A9 ADMINISTRATIVE SYSTEMS

A9.1 TOURISM ADMINISTRATIION

A9.1.1 Tourism Administrative Organizations

(1) Outline of the Government of Tunisia

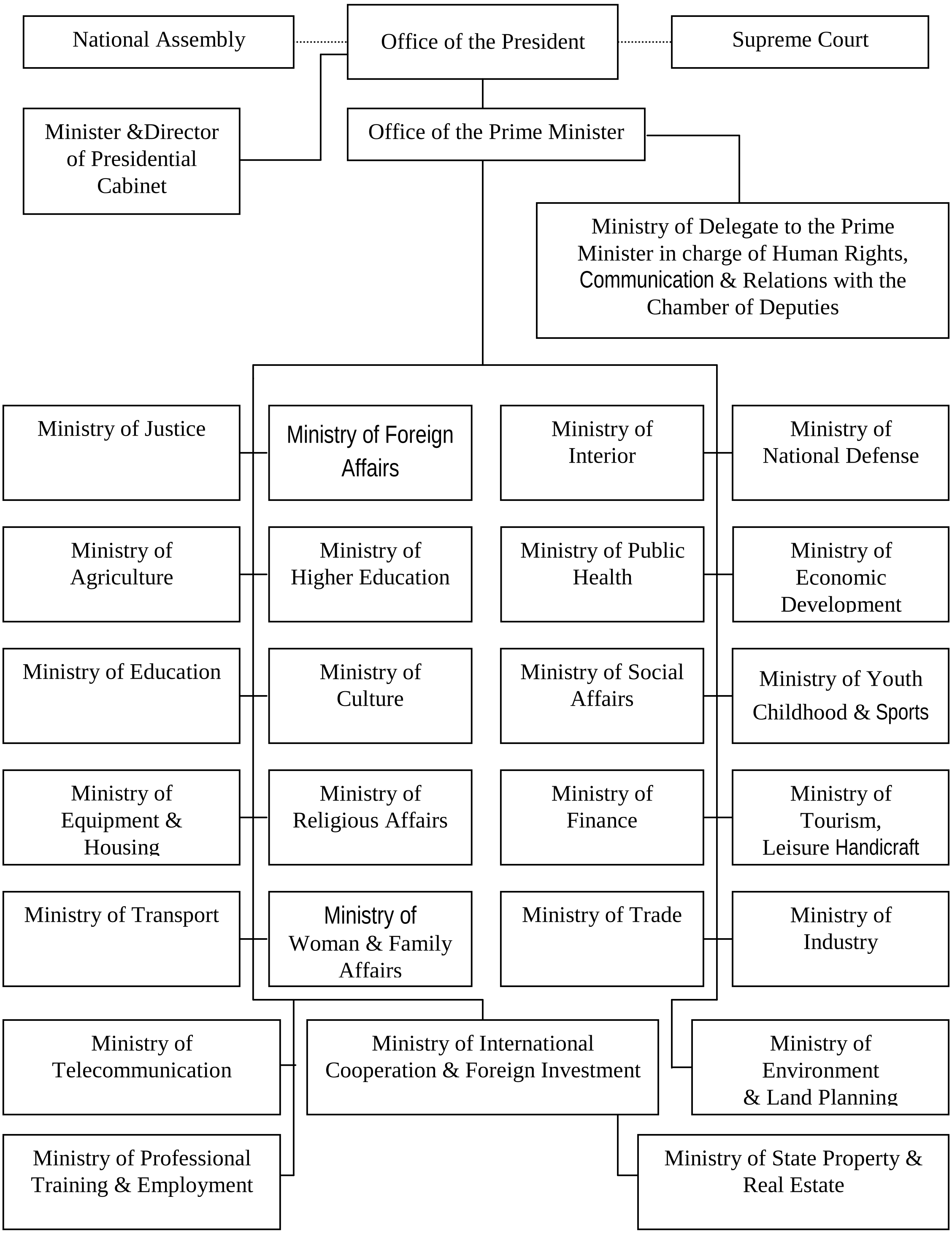
The organization chart of the Tunisian Government is shown in Figure A9.1.1.

The President is the state's head and has the executive power at his disposal. The Government consists of Office of the Prime Minister, 27 Ministers and 13 State Secretaries. Among them, the Ministry of Tourism, Leisure and Handicraft (MTLA) is the main responsible ministry involved in tourism.

Because tourism is influenced by various natural and social conditions, most ministries have at least some relationship with tourism. For example, construction and maintenance of roads by the Ministry of Equipment and Housing (MEH) are important factors in tourism development; immigration procedures and maintenance of security by the Ministry of Interior, and hygienic administration by the Ministry of Public Health (MS) are closely related to the satisfaction of foreign visitors. Of course, these fields are not primarily administrated only with respect to tourism. Thus many administrative functions that relate to tourism are undertaken not intentionally with respect to tourism, but rather with respect to the basic missions of each organization.

It is therefore important for Tunisia, where tourism is becoming an increasingly significant industry, to take action to coordinate government activities by tourism-related administrative functions and thereby cross over the borders that separate ministries.

Figure A9.1.1 Structure of the Central Government of Tunisia



Source: Internet Homepage of the Tunisian Government

(2) Ministry of Tourism, Leisure and Handicraft

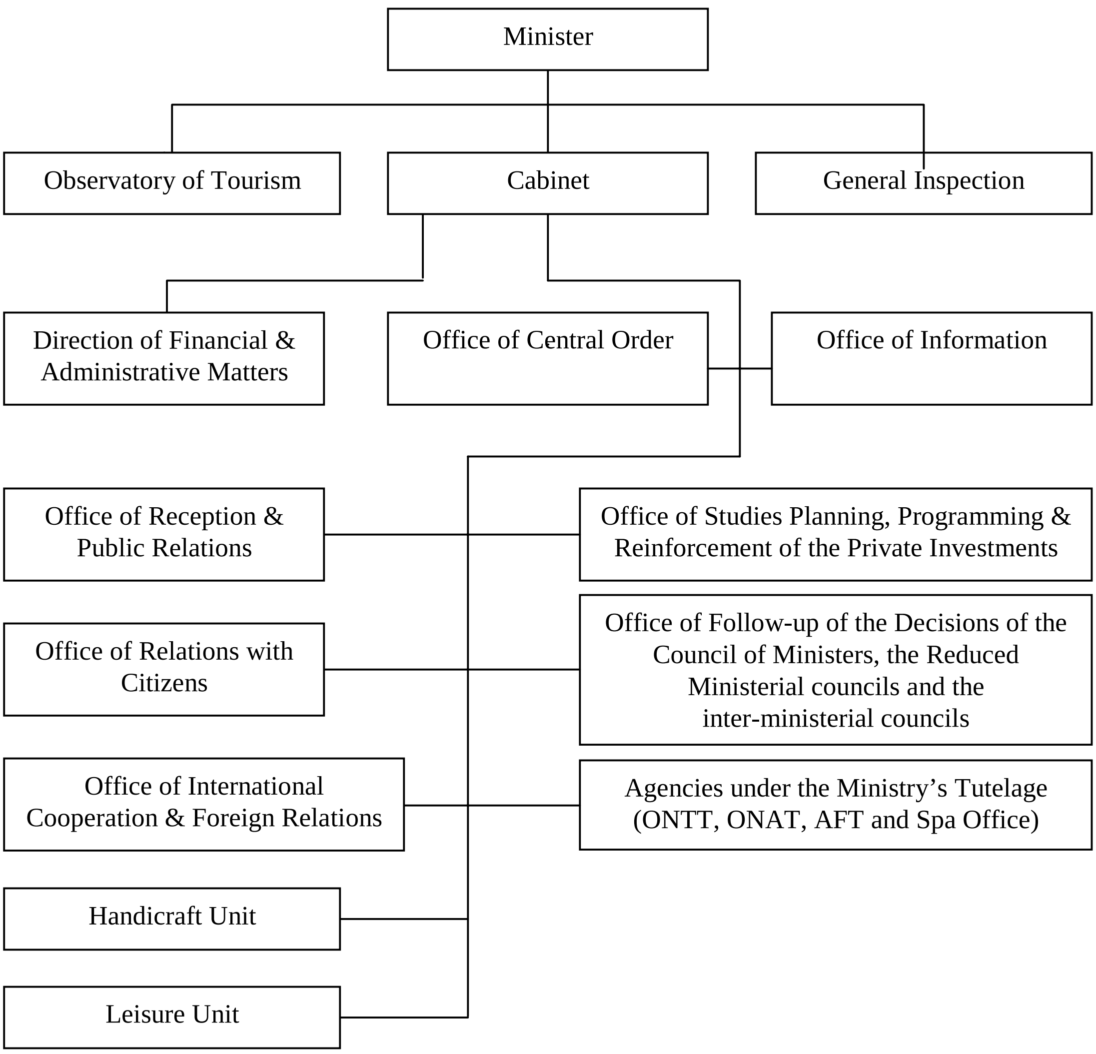
The duties of Ministry of Tourism, Leisure and Handicraft (MTLA) have been renewed in 1989 based on the legislative decree No.1684 of 1989. MTLA is responsible for the formulation and implementation of governmental policy in the tourism sector to encourage and develop tourism in order to contribute to the national economy.

The number of staff is approximately 50. There are 3 departments sharing MTLA works as follows:

- Cabinet: under which 9 subsidiary departments carry out different tasks,
- General Inspection, and
- Observatory of Tourism comprised of representatives of agencies under MTLA and professional federations.

An organization chart of MTLA is presented in Figure A9.1.2.

Figure A9.1.2 Organization Chart of MTLA



Source: ONTT

Essentially, the function of MTLA (with its staff of approximately 50) is to formulate the governmental policy on the tourism sector that encompasses a wide-range of sub-areas and to supervise the implementing agencies under its tutelage (ONTT, ONAT, AFT, and Spa Office), each responsible for certain areas. The functions of these implementing agencies are summarized below.

(3) Tunisian National Tourist Office (ONTT) [1]

Tunisian National Tourist Office (ONTT) is a non-administrative public organization having both legal and financial autonomy. It is under the supervision of the Ministry of Tourism, Leisure and Handicraft (MTLA). It was established on December 31, 1970 under the decree No.70/66. The decree No.76-799 of November 11, 1976 fixed the modalities of ONTT's functions, defined its mission and conferred to it its different attributions. The basic mission of ONTT is to implement the nation's tourism strategy.

The outline of the responsibilities of ONTT tasks by law is as follows:

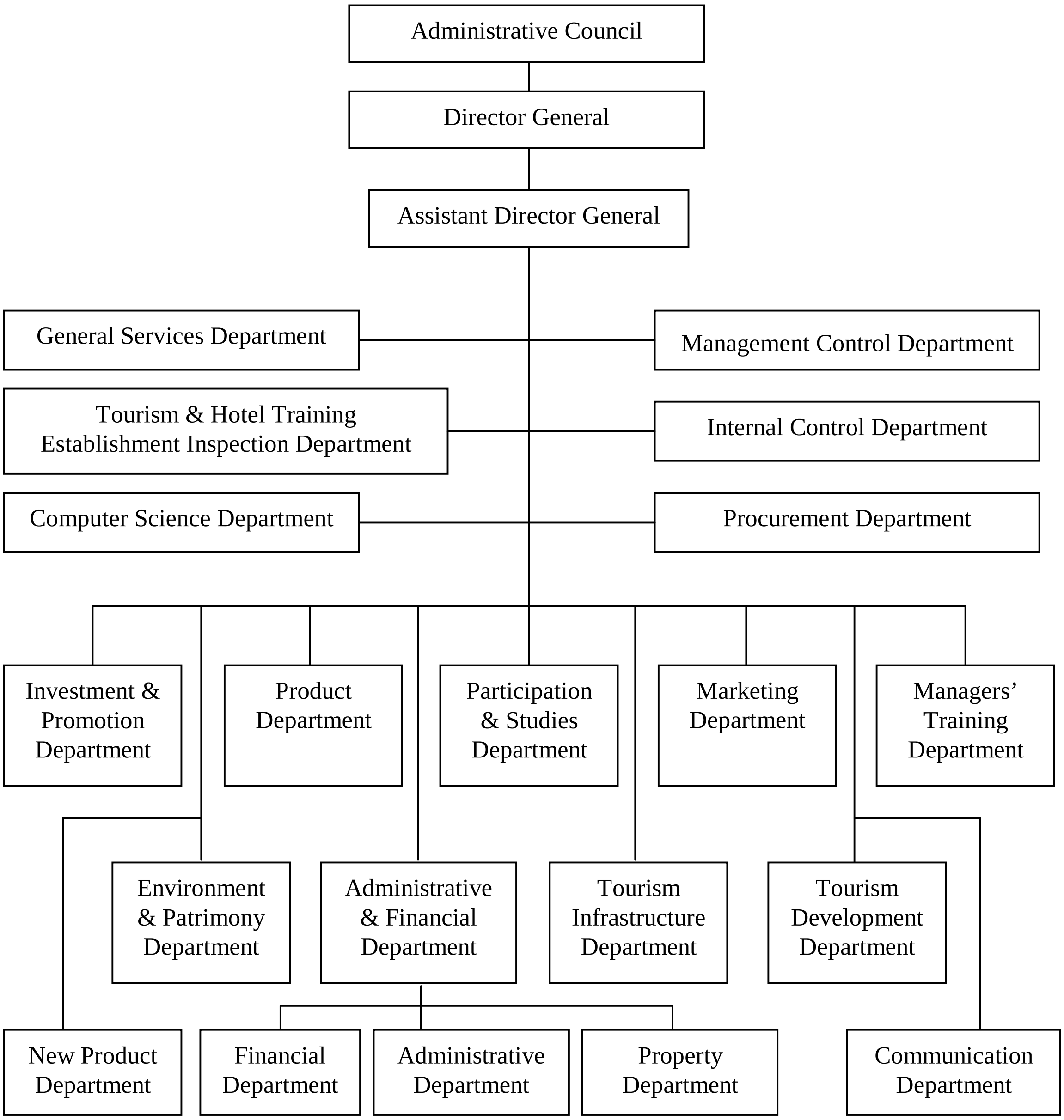
- To develop and promote the tourism sector,
- To regulate and control the tourism activities,
- To promote the new tourism products,
- To guarantee the hotel training abroad and locally, and
- To develop and equip tourist sites.

ONTT is administered by "Administrative Council" headed by the General Director. ONTT consists of 15 departments, 10 tourism regional boards (CRT) and 16 representative oversea offices with 1,024 staff as of 1999. An organization chart of ONTT is presented in Figure 5.1.3 and members of the Administrative Council are listed below:

- Director General of ONTT as chairman of the Council
- President of FTH
- President of FTAV
- Chairman, Director General of AFT
- Chairman, Director General of Tunisair
- State Controller of MDE
- Representative of MTLA
- Representative of the Ministry of Finance
- Representative of the Central Bank of Tunisia
- Representative of the Ministry of Interior
- Representative of the Ministry of Equipment and Housing
- Representative of the Ministry of Public Health
- Representative of the Ministry of Culture

[1] Much of the information of this section is drawn from ONTT's 1999 Annual Report.

Figure A9.1.3 Organization Chart of ONTT



Note: This diagram is approximate, for indicative papers only

Source: ONTT

Outlines of major departments are summarized as follows:

a) Product Department

- Management and development of the tourist products and services,
- Processes of applications for approvals related to tour guides, managers and travel agencies.

b) Managers' Training Department

- Management of the existing hotel and tourism schools,
- Development and update of the training programs and supervision of their implementation,

- Training of trainers,
- Development of cooperation with the professionals in the tourism sector, and
- Provision of technical and pedagogical assistance to private schools.

c) Tourism and Hotel Training Establishment Inspection Department

- Endowment of the ONTT with programs, procedures, and instruments to evaluate pedagogic performance and operations of private and public hotel and tourism institutions,
- Evaluation of their personnel and training materials.

d) New Product Department

- Analysis and study to enrich and diversify tourism products.

e) Tourism Development Department

- Physical development of tourist areas in association with Tourism Estate Agency (AFT),
- Determination of land use in order to answer to investment programs in the tourism sector.

f) Procurement Department

- Processing of fair bidding,
- Payments to outside providers and suppliers.

g) Studies and Participation Department

- Collection and processing of tourism statistics in Tunisia.
- Analysis of the current situation of the tourism sector,
- Surveys and studies concerning tourists' satisfaction as well as hotel performance,
- Studies and research on different subjects such as potential tourist markets, competing destinations and the competitiveness of the Tunisian tourism products, and
- Study and monitoring of management contracts.

h) Management Control Department

- Assistance to the general management of ONTT,
- Follow-up of the ONTT's on-going reform.

i) Administrative and Financial Affaires Department

- Administration of personnel,
- Management of ONTT's property including vehicles, and
- Budget allocation to each department, etc.

j) Investment Promotion Department

- Facilitation of private investment into projects relevant to the tourism sector,
- Assistance to developers in formulating development programs and in processing their applications for the different investment incentives available to them.

k) General Services Department

- Cooperation with international organizations.

l) Patrimony and Environment Department

- Improvement of environmental management at tourist sites,
- Development of visitor facilities in collaboration with INP and AMVPPC.

