia regarding the mainstreaming of sustainability. This is a first path to identify potential areas for improvement, particularly in regards to sustainable tourism practices. This research will be conducted through literature review combined with meetings with the ministry of Tourism and Handicrafts (MTH) and The National Tunisian Tourism Office (ONTT). This first study will later be compiled with interviews with key stakeholders in the tourism industry, and analysis of relevant data and statistics. The document is structured in three parts. First we trace the history of Tunisian tourism by identifying key phases from independence to the present day. This retrospective will be an opportunity to better understand the problems that hinder the integration of sustainability into tourism strategies as well as the ills of the tourism sector. This part will be followed by a description of the main tourism strategies conducted by MTH and other authorities. In this part we will focus on the National strategy of sustainable tourism by 2035 developed by tourism stakeholders under the authority of MTH. After that, we zoom on the role of international cooperation in the implementation of sustainable projects in the tourism sector. Following this presentation, a Strengths, weaknesses, opportunities and threats (SWOT) analysis of the challenges of considering sustainability in tourism policies in Tunisia is provided.

### 1. Tunisian tourism through a historical lens

To clearly understand the actual situation of Tunisian tourism and the public policies orientations it's necessary to look back and take stock of the accomplishments of more than 60 years of work on tourism.

Tourism has a long and rich history in Tunisia, dating back to the ancient times when the region was a major center of trade and commerce. The country's strategic location on the Mediterranean Sea, combined with its mild climate, fertile land, and diverse culture, made it a popular destination for travellers and traders.

In the 19th and early 20th centuries, Tunisia was a popular destination for European tourists, who were drawn to the country's sunny beaches, warm climate, and exotic culture. French colonization during this period also had a significant impact on the country's tourism industry, with many French citizens establishing vacation homes and resorts along the coast.

Since gaining independence in 1956, the Tunisian government has consistently recognized the importance of tourism to the country's economic development. Over the years, the tourism industry has experienced various ups and downs due to regional conflicts, economic downturns, and changes in global travel trends. Despite these challenges, the government has continued to prioritize the development of the tourism sector and has implemented several strategies to attract more visitors and enhance the overall tourism experience. These strategies have included investing in infrastructure, diversifying tourism offerings, improving the quality of accommodations and services, and promoting Tunisian culture and heritage. As a result, Tunisian tourism has evolved through six distinct phases, each with its own characteristics, challenges, and opportunities for growth.

**Period 1 “Primitive accumulation”<sup>1</sup>(1956- 1966):** After gaining independence in 1956, Tunisia made tourism a priority. In 1959, the Tunisian Hostel and Tourism Company (SHTT) was established to construct and lease hotels with public funding. During the 60th, the government invested heavily in infrastructure, including the construction of modern hotels, airports, and transportation systems. Substantial efforts geared towards promoting Tunisia as a safe and welcoming destination for tourists from around the world.

**Period 2” tourism model birth” (1966-1975):** to satisfy the high foreign tourists’ demand, tax and regulatory incentives were put in place to encourage the construction of hotels and tourist accommodations. In 1971 the National Office of Tourism and Hydrotherapy (ONTT) was created. This office, which was under the supervision of the Minister for the Economy, was responsible for guiding and regulating the tourism industry. Subsequently, in 1973 the AFT (Agence Foncière Touristique/tourism property Company) was created to plan new tourism areas. A favorable investment environment was created through tax, financial, and customs benefits to both Tunisian and foreign private investors. During this phase Tunisia has experienced an unprecedented tourist accommodations boom. The number of hotels and beds increased almost six-fold and for the first time, Tunisia reached one million non-resident tourists. In this phase, the government associated the private sector to the growth of tourism. Close ties have been established with investors and tour operators. From the 70th, the packaged beach holiday met a great success and Tunisia found its “perfect tourism model”: commercializing a single offer which combine several components of a trip (transport, accommodation, catering, excursions...) serving the mass market of European middle-class at a very attractive price<sup>2</sup>.

**Period 3 “stuning rise” (1975-1986):** During this period, Tunisian tourism was running at full capacity with 50% growth in accommodation capacity and the number of tourists doubled to reach the two million mark. The government continued with the same strategy of building hotels and increasing bed capacities in the coastal areas of Nabeul-Hammamet, Sousse-Monastir, and Djerba-Zarsis. The first specific regulation for the

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<sup>1</sup> Philippe Adair, Ali Abdallah. Overcapacities in the Tunisian tourism industry. 14th MEEA Conference, 2015, Hammamet, Tunisia, p.2

<sup>2</sup> Maxime Weigert (2012), Les Notes IPEMED (2012), Le Tourisme en Tunisie, les défis à l’heure de la transition démocratique, p.8

sector was put in place in 1973 regarding the adjustment of tourist areas. In the same year the Tourism Estate Agency (AFT) was founded. Its role is to monitor real estate as well as regulating the construction, management, and supervision of operational tourism facilities.

**Period 4 “running out of steam” (1986-2000):** Investments continued to grow by strengthening hotel construction in other areas such as Tunis, and the new Gafsa-Tozeur Saharan tourist zone was developed. Legislation matured with the adoption of a unified investment code for lodging, entertainment, and transportation. The 1995 law established the Development Fund for Competitiveness in Tourism. In July 1997 decree established the National Council of Tourism, and the Tourism Observatory was installed in 1998. Air transport developed with the creation of Nouvelair, a private company established in 1989 that complements the offerings of the national carrier Tunisair. Despite still drawing in substantial tourist traffic from Western Europe, Tunisia's share of the market has been shrinking due to the emergence of new products and destinations. The beginning of the 2000s marked the start of a structural crisis for Tunisian tourism as As illustrated in the World Bank strategic study of tourism commissioned by the Tunisian government.

**Period 5 “the crisis” (2000-2016):** The first phase was characterized by investments stagnation and a series of tragic events in the world as terrorist attack of September 11th, 2001, and Irak war in 2003. Locally, the synagogue Ghriba in Djerba, a famous seaside resort in Tunisia was the target of an attack in April 2002. A year later Casablanca in Morocco suffered the same fate. These circumstances surely played a role in the Tunisian tourist performances: only 5.4% annual average growth in tourists' arrivals between 2001 and 2006<sup>3</sup>. With improvements in the geopolitics situation, and a recovery in other competing destinations such as Morocco, Egypt or Turkey, the results of Tunisian tourism remained very modest, thus confirming a structural crisis in the sector.

Since 2011, the year of the Tunisian revolution, the political instability and the climate of insecurity have drastically reduced tourist arrivals from Europe. In 2015, the attacks on the Bardo Museum on March 18, combined with those in Sousse in June, dealt a heavy blow to tourism.

**Period 6 “the wake up call” (2016-currently) :** With the loss of its traditional market, Tunisia turned to the Eastern European market, particularly the Russians, whose growth rate between 2015 and 2016 was 1096%<sup>4</sup>. The Tunisian tourism sector was also saved by the influx of Maghrebians, who accounted for 52.2% of total foreign arrivals (mostly Algerians). In 2019, a new dynamic was introduced through international cooperation projects such as "Tounes Wijhatouna," led by GIZ and Expertise France. Other large-scale projects followed, such as the creation of DMOs (Swiss contact) and the USAID projects.

