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PROSPECTS FOR GERMAN FOREIGN POLICY

Economy as an Engine for Change: Opportunities of Increased Engagement in the Maghreb

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The political upheavals in the region and increasing security challenges are posing further major socio-economic problems for the countries of the Maghreb, requiring concrete and thorough answers. Due to their geo-strategic location as well as their economic potential for development as important growth markets, the Maghreb states are of particular significance for both German foreign policy and foreign trade. Economic development and vocational education are key to any success in the long-term and simultaneously a means of promoting regional stability in Northern Africa. Taking into account the different needs and realities of the countries, this paper sets out the essential challenges and obstacles for sustainable economic development. Based on this information, concrete recommendations for German (and European) policy makers are formulated which may help to sustainably promote the region's development potential by means of concerted know-how transfer.

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I. STATUS QUO

A frequently quoted Maghrebean saying goes as follows: "The Maghreb is a sacred bird. Its body is Algeria, its right wing is Tunisia, its left one Morocco." However, when one views the Maghreb region from a political and economic perspective, this natural unity must be called into question. Even though the Maghreb countries are facing comparable socio-economic challenges, such as extreme levels of unemployment, an expanding informal labor market, large regional disparities in view of the proportion of investment-deprived regions as well as to some extent very difficult funding and investment conditions as regards the private sector, their circumstances and, respectively, their development prospects vary a lot. This needs to be taken into consideration when it comes to the formulation of concrete policy recommendations aimed at furthering economic prospects in the countries of the region.

The official population of the Maghreb countries amounts to 87.5 million, with a population share of 60 per cent within an age range of 15 to 64 years or rather an average age of 26. The official youth unemployment rate varies between 30 and 35 per cent (2012). These numbers reflect the Herculean task that the Maghreb countries are currently confronted with. This is exacerbated by the fact that the respective states are faced with massive domestic and (intra)regional challenges against the backdrop of the political upheavals in North Africa. From a domestic policy perspective, the previously depicted socio-economic challenges are thus even complemented by questions concerning the social order, the distribution of political power as well as safeguarding natural resources in the medium term. From an (intra) regional perspective, the Maghreb is confronted with the increasing problem of how to control simmering border conflicts, flourishing trade in arms and drugs as well as smuggling and the growing terrorist presence in the Sahara border areas of Algeria, Libya and Tunisia.

While the Maghreb states made an attempt back in 1989 to respond to these challenges by the establishment of the so-called *Union du Maghreb Arabe* (UMA), this integration format has up to now unfortunately not achieved any success worth mentioning. The free trade zone that was planned for 1992 has not yet been realized. Neither have been initiatives to implement much-needed deeper political and economic integration due to two main reasons. The greatest obstacles to regional integration are intra-regional conflicts, in particular the Western Sahara dispute between Morocco and Algeria. Secondly, and not least due to the above-mentioned regional conflicts, the Maghreb countries are confronted with a complex framework of diverse (more or less efficient) inte-

gration and dialogue formats, which helps to systematically bypass the "troubled waters" of regional tensions. Nevertheless, there is a high price to pay – there is no common regional approach to complement national economic development strategies. If regional cooperation does take place, it is in fact dominated by bilateral interests, as for example the development of economic relations with the European Union (in particular in the case of Tunisia and Morocco) as well as more recently by an increasing orientation towards Sub-Saharan Africa.

Consequently, the Maghreb represents the least integrated neighborhood in the world. According to a recent study by the African Union (AU), the intra-Maghrebean trade volume amounts to a mere 3.36 per cent on a global comparison. The trade volume of the Association of South-East Asian Nations (ASEAN), by contrast reaches 21 per cent, the *Mercado Común del Cono Sur* (Mercosur) 19 per cent and the Economic Community of West African States (ECOWAS) 10.7 per cent, respectively. Repeatedly experts underscore the important impetus towards expansion in the case of improved regional cooperation and integration. In 2006, the World Bank calculated the potential growth benefits for a reference period of ten years (2005-2015). According to these calculations, increased intra-Maghreb integration would boost per capita income in the central Maghreb countries by 25 to 30 per cent, provided that more effective reforms are implemented to gradually liberalize services and investment conditions.