(4) Tourism Estate Agency (AFT)

The Tourism Estate Agency (AFT) is a public agency created in 1973 according to the decree No. 73-21 of April 14, 1973, which relates the construction and improvement of tourist, industrial and housing zones.

AFT was created to acquire, adjust, and sell lands suitable for the construction of tourist zones and facilities. Thus, AFT is empowered in the tourist zones and in any estate acquisition activity necessary to carry out its mission, to practice preemptive rights, to sell lands and buildings under its control as well as to intervene in any activity related to the execution of its mission.

The activities of AFT related to the tourist zone development are described in Volume III Section A5.6.

AFT is composed of the following departments:

- Legal Department,
- Commercial Department,
- Estate Streaming and Regional Coordination Department,
- Computer Science Department,
- Tourist Zone Development Department, and
- Study and Development Department.

For the purpose of coordination and supervision, regional delegations are established in Tunis (for the North region), Hammamet (for Cap Bon), Sousse (for the coast region), Sfax (for Southwest) and Jerba (for the Southeast).

The AFT is administrated by the “Administrative Council” composed of the following members:

- AFT’s President as chairman of the Council,
- A representative of Prime Minister’s Office,

- A representative of MDE,
- A representative of MA,
- A representative of MTLA,
- A representative of the Ministry of State Property and Real Estate,
- A representative director of ONTT,
- President of Industry Estate Agency,
- President of Housing Estate Agency, and
- President of FTH.

(5) ONAT

The National Handcraft Office (ONAT) is a public agency that has a legal autonomy. ONAT was founded in 1959 under the decree no-59-133 and was restructured in 1990. Main functions include:

- Promotion of the handcraft sector in all aspects (technical studies, investment studies, preparation of exhibitions and fairs, etc.),
- Guarantee of technical supervision of handcraft enterprises and their products, and
- Facilitation of handicraft development, particularly through training and re-training of craftsmen in collaboration with MFPE.

(6) Spa Office

The Spa Office is a public agency, founded under the decree No. 58-75 of June 14, 1975 and amended by the decree No. 102 of 1989. It is a public agency without administrative character aiming at promoting spa facilities and resorts. The Office is headed by the General Director, and managed by two advisory committees (a medical committee and a mineral water committee). Major tasks are quality control, studies, promotion and application of development incentives for investors.

(7) Major Organizational Issues of ONTT

a) Organizational Structure

Currently (as of March 2000), ONTT is preparing a restructuring plan, the contents of which are still under discussion within ONTT. According to an ONTT official, one major issue that is considered in this process is the shortcomings of the current centralized organizational structure where each department (see the organization chart described earlier) is linked directly to the head of the organization.

In general, one major strong point of this type of centralized structures is to facilitate a top-down decision that can lead to prompt actions. However, this argument requires a major assumption that the head of such an organization has plenty of time to absorb deeply and streamline, in an integrated fashion, a wide-range of matters and issues regarding so many relevant players, not only within his/her organization, but also from outside entities (often many) relevant to that organization. This, however, is a very strong assumption that is often unrealistic. It is a well-established view that time or “attention” of top management is among the most valuable *scarce resources* of an organization, and inefficiency and lack of effectiveness tend to result within the organization unless this scarce resource is used effectively.

This seems very true of ONTT as well, and is in fact well recognized by its officials with the current organizational structure that tends to increase the time of the director general to be spent for his responsibilities such as the following:

- Implementation of the national policies and programs set by MTLA
- Coordination with different ministries and agencies, professional associations, and leaders of the tourism-related industries
- Meetings with the central administration and the departments under him
- Public-relation tasks within the country and abroad

The increased tasks of the director general are likely to cause inefficiency in the operation of the entire organization and hamper responsive and effective actions, which in fact occurs within ONTT.

Another shortcoming of this type of a centralized structure is that it tends to cause a lack of coordination among different sections within an organization due to the direct link of each section with the top of the organization. Under such a structure, it is a natural tendency that the head of each section will communicate and discuss mainly with the top, without coordinating with other sections (prior to reporting to, and discussing with, the top) unless such coordination is obligatory.

This problem is again pointed out by a number of ONTT officials regardless of their level in the organization. Many say that it is hard to know what other departments are doing despite the well-recognized need for coordination in various aspects.

A desirable direction for ameliorating these situations and making the operation of ONTT more efficient and effective is to reduce its centralized features by delegating responsibilities for certain aspects to lower levels of management. This way, operational matters for which consultation with, and approval by, the director general are not essentially needed can be promptly handled by lower levels of management, thereby quickening decisions and making the operation more efficient. In addition, through decentralizing the organization this way, the director general will be released from many of the operational issues and will be able to concentrate more on strategic issues that are crucially important for the entire organization, the tourism industries within the ONTT’s jurisdiction, and tourism development of the country.

At the same time, there should be a structure that ensures coordination among different departments within ONTT, since only delegating responsibility to lower levels of management could aggravate the lack of coordination further by possibly allowing each department to do its jobs on its own. One approach that can ensure inter-departmental coordination is to create a level between the director general and the existing departments, the level to be responsible for the operation of several departments. Also, for specific issues requiring coordination, ONTT can set up, on an ad-hoc basis, a committee or a task force composed of directors or appropriate representatives of relevant departments (as well as representatives from relevant agencies and industry leaders depending on the issue).

According to ONTT officials, the current discussion on organizational restructuring mentioned above take these important issues into account.

b) Computerization

Computerization has not progressed much within ONTT, making it difficult to efficiently keep track of, and analyze, data and statistics. Critical functions such as planning and tourism trend analysis are severely lacking without well-organized data and information systems. Access to the internet is also seriously limited.

In addition, even basic information and data that are essential for ONTT's operation are kept in paper form, hampering efficient day-to-day operations. For example, the product department undertakes its work (supervising hotels, restaurants, and entertainment activities) without the help of computer systems. The files containing inspection reports of about 700 hotels are piled up in one of their offices. Those responsible for supervising travel agencies also spend much time on keeping track of even the basic information on the agencies that is kept on paper (even their office addresses, telephone and fax numbers that change from time to time, mostly for small agencies).

Under these circumstances, ONTT has been making a plan to implement a computerization program. It is strongly recommended that computerization, at least increasing the number of computers for its staff, should be expedited.

A9.1.2 Related Organizations

The following public agencies and a non-governmental organization are directly related to the tourism product development, thus playing a particularly important role in tourism development besides those described in the previous section. There are other organizations that provide supporting infrastructure and environmental protection, etc.

(1) National Heritage Institute (INP)

The INP is a governmental institution and an administrative entity with financial autonomy. The INP comes under the Ministry of Culture, under the terms of decree No.1609 of July 26, 1993. The INP is a body conducting academic research, excavations and projects on sites. Among its responsibilities are to prepare an inventory of Tunisia's archaeological, cultural, historic and artistic heritages, to study these heritages, and to protect and promote them.

(2) Agency for Cultural Heritage Promotion (AMVPPC)

The AMVPPC is a public organization on a commercial basis and is financially autonomous. It comes under the jurisdiction of the Ministry of Culture and is responsible for facilitation of tourism at cultural sites.

(3) Agency for Protection and Development of Coastline (APAL)

The APAL was established in 1995 under the decree No. 95-73 of July 24 1995, as a public organization under the Ministry of Environment and Land Development. Its objectives are to implement the Government's policy in protection and development of coastlines, to protect public coastal areas from illegal encroachment, and examine and give approvals for all development projects in the coast areas. As Tunisia relies much on the beach tourism, the role of APAL is considerably important.

(4) Syndicat d'Initiatives

The *Syndicat d'Initiative* is a non government organization (NGO). As such, it is a non commercial association governed by the law on associations.

This association is managed by a committee elected for a specific duration (two years in general). It is governed according to the statutes which define its objectives.

The role of this organization is as follows:

- To contribute to the tourism activities of the city regarding entertainment in particular;
- To facilitate the stay of the foreign visitors through the provision of all necessary information;
- To participate in the promotion of tourism in the area through collaboration to the tourism related events such as touristic festivals of national or international scale.

The budget of the *Syndicat d'Initiative* comes from member fees, donations as well as subsidies from institutions such as ONTT or local collectivities such as municipalities. A number of Syndicats d'Initiative are financially self-sufficient.

The role of the Syndicat d'Initiative regarding its contribution to the tourism sector is very important at the local level. It is desirable to stimulate these organizations, in particular in the touristic cities, and to involve them further in all of the tourism sector related activities.

(5) Medina Safeguard Associations (ASM)

The Medina Safeguard Association is a non government organization governed by the law on associations.

It is managed by an elected committee. Furthermore, a number of associations such as those in Tunis and Kairouan include a study and monitoring administration in charge of the safeguard, rehabilitation, and protection of the buildings and monuments located within the Medina.

The budget of these associations comes from member fees, donations as well as subsidies from institutions such as the Ministry of Culture, the municipality, AMVPPC and INP.

A9.1.3 Coordination in Tourism Development

Increased collaboration between the relevant authorities is essential for tourism development projects. The ministries and other governmental agencies that need to be coordinated with by ONTT (and MTLA) for tourism development include the following (by type of development or activities):

a) Infrastructure Development:

- Ministry of Transport (MT),
- Ministry of Equipment and Housing (MEH).

b) Tourism Promotion:

- Heritage Valorization and Cultural Promotion Agency (AMVPPC),
- National Heritage Institute (INP).

c) Tourism Resource Management:

- Ministry of Environment and Land Planning (MEAT),
- Agency for Protection and Development of Coastline (APAL)
- Ministry of Culture (MC),
- Heritage Valorization and Cultural Promotion Agency (AMVPPC),
- National Heritage Institute (INP),
- Medina Safeguard Associations (ASM).

d) Human Resource Development:

- Ministry of Professional Training and Employment (MFPE),
- Ministry of Education (ME), Ministry of Social Affairs

e) Area Development:

- Ministry of Equipment and Housing (MEH),
- Ministry of Economic Development (MDE),
- Ministry of Environment and Land Development (MEAT).

f) Tourism Investment Opportunities:

- Ministry of Finance (MF),
- Ministry of International Cooperation and Foreign Investment (MCIIE).

g) Other Tourism Related Entities:

- Tunisair, Tuninter (a Tunisair subsidiary), etc.

Lack of coordination between ONTT and relevant agencies has been pointed out by a number of officials and industry leaders. Tunisian tourism has focused primarily on beach holidays and the development of tourist zones. These are largely within the jurisdiction of ONTT and AFT, and the lack of inter-agency coordination may not have been a critical issue.

However, as proposed in Volumes I and II, diversification of tourism products, particularly into cultural tourism, will require close coordination among ONTT, the Ministry of Culture, INP, AMVPPC, and other relevant bodies engaged in the development of cultural tourism. Improved coordination will certainly be a key factor for smooth and successful undertaking of product diversification.

A9.1.4 Trade Associations and Private Entities

(1) Trade Associations

ONTT is a public organization in charge of the development and the promotion of the tourism sector in Tunisia, and is the official counterpart of trade and professional associations in the tourism sector. These associations are the intermediaries between the ONTT and the professionals. They have consultative powers, and the ONTT cooperates with them to develop legislation and solve common problems of the tourism industry.

a) Tunisian Hotel Federation (FTH)

FTH was established in 1960 with the aim to realize the objectives of the National Development Plan. Its main activities include promotion of hotel industry and defense of its members' interest.

b) Federation of Tunisian Travel Agencies (FTAV)

FTAV was established in 1962 in order to work with local authorities to assist the travel agencies. Its main activities include reinforcement of representation of travel agencies and training of its members' staff.

(2) Private Entities

Major private-sector players engaged in tourism include the hotel industry and travel agencies (or tour operators) that are represented by the two associations above. Current situations and major issues of tourism-related industries are described in Chapter A7 of this volume.

Another private entity expected to play an important role for the future of Tunisian tourism is TCB.

a) Tunisian Convention Bureau (TCB)

Established in 1998 as a private firm with equity from Tunisair, hotels, travel agencies, and other private entities, TCB undertakes marketing and arrangement of conventions and other events such as trade fairs using existing facilities owned both publicly and privately. TCB dose not own any facilities. With its short history, it has not undertaken large-scale conventions and is currently operated with a limited number of staff (five permanent staff and three from outside as of mid-2000), although several international conventions (with the number of participants ranging 1,500-5,000) are scheduled to be held by the year 2005 with TCB's arrangement.

MICE is a promising area for Tunisian tourism primarily due to its closeness to Europe, a large potential market for MICE, being located at the crossroads of the Mediterranean that is surrounded by several Middle Eastern countries as well as Europe, its central location on Africa's doorstep, good security condition, existence of intrinsically rich cultural tourism resources that can be a good source of attractive secondary activities, and a growing number of modern facilities in and around the newly built hotels at locations like Gammarth and Hammamet. Currently, however, TCB's limited resources make it hard to fully exploit these opportunities, and even no systematic records and statistics regarding the past MICE handling are available at TCB as well as at ONTT.

Strengthening of TCB is needed in order to make it fully capable to win strong confidence of potential MICE organizers (clients) who are generally very demanding, putting much emphasis not only on the capability of MICE planners (such as TCB) but also on all the facilities to be used including conventions facilities, lodging, restaurants, etc., and other essential services including transportation, touring, catering and general safety. TCB should be able to assemble all these services together and provide the clients with an integrated, quality product.

In addition, while the use of the private sector for MICE tourism development is a policy of the Tunisian government, which is perfectly consistent with the current national development plan for the tourism sector, more active joint undertaking between ONTT and TCB as well as strengthening the capability of TCB will be needed for aggressively promoting MICE and attracting a greater number of organizers to the country.

A9.1.5 Public-Private Partnership

There are various areas where public-private partnership is essential for tourism promotion and development. Marketing and promotion are a major area in which the government (ONTT) should play an active role. Tourism is a business involving a wide array of private players in delivering products, and in many cases it is not efficient for each player to market tourism products separately (although tourism industries should also market themselves, which is very feasible in today's information age with the use of internet technology). Issues on marketing and promotion are described in Chapter A6 of this volume, and measures to be taken by the government are proposed in section 7.4 of Volume I. Likewise, human resources development is also a joint undertaking by the public and private sectors, and its issues are examined in Chapter A8 (this volume), and measures proposed in section 7.6 (partially in 7.5.1) of Volume I.

This section describes other areas in which public-private partnership approach is particularly important, including tourist zone development, development of MICE tourism, operation of tourist facilities by the private sector, private sector participation in events and festivals, and active role of Syndicat d'Initiatives. Mostly, private sector force can be used more actively, thereby bringing creativity and efficiency as well as strengthening the private sector that is a major player in tourism businesses.

(1) Tourist Zone Development

As stated in the 9th Development Plan for the tourism sector, the Tunisian government began using private sector funds for tourist zone development, and two tourist zones, one in Hammamet South and the other in Tabarka, are being developed with a public-private partnership approach. For these zones, a development company established jointly by public and private entities is undertaking land and infrastructure development (for details of tourist zone development, see section A5.6 in this volume).

For Tunisia, the introduction of this approach is a major step toward more active use of the private sector force in tourist zone development and addition of accommodation capacity, which is in line with the tourism policy of the Government. Currently, private undertaking of resort development is an international norm, in both developed and developing countries, with a minimal use of public money as well as a maximum use of innovative ideas and expertise of private developers.