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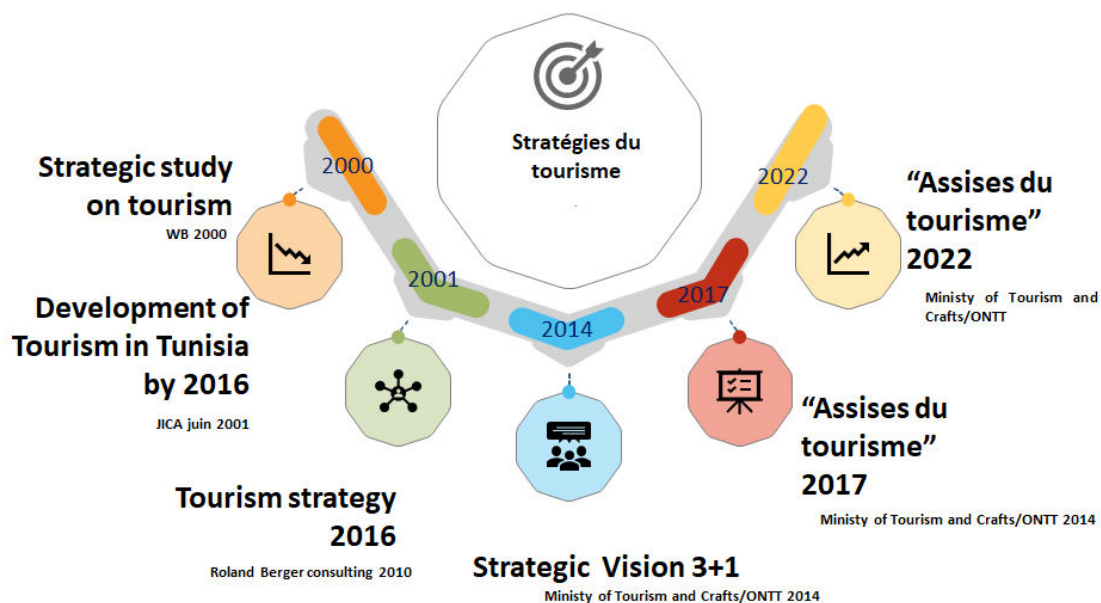
<sup>3</sup> Facilité euro-méditerranéenne d'investissement et de partenariat (Femip), Le tourisme dans les pays de la Femip : stratégies, politiques et propositions pour son développement à l'échelle sous-régionale, Rapport final, Femip, octobre 2007, p. 6.

<sup>4</sup> Hédi Hamdi (2016), Les vrais résultats de l'année touristique 2016 en Tunisie.  
<https://www.destinationtunisie.info/vrais-resultats-de-lannee-touristique-2016/>

In 2020, the COVID-19 health crisis served as a wake-up call to start looking for other alternatives to mass tourism. This led to the launch of a campaign encouraging domestic tourism called "Tounes Lik" in 2021. The aim of these projects is to position the country as a diverse and sustainable destination that offers high-quality tourism products and services.

## 2. A retrospective of the main tourism strategies

Since the 2000s, as soon as Tunisia recognized the stagnation of a mono-product model based on a seaside offering, several studies and sectoral strategies were developed. These strategies, before 2011, were the result of collaboration with international organizations such as the World Bank, the consulting firm Roland Berger (funded by the AFD), and the JICA (Japanese International Cooperation Agency). After 2011, the priority was political stability and national security, and the tourism sector continued to take actions without a strategic vision to stay afloat. It was only in 2014 that a strategy called "Vision 3+1" was put in place. However, the double attack in 2015 hindered its implementation. Sectoral strategies were resumed thereafter under the supervision of the MTH and the ONTT, leading to the current 2023-2035 strategy focused on the development of sustainable tourism (see figure below).



**Figure 1. Studies and strategies of tourism** (commissioned/elaborated by the MHT/ONTT)

### 2.1. Strategies commissioned by the MTH/ONTT

Between 2000 and 2010, three strategic studies were developed for the ministry of Tourism and handicrafts. These included:

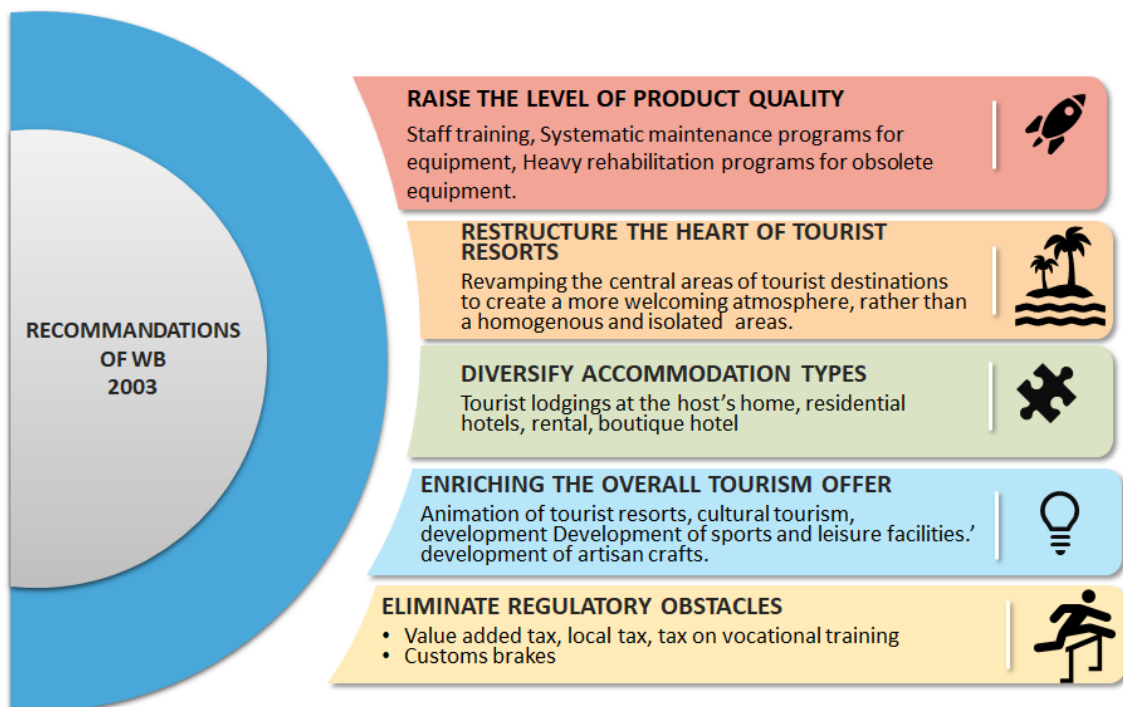
- a study by the World Bank in 2000 which resulted in the final phase in a strategy for tourism development in February 2003;

- a master plan for tourism development by 2016 by the JICA (Japanese International Cooperation Agency). The final report has been submitted the 1th June 2001
- a study conducted in 2010 by the French consulting firm Roland Berger on tourism strategy by 2016 (a donation from the French Development Agency).

These studies make an almost identical assessment of the tourism situation and provide a summary of the strengths and weaknesses of the sector, resulting in very similar recommendations.

- **WB study (2000-2003)**

The study of the world bank which was conducted on three phases from 2000 to 2003 highlighted these five strategic propositions:



**Figure 2. Strategic recommendation in the WB study**

- **JICA study (2001)**

In 2001, Following the request of the Tunisian government, the Japanese government decided to conduct a study on the Master Plan for Tourism Development in the Republic of Tunisia. The study was conducted in close collaboration between the Tunisian government and the Japan International Cooperation Agency (JICA), with the participation the ministry of Tourism and handicrafts and ONTT. The strategy was fragmented into three axes: Competitiveness, profitability, and sustainability. It's the first strategic study that explicitly mentioned sustainability as a strategic objective and warned about the need for efficient use of limited natural and cultural resources.