When one considers the current regional outlook, the concrete economic and consequently also (security) benefits of a common market are obvious. Keywords to be underscored in this context are above all the necessary intra-regional exchange, as is economic attraction for foreign investors, the development of the regional infrastructure, and lastly the shortage of and therefore competition for resources (which probably represents the largest long-term challenge in view of gradual desertification in Northern Africa).

II. ANALYSIS

Considering the above-depicted situation, there is a need for immediate action in five key areas, in order to sustainably develop economic perspectives in the countries of the Arab Maghreb:

First of all, the Maghreb states require well-targeted measures to combat systemic youth unemployment, which can also subsequently contribute significantly to a political stabilization of the entire region. Currently, youth unemployment varies between 30 and 35 per cent. In Tunisia for example



the number of graduates increases by nine per cent each year. Consequently, the supply of new jobs for university-educated people of around 30,000 per annum cannot meet an average demand of 59,600 young jobseekers. Many young adults are therefore forced to accept jobs for which they are overqualified or underpaid, ever more frequently in the informal sector. The high unemployment rate also represents an obstacle to social participation, as marriage between young people without a job is unacceptable in Tunisian society and their families alike. This situation had a great impact in fuelling social protest in Tunisia in particular and was one of the main reasons for the political upheavals two years ago.

The main cause underlying the high unemployment rate is the asymmetrical structure of the labour market, which is characterized by a "quantitative and qualitative imbalance" according to the Tunisian economist Mohammed Kriaa. This means that as its neighbours, Tunisia has a "self-created" problem to solve: Many school graduates go to college and university, not least for reasons of social status, even if this is ultimately not being rewarded by career prospects. According to analyses by the Tunisian Centre for Monitoring and Economic Intelligence (CTVIE), only 10 per cent of the existing post-school educational programmes are in the area of vocational education while 90 per cent is left to the university and higher education sector. This remains in stark contrast to actual demand. There are over 100,000 jobs in the area of skilled crafts and manufacturing that cannot be filled because there is a shortage of skilled workers.

Fifty years after its independence, the resource rich Maghreb state Algeria is also facing major social challenges. The country's population has been expanding by 26.79 million over the last fifty years with regional disparities increasing at the same time. The country's rentier economy relies to a large extent on incomes from the oil and gas industry. The absence of a manufacturing-based sector makes it difficult for young people to find jobs. The proportion of 15 to 24-year-olds among the population currently amounts to 27.9 percent. The main question therefore remains as to when the Algerian state will dedicate itself to adjusting its economic policy, by devising a sustainable development strategy for the country, including not least essential reforms of the state institutions.

In the coming years, regional forecasts do not predict any improvements as regards the overall demographic situation. According to estimates by the United Nations, the number of young people who will be entering the labor market in the countries of the MENA region will increase from currently 41 million to 47 million by 2035. The Maghreb countries will

therefore not be able to avoid more fundamental reforms of the national education systems in the near future in order to meet the current demand of the labor market. Employers increasingly criticize the countries' teaching approach mainly, which is based on lecturing and rote learning, lacking a stronger focus on problem solving or project-based application of acquired knowledge, the so-called "soft skills". Furthermore, in Tunisia and Morocco there is a shortage of graduates with technical skills that are of particular importance for the private sector. The objective should therefore be to promote foreign-language skills (particularly in English, which is crucial for economic relations), to offer technical and practical education at the tertiary level and to promote dual education, combining academic learning and work experience. This could ultimately also help to boost the social status of vocational qualifications as well as it may counteract the problems of the existing preference among young graduates for socially secure employment in the public sector.

A further crucial point is that many micro-sized enterprises that are often family-run, cannot afford to take on qualified labor due to the high indirect labor costs and the very rigid labor market regulations in the countries of the Maghreb; these include in particular the minimum wage policy as well as extensive legal regulations on starting and terminating employment. What this means for the private sector is that small enterprises are increasingly being driven into the informal sector. This trend multiplies in periods of crisis, like the one the Maghreb is currently going through.