Now that Tunisia has already passed an "infant" stage of beach resort development, it is a plausible choice that the public sector focuses on identification of sites suitable for large- or smaller-scale resort development and on legal and regulatory issues regarding such matters as land acquisition, land assembly, development approval, and provision of investment incentives. Desirably, the Government should provide an environment where private developers are able to fully demonstrate their creativity and expertise in designing, financing and developing tourist zones or smaller scale resorts.

It is also true that Tunisian private developers may not be fully capable of developing internationally competitive resorts, particularly those targeting the up-market, which is partly due to still under-developed financial industry in Tunisia (e.g., investment banks, pension funds, and insurance companies). In view of this, the Government can actively attract sophisticated foreign developers and resort operators that are well experienced in resort development and operation elsewhere. This choice has been significantly under-exploited in Tunisia, with essentially all the tourist zone developments having been initiated and undertaken domestically. The use of international expertise can lead to not only successful creation of resorts fully funded by the private sector (particularly, those that can attract higher paying tourists) but also enhancing the capability of domestic developers through gaining expertise in resort development from foreign developers and operators.

(2) Development of MICE Tourism

As mentioned earlier, the government policy on MICE tourism development is to use the private sector to the extent possible, which is plausible particularly due to lucrative nature of this type of tourism. However, marketing of MICE tourism requires substantial amount of initial costs that can hardly be borne by a small-scale private entity such as TCB. Overseas network is essentially needed for MICE marketing that should be very focused especially at the current under-developed stage, requiring identifying and approaching potential target companies and organizations in each of the major source countries. Currently, there is no way to expect TCB to undertake this; instead ONTT can use its overseas network to activate marketing and promotion of this promising business whose development is expected to benefit the country's tourism considerably.

ONTT and its overseas offices can play an important role in developing this market jointly with TCB, for example in terms of (but not limited to) the following:

- Identification of target companies and organizations
- Preparation of sales manuals specifically for marketing MICE tourism
- Use of advertising companies in the source markets for MICE marketing
- Preparation of promotional materials
- Organizing FAM trips for potential MICE organizers

(3) Operation of Tourist Facilities by the Private Sector

Currently, tourist facilities at major Tunisian cultural sites such as museums, visitor centers and arts and crafts centers are operated by the public sector with only a few exceptions being operated by private entities (a notable example is Saint-Luis Cathedral in the Carthage Park which is operated privately under a concession contract between AMVPPC and a private entity).

For active development of cultural tourism, there will be a greater need for involving the private sector in the operation of these facilities due to limited financial and human resources of the governmental agencies and to better service delivery by the private sector that can be expected with the use of adequate incentives.

Because of still not sufficient experience with concessioning in cultural tourism, adequate concession procedures and contractual arrangements need to be established in cooperation between the public and private sectors (e.g., AMVPPC, Chamber of Commerce), and made clear to potential private operators as well as to concessioning bodies themselves.

(4) Private Sector Participation in Events and Festivals

Approximately 2,400 cultural events and festivals are held per year in Tunisia, large or small, and essentially all these events are funded mainly by the public sector (though many receive contributions from the private sector), including the Ministry of Culture, governorates, municipalities, regional cultural committees, appointed committees specifically set up for certain festivals, and other ministries (e.g., MTLA, the Ministry of Agriculture, and MEAT). Currently, private sector's role is limited to sponsorship, publicity and advertising, not directly involved in event operation.

These are true of larger scale festivals, including the International Festival of Carthage (held about one month from July to August, using Roman Theater in the Carthage Park) and the festival at El Jem (held also about one month from July to August). For these festivals, an appointed committee (Festival's association) is formed as a body responsible for organizing the festival, with its head appointed by the Ministry of Culture. Although the government expects these festivals to become financially self-sustaining, they still rely heavily on public funding.

Such festivals held at monumental sites could be a great attraction for foreign visitors, and could potentially be a good opportunity for private operators and organizers with profit motives. The Government can take some measures to encourage the private sector to actively participate in these festivals such as musical shows and the like, for example, by minimizing costs to be borne by private operating entities (e.g., with subsidies) and providing them with favorable terms and conditions in contracting.

Hotels and tour operators also can cooperate for the increase in visitors to these festivals through more active communication with their clients and participating in advertising. These efforts to increase visitors to the festivals will certainly be beneficial for hotels and tour operators, first benefiting and strengthening organizers of these festivals and potential private participants (e.g., those holding a show), which could encourage them to innovate more attractive events and festivals.

(5) Active Role of Syndicat d'Initiatives

Syndicat d'Initiatives (with its functions described earlier) is an important non-governmental and non-profit organization in tourism promotion, and can play a greater role, particularly in tourist information provision, tourism promotion of each area and organizing and/or promoting events and attractions.

For tourist information provision, both ONTT and Syndicat d'Initiatives play this role separately (at different locations) in several tourist destinations, causing duplication and inefficiency in information provision. Instead, ONTT can operate joint offices with Syndicat d'Initiatives to share staff as well as lengthen service hours (for example, eliminating lunch-time closing).

Strengthening and wisely using Syndicat d'Initiatives can lead to promoting tourism in each area, for example, cooperating with ONTT, AMVPPC, TCB, etc. in their preparing themed promotion materials and site information. In addition, it can more actively participate in organizing events for the benefit of its members.

A9.1.6 Donor Activities

Activities by donor agencies and by bilateral ones in support of tourism in Tunisia are very limited. No study for a master plan or overall sectoral strategy has been prepared in recent years with funding from foreign sources. This may be a result of the foreign community's assessment of Tunisia's tourism sector as a leading and successful sector not in great need of foreign planning expertise. Some of the activities of different development agencies are directly related to the improved management and presentation of Tunisia's cultural resources. Consequently, these efforts are indirectly supporting the tourism sector because they are improving the cultural product that Tunisia can offer. The programs of several agencies relating to tourism or to heritage are summarized below.

(1) European Community

The MEDA program sponsored by the European Community has undertaken a project in Tunisia of restoration or upgrading of historic structures located in different parts of the country including the posting of interpretive information in different languages on each of the sites. This program has also developed ten itineraries distributed around the country to logically link these sites into circuits to promote easy travel for educational and touring purposes. The itineraries are designed to present themes reflecting aspects of Tunisian history and culture by linking together the related sites. These are cultural circuits that include both well-known and little known cultural sites. The AMVPPC and the INP are the relevant agencies collaborating on this effort. The EC is undertaking similar cultural projects in other countries ringing the Mediterranean area.

(2) World Bank

The Cultural Heritage Management and Utilization Project (Projet de Gestion et de Valorisation du Patrimoine Culturel) planned since 1997, is a cultural resources project that has World Bank and Japanese funding. The purpose is to improve the management of the nation's cultural resources consisting of ancient classical sites and structures in order to propose institutional reforms to manage them more effectively, and to set priorities for selection of specific sites for future improvement projects to be undertaken under World Bank funding or similar. It is a strategy and feasibility study in three phases and the two crafters of the project plan [the Tunisian officials and the Bank] anticipate final approval of the scheme this year (2001). The INP and the AMVPPC are the counterpart agencies for the World Bank team.

Key elements of the strategy call for:

- An integrated strategy highlighting the different aspects of Tunisia's history to give depth to its image abroad as a cultural destination offering great variety;

- A multi-dimensional strategy linking the development of cultural resources with a clearer national identity, directly upgrading the tourist industry, and generating economic benefits for local industry; and
- A participative strategy engaging the local governments and communities at both the local and regional levels.

The study is laying out a framework of how the relevant Tunisian agencies can better coordinate their work to derive a variety of benefits related to cultural and educational issues as well as economic benefits related to international tourism. Additional information follows and is subject to change in the project's final form.

A large number of sites have been reviewed and characterized according to a scheme developed specifically for this project. The following sites have been selected as candidates for development projects. They include:

1 The Bardo Museum and the archeological site at Carthage, combining the country's premier museum with archeological sites and monuments;
2 Oudna and nearby sites of Zaghouan, El Oust and Ain Tounga forming a circuit;
3 Kairouan, a major Islamic site both monumental and urban in character, and Raccada Museum;
4 Sousse Region, complementing a major beach holiday destination;
5 The Testour-Dougga-Bulla Reggia-Chemtou Circuit, located in the northwest along the Andalucian border;
6 Jerba and its museum of arts and popular traditions, a site with potentially high visitor volume; and
7 Berber villages in the Tataouine region and Matmata.

In the final report of the study, the consultants will develop a series of culturally related projects suitable for funding by different development agencies, and will perform more detailed work on a small number of them. This work is to be agreed towards the end of the year 2000. The JICA team will follow the progress of this report with the INP and APPC with a view to avoiding any duplication of activities and to coordination of actions where possible.

In the area of nature-based tourism, the World Bank is starting a five-year program of assistance to MEAT to improve its management capabilities for protected areas. This program also has a primary focus of generating benefits for local community members from activities related to environmental management and recreation. It will involve capacity building at both national and local levels.

(3) French Cooperation

The Institut Français de Coopération has been supporting improvements in training for tourism skills for some six years by having the Toulouse University assist ONTT's Training Direction with strengthening of curricula for several different programs. These include hotel and restaurant skills, training of travel agents, and training of tour guides. Seven hotel schools located around the country are involved in this program. It is designed to produce better quality graduates who will improve the standard of service in the hotels and restaurants, which is a major area of concern for the industry in all parts of the country. This is the only programs under French sponsorship directly dealing with tourism as a sector.

However, a number of activities of Coopération Française relate to management of different types of cultural or heritage resources.

- France is currently assisting the INP with the creation of an archeological park at Oudna requiring topographical surveying for land acquisition and management purposes;
- It has for some years assisted with training in museum management and curatorial skills and restoration sciences;
- It has assisted the “Direction de l’Architecture et du Patrimoine” with the strengthening of “Associations de Sauvegarde for Medinas (ASM)” in different cities including topographical surveying and planning efforts to save the old towns;
- It has organized exchanges to bring together French and Tunisian firms active in design and restoration work to encourage technology transfer and working partnerships to upgrade the technical restoration capabilities of Tunisia’s craftsmen;
- It has arranged for a French university to offer a course at the INP for a DESS college diploma in the specialty of heritage architecture available to applicants from any of the three Maghreb countries. It is funded by the European Union’s Euromed effort, which is assisting North African nations; and
- It is assisting the MEAT with preliminary legal reforms to ease the creation of marine parks at coastal and island locations for the benefit of recreational uses and for tourism.

(4) German Assistance

German assistance is not providing any direct support for the tourism sector specifically. However, it is providing support in other fields related to tourism. Two are explained below.

The Cultural Office of the German embassy in Tunis has arranged over the last few years for several programs of assistance for the museums of the Bardo, the Carthage archeological site, and for the Chemtou archeological site. Various German universities and archeological institutes have participated in these programs. In this last case Germany has assisted with the design and construction of a totally new visitor center of TD 1.4 million on the site using modern innovations of museography. An official donation of TD 400,000 helped fund this project, as well as private donations from Tunisian, German and other sources. There is a plan to develop an open-air museum on the site of Dougga.

In the area of environmental management, Germany has assisted with policy, legislative and institutional matters, for example, resulting in the creation of the APAL agency for coastal development, in development of national parks, and of eco-museums. The tourism sector is not a direct focus of this program.

(5) Spanish Cooperation

Spain's official cooperation authorities are providing assistance in the area of cultural preservation. The ancient Chikli castle located in the Tunis lake is in the middle of a multi-year preservation program to adapt it as a cultural attraction for visitors, while preserving it as a bird refuge, an example of joint use of a cultural site for environmental as well as cultural purposes. Spanish cooperation is also assisting in the preservation of structures in the historic urban core of the town of Testour.

A9.2 LAWS AND REGULATIONS

Major issues regarding the laws and regulations governing and/or affecting the tourism-related industries as well as the investment incentives are examined in Chapter A7 of this volume along with the assessment of these industries' performance. Most of the recommendations on the laws and regulations for the tourism sector, which are made in section 7.5 of Chapter 7 (Volume I), are based on the analysis conducted in Chapter A7.

This section briefly summarizes the existing laws and regulations governing the tourism sector and describes the investment incentives provided for tourism-related activities.

A9.2.1 Laws and Regulations for Tourism

Tunisia has tourism related laws and regulations: i) to control and regulate tourism activities to improve services, ii) to promote investment, and iii) to protect the environment. Laws and regulations in force are listed below:

a) To control and regulate tourism activities to improve services.

- Law for the control of the management of tourism establishments decree No. 73-3 promulgated on October 3, 1973,
- Law for the construction of tourism establishments decree promulgated on July 24, 1943 (law number not shown in the text),
- Regulation for minimal norms of hotel classification decreed by The Ministry of Tourism, Leisure and Handicrafts in collaboration with The Ministry of Trade promulgated on February 4, 2000,
- Law for Travel Agents decree No.73-13 promulgated on October 17, 1973,
- Law for Tour Guides decree No.73- 5 promulgated on October 3, 1973;
- Law for the Classification of Restaurant decree No. 89-432 promulgated on March 31, 1989,
- Regulation for Riding Schools and Clubs decreed by The Ministry of National Economy and Agriculture promulgated on November 22, 1977,
- Regulation for Camping decreed by The Ministry of Trade promulgated on September 25, 1978, and
- Law for Casinos (incl. the entertainment, show facilities and Lottery) decree No.74-20 promulgated on October 24, 1974.

b) To Promote investment

- Incentive Law for Tourism Development decree No.93-120 promulgated on December 27, 1993.

c) To Protect the environment

- Law for the collection and management of packaging material and plastic bags decree No.1102-97 promulgated on June 2,1997,

- Law for the management of wastes and its follow up decree No.41-96 promulgated on June 10, 1996,
- Law for the organization and attributions of the external services of the Ministry of Environment and Regional Development decree No.1626-94 promulgated on August 1, 1994, and
- Law for the attributions of the Ministry of Environment and Regional Development decree No.3003-93 promulgated on February 1, 1993.

d) Other projects of laws are being finalized (next not promulgated yet)

- Rewriting of the text regulating the approval of hotel directors,
- Revision of text regulating the activities of Travel Agents,
- The elaboration of a project of a text on diving, and
- Reorganization of the activities of tour guides.

Other laws being finalized yet and in the process of promulgation includes i) revision related to the approval of hotel managers, ii) revision related to the activities of travel agencies, iii) elaboration of text related to diving, and iv) reorganization of the activities of tour guides.

A9.2.2 Incentives for Investment

The Government of Tunisia has been encouraging the investment for the tourism development by offering incentives for both Tunisian and foreign investors. These incentives and regulations are included in the Investment Incentives Code (Law No.93-120) promulgated on December 29, 1993.

The tourist industries entitled by law are:

1 Accommodation,
2 Tourist transportation services,
3 Travel agencies,
4 Thalassotherapy centers, and
5 Meetings and conventions facilities.

Two different types of incentives are available: i.e. “Standard Incentives” and “Specific Incentives”.

(1) Standard Incentives:

- 35% reduction of income or profit taxes for individuals and legal entities (this reduction is subject to a number of conditions),
- Progressive depreciation (material and equipment depreciation over at least a seven-year period),
- Reduction of customs duties on required equipment except on the tourism cars, and
- Suspension of the VAT and the consumption tax for the locally made equipment.

(2) Specific Incentives:

a) For Regional Development:

- Total exemption from corporate income tax for the first 10 years of operation, and reduction of 50% of income or profits from the tax base for a further 10 years,
- Deduction of the reinvested income or profits from the available income or profit subject to the income tax,
- Waiving of the employers’ contribution to the mandatory state social security plan for the first 5 years of operation, and
- An investment premium of up to 8% of total project costs.

b) For New Promoters, Small Companies and Small Activities:

- An investment subsidy,
- A state subsidy (study fees), and
- State’s responsibility for the employer’s contribution to the Tunisian workers social safety regime during the first five years.

c) For Support Investments:

- A 10% customs duties reduction, suspension of the VAT and consumption tax for transport investment. These incentives relate only to imported equipment having no locally-made equivalents, except the tourism cars other than those used in Saharan and hunting tourism; and
- Real Estate projects such as social housing, development of agricultural, tourism and industrial areas, and the setting of industrial buildings benefit from a 50% tax reduction on incomes or disposable profits.