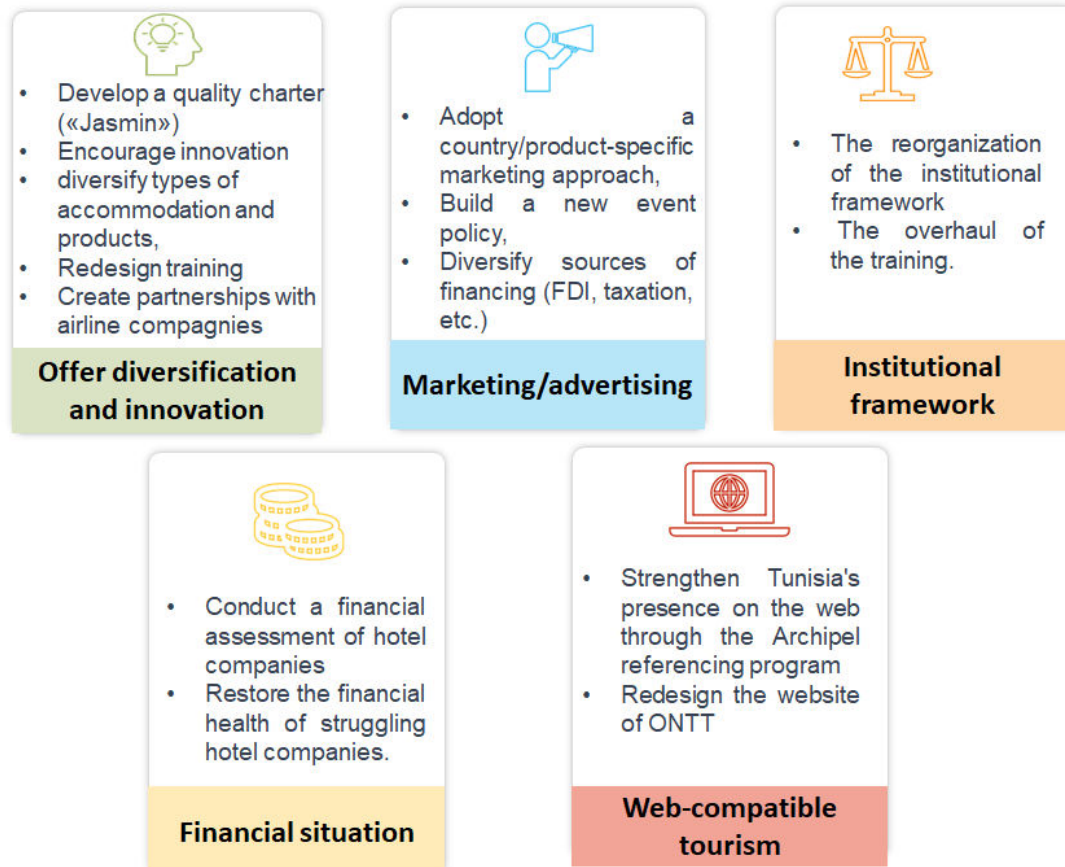


**Figure 3. Axes of tourism development in JICA study**



- **Roland Berger study on tourism strategy by 2016 (2010)**

The experts of the consulting firm Roland Berger have conducted a three-phase study with a diagnosis of the tourism situation, a strategy proposition, and an action plan. The aim of this new strategy was to enhance the competitiveness of the tourism sector and solidify Tunisia's position in the global market. The objective was to attract one million more tourists annually, reach 10 million visitors by 2016 and 14 million by 2020, and double the average daily tourist expenditure by 2020. This strategy was based on five key axes.



**Figure 4. The axes of tourism strategy by 2016**

## 2.2. Strategies developed by the MHT/ONTT

- **The roadmap of tourism at the dawn of the Arab Spring**

The revolution of 2011 had a significant impact on tourism in Tunisia. In the immediate aftermath of the revolution, there was a sharp decline in tourism arrivals, as many countries issued travel warnings and advisories to their citizens (The number of arrivals dropped by 54,1%<sup>5</sup>). This led to a major drop in revenue for the country, as tourism was a significant contributor to the economy.

In response to the decline in tourism, the government and tourism industry worked to promote the country's safety and stability to potential visitors. This included increasing security measures and implementing new marketing campaigns to highlight Tunisia's cultural and historical attractions.

From 2011 to 2014 The Ministry has undertaken some actions, particularly in marketing and promotion, to mitigate the damage caused by the political instability and insecurity in the country on tourist arrivals.

The ministry's roadmap in 2011 was to reach the threshold of 10 million tourists (Roland Berger study objective) with 4 axes:

1. Upgrading the seaside tourism with the design of high-end eco-resorts,
2. Developing new products for short stays, adopting the open sky policy,
3. Restructuring the governance of the sector through the merger of the MHT and ONTT,
4. Transforming totally of the sector through the gradual disengagement of the state.

This roadmap remained a dead issue, since 4 ministers have succeeded each other from 2011 to 2015.

- **The strategic vision 3+1 in 2014**

This strategy implemented by the ministry in 2014 is a synthesis of studies conducted between 2000 and 2010, as well as a series of workshops with professionals.

This vision consists of three axes:

1. Diversification of Offer: Regional development, investing in the creation of destinations in regions such as Ain Drahem and Kerkenah.
2. Quality & Training : establish a quality label, allocate a budget for the training of tourism professionals and implement an online learning system.
3. Branding & Marketing: the focus is on leveraging digital innovations and using digital channels to stimulate domestic and international tourism.

+ To these 3 axes the modernization of the Sector has been added.

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<sup>5</sup> <https://www.destinationtunisie.info/statistiques-du-tourisme-ces-chiffres-qui-ne-surprennent-personne/>

Another strategy which was a fruitless effort and was cast aside with the arrival of a new minister in February 2015.

The terrorist attacks of Bardo and Sousse in 2015 had a severe impact on tourism in Tunisia. Both attacks targeted tourists, resulting in a significant decline in the number of visitors to the country. The number of tourist arrivals fell by more than 25%<sup>6</sup> in 2015 compared to the previous year, and the trend continued in the following years.

### *2.3. Strategies from participative decision-making process*

- **Tourism Forum of 2017**

Strategies resulting from the first participatory forum called “Assises” of Tourism were based on several workshops involving the other ministries (transportation, culture, territories development,...), federations of hotels, travel agencies and restaurants, experts, academicians and citizens. Reports of the commissions responsible for the development of the Tourism forum identified 27 projects that can be grouped into six priority areas :

1. accessibility to the Tunisian destination (air access, land and sea transport, visa procedures and accommodation structures),
2. innovative promotion strategy
3. development of sustainable tourism
4. Enhancement of the quality of Tunisian tourism product (to meet the expectations of local and international customers in terms of safety, quality, technology...)
5. Restoration of the the financial balance of tourism companies and developing new financing mechanisms

- **Tourism Forum of 2022 and the strategy of sustainable tourism**

This forum was organized with the support of USAID and was designed with a similar methodology to the first forum, with a participatory approach. In October 2021, a series of workshops has been staged in 8 locations involving approximately 500 stakeholders: Tabarka, Kairouan, Tozeur, Kebilli, Dahar/Tataouine, Djerba, Sousse and Tunis. These workshops helped to identify the challenges of Tunisian tourism and the solutions required to meet the changes in tourism demand.

From May to June 2022, in-person consultations were organized to clarify the priorities and strategic objectives. These objectives were divided in Competitiveness, Diversification, Investment, and Marketing.

The process included an online survey of 354 individuals from various sectors of the tourism.

For the first time, the national strategy in tourism use explicitly the term “sustainable”. The report entitled “**National Sustainable Tourism Strategy: Working Together to Build a 21st Century Travel Destination**” presented the vision of Tunisian tourism by 2035.