Secondly, the investment conditions and the investment climate for domestic and foreign investors need to be improved. In the Maghreb states, politics and the economy are closely linked, with direct consequences for investors. Current political developments in the countries thus have an immediate impact on the economic climate and thereby on the investment climate. However, distinguishing between the individual Maghreb states is a must. After more than four decades of Gaddafi's rule, the Libyan transitional government, for instance, is faced with major challenges as preventing the country from sliding into an east/west split after the end of the civil war, ensuring the disarmament of the "revolutionary" militias as well as integrating them into the security structures in the medium term. There is moreover a need for decisive action to counter the growing terrorist threat. But it appears that this is becoming increasingly difficult in view of the flourishing trade and arms smuggling in the Libyan border areas (and also reaching far beyond). Due to its historic topography the Libyan state, characterized by its tribal structures, is facing fundamental social conflicts. These conflicts become even more visible



from an economic perspective when one examines the resource distribution in the country. Libya disposes of about 3.5 per cent of global oil reserves.

Presently, the situation in Libya even poses a serious security threat to its neighboring country Algeria as well as its small neighbor Tunisia, two states that are already struggling with the security situation within their respective territories. Algeria is at the same time seeking to prevent the “consequences” of the conflict in Northern Mali from spilling over into its own territory and on controlling Islamist networks, most specifically Al-Qaeda in the Islamic Maghreb (AQIM), from gaining control and power, which is also due to ever more uncontrollable migration flows in the region. Furthermore, the institution ‘state’ is exerting considerable influence over the economy in the Maghreb countries, with negative consequences for investment conditions. Tunisia under the regime of Ben Ali, for instance, has consistently focused on opening its economy and developing economic relations with Europe, however on the conditions set by the authoritarian ruling family. The dominance of the public sector, which (was and) is characterized by nepotistic power structures and which, most importantly, (was and) is also in control of the banking sector, has inhibited the development of a private sector based on the principles of a market economy for years. Inefficient administrative structures, state subsidies and protectionist measures in key sectors of the economy have produced a lack of transparency and preferential treatment for large companies that are under the influence of a small, exclusive elite. While Tunisia has made increasing efforts to improve its business climate over the last few years, particularly in terms of reducing bureaucratic and fiscal barriers for investors as well as through well-targeted incentives for start-ups, significant problems remain, particularly in the Tunisian banking sector. Against this backdrop, the EU-Tunisia Task Force on 28 November 2012 approved the establishment of a so-called *Conseil Economique Consultatif Europeen pour les Investissements en Tunisie*. It stated three main objectives:

- a) drawing up proposals to improve the business climate in Tunisia,
- b) investigating new investment opportunities for European companies and
- c) promoting economic relations, industrial collaboration and the role of SMEs in Tunisia.

The challenge now is to actually implement these objectives, in order to avoid merely creating another cooperation format that only exists on paper and is satisfied with engaging in political rhetoric.

Even Algeria, which not least due to its history has been extremely critical when it comes to foreign actors, is also opening up some, and is increasingly taking measures to tackle the large deficiencies in the development of the country’s infrastructure. Moreover, the country has approved an investment programme for the next five years equivalent to 286 billion US dollars. There is, however, still a need (even if not always the will) for structural reforms that are still lagging behind in the largest state of the Maghreb, in particular in the Algerian banking sector. Protectionist measures by the Algerian state are curbing the readiness of investors, including German investors, to become active in profitable sectors of the future. A particularly influential measure in this area is a controversial piece of investment legislation, which prescribes a 51 per cent Algerian majority stake for foreign investors.

Thirdly, small and medium-sized enterprises (SMEs) need to be supported by well-targeted incentives so that they can act as the engine for sustainable economic growth. Although Tunisia has made substantial efforts to improve the investment climate, private investments still make up less than 60 per cent of total investments, amounting to less than 15 per cent of the country’s GDP. The Maghreb states are in need of urgent and proactive improvement of the business climate in the private sector, and they all face the challenge of introducing reforms in line with the principles of a market economy, above all guaranteeing a transparent legal and competition framework as well as combatting widespread corruption.