A9.3 BUDGETS FOR THE TOURISM ADMINISTRATION

MTLA provides the major part of the ONTT budget on a yearly basis. Each year the ONTT submits a proposal pertaining to its needs to the government, who after deliberating, allocates a budget. The ONTT requests two different budgets. One is used for equipment and the other is for the organizational operations The total budget was TD 48,130,000 for 1995, and TD 58,841,000 in 1999, with approximately 70% used for equipment and only 30% for operations.

In addition to the budget provided by the government, there is another budget, a special fund, fed by funds collected from the hotels and used by the ONTT. The hotels are required to give ONTT a 2% tax each month. This special fund is used for both the environmental protection (1%) and the competitiveness fund (1%). The competitiveness fund (established in 1996) is used for the promotion of the hotel and tourist sectors. The amount collected oscillates between TD 9,469,000 in 1997 and TD 10,142,000 in 1999.

Table A9.3.1 Contribution from State Budget

Year	Equipment budget	Operations budget	Total (TD)
1995	35,240,000	12,890,000	48,130,000
1996	36,460,000	13,500,000	49,960,000
1997	37,080,000	15,248,000	52,328,000
1998	40,100,000	17,019,000	57,119,000
1999	40,544,000	18,297,000	58,841,000

Source: ONTT

Table A9.3.2 Competitiveness Fund (Hotels Contribution)

Year	Budget collected (TD)	Budget used (TD)
1996 (partial)	6,496,290	6,117,000
1997	9,468,661	8,120,377
1998	8,223,360	8,223,360
1999	10,142,000	10,142,000

Source: ONTT

A9.4 KEY ISSUES

Major issues identified regarding Tunisian tourism administration and institutions are summarized below, which include organizational issues, inter-agency coordination, and issues on public-private partnership. Measures for these issues are proposed in "7.5.3 Measures for Public Entities" in "7.5 Tourism Industry Vitalization Plan" (Volume I).

Note that regulatory issues are examined in Chapter A7: Tourism Industries and Their Performance (this volume) and measures are proposed in 7.5 Tourism Industry Vitalization Plan (Volume I).

(1) Organizational Structure

With the centralized features of ONTT's organizational structure, the tasks of the director general seem to be exceeding the optimal level, which tends to cause, at least partly, inefficiency of ONTT's operations and hamper responsive and effective actions. In the process of preparing a restructuring plan, which is currently undergoing within ONTT, the shortcomings of the current centralized structure are taken into account.

A desirable direction for making the entire organization more efficient and responsive is to reduce its centralized features by delegating responsibilities for various matters to lower levels of management, specifically to directors of departments.

Two major positive effects are expected to result from decentralizing the organization: (i) enhancing operational efficiency by quickening decisions, particularly those on operational matters for which consultation with, and approval by, the director general are not essentially needed; and (ii) enabling the director general to concentrate more on strategic issues and visions about the tourism sector by reducing his time to be spent for operational issues.

(2) Communication within ONTT

Each department of ONTT does not fully understand the other departments' functions and attributions since information exchange is limited between departments. This appears partly due to the centralized organizational structure of ONTT where each department is linked directly with the top of the organization.

Only decentralizing the organization could further aggravate the lack of communication and coordination allowing each department to do its jobs on its own. There should be a structure that can ensure communication and coordination among different departments and sections within ONTT.

One approach is to create a level or a position for coordination between the director general and the existing departments, the level to be responsible for coordinating different departments. Also, for specific, important issues requiring coordination, ONTT can set up, on an ad-hoc basis, a committee or a task force composed of directors or appropriate representatives of concerned departments and sections (as well as representatives from relevant agencies and industry leaders depending on the issue).

In addition, a monthly meeting can be held and attended by directors and managers of all the departments in order to present their current major activities and other relevant topics. At the same time, there are always some issues involving two or more departments. An occasional meeting can be held by the active members at a working level involved in these common issues for reaching mutually convincing agreement.

(3) Computerization

The computerization of key information and data at ONTT is incomplete for practical and effective use. Critical functions such as planning or statistical trend analysis are severely lacking. Computerization will simplify the ONTT tasks by receiving data real time from its oversea offices and by informing the issues discussed at meetings mentioned in (2) above.

In addition, simply introducing computers at each department and section will make a big difference, enabling the staff to efficiently handle basic data and information that should be maintained and/or updated, e.g., those on the tourism industries under ONTT's supervision and the records on investment applications. Current system with the use of papers is too inefficient.

(4) Regional Board (CRT)

The regional boards of tourism have shown different levels of performance (e.g. foreign language competence). In addition, many staff-members at the information counters lack in practical knowledge regarding local conditions and services, and can chiefly distribute tourist literature to visitors. This situation is inconsistent with the stated objectives of ONTT to upgrade service levels, to globalize and tap new markets such as Northern Europe, North America and Asia.

(5) Insufficient Inter-Agency Coordination

Insufficient coordination between ONTT and relevant agencies has been well recognized within the administration as well as by industry leaders, which seems partly because Tunisian tourism has been focusing largely on the areas that can be handled by ONTT and AFT (e.g., beach holidays and the development of tourist zones) without undertaking intense coordination with other agencies.

However, in view of the importance of product diversification and strengthening other core areas than beach holidays, ONTT will need to more actively communicate and coordinate with other relevant agencies, e.g., the Ministry of Culture, INP, and AMVPPC for effectively developing cultural and Saharan tourism, and MEAT and APAL for the development of tourist zones and other smaller scale resort areas.

(6) Public-Private Partnership

a) More active use of private sector force for resort development

The Tunisian government began using private sector funds for tourist zone development, gradually retreating from financing of land and infrastructure development. Internationally, private undertaking of resort development is fairly common, though generous investment incentives are often provided as in Tunisia.

The Government can further extend this approach toward the full use of private sector force for resort development at least of smaller scale than conventional types of tourist zones that require huge amount of investment. At this moment, Tunisian private developers may not be sufficiently capable to develop resorts fully funded privately. In view of this, the Government can actively attract sophisticated international resort developers and operators well versed in financing arrangements as well as physical designing and development. This choice has been significantly under-exploited in Tunisia, and its adoption along with active foreign investment promotion can potentially lead to creating resorts that are new to the country (particularly, those generating higher yields) as well as provide valuable opportunities for Tunisian developers to gain know-how available and accumulated elsewhere.

b) Need for Strengthening ONTT's Function of MICE Marketing

While the Tunisian government intends to use, for MICT tourism development, the private sector to the extent possible, thus having established TCB along this line, TCB alone is not able to drastically develop this type of tourism due to its very limited resources. While TCB will have to be strengthened, ONTT can use its overseas network to activate marketing and promotion of this luctative business jointly with TCB, particularly in terms of the following:

- Identification of target companies and organizations
- Preparation of sales manuals specifically for marketing MICE tourism
- Use of advertising companies in the source markets for MICE marketing
- Preparation of promotional materials
- Organizing FAM trips for potential MICE organizers

c) More Active Participation of the Private Sector and NGOs in Cultural Tourism Promotion

Currently, the involvement of the private sector in promoting cultural tourism is still not active, which seems due largely to the fact that Tunisia's cultural tourism has been far less developed than its potential while focusing heavily on beach tourism.

As government-led development efforts in this area progress, there will certainly be much greater opportunities for the private sector to be involved and gain reasonable level of return. Its more active participation will also be desirable for the Government since the requirement for human resources is expected to increase with the progress of cultural tourism development. Government agencies will most probably not be able to meet this need for increased personnel, and thus need the participation of the private sector. In addition, NGOs can play a more active role in cultural tourism as well as other areas with the increase in demand.

While hotels, travel agencies, and transportation companies are the major private sector players in cultural tourism, non-traditional types of businesses are expected to increase including operation of tourist facilities at major cultural sites and organizing events, festivals, and shows. The Government can encourage active participation of the private sector and NGOs (particularly, Syndicat d'Initiatives) in these activities by providing adequate incentives for them.

(7) Other Issues

a) Competitiveness Fund

Only hotels, unlike other types of tourism businesses such as restaurants, or travel agencies are currently required to contribute to the competitiveness fund. However, the fund has played a decent role for the development of overall tourism sector. Similar contribution can be made by other tourism industries as well.

b) Cumbersome procedures

The entire process of investment procedures seems not to be fully transparent, thereby, decreasing investors' interests. Some investors choose to ignore the incentives rather than attempt to apply the process.

c) Cooperation between ONTT and Industry Professionals

The ONTT has the executive power while the industry professionals only have a consultative power. Professionals with practical knowledge shall be able to involve more in decision-making process of any issue related to tourism, in collaboration with ONTT.

A10 SUPPORTING INFRASTRUCTURE

A10.1 TOURIST TRANSPORT

A10.1.1 Airports and Air Transport

(1) Airports

Airport facilities are important as tourist transport in Tunisia, because about 70% of visitors mainly from Europe and Middle East to Tunisia depend on air transport. Tunisia has seven international airports such as Tunis-Carthage, Tabarka 7 November, Manastir-Skanes, Sfax-Thyna, Djerba-Zarzis, Tozeur-Nefta, and Gafsa-Ksar which are managed by the Civil Aviation and Airport Authority (OACA). These airports directly connect to Europe, Maghreb countries and the Middle East, and handle not only regular flights but also the charter flights being operated by airlines, tour operator companies, and airlines specialized for charter. Since almost all the airports have the runway length of 3,000m, the arrival and departure of jumbo-jet aircraft are available at their airports. Almost all the airports are fully equipped for night landings and have navigational equipment based on international standards. Generally, those facilities are well developed.

There is a master plan for airport development for the target year of 2020. The development plans and projects at the major international airports are as follows:

a) Tunis-Carthage international airport

The expansion to the capacity of 4.5 million passengers per year has already been completed, and there will be no more expansion.

b) Manastir-Skanes international airport

The current capacity is 3.5 million, with the extension to 5.0 million currently undergoing and to be completed probably by 2003. There will be no more expansion beyond that.

c) Djerba-Zarzis international airport

The current capacity is 1.5 million, with the extension to 4.3 million currently undergoing and to be completed by 2003.

d) New airport at Enfidha between Hammamet and Monastir

The planned capacity to be built by 2004 is 5.0 million per year, with the estimated project cost being TD350-400 million. This airport is expandable to the capacity of 30 million passengers per year. The planning of this airport was undertaken by a French consulting firm, called Aeroport du Paris (ADP). The study was completed in May 2000, though the plan has not been finalized yet as of July 2000. According to MOT, the implementation is to start in January 2001. It is expected that the new airport will be used as the major gateway in place of Tunis-Carthage and Manastir-Skanes international airports.

(2) Air Transport

The numbers of planes and passengers reached 89.6 thousands and 9.37 million in 1999, respectively as shown in Table A10.1.1. Air traffic has been slightly increasing at the six international airports.

The growth rates of the numbers of plane and passengers in total between 1998 and 1999 are 4.1% and 6.0%, respectively. Three international airports of the Tunis-Carthage, the Monastir-Skanes and Djerba-Zarzis continue to be the major airports with 94.1% of total airplane traffic and 97.6% of passenger traffic.

The structures of air traffic show significant increase at Tabarka 7 November and Monastir-Skanes. The increase rates are 34.5% at Tabarka 7 November and 17.0% at Monastir-Skanes. However, traffic shows a slight decrease at Sfax-Thyna.

Table A10.1.1 Number of Planes and Passengers at 7 International Airports

Airport	1998		1999		Variations (1999/98 in percentage)	
	Planes	Passengers	Planes	Passengers	Planes	Passengers
1. Tunis-Carthage	36.9	3,434.3	37.0	3,373.0	0.3	-2.1
2. Monastir-Skanes	23.6	3,087.3	27.4	3,614.0	16.1	17.0
3. Jerba-Zarzis	20.0	2,088.5	19.9	2,158.3	-0.5	3.4
4. Sfax-Thyna	2.9	66.7	2.4	57.5	-17.2	-14.1
5. Tozeur-Nefta	2.0	109.5	2.0	106.0	0.0	-3.6
6. Tabarka-7 November	0.7	44.9	0.7	60.4	0.0	34.5
7. Gafsa-Ksar	0.0	0.0	0.2	4.9	-	-
Total	86.1	8,841.9	89.6	9,374.1	4.1	6.0

Unit: thousands

Source: OACA

The program of regularly scheduled flights by the Tunisian Air Company (Tunisair) is shown in Table A10.1.2. The map of international air routes of Tunisair is shown in Figure A10.1.1. Those flights including supplementary ones in peak seasons carried a stable 1.9 million travelers, which accounted for 55% of overall traffic, according to “Annual Report 1999, Central Bank of Tunisia”.

Table A10.1.2 Programs of Scheduled Flights by Tunisair

To	From	Nos. of Flight per Week*	Type of Aircraft
Tunis	Abu Dhabi	1	A300
	Algeria	5	B737/A320
	Amman	2	A320
	Amsterdam	2	A320
	Athens	2	B737
	Barcelona	6	B737/A320/MD
	Berlin	1	B737
	Beyrout	2	A320
	Bilbao	1	B737
	Bordeaux	2	B737
	Bratislava	1	A320
	Brussels	4	A320/A300
	Budapest	1	B737
	Cairo	3	A320
	Casablanca	12	A320/A737
	Copenhagen	1	B737
	Dakar	1	A320
	Damas	2	B737
	Djerba	35	ATR
	Dusseldorf	1	A300
	Frankfurt	12	B737/A320
	Geneve	6	A320
	Hamburg	1	B737
	Istambu	3	A320
	Jeddah	2	A320/A300
	Lille	1	A320
	Lisbon	2	A320/B737
	London (Gartwick/Heathrow)	8	A320/B737
	Lyon	20	A320/B737
	Madrid	6	A320/MD
	Malta	2	ATR
	Marseille	21	A320/B737
	Milan	13	MD/B737
	Munich	1	A319
	Nice	11	A320/A300
	Nouackchott	1	A320
	Palerme	5	ATR
	Paris (Orly Sud)	21	A320/A300
	Paris (Charles de Gaulle)	28	A319/B737
	Prague	2	A320
	Rome	18	MD/A320
	Stockholm	1	B737
	Strasbourg	2	B737
	Toulouse	2	A320
	Varsovie	2	A319/B737
	Vienna	2	A320
	Zurich	8	RJ100/A320/B737

Note: *:one way

Source: Tunisair Timetable 2000

Table A10.1.2 Programs of Scheduled Flights by Tunisair (Continued)

To	From	Nos. of Flight per Week*	Type of Aircraft
Monastir	Amsterdam	2	B737
	Brussels	3	A320
	Budapest	2	A319/B737
	Dusseldorf	1	B737
	Frankfurt	1	B737
	Geneve	1	B737
	Graz	1	B737
	Hamburg	1	B737
	Linz	1	B737
	Luxembourg	2	A319
	Lyon	2	B737/A319
	Malta	2	ATR
	Marseille	1	A320
	Munich	1	B737/A319
	Nice	2	B737
	Palerme	1	ATR
	Paris	3	A320/B737
	Prague	1	A320
	Rome	1	A320/B737
	Toulouse	1	B737
	Vienne	1	B737
Djerba	Brussels	2	B737/A320
	Budapest	1	A319
	Frankfurt	1	B737
	Geneva	2	A319/B737
	Luxembourg	2	A319
	Lyon	2	B737/A320
	Madrid	1	B737
	Marseille	2	B737/A320
	Nice	1	B737
	Paris	5	A320
	Rome	2	A319/A320
	Vienne	1	B737
	Zurich	1	A320
Tabarka	Brussels	1	B737/A300
	Geneva	1	B737
	Paris (Charles de Gaulle	1	B737
Tozeur	Brussels	1	B737
	Geneva	1	B737
	Lyon	2	B737
	Madrid	1	B737
	Marseille	1	A320
	Milan	1	B737
	Paris	2	A300
Sfax	Paris (Orly Sud)	1	B737
	Paris (Charles de Gaulle)	2	B737

Note: *:one way

Source: Tunisair Timetable 2000

Tunisia's domestic air network is fairly limited. Domestic flights are operated by Tuninter which is subsidiary of Tunis Air with only 3 aircrafts (two crafts of ATR-72, one craft of Boeing-737). The domestic air network includes 4 routes; Tunis-Jerba, Tunis-Tozeur, Tunis-Sfax, and Tunis-Gasfa. Details are shown in Table A10.1.3.