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<sup>6</sup> <https://www.worldbank.org/en/region/mena/publication/economic-impact-of-conflicts-and-the-refugee-crisis-in-the-middle-east-and-north-africa>

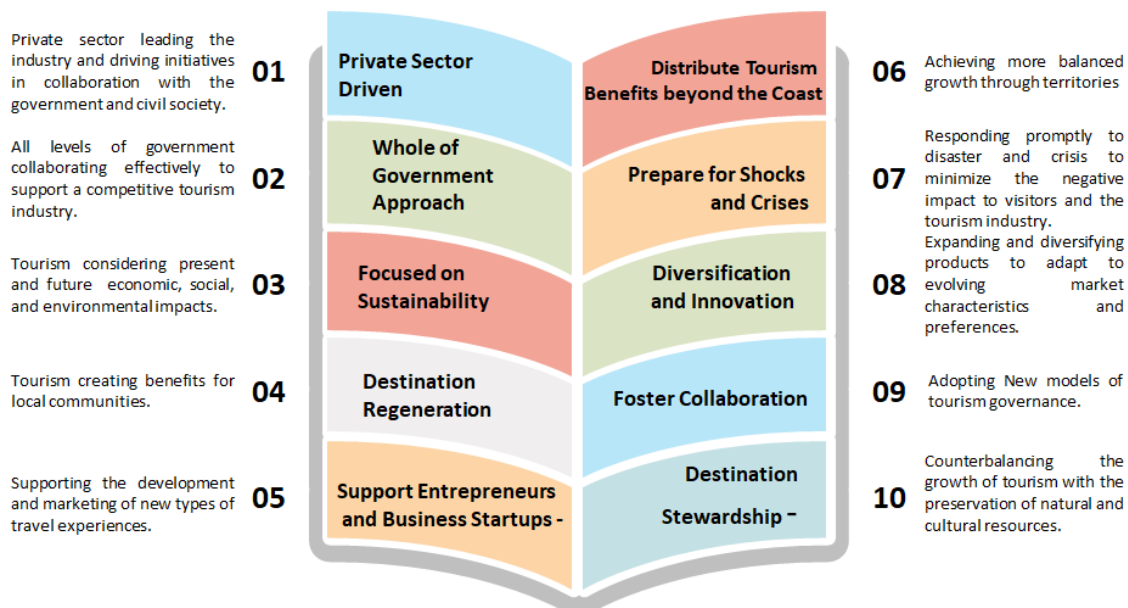
competitiveness, diversification, investment, and marketing objectives aim to achieve sustainable recovery of the tourism sector from the Covid-19 pandemic by learning from the negative impacts of mass tourism. This strategy is based on a Sustainable Destination Management approach, which aims to minimize negative impacts on the industry and create positive impacts for local residents, the environment, and cultural heritage. The tourism vision statement adapted from the report of the forum is as follow:

### Tourism vision 2035

*Creating a competitive and sustainable destination that preserves cultural and natural heritage for current and future generations and deliver memorable experiences to visitors.*

Source: adapted from "Tunisia Tourism 2035: National Sustainable Tourism Strategy, Working Together to Build a 21st Century Travel Destination, executive summary"

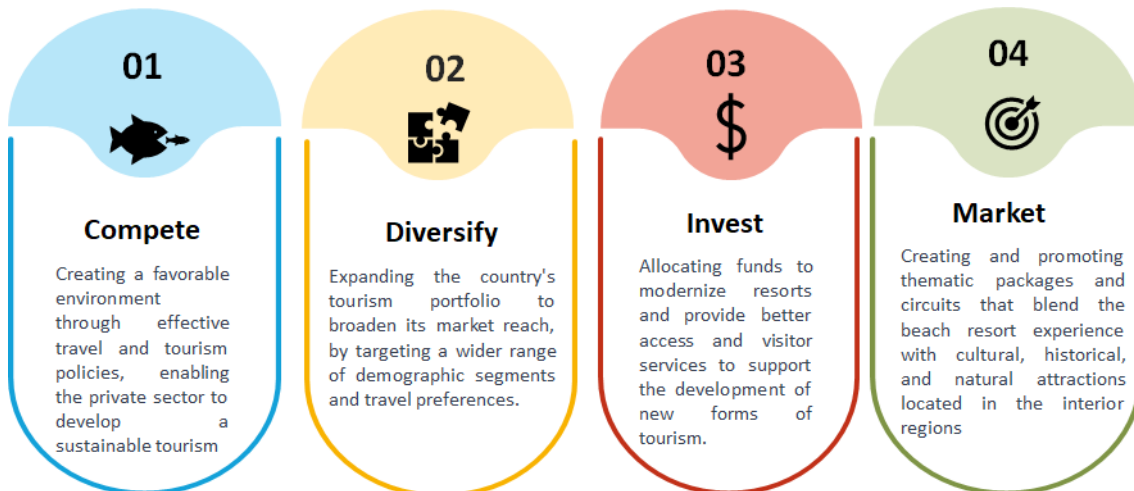
This vision is guided by ten guiding principles:



**Figure 5. The guiding principles of the strategy of tourism by 2035**

Source: adapted from "Tunisia Tourism 2035: National Sustainable Tourism Strategy, Working Together to Build a 21st Century Travel Destination, executive summary"

The strategic objectives are grouped into 4 axes which synthesize the priorities of various stakeholders (each strategic objective could be broken down into 10 actions):



**Figure 6. The 4 axes of the strategy of tourism by 2035**

Source: adapted from "Tunisia Tourism 2035: National Sustainable Tourism Strategy, Working Together to Build a 21st Century Travel Destination, executive summary"

The new tourism strategy shares many similarities with the 3+1 vision that was initiated by the MHT in 2014 but was not implemented. However, the new strategy has the merit of highlighting new priorities for the sector. With the emergence of startups in the tourism industry offering services beyond the institutional framework, the growing engagement of civil society in the sector, the changes in global travel habits and motivations, and the need to consider the ecological, economic, and social impacts of tourism activities, new policies have become necessary.

The new measures (with respect to the previous strategies) introduced in the tourism strategy by 2035 are:

- Implementing **management plans for Tunisia's cultural sites** and protected areas to ensure responsible and long-term use of the country's natural and cultural resources.
- Developing and implementing **maintenance programs** that ensure destinations are well-maintained and clean.
- raising awareness about the significance of the tourism sector among **local communities and changing attitudes and behaviors**.
- Creating partnerships between the public and private sectors to encourage **investments in n cultural and historic sites as well as protected areas**.
- Fostering the **creative economies of cities** and towns by promoting their unique cultural identities and supporting the arts.
- Creating **new protected areas** that support tourism development and conservation.
- Providing **access to finance in tourism and hospitality** with national banks, development partners and a Hospitality Opportunities Private Equity (HOPE) Fund.
- **Creating a semi-public/semi-private entity** that will be responsible for advertising and promoting Tunisia both in the global and local tourism market.
- Supporting regional and **destinations brands**
- Creating special visa and **programs for both retirees and nomads**.

#### 2.4. Strategies of tourism designed by other institutions

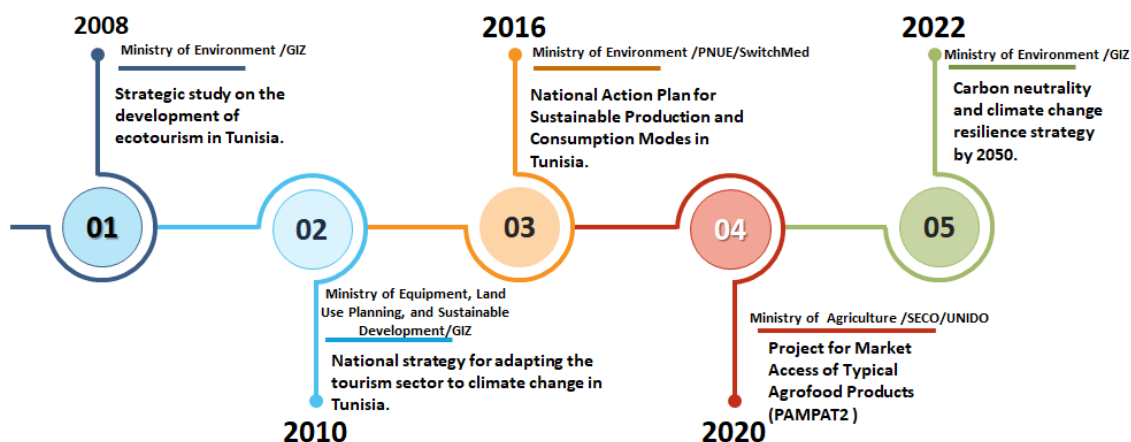
Among the institutions involved in the tourism strategy, the ministry of Environment can be considered a major protagonist. This ministry is even considered the coordinator of any strategy related to sustainable tourism and in particular ecotourism.

Other studies were directed by the ministry of Equipment, Land Use Planning, and Sustainable Development (MELUPSD) or the ministry of agriculture.

The major strategies were developed in the framework of international cooperation and NGO partnerships such GIZ and SWITCH-Med.