In post-revolution Tunisia and in view of the financial crisis, for instance, the relationship between SMEs and the banks in particular has developed into a “crisis of trust”, resulting in a strong squeeze on lending. While SMEs represent 80 per cent of businesses in Tunisia, they only receive 15 per cent of bank loans in total, as is reflected in a 2012 study by the African Development Bank. This means in turn that entrepreneurs must rely on private capital, which is beyond the capacities of many SMEs and start-up initiatives. These restrictive financial practices have far-reaching consequences for the Tunisian economy, as the bank, after all, represents an essential pillar for the survival of business and remains an indispensable partner for SMEs.

What the countries therefore need above all, besides an improvement of the investment conditions that can only be achieved by strengthening the willingness to cooperate with both the public and private sector, are short and medium-term reforms of bank lending. It is crucial that the banks are enabled to better assess the potential of SMEs as well as to investigate the concept of “micro-lending”, in order



to provide projects with great economic potential a market opportunity.

A second aspect requiring serious attention is the problem of outstanding payments, which immediately affect SMEs. In collaboration with its Tunisian partner, the *Centre des Jeunes Dirigeants d'Entreprise* (CJD), the Konrad-Adenauer-Stiftung (KAS) in Tunis asked the research institute SIGMA Conseil to conduct a study on the status quo of debt collection by Tunisian SMEs. The survey, carried out in April 2013, shows that businesses must frequently allow for outstanding payments exceeding three months, causing them serious financial difficulties. This can partly be explained by complex payment methods as well as frequent payment difficulties on the part of customers. The surveyed entrepreneurs also complained about the lack of reliable information mechanisms, such as a credit agency, to obtain information on the creditworthiness of customers.

Fourthly, growing employment in the informal sector, which is increasingly developing into a type of parallel labor market, represents a significant problem in the Maghreb states. The countries' governments, and particularly the Algerian state, have been tolerating this informal labor market up to now, as it plays a significant role in combatting social unrest. According to the African Development Bank, today the informal sector makes up some 50 per cent of employment in the three Maghreb states Algeria, Morocco and Tunisia excluding the agricultural sector. As previously stated, the main reasons behind this development are excessive labor market regulations in the countries (statutory minimum wages, rules on starting and terminating employment as well as high social security contributions) as well as high corporation taxes, difficulties with registration and problems in accessing finance. Many entrepreneurs therefore find themselves forced to operate in the informal sector, not employing official staff, not registering with the respective authorities, and increasingly operating as independent one-man companies.

The risks inherent in being employed in the informal sector (apart from distorted labor market statistics) are obvious. Young people in particular in rural areas work under very bad working conditions especially as regards remuneration, without any employment contract or social security, let alone opportunities for social and professional promotion. In addition, overall productivity in the informal sector is relatively low due to the large proportion of micro businesses, which has a negative impact on (international) competitiveness.

Fifthly, there is a need for a long-term strategy to provide sustained support for rural areas and areas with little investment. However, as already explained in detail in the description of the current situation, an appropriate programme for national economic development should be complemented by regional integration and cross-border infrastructure development. In Tunisia, for example, the longstanding concentration of investments in the coastal areas of the country have produced severe regional disparities and considerably disadvantaged the central region as well as the northwest, south-east and southwest of Tunisia in terms of sector attractiveness for investors. Especially in the rural areas in the northwest, in central Tunisia and in the desert areas of the south-east, programmes supporting the production of drinking water and electricity supplies, sewage treatment, water and soil pollution control as well as the fight against desertification are most important, but their implementation continues to be extremely difficult due to the poor infrastructure.