Table A10.1.3 Domestic Flight Routes and Fares (As of October, 2000)

Domestic Route	Travel Time	Frequency	Fares (one way / return)
Tunis to Jerba	1 hour	Daily (summer)	TD 51.200 / 100.700
Tunis to Tozeur	45 minutes	5 flights a week	TD 48.500 / 92.700
Tunis to Sfax	45 minutes	4 flights a week	TD 42.500 / 82.800
Tunis to Gasfa	1 hour	2 flight a week	TD 42.700 / 85.200

Source: Tuninter

Figure A10.1.1 Flight Route of Tunisair

Source: Tunisair

A10.1.2 Roads and Road Transport

(1) Roads

The roads and bridges are managed by the Ministry of Equipment and Housing (MEH). The MEH has 24 regional offices to cover the all Governorates in the country with about 6,500 staff.

In 1994, the classified road network consisted of some 17,900 km of roads, of which 11,700 km or two-thirds of the total were paved. With 1.4 km of paved roads per 1,000 inhabitants, Tunisia lags far behind the industrial countries (6-10 km per 1,000 inhabitants) but ranks average among middle-income countries. The national core network consists of the 6,000 km of key roads linking the country's main economic cores. There is a relatively high proportion of "National Roads" (23%). Paved road density varies from 10 m/sq.km in the provinces of Kebili and Tataouine to about 1 km/sq.km around Tunis, within a national average of 70m/sq.km. A quality deficit exists because of the irregular nature of maintenance, in rural areas especially, and capacity constraints (three-fourths of classified roads are less than 6.5 m wide for daily traffic often above 7,000 vehicles). The expressway network is currently limited to 140 km between Tunis and M'saken, near Sousse. However, there is no resting-place with toilet facilities on the expressway. In 1998, the total length of road network reached about 19,000 km consisting of the National Roads (4,100 km), the Regional Roads (6,500 km) and the Local Roads (8,400 km). Of the total road network (19,000 km), the road length of 12,550 km is paved. The road network in parallel with rail network is shown in Figure A10.1.2.

The urban road has not kept pace with population growth, especially in Tunis, where traffic conditions are deteriorating; the points at which the two beltways intersect with main radial roads connecting to the city center are congested at peak hours, especially the Bab Saâdoun intersection. In order to reduce the traffic congestion in the center of Tunis, the ring road project inclusive of the new bridge project at La Goulette is being undertaken by MEH. Although the new construction section for the ring road has been constructed, the expansion of the existing road has not yet completed. Concerned with the new bridge project at La Goulette, the detailed design for the bridge construction started in January 2001 and the construction will be carried out from March 2002 to the end of 2005 with the financial assistance of JBIC (Japan Bank for International Cooperation).

As for the road conditions to access the major tourist resources, those are relatively well paved and developed. It is evaluated that there are not serious problems on road facilities for tourism. However, the traffic congestion is found at some parts in Tunis and Hammamet due mainly to lack of parking area. Also, there is a shortage of road signage and information in the major tourist resources, especially in French or English languages.

There are some construction plans of expressways as follows:

- Expressway (Tunis-Bizerte) To be constructed by 2003,
- Expressway (Tunis-Oued Zarga) under study, and
- Expansion of existing expressway (Sousse-Sfax) (under study).

In addition there are a conceptual plans of expressways as follows:

- Expansion of existing expressway (Sfax-Medenine), and
- Maghreb expressway through Tunisia.

(2) Road Transport

Inter-city passenger transport comprises bus services provided by National Interurban Transport Company (SNTRI) under the administrative supervision of the Ministry of Transportation, and 12 regional companies mostly operating within the boundaries of their particular Governorates) and by privately-owned collective taxis licensed with the numbers of about 800 in total to operate on fixed itineraries.

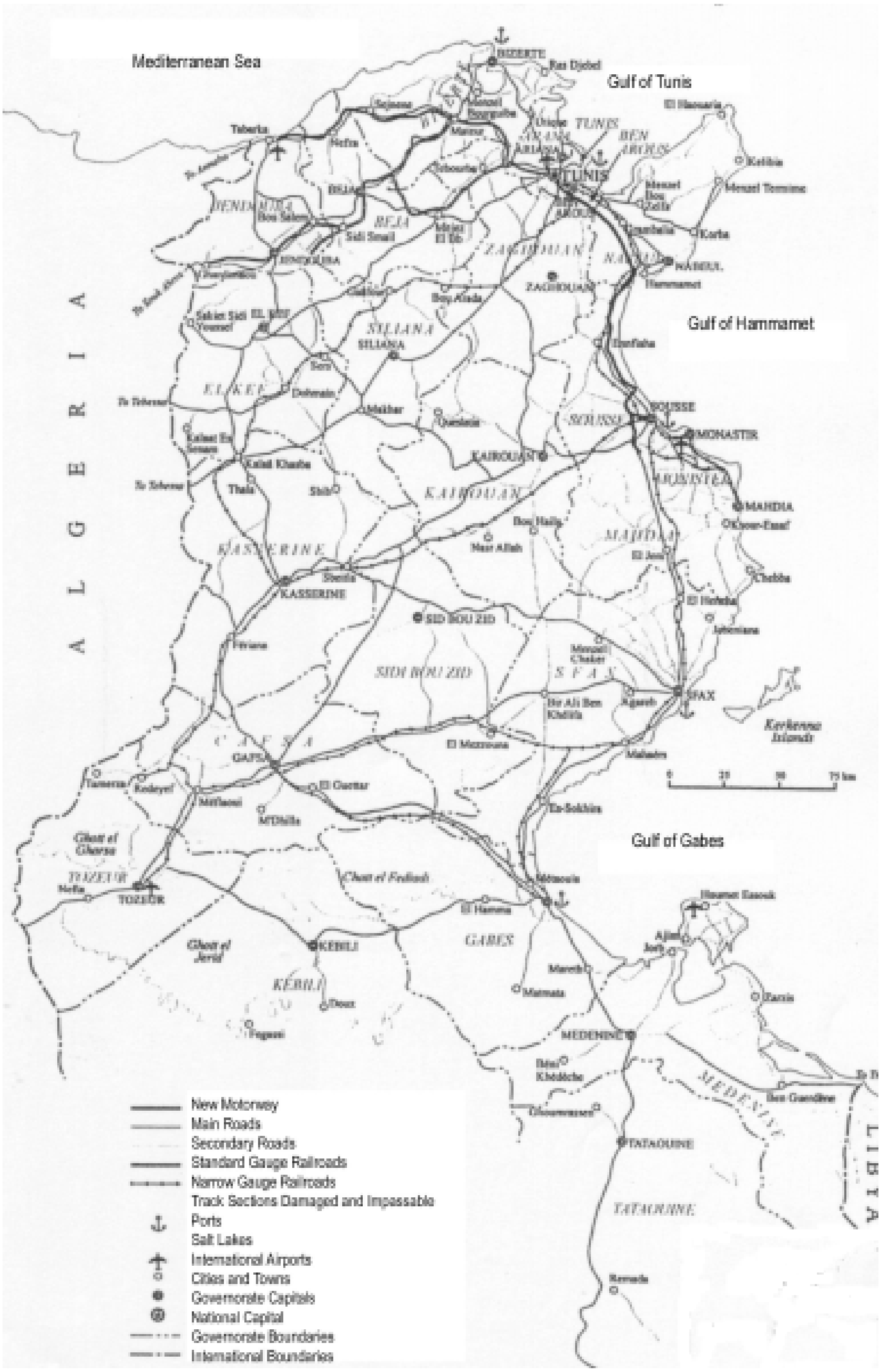
SNTRI, which has about 900 staff in total, operates nationwide (71 lines) by using 220 buses (20 buses with 67seats and 200 buses with 55 seats) made in Germany. The average renewal numbers of buses are 20 per year. Among 71 lines, the major lines are listed below. The tariff of inter-city bus services is set based on distance. For example, the tariff of bus service with the distance of 500 km is about 20 TD.

- Tunis-Jerba;
- Tunis-Kairouan;
- Tunis-Tozeur;
- Tunis-Matmata;
- Tunis-Kebili;
- Tunis-Tabarka; and
- Tunis-Le Kef

In rural areas, mixed transport of passengers and goods authorized at the Governorate level is the general rule. Urban transport services are provided by 12 regional companies plus taxi. The Greater Tunis area is an exception with a publicly owned bus company, operating in tandem with small-scale private bus operators who have been allowed in since 1990. Their share of the market is still negligible.

The public passenger traffic reached some 613 million in 1998 (against 600 million in 1997). 333.3 million passengers, 43% of which are students, were transported by the National Transport Company and 3.5 million passengers were transported by SNTRI in 1998. According to SNTRI, about 5,000-10,000 foreign tourists use inter-city buses operated by SNTRI.

Figure A10.1.2 Road and Railway Network



Source: World Bank, Tunisia; Transport Strategy Report, 1997

A10.1.3 Rail Network and Rail Transport

(1) Rail Network

The rail network, 2,268 km long with about 260 stations in total covers nationwide, and consisting of the following four major lines is managed and maintained by the Tunisian National Railroad Company (SNCFT).

- Tunis-Sousse-Sfax-Gabes (8 trains per day to Sousse, 6 trains per day to Sfax, 3 trains per day to Gabes);
- Tunis-Mateur-Bizerte (about 4 trains per day);
- Tunis-Beja-Jendouba-Ghardimaou at the Algerian border (5 trains per day); and
- Tunis-Mahdia (12 trains per day).

The broad gauge with the width of 1.435m, which meets the European Standard, is adopted for only railway network covers northern area (Tunis-Mateur-Bizerte and Tunis-Beja-Jendouba-Ghardimaou). The narrow gauge with the width of 1.0 m is adopted for the remainder being the majority of the railway network.

SNCFT has an under-going expansion project of network between Gabes and Mednine with the distance of about 70km. The platforms of the new railway are developed so far. The electrification project for the line between Tunis and Bordj Cedria with the distance of about 30km is to be financed by JBIC. Also SNCFT has the double-track project of the line between Tunis and Sousse in the near future.

The Metro network within Grater Tunis area consists of 5 ‘Metro’ lines with the distance of 7 to 10 km each, and Tunis-Goulette-Marsa (TGM) line with the distance of 18.7 km. In addition to above Metro lines, a new line of ‘Ibn Sina-El Mourouj’ with the distance of 6.7 km has been developed by the Tunis Rapid Transit Company (SMLT) financed by European Bank for Investment. The development cost including trains is estimated about US$ 90 million and it is scheduled that operation will be started in 2002. Also it is scheduled that 4 regional (ring) lines will be developed by 2016 in line with the Regional Master Plan of Transportation for Greater Tunis Area prepared by Ministry of Transportation in 1998.

(2) Rail Transport

The rail transport is operated by SNCFT and SMLT.

The rail transport covers nationwide is operated and managed by SNCFT with the staff of 6,550 in total.

SMLT, has about 1,600 staff in total, is a responsible agency for operating railway services by Metro lines and TGM line within Greater Tunis area. The description of Metro lines and TGM line is as shown below.

Table A10.1.4 Metro and TGM Service Outline

Description of Railway Services	Metro Line No.1	Metro Line No.2	Metro Line No.3	Metro Line No.4	Metro Line No.5	TGM Line
1.Operation Start	1985	1089	1990	1990	1992	1872
2. Distance (Km)	9.5	7.4	8.2	8.7	9.9	18.7
3. Origin	Tunis Marine	Place Republique	Place Barcelone	Place Barcelone	Place Barcelone	Tunis
4. Destination	Ben Arous	Ariana	Ibn Khaldoun	Den Den	El Intilaka	Marsa
5.Time of Trip (minutes)	28	22	28	31	35	35
6. Numbers of Operated Trains	30	18	10	18	24	13
7. Operational Schedule (Interval) (1) Peak (minutes) (2) Off Peak (minutes)	4 12	6 12	12 12	6 12	6 12	6 12

Source: SMLT

The numbers of rail passengers transported by SNCFT increased by 6.2% to 34.4 million (refer to Table A10.1.5), 85% of those traveled on short-distance routes covering the southern suburbs of the capital, cities throughout the Sahel and the Bir Bouregba-Nabeul shuttle.

Table A10.1.5 Rail Transport in Tunisia

Description	1998	1999	Variations in % (1999/98)
1. SNCFT			
(1) Long-distance routes	5.1	5.3	3.9
(2) Short-distance routes	27.3	29.1	6.6
Sub-total	32.4	34.4	6.2
2. SMLT			
(1) ‘Metro’ lines	95.4	97.4	2.1
(2) Tunis-Goulette-Marsa line	17.7	18.2	2.8
Sub-total	113.1	115.6	2.2

(Travelers in million)

Source: SNCFT and SMLT

Those transported by SMLT increased by 2.2% to 115.6 million passengers, 97.4 million of those traveled by the five “Metro” lines. The travelers on the Tunis-Goulette-Marsa (TGM) line increased by 2.8% to 18.2 million.

(3) Railroad Tourist Attraction

Concerned with the railway use in tourism, a train tour between Metlaoui and Gorges du Seldja called “Lézard rouge” is operated by a private company in the Southern region. The railway facilities are owned by SNCFT and rent on concession basis. The scenery of gorges and canyons can be enjoyed from the train for about 1 hour for one-way. The tour is set a round-trip starting from Metlaoui with a fare of 20 TD/person. Some passengers get off at Gorges du Seldja and go up to Mides located near Algerian border, which has a magnificent canyon by vehicles. Some identified issues are listed below:

- Only one daily trip is available,
- No management (statistics) of number of passengers (sale of tickets beyond capacity),
- No information of departure and arrival, and
- No parking area for vehicles at Gorges du Seldja.

A10.1.4 Ports and Water Transport

(1) Ports

There is more than a sufficient number of ports which consists of Tunis-Goulette-Rades in Tunis and its environs and six ports (Sfax, Bizerte, Gabes, Sousse, Zarzis and Skhira) along the coast from Bizerte to Gabes being managed by the Merchant Marine and Port Authority (OMMP). However, vessels drawing more than 11 m cannot enter any of these ports, and they also afford only limited land side access. Among those ports, the Tunis-Goulette Port, which the majority of the seaway passengers have been utilizing for entries and exits, is the major port.

(2) Water Transport

The numbers of entries and exits passenger in Tunisia increased to 381,000 in 1999 against 316,000 in 1998. More than 99% of passengers utilize the Tunis-Goulette Port for entry and exit point as shown in Table A10.1.6.

Table A10.1.6 Seaway Passengers Entering the Tunis-Goulette Port

	1996	1997	1998	1999
Passenger arrivals	156	170	173	208
Passenger departures	129	141	137	172
Total	285	311	310	380

Unit: thousands

Source: Merchant Marine and Port Authority (OMMP)

The number of cruise passengers (foreign tourist) was about 170,000 in 1999, significantly increased from previous years (Table A10.1.7). It is noted that the decline in 1998 was due mainly to shifting the travel to France for the 1998 world football cup. The average size of the cruise ships received is getting larger, which is indicated by a much lower growth rate for the number of ships received than that for the number of passengers.

Table A10.1.7 Trend of Cruise Traffic

	1995	1996	1997	1998	1999	Growth Rate 95-99(p.a.)
Number of ships received	159	146	181	143	200	5.9%
Number of tourists (persons)	88,348	100,102	132,713	106,124	168,693	17.6%

Source: OMMP

Most of the cruise ships are received by the port of Goulette which is located at the mouth of the Tunis Lake, accounting for 93% of the total traffic (Table A10.1.8).

Table A10.1.8 Cruise Traffic by Port

Year	Tunis	Goulette	Radès	Bizerte	Sousse	Sfax	Gabès	Zarzis	Total
1997	-	130,285	-	603	907	-	918	-	132,713
1998	-	100,811	-	-	3,451	-	1,862	-	106,124
1999	-	156,297	-	1,298	1,820	535	8,660	83	168,693

Source: OMMP

Currently, there are no Tunisian entities owning or operating cruise ships primarily because it requires a large amount of investment to be recovered in a relatively long term. The nationalities of the ships coming to Tunisia are mostly French and Italian, and most of the passengers are from France, Italy and Germany. These ships are cruising around the Mediterranean Sea, and due to a short distance from the international maritime route (in the middle of the Mediterranean Sea) to the Gulf of Tunis, most of the ships are coming to Goulette rather than to the ports in the south in order to minimize transport costs.