Many studies including diagnosis, development actions, promotional actions and local strategies were carried off by the different ministries and included directly or indirectly the tourism sector. For example Six ecotourism studies have been identified: the Ramsar case study on tourism and wetlands (2005), the study on the potential and modalities of ecotourism development in Tunisia's protected areas (2005), the study on ecotourism promotion (2005), the strategic ecotourism study (2008) the study on assessing the attractions of forest areas and protected areas for ecotourism, classification criteria (2012), and the study on ecotourism in rural forest areas (2016)<sup>7</sup>.

On the national level we can identify 5 strategic studies that are directly related to the tourism sector and that have been coordinated by other ministries.



**Figure 7. The main strategies of tourism developed by other ministries**

In the following table we summarize the objectives and main results of the strategic studies coordinated by the ministry of environment, the ministry of Equipment, Land Use Planning, and Sustainable Development in partnership with international organizations.

<sup>7</sup> Olfa Boughamoura (2019), Cartographie et analyse territoriale en vue d'un développement durable par l'écotourisme autour des aires protégées en Tunisie. Géographie. Université Toulouse Le Mirail - Toulouse II; Institut national agronomique de Tunisie, 2019.

These strategies have included action plans and guides for entrepreneurs in ecotourism or in the valorization of local products. Despite these efforts, the challenge of implementing these actions remains a persistent issue that hinders the creation of an effective sustainable tourism strategy.

Strategic studies directed by other institutions	Strategic study on the development of ecotourism in Tunisia 2008	National strategy for adapting the tourism sector to climate change 2010	National Action Plan for Sustainable Production and Consumption Modes in Tunisia 2016	Project for Market Access of Typical Agrofood Products (PAMPAT2 ) 2020	Carbon neutrality and climate change resilience strategy by 2050 2022
<b>National coordinator</b>	Ministry of Environment	M E L U P & S D	Ministry of Environment	Ministry of Agriculture	Ministry of Environment
<b>International partner</b>	GIZ	GIZ	PNUE SWITCH-Med	SECO UNIDO	GIZ
<b>Study objectives</b>	Developing ecotourism products and activities	Developing a national strategy for tourism adaptation	Proposing a strategy and an action plan for tourism and agri-food (2016-2025)	Developing regional products and positioning Tunisia as a gourmet tourist destination	The decrease of GHG emissions in all sectors and promoting a green growth of the Tunisian economy
<b>Main results</b>	6 models of products and activities in Zaghouan, Ichkeul National Park, Kerkennah, Hazoua and ksours and jessours of Beni Kheddache	(1) Improve building management, (2) Integrated coastal management (3) diversify the offer (4) energy-efficient modes of tourist transportation (5) (6) rethinking governance and legislation	(1) Ensuring the sustainability of beach tourism (2) developing nature and cultural tourism (3) Adapt marketing to regional specificities	(1) Marketing of local products (2) territorial marketing and tourism (3) Agricultural production and valorization (4) Institutional and organizational framework	(1) Increase the resilience of beach tourism (2) Controlling the use of water and energy resources (3) Improve the attractiveness of the territories.

**Table 1. Description of the strategies developed by other ministries**

### 3. The role of International cooperation in mainstreaming sustainable tourism in Tunisia

Taking advantage of its status as a country in democratic transition, Tunisia has benefited from several projects and actions carried out within the framework of international cooperation. These actions aim in particular at the development of sustainable tourism that benefits local communities, respects the fragility of natural ecosystems, and values the tangible and intangible heritage of the region. These projects involve the development of DMOs (Destination Management Organizations), support for startups in the implementation of sustainable and innovative tourism products, training for industry professionals in sustainability, the creation of new products, and destination marketing. The organizations that have been involved in these actions are mainly Swiss Cooperation, German Cooperation, Expertise France, and USAID.

### 3.1. Project 1 Development of sustainable tourism “Tounes Wajhetouna”<sup>8</sup> (2019-2024)

**General objective:** This program aims to support the diversification of tourism, the development of crafts, and the promotion of Tunisian cultural heritage.

**Period:** from September 2019 to 2024

**Budget:** 51 million dinars

**co-financement:** European Union and German Federal Ministry for Economic Cooperation and Development (BMZ)

**Implementation:** GIZ, UNIDO and Expertise France in partnership with the MTH

**Program overview:** “Tounes Wijhatouna” program adopts a participatory approach in close collaboration with the MHT. It involves associations, interest groups, support structures, media, and public and private stakeholders in the tourism and handicrafts industries. Its aim is to create synergies between tourism activities, handicrafts, local products, and cultural heritage.

The program is organized around 4 main components, each aimed at achieving specific objectives:

**Component 1:** focuses on diversifying and enhancing the quality of the tourism offer through improving governance, administrative environments, and support mechanisms.

**Component 2:** aims to strengthen the value chains of artisanal professions by upgrading the quality of their products, increasing their competitiveness, and facilitating their access to new markets.

**Component 3:** aims to enhance the value of the country's cultural heritage by developing cultural tourism.

**Component 4:** was added in 2022, in collaboration with Swisscontact, which focuses on creating sustainable Destination Management Organizations (DMOs) in the regions.

#### **Main achievements of the program “Tounes Wijhatouna”:**

- Collaboration with 16 hotels and 13 alternative accommodation structures to design and implement innovative activities and solutions in the field of sustainability (2021-2022)
- Support in creation of culinary and film route (2022)
- Acceleration of 108 projects (de 2020 à 2023)
- Creation of an acceleration program “Grow Together” to support startups in the Development of innovative solutions (since August 2020).
- Development of a 1000 m<sup>2</sup> space in the craft village of Denden in collaboration with Creative Tunisia to innovate in the design of handicraft products (February 2023)
- 80 Hotel and restaurant units benefiting from training as part of the promotion of Tunisian culinary heritage of the project "Makletna" It started in four pilot regions (Zaghouan, Mahdia, Tozeur and Tabarka - Ain Draham) (since September 2022)
- creation of a new cultural, touristic, and economic dynamic in the Medina of Tunis with the economic interest grouping M'dinti (since August 2020)
- creation of 4 DMOs in Tunis-Carthage, Mahdia, Zaghouan et El Kef (in progress)

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<sup>8</sup> <https://www.giz.de/en/worldwide/86068.html>



### *3.2. Project 2 Governance and territorial tourism marketing (2014-2019/ 2019-2024)<sup>9</sup>*

**General objective:** Making DMOs a full-fledged component of the governance of the Tunisian tourism system.

**Period:** The signature of a first agreement in August 2014 and a second one in November 2019

**Budget:** 745000 dinars (contribution of the State Secretariat for Economic Affairs of Switzerland, SECO) and 7 million dinars (from ONTT)

**co-financement:** State Secretariat for Economic Affairs of Switzerland, SECO and ONTT

**Implementation:** Swisscontact and MTH

The DMO (Destination Management Organization) project in Tunisia is a collaboration between Swisscontact, a Swiss foundation for international development cooperation, and the Tunisian ministry of Tourism and Handicrafts. The project aims to support the development of sustainable tourism in Tunisia by creating and strengthening Destination Management Organizations (DMOs) in several regions of the country. These DMOs will work to promote tourism in their regions by developing and implementing sustainable tourism strategies and activities, collaborating with local stakeholders, and improving the quality of tourism products and services. The project is expected to contribute to the economic development of the regions involved, while preserving their cultural and environmental heritage.

#### **Main achievements of the program:**

- Creation of the first DMO in Tunisia. The DMO Dahar located in the southeast of Tunisia (Marsh 2018)
- The launch of DMO Djerba in February 2021
- The technical support to GIZ and MTH for the creation of 4 new DMO in tunis-Carthage, Mahdia, Zaghouan and El-Kef
- Establishment of a standardized methodology that could be replicated for the creation of new DMOs.
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### *3.3. Project 3 Visit Tunisia, accelerating Tunisia's tourism recovery and building a resilient industry<sup>10</sup>*

**General objective:** Building a diverse, competitive and resilient tourism

**Period:** 2020-2025

**Budget:** 50 million Dollars

**Financement:** American Government

**Implementation:** USAID/Chemonics agency in partnership with MTH

<sup>9</sup> <https://www.swisscontact.org/fr/projets/gmt>

<sup>10</sup> <https://www.visittunisiaproject.org/>

**Program overview:** Visit Tunisia is an initiative supported by USAID that spans over a five-year period with the goal of expanding and broadening the Tunisian tourism sector, leading to the creation of long-lasting job opportunities and increasing revenue generated from tourism. The objective is to establish a tourism industry that is characterized by top-notch quality and also to alleviate the effects of the COVID-19 pandemic. The project is based on 4 axis:

- Product development by quality improvement and diversification
- Investment and innovation to strengthen the competitiveness of the destination
- Enabling environment to achieve sustainable growth of the sector by encouraging the public/private collaboration
- Marketing and communication to reach new markets and upgrading the destination marketing strategy

**The expected results are:**

- Facilitating the investment of 20 million dollars in Tourism sector
- Reaching 11.3 million arrivals by 2026
- achieving an increase of 20% in tourists 'expenditures
- Creating 15,000 sustainable jobs

**Main achievements of the program:**

- Marketing technical support for the DMO Dahar started in October 2023 with the signature of a Memorandum of Understanding with FTADD (Federation of Authentic Tourism Destination Dahar).
- Sustainable tourism education and public awareness campaign in the region of Kairouan as a pilot region (January 2023)
- Training and recognition of 14 partner hotels and more than 350 professionals in the hospitality sector in the pilot regions of Tunis and Hammamet
- Support program for sustainable tourism entrepreneurs ( February 2023)
- Supporting the marketing campaign of ONTT "Tounes lik" (December, 2022)

## 4. SWOT Analysis of Tunisia Tourism policies

After reviewing the various national tourism strategies in Tunisia over the past two decades, we conduct in this section a SWOT analysis to highlight the aspects that are in favor of integrating sustainable development into the tourism sector, the gaps in current strategies, as well as the threats and the opportunities that the environment offers for the development of an effective sustainable tourism strategy.

The SWOT analysis take into account the four key indicators of assessing the mainstreaming of sustainability challenges in tourism policies<sup>11</sup>: Governance, environmental, economical and socio-cultural pillars.

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<sup>11</sup> <https://www.enicbcmed.eu/fr/node/18295>

## INTERNAL FACTORS

STRENGTHS +	WEAKNESSES –
<p><b>Governance</b></p> <ul style="list-style-type: none"> <li>-A participatory decision making since the first tourism forum in 2017</li> <li>-Establishment of territorial management of destinations (DMOs)</li> <li>-Inclusion of private sector</li> </ul> <p><b>Environmental</b></p> <ul style="list-style-type: none"> <li>- Richness of natural resources</li> <li>- Diversity of natural landscapes</li> </ul> <p><b>Economical</b></p> <ul style="list-style-type: none"> <li>- Strong contribution in the national GDP</li> <li>- Proximity to European markets</li> <li>- Creation of jobs</li> </ul> <p><b>Socio-cultural</b></p> <ul style="list-style-type: none"> <li>- Rich cultural heritage</li> <li>- Diversity of intangible heritage</li> <li>- Amplification of the number of young entrepreneurs</li> <li>- Authentic destinations</li> </ul>	<p><b>Governance</b></p> <ul style="list-style-type: none"> <li>- A lack of transparency and communication among stakeholders</li> <li>- Weak promotion of sustainability in tourism activities</li> <li>- Lack of certification policies</li> <li>- Insufficient local branding</li> <li>- Non efficient monitoring of tourism impacts</li> <li>- Investment shortage in sustainable tourism</li> <li>- Out-dated laws of sustainability based tourism activities</li> </ul> <p><b>Environmental</b></p> <ul style="list-style-type: none"> <li>- Deficiency in waste management</li> <li>- Intensification of erosion process</li> <li>- Degradation of ecosystems and landscapes</li> <li>- Shortage of water resources</li> <li>- Polluting modes of transportation</li> </ul> <p><b>Economical</b></p> <ul style="list-style-type: none"> <li>- Precarious jobs</li> <li>- Low competitiveness</li> <li>- Low cost model</li> <li>- Low sector profitability</li> </ul> <p><b>Socio-cultural</b></p> <ul style="list-style-type: none"> <li>- Insufficient valorisation of cultural heritage</li> <li>- Absence of community-based tourism</li> <li>-Low public awareness actions</li> <li>- Region discrimination in terms of tourism investments</li> </ul>

## EXTERNAL FACTORS

OPPORTUNITIES +	THREATS –
<p><b>Governance</b></p> <ul style="list-style-type: none"> <li>- International cooperation programs enabling the environment to achieve a sustainable growth</li> </ul> <p><b>Environmental</b></p> <ul style="list-style-type: none"> <li>- The implementation of the Carbon neutrality and resilience to climate change strategy by 2050</li> <li>- Nature based activity tourism trends</li> </ul> <p><b>Economical</b></p> <ul style="list-style-type: none"> <li>- Up scaling service quality</li> <li>- Reducing the job seasonality</li> <li>- EU and American government fundings</li> </ul> <p><b>Socio-cultural</b></p> <ul style="list-style-type: none"> <li>- Engagement of local stakeholders (International cooperation projects)</li> <li>- Historic sites remediation</li> <li>- Regions regeneration</li> </ul>	<p><b>Gouvernance</b></p> <ul style="list-style-type: none"> <li>- The ministerial reshuffle</li> <li>- Insufficient budget due to the economic situation</li> <li>- Absence of common vision between ministries</li> <li>- Slow decision-making process</li> </ul> <p><b>Environmental</b></p> <ul style="list-style-type: none"> <li>- Climate change</li> <li>- Mass tourism in protected areas</li> </ul> <p><b>Economical</b></p> <ul style="list-style-type: none"> <li>- Non-sustainability of International cooperation projects</li> <li>- The destination actual positioning doesn't meet the tourists demand</li> <li>- Slow transition to more sustainable tourism model</li> <li>- An economic recession</li> </ul> <p><b>Socio-cultural</b></p> <ul style="list-style-type: none"> <li>- Low sustainability awerness</li> <li>- Disneyfication of some destinations</li> </ul>

## Challenges of mainstreaming sustainability in tourism policies in Tunisia

The challenges for integrating sustainability into Tunisia's tourism strategies are numerous. **Sharing a common vision and political will** are two essential conditions for implementing tourism that preserves natural and cultural heritage and benefits local communities. Furthermore, effective policies cannot be put in place without **measuring the impacts of tourism and controlling its effects** on the environment, economy, and social and cultural aspects.