The master plan for the port of Goulette, which was prepared by a consortium of Tunisian, Dutch, and French firms in 1995, recommended stage-wise development of facilities to serve cruise ships. In the master plan, it is pointed out that the actual cruise traffic has already exceeded the projection for year 2020 (171 ships to be received by the port of Goulette). In line with the plan, OMMP responsible for development, operation and maintenance of all of the Tunisian ports is currently studying the construction of a reception hall for cruise passengers. Its total construction cost is estimated at US$ 380,000. Another development currently planned is to expand turning basin to receive larger-sized ships (those with the length of 200-250 meters, up from the current limit of 160-180 meters), with its development cost of about US$ 2.22 million. The master plan also recommended moving quays for cruise ships to the location closer to Rades in order to expand the capacity, although this may be a future project as the existing quays currently with the occupation rate being 35-40% are expected to provide sufficient capacity for the traffic growth in the years to come.

For other ports, there are no development plans related to cruise transport as the demand is expected to be very small relative to that for the port of Goulette.

A10.2 UTILITIES

A10.2.1 Water Supply

Water supply in Tunisia is operated by the National Company for Water Supply and Distribution (SONEDE) with about 7,500 staff in total under the administrative supervision of Ministry of Agriculture. The water to the Greater Tunis region is supplied by the distribution pipes through the purification plant originated by surface water of 5 major lakes located in Sidi Salem, Joumine, Sejnane, Kassab and Beni Mtir. The water to the Central region such as Sousse, Monastir and Sfax is supplied by the distribution pipes through two pumping stations located at Tunis and Cap Bon (near Hammamet). The water to the Central-west, East and South regions including Jerba is supplied by groundwater.

According to SONEDE, the domestic water (excluding irrigation water) consumption reached 272 million cubic meters against the production water of 337 million cubic meters in 1999. The tourism sector consumed 17 million cubic meters or about 6.1% as shown in Table A10.2.1.

Table A10.2.1 Water Volume for Production and Consumption (1999)

Region/Province	Water Vol. for Production	Water Vol. for Consumption		
		Total	Tourism Sector	Share of Tourism Sector (%)
1. District of Tunis	106,870	87,994	1,669	1.9
2. North Region	69,205	55,225	3,771	6.8
3. Central Region	68,899	54,597	5,799	10.6
4. South Region	91,923	73,747	5,433	7.4
Total	336,896	271,563	16,672	6.1

Unit: thousands cubic meters

Source: SONEDE

The covering ratio of drinking water service for the population by region is shown in Table A10.2.2. The service level is relatively high excluding that in North West Region (Beja, etc.) and Central West Region (Kairouan, etc.).

Table A10.2.2 Covering Ratio of Drinking Water Service by Region

Region/Province	1996	1997	1998*	1999*
1. District of Tunis	95.9	96.1	96.3	96.7
2. North East (Bizerte, etc.)	71.2	71.8	72.4	72.7
3. North West (Beja, etc.)	48.3	49.1	50.2	50.9
4. Central West (Kairouan, etc.)	39.7	41.0	42.5	43.8
5. Central East (Sousse, etc.)	80.8	81.5	82.4	83.0
6. South West (Tozeur, etc.)	83.6	84.0	84.8	85.2
7. South East (Gabes, etc.)	71.5	72.8	74.8	75.8
Total	72.4	73.2	74.2	74.9

Note: (%), *: Estimated figures

Source: Ministry of Economic Development, SONEDE, Report on Annual Indicators of Infrastructure, 1999

The water supply project to the Jerba is under processing funded by JIBIC according to SONEDE. Also there is an issue on lack of distribution capacity from Tunis to Sfax at this moment.

A10.2.2 Sewerage Treatment

The sewerage treatment in Tunisia is operated by the National Sewage Agency (ONAS) under the administrative supervision of the Ministry of Environment and Land Use Planning. ONAS, which was established on August, 1974, has 3,951 staff in total and the following responsibilities.

- Protection of water pollution,
- Managing, operating, maintaining and renewing all urban wastewater facilities,
- Promoting by-products from the sewage treatment plants, and
- Planning and carrying out integrated projects.

There are 55 treatment plants and the length of public sewer pipes reaches 8,200 km in Tunisia, according to “Yearly Report 1998, ONAS”. The covering ratio of sewer pipes network by region is shown in Table A10.2.3. The average of that is 65% in 1997 and not so high. Particularly, that in South West (Tozeur, etc.) and South East (Gabes, etc.) is relatively low level.

Table A10.2.3 Covering Ratio of Sewer Pipes Network by Region

Region/Province	1996	1997	1998*	1999*
1. District of Tunis	77.4	78.7	77.6	76.4
2. North East (Bizerte, etc.)	74.4	74.9	75.5	76.2
3. North West (Beja, etc.)	80.0	82.7	85.5	86.9
4. Central West (Kairouan, etc.)	56.2	57.6	58.0	59.8
5. Central East (Sousse, etc.)	52.9	57.1	58.4	59.2
6. South West (Tozeur, etc.)	36.7	45.5	46.3	47.8
7. South East (Gabes, etc.)	22.8	25.1	25.2	26.2
Total	62.6	65.2	65.5	65.8

Note: (%), *: Estimated figures

Source: Ministry of Economic Development, ONAS, Report on Annual Indicators of Infrastructure, 1999

Beside Ministry of Equipment and Housing is a responsible organization for drainage treatment. As the combined system between drainage and sewerage has been adopted in the majority of the urban area, ONAS has been dealing with both treatments at this moment. However, it is scheduled that the separate system will be adopted for the new projects on their treatment.

A10.2.3 Power Supply

The power supply in Tunisia is operated by the National Company for Electricity and Gas (STEG) under the administrative supervision of the Ministry of Industry. The covering ratio of electricity service in 6 regions excluding Central West Region (Kairouan, etc.) is more than 90% which is high as shown in Table A10.2.4.

Table A10.2.4 Covering Ratio of Electricity Service by Province

Region/Province	1996	1997	1998*	1999*
1. District of Tunis	98.4	98.6	98.9	99.1
2. North East (Bizerte, etc.)	91.0	92.0	93.2	94.3
3. North West (Beja, etc.)	83.8	86.8	89.3	91.2
4. Central West (Kairouan, etc.)	69.0	73.5	77.4	82.2
5. Central East (Sousse, etc.)	96.5	97.2	97.9	98.1
6. South West (Tozeur, etc.)	93.9	94.8	95.2	96.5
7. South East (Gabes, etc.)	93.7	94.7	95.4	96.1
Total	90.4	91.9	93.3	94.5

Note: (%), *: Estimated figures

Source: Ministry of Economic Development, STEG, Report on Annual Indicators of Infrastructure, 1999

A10.2.4 Telecommunication

The telecommunication service in Tunisia is operated by the “Tunisie Telecom” under the administrative supervision of the Ministry of Telecommunication. The connecting ratio to telecommunication network of residents is quiet low as shown in Table A10.2.5. However, mobile phones have recently introduced widely and this situation will be drastically change in near future.

Table A10.2.5 Covering Ratio of Telephone Service by Province

Region/Province	1996	1997	1998*	1999*
1. District of Tunis	31.1	33.0	35.7	39.2
2. North East (Bizerte, etc.)	16.5	18.0	20.3	23.0
3. North West (Beja, etc.)	8.3	9.0	10.7	12.2
4. Central West (Kairouan, etc.)	6.5	6.9	8.1	9.0
5. Central East (Sousse, etc.)	23.4	26.1	29.1	33.5
6. South West (Tozeur, etc.)	14.7	16.4	19.1	21.8
7. South East (Gabes, etc.)	18.9	20.5	23.5	27.8
Total	19.0	20.7	23.1	26.2

Note: (%), *: Estimated figures

Source: Ministry of Economic Development, Tunisian Telecom, Report on Annual Indicators of Infrastructure, 1999

A10.3 KEY ISSUES

A10.3.1 Tourist Transport

In general, tourist transport in Tunisia is well developed and well organized thanks to the experience since 1950s in tourism development. However, for further tourism development with diversified activities and products, the following issues should be solved.

(1) Airports and Air Transport

a) Airports

Generally, airport facilities are well developed. However, tourist facilities such as waiting lounge, restaurants and coffee shop, tourist information, toilets, etc. should be improved particularly in the Airports of Jerba, Tozeur and Monastir. In addition, various tourist services including check-in, ticketing, tourist information, etc. should be improved in parallel with the above facility improvement.

b) International Air Transport

- Limited regular international connection other than major European cities (both Tunis Air and other foreign air companies).
- Limited foreign air companies operating regular flights to Tunisia.

c) Domestic Air Transport

- Reservation system; duplicated booking, limited availability of overseas booking, etc.
- Several lines are operated barely profitable; e.g., Tunis-Gabes, Tunis-Sfax, Tunis-Tabarka, etc.
- Availability of flights is limited in terms of frequency and variety of connection.

(2) Roads and Road Transport

a) Traffic signs for tourists

Traffic signs are generally well provided all over the country. However, many scattered tourist sites, especially in the southern region, are not easily accessible by individual tourists due to lack of appropriate tourist traffic signs indicating how to reach the target sites.

b) Access road to tourist sites and parking facility

In order to serve tourists better and to preserve value of the sites, access roads and parking should be well provided.

c) Some missing links

Generally, road network is well developed. However, some missing links among important tourist sites are found. This is due to the difference between regional development concept and tourists' behavior. Tourists insist only interesting tourist sites and like to follow their itinerary. Above all, an easy connection between Matmata and Tataoine via villages of ksars and ghorfas is the most important missing link.

(3) Rail Network and Rail Transport

Currently, railway is limitedly used as means of transport for foreign tourists. Therefore no major problem was found. More efficient use of railway in the tourism may be needed, particularly for domestic tourists and foreign individual tourists.

(4) Ports and Water Transport

In spite of efforts made by CTN, current operation does not contribute much to the tourism promotion. A marketing survey is essential.

A10.3.2 Utilities

(1) Water Supply and Sewerage Treatment

In some parts of the country, water supply for the tourism sector exceed more than 10 % of total consumption. Conservation of water consumption should be encouraged by more use of recycled water in hotels and sensitization of local people.

As for the sewerage treatment, refer to Section related to the environment.

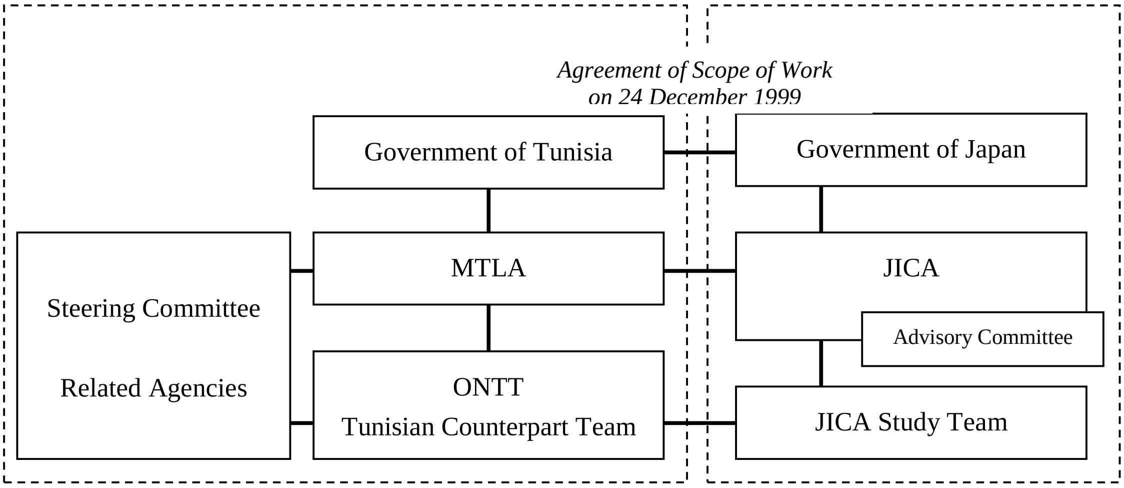
(2) Power Supply and Telecommunication

In the historical districts of Medina, power supply and telecommunication lines are in a mess. It is needed to put them underground. Television antennas are also harming the charm of historical Medinas. They may be needed to be replaced with multimedia cable television system installed underground.

A11 APPENDIXES

A11.1 STUDY ORGANIZATION AND MEMBERS

Study Organization



(1) Japan International Cooperation Agency (JICA)

JICA Advisory Committee:

Mr. SUZUKI Mitsuo	Leader / Tourism Development	Senior Executive Director, Harbor Transport Modernization Fund,
Mr. HANDA Masanori	Tourism Administration and Policy	Tourism Department, Policy Bureau, Ministry of Land Development and Transport

JICA Headquarters

Mr. HIRAI Toshio	Director, First Development Study Division, Social Development Study Department, JICA
Mr. KUMAGAI Hidenori	Deputy Director, First Development Study Division, Social Development Study Department, JICA
Mr. YUZURIO Susumu	First Development Study Division, Social Development Study Department, JICA

JICA Tunisia Office

Mr. NAMAI Toshio	Resident Representative of JICA Tunisia Office
Mr. TOMIZAWA Ryuichi	Deputy Resident Representative of JICA Tunisia Office

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Mr. KAMOUN Younes	Director, Study and Participation
Mr. NASRI Mustapha	Director, General Department
Mr. CHAPOTEAU Jean	Director, General Department
Mr. LAZEM Slah	Director of Management Control
Ms. KNANI Fethia	Director of New Products
Ms. JALILA Gara	Director of Administration and Finance
Mr. MEHREZ Dridi	Director of New Products
Mr. ESSAIES Ahmed	Director of Internal Audit
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Mr. ACHOURI Mokdad	Director, General Department
Mr. MEHRZI Affif	Director of Products
Mr. GHORBEL Rachid	Director of Heritage and Environment
Mr. FERCHICHI Habib	Director of Investment Promotion
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Mr. AYARI Nabiha	Department of Managers' Training
Mr. CHABAANE Hedi	Chief, Department of Investment Promotion

Members of Related Agencies

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Mr. BRADAI Amis	Cabinet, MTLA
Mr. BEL HASSINE Karim	MTLA
Mr. JOUNI Afraa	Cabinet, MTLA
Mr. BEN AYED Faouzi	General Inspection, MTLA
Mr. ASKRI Houda	Premier Minister Office
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Mr. EL KAMEL Borhene	MAE
Mr. HAOUALA Habib	MCIIE
Ms. ARAAR Emna	MCIIE
Mr. SOYED Bechir	MDE
Ms. BELKEFI Assia	MDE
Mr. DERWISH Walid	MF
Mr. LARBI Dabki Mohamed	MF
Mr. CHLIOUI Dhia	MI
Mr. KEDRI Med Salah	MC
Mr. LAHDHIRI Ezzeddine	MEAT
Mr. BEN HADJ ALI Hammadi	MEAT
Mr. BADREDDINE Mokchah	MEH
Mr. CHAFIK Bouraoui	MEH
Mr. HISSEN Lotfi	MT
Mr. OUERGUERMI	MS
Mr. ROMDHANE Abdallah	MS
Ms. LAMARI Khedija	MAS
Mr. BEN SALEM Habib	MAS
Mr. CHAHERLI Khaled	MFPE
Mr. RADHOUANE Kais	MFPE
Mr. EZZEDINE Boughdiri	MFPE
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Ms. SLIM Sihem	APAL
Mr. KSIA Anissa	APAL
Mr. CHABOUNI Maymoun	ONAS
Mr. REZGUI Faiza	ONAS
Mr. SKANDRANI Habib	DGDR
Mr. MALOUCHE Naceur	FTAV
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Mr. RACHID Ezzedine	CTN
Mr. MEHDI Mohamed	CTN
Mr. HACHAICHI Taieb	TCB
Mr. HIZAOUI Nouri	STEG
Mr. MARZOUKI Mokthar	Tunisie Telecom