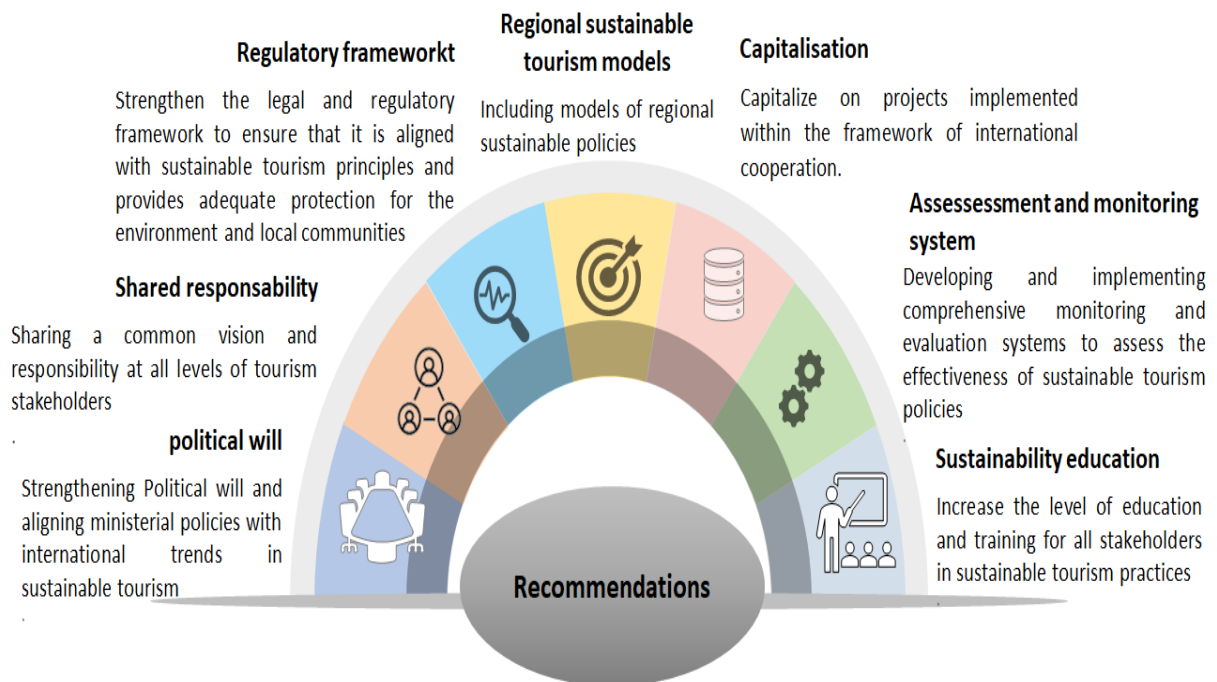
Relying on funding and support from international organizations is an excellent opportunity if knowledge and know-how transfer is carried out. This is in order to perpetuate the projects implemented and duplicate them autonomously. The transition towards a sustainable and resilient tourism model must be done in a **conscious and responsible manner by involving all stakeholders, including citizens**. **Local tourism should be the first cornerstone of a sustainable tourism strategy**. **Educating Tunisian citizens and tourists** on the pillars of sustainable development should be a key element of the overall sustainable tourism strategy.

### 5. Recommendations for mainstreaming sustainability in tourism policies

After this in-depth and critical analysis of the different strategies developed by the ministries to integrate sustainability into current tourism policies and based on the focus groups conducted with Tunisian tourism stakeholders, we present in this section the main recommendations.

We could mainly formulate the following recommendations for mainstreaming sustainability in tourism policies:

- Strengthening Political will and aligning ministerial policies with international trends in sustainable tourism;
- Sharing a common vision and responsibility at all levels of tourism stakeholders
- Developing and implementing comprehensive monitoring and evaluation systems to assess the effectiveness of sustainable tourism policies;
- Strengthen the legal and regulatory framework to ensure that it is aligned with sustainable tourism principles and provides adequate protection for the environment and local communities;
- Including models of regional sustainable policies;
- Capitalize on projects implemented within the framework of international cooperation;
- Increase the level of education and training for all stakeholders in sustainable tourism practices and principles, including government officials, tourism operators, and local communities.



**Figure 8. The main recommendations for mainstreaming sustainability in tourism policies**

5.1. *Strengthening Political will and aligning ministerial policies with international trends in sustainable tourism*

To enhance sustainable tourism practices in Tunisia, it is crucial to strengthen political will and align ministerial policies with international trends in sustainable tourism. It is important to address the challenges and gaps that exist in policy development and implementation. These challenges are not merely technical in nature but involve complex political, cultural, economic, social, and psychological changes.

Sustainable tourism stakeholders need to recognize the pivotal role of the state in guiding tourism development and consider how it manages conflicts of interest among actors. Power dynamics and political issues play a crucial role in the sustainable development of tourism.

National-level tourism policies in Tunisia primarily focus on increasing tourism revenues, infrastructure development, investment promotion, diversification, and tax regulations. These priorities often prioritize economic growth and may not fully align with the goals of sustainable tourism policies. This inconsistency highlights the need to bridge the gap between officials' priorities and the objectives of sustainable tourism policies in national tourism strategies.

One of the key challenges is the multi-faceted nature of sustainable tourism, which requires coordination across various policy areas. Often, policies related to sustainable tourism are developed within different sectors, making it difficult to influence private sector decision-making and achieve cohesive governance. The diverse range of stakeholders involved in the tourism industry also adds complexity, as each group may have different interests and priorities.

To address these challenges some actions are proposed.

**Recommendation 1: Strengthening Political will and aligning ministerial policies with international trends in sustainable tourism**

**Action 1 Capacity Building:** Provide training and capacity-building programs for government officials and tourism stakeholders on sustainable tourism practices. This will enable them to understand the principles and benefits of sustainable tourism and implement them effectively in their respective roles and responsibilities.

**Action 2 Leadership and Advocacy:** Promote the importance of sustainable tourism at the highest levels of government and encourage political leaders to champion sustainable tourism initiatives. This will help create a conducive environment for the development and implementation of sustainable tourism policies.

**Action 3 Policy Alignment:** Ensure that Tunisian ministerial policies related to tourism are in line with international best practices and guidelines for sustainable tourism. This includes integrating principles of sustainability, environmental conservation, social responsibility, and cultural preservation into policy frameworks.

**Action 4 Policy Integration:** Leaders should ensure that sustainable tourism principles are integrated into national policies, strategies, and development plans. This involves aligning tourism objectives with broader sustainable development goals, such as poverty reduction, environmental protection, and cultural preservation.

**Action 5 Public Engagement:** Leaders can engage with the public through various communication channels to promote sustainable tourism and raise awareness among citizens. This can include public campaigns, educational programs, and the dissemination of information about sustainable tourism practices and responsible traveler behavior.

## 5.2. *Sharing a common vision and responsibility at all levels of tourism stakeholders*

Aligning diverse stakeholders around a common vision and responsibility can be challenging, as each group may have different expectations and motivations. Conflicts may arise between the public and private sector in one hand, and the classic private actors such travel agencies, hotels and new entrepreneurs, startups and civil society members.

These conflicts are due to

- A lack of communication: gaps in communication channels and limited opportunities for meaningful engagement and dialogue between actors.
- Power Imbalances: Certain groups or entities have more influence and decision-making power (travel agencies federation, hotel federation), which can marginalize other stakeholders and impede collaborative efforts.
- Limited Awareness and Capacity: Some stakeholders have limited awareness and understanding of sustainable tourism principles and practices. Building capacity and providing education and training programs are crucial to ensure that all stakeholders have the knowledge and skills necessary to contribute to sustainable tourism.

To develop a shared vision and responsibility among stakeholders we suggest these actions:

### **Recommendation 2: Sharing a common vision and responsibility at all levels of tourism stakeholders**

**Action 1 Establish a Platform for Dialogue:** Create a platform or forum that brings together all relevant stakeholders, including policymakers, tourism operators, local communities, NGOs, and academia. This platform should facilitate open dialogue, information sharing, and collaborative decision-making processes.

**Action 2 Develop a Shared Vision:** Engage stakeholders in a participatory process to develop a shared vision for sustainable tourism in Tunisia. This vision should encompass economic, social, cultural, and environmental dimensions and reflect the aspirations and values of all stakeholders.

**Action 3 Foster Partnerships and Networks:** Encourage partnerships and networks among stakeholders to foster collaboration, share best practices, and leverage resources. This can involve establishing formal partnerships, promoting networking events, and supporting collaborative projects and initiatives.

**Action 4 Enhance Communication and Collaboration:** Strengthen communication channels and foster collaboration among stakeholders. This can be achieved through regular meetings as well as the use of digital platforms for information exchange and knowledge sharing.

**Action 5 Monitor and Evaluate Progress:** Establish mechanisms to monitor and evaluate the progress towards achieving the shared vision in sustainable tourism. Regular assessments can help identify gaps, measure the impact of actions, and make necessary adjustments to policies.



5.3. *Developing and implementing comprehensive monitoring and evaluation systems to assess the effectiveness of sustainable tourism policies.*

As illustrated by the quote "You cannot manage what you do not measure," it is difficult to integrate sustainability dimensions into tourism policies without evaluating them or measuring the impacts of implemented actions.