(3) Study Team

Members of Study Team

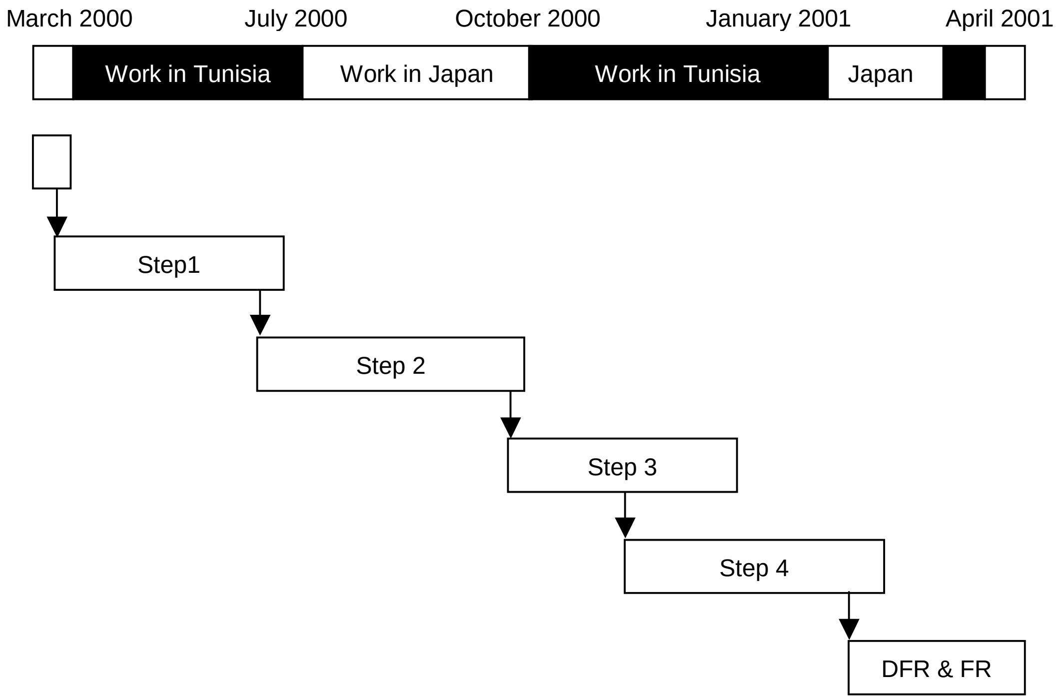
Mr. ISONO Tetsuo	Team Leader/ Tourism Development
Mr. SAKAMOTO Hideo	Deputy Team Leader/ Tourism Resource Evaluation
Mr. SASAGUCHI Kazuhiko	Tourism Administration
Mr. TAKAKUWA Kiyoaki	Tourism Marketing/ Demand Projection
Mr. SUZUKI Toshihito	Tourism Promotion
Mr. KNIGHT Manuel L.	Tourism Product Development
Mr. KISHINAMI Atau	Tourist Services/ Human Resource Development
Mr. WATANABE Akifumi	Socio-Economic Impact Analysis
Mr. OSHIMA Nobuhiro	Infrastructure/ Implementation Program
Ms. KONDO Akiko	Tourism Facilities/ Land Use
Mr. KIMURA Kenji	Financial and Economic Analysis/ Investment Planning
Ms. HASHISAKO Megumi	Environmental Impact Assessment
Ms. SHINONAGA Yuko	Coordinator

A11.2 STUDY SCHEDULE

The Study comprised the following steps according to the objectives of the Study, which cover all aspects described in the Scope of Work for the Study:

- Preparatory Study;
- Step 1: Assessment of the current situation of Tunisian tourism including comparison with competing destinations,
- Step 2: Formulation of a draft National Tourism Development Plan with the target year 2016,
- Step 3: Formulation of tourism development plans for the selected regions with the target year 2016,
- Step 4: Formulation of Action Plan with the target year 2006, and
- Final Report preparation.

Figure A11.2.1 Study Schedule



Source: JICA Study Team

A11.3 SUMMARY OF THE SEMINAR IN JAPAN

1. Introduction

1.1. Objectives

The objectives of the seminar were: i) to enhance understanding of the Japanese and East Asian Tourism Market for the Director General of the ONTT Mr. Mohamed Saifallah LASRAM, who visited Japan to join this seminar, and for the Director of ONTT Mr.Younes KAMOUN, who visited Japan as a JICA counterpart trainee; and ii) to facilitate understanding of the Study among concerned parties in Japan, thorough the exchange of opinions on the current issues and direction of future tourism development in Tunisia.

1.2. Program

Date: 13:30 – 17:30, 8th June (Friday) 2001

Place: International Conference Hall, Institute for International Cooperation (IFIC)

Agenda:

1. Opening Speeches
1) Mr. Takanori JIBIKI
Managing Director of JICA Social Development Study Department
2) H.E.M. Salah HANNACHI
Ambassador of the Republic of Tunisia to Japan
2. Presentation
1) Mr. Mohamed Saifallah LASRAM
Director General of ONTT
2) JICA Study Team
(Coffee Break)
3. Panel Discussion
"Development of Tourism Products and Diversification of Markets"
4. Question and Answer Session

1.3. Participants

There were 80 participants from various agencies including the Embassy of Tunisia, the Japanese and Tunisian Governments, JICA, universities, research institutions, travel agents, and others. Participants include the following panelists:

H.E. Mr. Salah Hannachi
Ambassador of the Republic of Tunisia to Japan

Mr. Mohamed Saifallah LASRAM
Director General, Tunisian National Office of Tourism

Mr. Younes KAMOUN
Director for General Department, Tunisian National Tourism Office

Ms. Ayako AOKI
Director, Moroccan National Tourist Office (ONMT) in Japan

Mr. Mitsuo SUZUKI
Leader of the JICA Advisory Committee for the Tourism Development Study in Tunisia

Mr. Akira MIZUNO
Assistant to General Manager, Travel Plaza International Co., Ltd.

Ms. Keiko TAKAKI
Professor, Department of International Studies, Obirin University

Mr. Yuji ARAI
Research fellow, Japan Society for the Promotion of Science

Mr. Tetsuo ISONO
Leader of the JICA Study Team for the Tourism Development in Tunisia

2. Record of the Seminar

2.1. Opening Speech

Firstly, Mr. Jibiki, Managing Director of JICA Social Development Study Department, and H.E. Mr. Hannachi, Ambassador of the Republic of Tunisia to Japan, made opening speeches to begin the seminar.

Mr. Jibiki stated that Tunisia's richness in tourism resources, particularly beautiful beaches and cultural heritages, is among the great advantages, based on which ONTT has made a significant effort for tourism development. He briefly explained the JICA tourism development study in Tunisia, including strategic planning based on development needs, tourism promotion plans, formulation of regional plans for selected regions, and pre-feasibility studies on priority projects. He added that the cooperative relationship between ONTT and JICA will be strengthened in terms of tourism development and that this seminar will help those in the Japanese travel industries understand the outcome of the study.

H.E. Mr. Hannachi, Ambassador of the Republic of Tunisia to Japan, began his speech by expressing gratitude to a number of people concerned for their valuable advice on tourism development in Tunisia. In view of the great opportunities in the Japanese and East Asian markets as well as the deepening relationship in various fields between Tunisia and Japan, he stressed the need for tourism product development based on the analysis of Tunisia' strengths, environmentally sustainable development, and the effective use of resources possessed by Tunisia. Finally, he proposed the "oasis approach", making steady progress in developing and providing new products from a long-term perspective in order to meet the new needs, e.g., those for Asians.

2.2. Presentation

After briefly introducing general conditions, tourism resources and products, and historical background of tourism development in Tunisia, Mr. Lasram, Director General of ONTT, explained the current status and progress of tourism development in Tunisia as follows:

- Accommodation capacity has been significantly increased along the Mediterranean coastline, with more than 30% of the capacity being 4- and 5-star units. Mobility has also been made easier with the infrastructure development, and sewerage treatment has been installed.

- Product development for niche markets has also been undertaken, including golf and thalassotherapy close to beach resorts.

- There are various resources unique to Tunisia including culture and Sahara, with a number of world heritages existing. Safe trips can be guaranteed across the country.

- Quality improvement will be made for further developing the tourism, including increasing leisure facilities; themed beach products including events on water and sea and ecotourism; improving the environment for families to go for a safe trip; development of cultural tourism; implementing the open-sky policies thereby increasing the number of seats; human resources development; increasing the share in traditional markets as well as market development in the long-haul market; and promoting the political stability and safe image.

Finally, the Director General expressed his gratitude to JICA and those concerned for their various advices and the study results, hoping that this friendly relationship between Tunisia and Japan will be deepened further.

After the speech by the Director General, a video presentation on the contents of the study's draft final report was made. The video was produced by the study team in consideration of detailed contents, ease of comprehension, and conciseness.

2.3. Panel Discussion

Nine panelists presented a variety of significant points of view related to tourism development in Tunisia at the panel discussion, moderated by Mr. Isono, study team leader. Major points are illustrated in the following subsections (those written *in Italic* are the opinions or comments made by the Ambassador, the Director General of ONTT, or the Director of ONTT, as specified below):

(1) Tourism development in the face of international competition

- While Tunisian tourism grew very rapidly in the 1980s offering the inexpensive alternative of vacation for Europeans, recent trend is fairly stable compared with major neighboring destinations. Europeans tend to choose new destinations if the price becomes comparable, e.g., the Gulf countries.

- Tunisia has various strengths in addition to beautiful beaches, including Sahara, rich cultural resources, and moderately Westernized living style. The fact that 80% of tourists are beach holiday vacations indicates the lack of promotion in other aspects of Tunisian tourism.

- There is also much room for inviting foreign companies for accommodation development. In this regard, Tunisia considerably lags behind Egypt where a number of international hotel chains are coming in.

- *(Ambassador) Tourism development for health is also important, including thalassotherapy, particularly because the cost for this tourism is very high in Europe. In addition, there is room for developing tourism for shopping.*

- *(Director General) As for the inexpensive image of Tunisia, I would like to regard this as positive, meaning that the quality-price balance is good. It is important to maintain this good balance.*

- *(Director General) While Tunisia benefited the unexpected incidents in competing countries, looking closely at the statistics we can find that Tunisia has built on these incidents, further increasing the number of visitors following them.*

- *(Director General) As for the existence of few international hotel chains in Tunisia, there is a background that Tunisian tourism has been developed on its own, thereby domestic promoters having grown up. The existence of few international chains does not necessarily mean low quality. In addition, several international chains exist in Tunisia, with more to be coming soon.*

(2) Sustainable tourism development

- It would be necessary to consider (i) for whom the development will be undertaken, and (ii) sustainability of tourism development.

- The development of cultural tourism should be not only for foreign visitors but also for local people, making them proud of their own culture and Arabic and Moslem tradition. This is also true of nature and Sahara/Oasis life, which can be proudly presented by Tunisian people.

- One idea is to adopt an approach of "one unique product in one area", stimulating the self-help efforts for local people.

- In terms of sustainability, several points were raised: need for developing inland areas, thereby contributing to more equitable distribution of wealth; development of appropriate scale (note: Japan has a number of experiences with failure due to large-scale development) including the development of family pensions; and need to consider scarce water sources in desert areas, and an idea to develop model oasis farms where tourists can experience the desert life, tradition and farming.

- Visitor facilitation is also very important for tourism development in local areas, including the provision of signboards presenting the background of historical architectures and places of beauty and historic interests, which could possibly contribute to attracting highly educated people. Even preparing a city map will make a difference.

- *(Ambassador) As commented, it is necessary to consider for whom the tourism sector should be developed, paying attention to giving dignity to Tunisian people.*

- *(Director General) As for the family pensions, they exist in Jerba and are in operation. This* *kind of lodging is being developed in Tunis Medina as well.*

(3) Attractiveness and issues on Islamic life and architecture

- While medinas in Tunisia have various attractive features, there are several issues, including (i) the inside of mosques can be only partially visited, while in some other countries, visitors can directly experience the Islamic space; (ii) image of darkness in old cities inside medinas; and (iii) there are rooms for effective use of living spaces for visitors.

- Currently, medinas lack in features to provide enjoyable walking experiences for visitors, e.g., introducing people's life and tradition through which visitors can better understand Tunisians.

- In sum, the issues on the use of medinas for tourism purposes include: need for offering enjoyable walking experiences for tourists; need for improving the attitude of shop keepers; opening mosques to public; lack in the introduction of Islamic culture and life; and lack in provision of maps and information inside medinas. It would be necessary to enhance the attractiveness of people's lives and culture in order to capture comeback opportunities.

(4) Tourism promotion in Japan

- From the viewpoint of the Japanese market, tourists are likely to choose a destination from a number of alternatives in the world, and Tunisia is not really competing with other Maghreb countries. In view of this, it may be a promising approach to promote the Maghrebs in cooperation, e.g., with Morocco.

- For the promotion of Morocco in Japan, the initial objective was to increase the number of Japanese people who like Morocco, rather than increase the number of Japanese visitors to Morocco.

- For this purpose, a number of inexpensive promotional measures were used, including inclusion of Casablanca as part of the major European cities for weather forecasts on Japanese TV; making T-shirts promoting Morocco (rather than Casablanca that has been more well-known than Morocco in Japan); use of media including newspaper, radio and TV; requesting naming little green rose existing in Morocco while having been unnamed in Japan as "Lady Casablanca"; proposing the change in the location of a Japanese TV drama to cities in Morocco, and the use of "Lady Casablanca" in the drama (which actually materialized); and proposing the use of Marrakech in a song of a very famous Japanese singer (which actually materialized).

- In promoting Morocco, while its exotic feature is being emphasized, the points not meeting the expectation of Japanese tourists are also being frankly conveyed to them, including the difference in the sense of time between Japan and Morocco in order not to unexpectedly dissatisfy them when visiting Morocco.

- *(Ambassador) After explaining the promotional activities undertaken in Japan, H.E. Mr. Hannachi commented that in cooperation with other countries, it may be possible to develop tourism products for the Mediterranean basin that used to be called the "Phoenicia Rim" in order to meet the future needs.*

- *(Director General) It is necessary to strengthen the marketing and promotion in such a big market, Japan, thereby supplementing the efforts made by the Ambassador.*

(6) Overall Comments

- Implementing the proposed plans is important for further development of Tunisian tourism, with an approach as suggested by the Ambassador, i.e., the "oasis approach" of making steady progress in tourism development from a long-term perspective.

- There could be a possibility of financial assistance from Japan for implementing the proposed projects, and for that, it is essential for the Tunisian side to undertake prioritization of the project components.

- Potential measures for attracting a greater number Japanese tourists may include: developing star attractions, e.g., emphasizing the Phoenician city state which is unique to Tunisia; better and easier access; better services in receive tourists; emphasis on safety, thereby getting rid of the image of danger likely to be created by the neighboring countries; emphasis on “soft” image relative to other Moslem countries; and developing souvenirs and handicrafts that are light in weight, fashionable and easy to handle.

- A mission from JATA (Japan Association of Travel Agents) dispatched to Tunisia last year returned with a very good impression on Tunisian tourism, which is in fact a promising sign. In view of the fact that most Japanese tourists to Tunisia go on a package tour at this stage, it is recommended to strengthen the approach to Japanese travel agents.

- *(Director General) Through my visit to Japan, my knowledge in Tunisian tourism was deepened, and found that Tunisian tourism will be highly valued through the improvement in its quality and directing the development efforts to details. This way, profitability and sustainability can be achieved.*

- *(Director) We are considering the implementation of the proposed plans and improving tourism-related facilities, possibly including more focused studies based on the study results; diversifying the types of hotels from a long-term perspective; adding value to the existing products as well as developing new products, thereby improving profitability of the tourism sector; and developing cultural tourism in the inland areas as well as along the coastal areas (while beach resorts will continue to be the main products), which will contribute to vitalizing the rural economy and to more equitable distribution of income across regions. We are hoping that travel agents in Japan will help increase Japanese visitors to Tunisia.*

2.4. Question and Answer Session

Q1: To what extent does the tourism sector contribute to the Tunisian economy, and what is the size of the Japanese tourists visiting Tunisia?

A1: *(ONTT) The tourism sector plays a significant role in the national economy, accounting for 6-7% of GDP and 17-18% of total amount of exports. Currently, the number of Japanese visitors to Tunisia is about 10,000 per year, but it is increasing very rapidly in recent years in percentage terms.*

Q2: There are several requests to the Tunisian tourism: train guides who can use the Japanese language since Japanese generally do not have a good command of foreign languages; improve services to receive tourists in group as Japanese tourists generally behave this way; make everything ready in time as they are demanding in terms of timeliness; hope to create star attractions that are the favorite of Japanese tourists; increase shopping opportunities that are also their favorite; set a target of the number of Japanese visitors and undertake marketing and promotion based on that target.

A2: *(ONTT) Although Japanese tourists visiting Tunisian are still not many, we are getting to know their characteristics, recognizing the need for significant efforts to increase them. We would like to make efforts to respond to the need of the Japanese tourists.*

Q3: It would be good to establish an office of Tunisair in Japan. Also, it would be a promising approach to undertake joint marketing and promotion between Tunisia and Morocco.

A3: *(ONTT) The reason for Tunisair’s not having the office in Japan is that it is a national airline* *focusing on relatively short-haul markets without providing services for long-haul markets. As for the joint marketing and promotion, the issue would be to implement it. We have undertaken this jointly with Morocco in Canada. It is quite possible to do this also in Japan.*

A11.4 SURVEY QUESTIONNAIRES

A11.4.1 Foreign Tourists' Interview Survey

TUNISIAN TOURISM MARKETING SURVEY (1)
International Tourists Questionnaire Survey

Ministry of Tourism, Leisure and Handicraft

Tunisian National Tourism Office

Questionnaire for Tunisian Tourism (May -July 2000)

Q-1 How Long Are You Staying in Tunisia?

1) How many nights in Tunisia	(1) below 2	(2) 3 to 5		(3) 6 more
2) How many nights in Tunis	(1) 0	(2) 1	(3) 2	(4) 3 more
3) How many nights in Hammamet	(1) 0	(2) 1	(3) 2	(4) 3 more
4) How many nights in Sousse	(1) 0	(2) 1	(3) 2	(4) 3 more
5) How many nights in Jerba	(1) 0	(2) 1	(3) 2	(4) 3 more
6) How many nights in Tozeur	(1) 0	(2) 1	(3) 2	(4) 3 more
7) How many nights in Others (where:				)
	(1) 0	(2) 1	(3) 2	(4) 3 more

Q-2 Countries You Plan To Visit Before / After Tunisia?

(1) Morocco (2) Egypt (3) Malta (4) Cyprus (5) Italy
(6) Libya (7) Others ( )

Q-3 Are You On A Packaged Tour? (1) Yes (2) No

Q-4 You Are Travelling With

(1) Alone (2) Spouse (3) Family (4) Friends (5) Others

Q-5 How Many Times Have You Traveled Overseas?

(1) First time (2) 2~4 times (3) 5~9 times (4) 10 times or more

Q-6 Have You Ever Visited Tunisia?

(1) First time (2) 2 times (3) 3 times (4) 4 times or more

Q-7 Purpose of Visit

(1) Holiday (2) Business (3) Official (4) Holiday/Business combined
(5) Visiting Friends or Relatives (6) Others ( )

Q-8 Have You Considered Other Destinations Before Choosing Tunisia?

(1) Morocco (2) Egypt (3) Malta (4) Turkey (5) Portugal
(6) Spain (7) Greece (8) Israel (9) Others ( )

Q-9 You Have Chosen Tunisia. Because Of:

(1) Beach Holiday (such as Hammamet, Port el Kantaoui, Jerba, etc.)
(2) Archeological Sites (such as Cartage, Dougga, El Djem, etc.)
(3) Cultural Sites (such as Medina in Tunis, Medina in Sousse, etc.)
(4) Natural Wonder (such as Sahara, chott el Jerid, etc.)
(5) Others ( )

Q-10 Useful Information Source

(1) Tour Brochure (2) Guidebook
(3) Newspaper / Magazine (4) Recommended by Friends (5) Internet
(6) Others ( )

Q-11 More Information Needed

(1) Tourist Sites (2) Hotels (3) Restaurants
(4) Maps (5) Transport (6) Souvenir (7) City Amusement
(8) Others ( )

Q-12 Have You Visited Cultural Sites?

1) Cultural Sites

(1) Bardo Museum
(2) Carthage and Sidi Bou Said
(3) Dougga
(4) El Djem
(5) Others ( )

2) Value	Good	Fair	Poor
3) Interpretation	Good	Fair	Poor
4) Signage / Facility	Good	Fair	Poor

Q-13 How Good is Your Accommodation?

1) Room	Good	Fair	Poor
2) Meal	Good	Fair	Poor
3) Facility	Good	Fair	Poor
4) Service	Good	Fair	Poor

Q-14 Have You Tried Restaurant Outside of Your Hotel?

(1) Yes (2) No

1) Food / Menu Served	Good	Fair	Poor
2) Price	Good	Fair	Poor
3) Hygiene	Good	Fair	Poor
4) Waiter / Waitress	Good	Fair	Poor

Q-15 What Souvenir Did You Buy?

1) Souvenirs

(1) Handicraft of Fabric (Embroidery, Rug, Weaving)
(2) Handicraft of Wood (Basketwork, Carving)
(3) Handicraft of Brass, Copper, Ceramics
(4) Jewelry
(5) Others ( )

2) Quality of Product	Good	Fair	Poor
3) Price	Good	Fair	Poor
4) Shop Attendant	Good	Fair	Poor

Q-16 What Is Your Approximate Travel Expenses in Tunisia?

If You Are **On A Package Tour**

Total About ______________________________(in Tunisian Dinar)
(of which: Meals %, Souvenir %, Others %)

If You Are **NOT** On A Package Tour

Total About ______________________________(in Tunisian Dinar)
(of which: Hotels /Meals %, Transport %,
Souvenir %, Others %)

Q-17 How Good is Your Tour?

1) Tunis	Good	Fair	Poor	N/A
2) Hammamet	Good	Fair	Poor	N/A
3) Sousse	Good	Fair	Poor	N/A
4) Jerba	Good	Fair	Poor	N/A
5) Tozeur	Good	Fair	Poor	N/A
6) Others (where:		)		
	Good	Fair	Poor	

Q-18 How Do You Rate Tunisia in terms of:

1) Inland Landscape	Good	Fair	Poor	
2) Seaside Landscape	Good	Fair	Poor	
3) Urban Amenity	Good	Fair	Poor	
4) Security	Good	Fair	Poor	
5) Sanitary Conditions	Good	Fair	Poor	
6) Tourist Attractions	Good	Fair	Poor	
7) Tourist Transport	Good	Fair	Poor	
8) Tourist Information	Good	Fair	Poor	
9) Tourist Guide	Good	Fair	Poor	
10) Customs & Immigration	Good	Fair	Poor	
11) Money Exchange	Good	Fair	Poor	
12) Hospitality		Good	Fair	Poor

Q-19 Are You Satisfied With Your Tunisia Visit?

Good Fair Poor

Q-20 Are you going to recommend your friend to visit Tunisia?

Yes No

Q-21 Your Profile Please

1) Gender	(1) Male	(2) Female	
2) Age	(1) 25 below	(2) 26 ~ 35	(3) 36 ~ 45
	(4) 46 ~ 55	(5) 56 ~ 65	(6) 66 over
3) Country of Residence	( )		
4) Nationality	( )		
5) Activity	(1) Liberal Profession (Executive)		
	(2) Manager (Trade, Industry)		
	(3) Senior Civil Servant		
	(4) Employee		
	(5) Labor		
	(6) Retired		
	(7) Inactive		
	(8) Farmer		
	(9) Student		
	(10) Others		

Thank you for your time and cooperation

Survey Airport: (1) Tunis (2) Jerba(3) Monastir (4) Tozeur
Date: Month ( ) Day ( )
Sample No. ( )

A11.4.2 European Tour Operators' Survey (including Tunisian Tourism Industry)

TUNISIAN TOURISM MARKETING SURVEY (2)
Interview Survey of Tour Operators in the European Countries and Interview Survey of Ground Operators and Airlines in Tunisia

INTERVIEW RECORD (A)

Date:
Agency Visited, Address:
Person Interviewed, Position:
Interviewed by:

Agency Profile:
When started:
How many employees:
Number of Tourists handled: pax
Major destinations:

North African Operations:

North African destinations:	Tunisia	pax
	Morocco	pax
	Egypt	pax

Tour Brochure/Catalog (at least two copies):

Typical itinerary:

Major Market Segment:
General Tourist on GIT package
SIT (Special Interest Tourists (culture tourism, archaeology, etc))
Others ( )

Market Perception of Tunisia as "a Tourist Destination":
(vis-a-vis neighboring destinations of Morocco and Egypt)

Tunisia's Potentials for Future Destination Development:
(vis-a-vis neighboring destinations of Morocco and Egypt)

Constraints and Issues for Tunisia's Destination Development:
- Tourist Resources and Attractions:
(Tourist Sites, Museums, Presentation, etc.)

- Entrance Fee
The "maximum" amount that you will be OK to pay to enter or use the following tourist sites (unit: TD)

Carthage (common ticket):	5	7.5	10	15
National Museum of Bardo:	3.5	5	7.5	10
El Djem (L'amphitheater):	5	7.5	10	15

- Tourist Facilities (Hotels, Restaurants, etc.):

- Tourist Services (Guide, Shopping, Souvenir, etc.):

- Tourist Transport (Tourist Coach, Taxi, etc.)

- Entry / Exit Formalities

- Tourism Support Infrastructure:
(Airport, Road, Telephone, etc.)

- Promotion (Overseas / in Syria / on Tourist Site):

Position of Tunisia vis-a-vis neighbor destinations (Morocco and Egypt)

- What is Tunisia's Advantage over the neighbors:

- What is Tunisia's Weakness compared with the neighbors:

What should Office National de Tourisme Tunisien (ONTT) do to promote:

- In Tunisia:
    - Tunis Gateway
    - Others
- Overseas

INTERVIEW RECORD (B)

Date :
Agency Visited, Address :
Person Interviewed, Position :
Interviewed by :

Agency Profile:
When started:
Category:
How many employees:
Number of Tourists handled: pax
Major Clients (from):
France: pax
Germany: pax
UK: pax
Italy pax
Poland pax
Spain pax

Typical itinerary:

Major Market Segment: General Tourist on GIT package
SIT (Special Interest) Tourists (culture tourism, archaeology, etc)
Others ( )

Tunisia's Potentials for Future Destination Development:

Constraints and Issues for Tunisia's Destination Development:

- Tourist Resources and Attractions:
  (Tourist Sites, Museums, Presentation, etc.)

- Tourist Facilities (Hotels, Restaurants, etc.):

- Tourist Services (Guide, Shopping, Souvenir, etc.):

- Tourist Transport (Tourist Coach, Taxi, etc.)

- Entry / Exit Formalities

- Tourism Support Infrastructure:
  (Airport, Road, Telephone, etc.)

- Promotion(Overseas / in Tunisia / on Tourist Site):

Interview of European T.O

List of interviewees

ITALY

1 ALPITOUR (GIT) : Product Manager (Mr. Maurizio MONTU)

2 COSMORAMA (SIT-regional) : Managing director : Leonardo BISOGNI

SPAIN

1 JULIA TOURS (GIT) : Product Manager for North Africa Middle East & Europe : Gabriel GUILLEN

2 TOUCALP (SIT Golf) : Product Manager : Palo GACIAROUS

HOLLAND

1 Holland International (GIT) : Contact Manager (Minou BRUELS)

2 Advanced Travel Partners : Commercial manager (Karl JERKINS) (SIT : incentives)

POLAND

1- S -TOURISTS (GIT) : Regional Manager (Hanna BARGIEL)

2- BEST REISEN (SIT : incentive/cult) : Product Manager / Tunisia : Mondher MEHILI

Ground Operators

List of interviewees

1- T T S :	Executive Tourism Manager (Mohamed DGHAM)
2- Tunisie Voyages :	Executive Tourism Manager (Faiza BENABID)
3- Voyages & Loisirs de Tunisie	General Manager (Slah JGHAM)
4- Hammamet Travel Service	General Manager (Mohamed KHOUJA)
5- Orange Tours Tunisie	Technical Manager (Faouzi AlAdab)
6- Carthage Tours	Genera Manager (Mme Soukri)
7- Holiday Travel Tunisia	Technical Manager (Mohsen BAOUENDI)

Airlines Operators

List of interviewees

1- Tunis Air	Sales Manager / charters flights (Ridha CHEIKHROUHOU)
2- Nouvel Air	Commercial Manager (Karim DAHMANI)
3- KARS –	General Manager (Moncef KHELIL) (German Charters flights Representative)
4- ATAC S	General Manager (Mounir AROUS) (Multinational Charters flights Representative)

A11.4.3 Interview Survey for Social Impacts

Social inquiry

Date :
Name and Address of interviewee :
Region of interview :
City :
Name of surveyor :

Do you think that tourism is an important economical activity :
Q1 : for the country ?
Q2 : for the region ?

Q1 1	Absolutely agree	Q1 2	
Q2 1	Agree	Q2 2	
Q3 1	No opinion	Q3 2	
Q4 1	Disagree	Q4 2	
Q5 1	Absolutely disagree	Q5 2	

Q3-Do you think that tourism is a sector which creates employment?

Q1 3	Absolutely agree	
Q2 3	Agree	
Q3 3	No opinion	
Q4 3	Disagree	
Q5 3	Absolutely disagree	

Q4 -Do you think that tourism development is a solution for the problem of unemployment?

Q1 4	Absolutely agree	
Q2 4	Agree	
Q3 4	No opinion	
Q4 4	Disagree	
Q5 4	Absolutely disagree	

Q5-Can you precise whether:

Q1 5	You have already worked in the field of tourism	
Q2 5	You are working now in the field of tourism	
Q3 5	You intend to work in the future in the field of tourism	
Q4 5	You have never worked and you do not intend to work in the field of tourism	

Q6-How do you estimate the global impact of tourism on the economical activity in your region?

	Excellent	good	average	bad	Too bad
A1- 6					

Q7-What impact tourism in your region has on :?

		excellent	good	average	bad	Too bad
Q1 -7	The improvement of incomes					
Q2- 7	The cost of living					
Q3- 7	Access to leisure					
A4- 7	Improvement of infrastructure					
A5- 7	Standards of life					
A6- 7	Scholarship and education					
A7- 7	Emigration					

Q8- How do you evaluate the impact of tourism on:?

		Very negative	Negative	Neutral	Positive	Very positive
Q1 -8	Arabic language					
Q2- 8	Traditions					
Q3- 8	Values & Morals					
Q4- 8	Clothing fashions					
Q5- 8	Other aspects					

Q9- Do you think that it is a good thing that tourism enables you to discover some aspects of their culture, as :

		Totally agree	Agree	No opinion	Disagree	Totally disagree
Q1-9	Traditions					
Q2-9	Values & Morals					
Q3-9	Clothing fashions					
Q4-9	Foreign languages					
Q5-9	music					

Q10- To what extent do you agree with people who consider tourist mainly as :

		Totally agree	Agree	No opinion	Disagree	Totally disagree
Q1- 10	Source of income					
Q2- 10	Foreigners who disturb daily life					
Q3- 10	Foreigners with other culture with whom anybody can have exchange relationship					
Q4- 10	Other answer					

Q11- Do you think that tourism helps to promote the following aspects of Tunisian culture abroad, like :

		Totally agree	Agree	No opinion	Disagree	Totally disagree
Q1- 11	Customs & Traditions					
Q2- 11	Values					
Q3- 11	Clothing fashions					
Q4- 11	Arabic language					
Q5- 11	Culinary aspects					
Q6- 11	History of Tunisia					
Q7- 11	Music and Arts of Tunisia					
Q8- 11	Other aspects					

Q12- Do you agree with this statement that tourism contributed to give more value to

		Totally agree	Agree	No opinion	Disagree	Totally disagree
Q1- 12	Historical heritage, like ruins, archeological sites					
Q2- 12	Aspects of Tunisian folk					
Q3- 12	New regions for tourism					
Q4- 12	Products of handcraft					
Q5- 12	Other					

Q13- In some tourism region, families who have facilities offer services to tourists like

1. renting rooms
2. soft drinks and meals in traditional way
3. special events with traditional music and drinks
4. other activity

Q13A – Which from those activities are you interested in and which fits with your situation?

Activity	Yes	No	Other
1			
2			
3			
4			

Q13B – (if yes) Do you intend to launch such activity –ties ?

Activity	Yes	No	Other
1			
2			
3			
4			

THANK YOU VERY MUCH FOR YOUR COOPERATION

OTHER INFORMATION

Sex : **Age :**

Profession :

Marital status :

Level of instruction :

Number of persons in charge :

Tozeur : Do you own a land in oasis ? **yes** **no**

Matmata : Do you own a cave dwelling ? **yes** **no**

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