Currently there are many gaps that prevents the implementation of a monitoring system. First, stakeholders are not involved in the collection of data on various sustainability indicators in the tourism sector. This is because of limited capacity and limited human and financial resources but above all the absence of authority engagement in sustainability assessment.

Here are the actions that can support the assessment and monitoring system implementation.

**Recommendation 3: Developing and implementing comprehensive monitoring and evaluation systems to assess the effectiveness of sustainable tourism policies**

**Action 1 Establish Clear Objectives and Indicators:** Define clear objectives and identify relevant indicators that align with sustainable tourism goals. The website [sustainabilitymeasures.com](https://sustainabilitymeasures.com) offer these bases for selecting and identifying the right indicators. These indicators should be tailored to each region/destination.

**Action 2 Enhance Stakeholder Engagement:** Engage stakeholders from different sectors, including government agencies, tourism industry representatives, local communities, and NGOs, in the design and implementation of the monitoring and evaluation system.

**Action 3 Use Technology and Digital Tools:** Leverage technology and digital tools to streamline data collection, analysis, and reporting processes. Explore the use of remote sensing, Geographic Information Systems (GIS), and data visualization tools to enhance monitoring capabilities.

**Action 4 Regular Reporting and Feedback Mechanisms:** Establish mechanisms for regular reporting and feedback to stakeholders. Share monitoring results, trends, and insights through periodic reports, dashboards, and stakeholder meetings to facilitate informed decision-making.

**Action 5 Capacity Building and Training:** Provide capacity building and training programs to enhance the skills and knowledge of stakeholders involved in monitoring and evaluation. This can include training on data collection, analysis techniques, and reporting.

#### 5.4. *Strengthen the legal and regulatory framework*

Sustainable tourism suffers in Tunisia from Inadequate legislation. The existing laws and is a lack of clear guidelines and standards for sustainable practices, making it difficult for businesses and stakeholders to comply. Besides, the perspectives and needs of tourism operators are not adequately considered, leading to a disconnect between policy objectives and on-the-ground realities.

We propose these actions to address the regulatory framework challenges.

**Recommendation 4: Strengthen the legal and regulatory framework to ensure that it is aligned with sustainable tourism principles and provides adequate protection for the environment and local communities**

**Action 1 Review and update existing laws:** Conduct a comprehensive review of the current legislation and regulations related to tourism. Identify gaps and areas that need improvement to align with sustainable tourism principles. Develop new legislation or amend existing ones to ensure adequate protection for the environment and local communities.

**Action 2 Establish clear guidelines and standards:** Develop and disseminate clear guidelines and standards for sustainable tourism practices. These guidelines should provide specific criteria and requirements for businesses to follow, promoting environmental conservation, social inclusivity, and cultural preservation.

**Action 3 Strengthen enforcement mechanisms:** Enhance the capacity and resources of regulatory bodies responsible for enforcing tourism laws in ONTT. Establish penalties and incentives to encourage adherence to the regulations.

**Action 4 Foster stakeholder collaboration:** Facilitate dialogue and collaboration among all relevant stakeholders, Engage them in policy and laws discussions. Form an ad hoc commission to take decisions.

**Action 5 Capacity building and awareness-raising:** Provide training and capacity-building programs for tourism operators, regulatory agencies, and local communities to enhance their understanding of sustainable tourism principles and practices.

### 5.5. *Including models of regional sustainable policies*

It is important to recognize that each region in Tunisia has its unique characteristics, resources, and challenges. Therefore, it is essential to consider the specific needs and opportunities of each region when developing sustainable tourism policies. The 2035 national strategy should be translated into specific sub-strategies for each region and destination. This approach recognizes the importance of tailoring sustainable tourism initiatives to the unique characteristics and potential of each region and destination in Tunisia. The following measures are proposed.

#### Recommendation 5: Including models of regional sustainable policies

**Action 1 Regional assessments and consultations:** Conduct detailed assessments of each region and destination, taking into account their natural, cultural, and socio-economic attributes. Engage local stakeholders, including community representatives, businesses, tourism operators, and relevant authorities, in the process to gather their insights and aspirations.

**Action 2 Develop regional strategies:** Based on the assessments and stakeholder consultations, develop specific strategies for each region and destination. These strategies should align with the overall goals and principles of the national sustainable tourism strategy but also address the specific challenges and opportunities of each area.

**Action 3 Engage local stakeholders:** Involve local communities, businesses, and organizations in the decision-making processes. Involve them in the planning, implementation, and monitoring of sustainable tourism initiatives. This participatory approach will ensure that the policies and actions reflect the specific needs and aspirations of each region.

**Action 4 Enhance environmental sustainability:** Introduce and enforce regulations and guidelines that promote sustainable practices in tourism operations, including resource management, waste reduction and recycling, and the protection of natural and cultural heritage sites. Provide training and support to tourism businesses to adopt sustainable practices.

**Action 5 Support small-scale enterprises:** Develop programs and funding mechanisms to support the establishment and growth of small-scale sustainable tourism enterprises, including access to finance, business development support, and marketing assistance.

## 5.6. *Capitalize on projects implemented within the framework of international cooperation*

Many projects initiated within the framework of international cooperation face challenges in sustaining their activities after the initial funding period. This can be due to limited financial resources, lack of expertise, inadequate management structures, or insufficient community engagement. As a result, the long-term impact and benefits of these projects may be compromised.

The following measures could be taken.

### Recommendation 6: Capitalize on projects implemented within the framework of international cooperation

**Action 1 Inventory of international cooperation projects:** Conduct a comprehensive inventory of past and ongoing projects in the tourism sector that have been implemented with the support of international cooperation. This includes projects funded by bilateral and multilateral development agencies, non-governmental organizations, and other international partners. Document the objectives, activities, outcomes, and lessons learned from these projects.

**Action 2 Identification of best practices:** Analyze the inventory of projects to identify best practices and success stories that align with sustainable tourism principles. Identify projects that have demonstrated positive impacts on the environment, local communities, cultural preservation, and economic development.

**Action 3 Knowledge transfer and capacity building:** Facilitate knowledge transfer and capacity building by organizing training sessions and workshops to equip local stakeholders with the necessary skills and knowledge to sustain project activities.

**Action 4 Develop project sustainability toolkits** Create practical toolkits that provide guidance on maintaining project activities, managing resources, engaging stakeholders, and securing ongoing funding.

**Action 5 Create support mechanisms:** Set up support mechanisms, such as mentorship programs or advisory services, to assist project beneficiaries in overcoming challenges and ensuring the sustainability of project outcomes.

5.7. *Increase the level of education and training for all stakeholders in sustainable tourism practices and principles*

We can notice a lack of awareness and understanding among stakeholders about the concepts, principles, and practices of sustainable tourism. This can result in a limited adoption of sustainable practices and a lack of commitment to sustainability goals. So the following measures are suggested:

**Recommendation 7: Increase the level of education and training for all stakeholders in sustainable tourism practices and principles**

**Action 1 Develop educational and training programs:** Design and implement educational and training programs that specifically target stakeholders in the tourism sector, including tourism professionals, local communities, government officials, and tourism students. These programs should focus on sustainable tourism principles, best practices, and strategies for implementation.

**Action 2 Promote awareness campaigns:** Conduct awareness campaigns and workshops to increase understanding and raise awareness about sustainable tourism among stakeholders. This can be done through collaboration with industry associations, tourism organizations, and local communities.

**Action 3 Integrate sustainable tourism in educational curricula:** Work with educational institutions to integrate sustainable tourism principles and practices into their curricula. This can include developing specialized courses, modules, or degree programs that emphasize sustainable tourism as a core component of the curriculum.

**Action 4 Foster partnerships with educational institutions:** Collaborate with educational institutions, tourism organizations, and industry associations to foster partnerships for the development and delivery of sustainable tourism education and training programs.

**Action 5 Community-based tourism initiatives:** Encourage the development of community-based tourism initiatives that allow local communities to directly benefit from tourism activities. This can include homestays, handicraft cooperatives, or guided tours led by community members.

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