The Tunisian government is currently working on a new investment plan. However, in view of the political situation in the country, questions concerning its sustainability are absolutely justifiable. Tunisia is being "administered" by a transitional government, whose mandate officially ended over a year ago (inaugurated in October 2011; it was tasked with drawing up a new constitution within a year) and which does not appear to have a clear strategy for the country's economic development. While there is some talk of an "inclusive development of the regions" in the draft of the new investment plan, amongst other things by means of an envisaged planned investment fund as well as increased support for public private partnerships (PPP), there is a lack of concrete provisions and proposals as to what this might actually entail.

With a regional unemployment rate of up to 52 per cent (in the southeast of Tunisia) compared to an average national unemployment rate of 17 per cent, a lack of income from the tourism sector as well as deficiencies in the regional infrastructure, the country is in need of a long-term strategic roadmap when it comes to its economic development, based on the country's regional requirements and that avoids any artificial distortions. The main objective should be to encourage intra-regional cooperation by means of administrative decentralization and well-targeted infrastructure development. This will allow the previously disadvantaged regions to benefit from the investment-rich ones. In this context, there is a particularly great potential for measures to boost productivity in the agricultural sector and in the alternative tourism sector, the so-called green tourism or ecotourism.



III. RECOMMENDATIONS

Due to its geostrategic position in close proximity to the European Union on the one hand and its economic development potential as an important growth market on the other, the Arab Maghreb region is of particular significance for German foreign policy as well as foreign trade. Concrete recommendations for German policy makers must be based on long-term partnerships. The objective must be to aid in boosting the region's potential through well-targeted transfer of know-how and the sharing of experiences, and, most importantly, to take into account the different circumstances and requirements of the individual states.

Economic development and education based on practical needs are key to a positive long-term outlook both for the resource-rich countries of the region, Algeria and Libya, as well as for Morocco and Tunisia. They are ultimately also the (only) way to regional stability in North Africa.

During his visit to Tunis at the end of 2012, the Vice President of the European Commission and Commissioner for Industry and Entrepreneurship, Antonio Tajani, put it succinctly when he said in the framework of an event organized jointly by the Konrad-Adenauer-Stiftung and the Tunisian association of young entrepreneurs CJD: "We must transform the dream of the young into something concrete. Collaboration between small and medium-sized enterprises is a good way of creating more work, as is the engagement of large companies aimed at supporting the growth of SMEs and thereby supporting Tunisian youth. However, business development requires certain conditions, above all security, political stability and improvements in the business climate."

There are six concrete recommendations for German (and European) policy makers that can be derived from the analysis:

Firstly, Germany can provide support to the countries of the Arab Maghreb by means of well-targeted know-how transfer and sharing of its own experiences with the transition to a social market economy. However, a comparison with the political and economic transformation process in Central and Eastern Europe should be avoided in any case. The countries of the Maghreb are already "equipped" with structures based on the principles of a market economy, even though the state exerts considerable influence over the economy.

Germany enjoys the reputation of an "economic success" model in the Maghreb states and it is able to rely on its broad SME backbone as the engine for sustainable growth and employment. Increased cooperation with employers'

and trade associations in the Maghreb countries as well as well-targeted consulting projects based on continuous and long-term sharing of experience are suitable models for co-operation.

Secondly, specific key sectors and major infrastructure projects can act as catalysts, increasingly attract German investors and, in addition to technical consulting, make an economy-driven contribution to rural development in the Maghreb countries. Sectors that are of interest to German investors and represent promising prospects for the countries themselves include in particular export initiatives involving renewable energies, transport infrastructure projects, the health sector, the construction and water industries as well as information and communication technologies. German expertise is further in demand when it comes to research and technology, as the countries of the Maghreb will have to increasingly rely on research and development in the future. There is also considerable potential in the tourism sector, for instance in the development of a strategy for high quality tourist packages, which should increasingly focus on alternative ecological tourism to complement the mass tourism that dominates the sector until today. The country possesses cultural and scenic wealth that should be sustainably exploited.

Thirdly, owing to its experience in the field of dual education and training, project-based, technical tertiary education as well as full-time and part-time continued vocational training, Germany can make a concrete contribution towards improving the qualification of young adults and school graduates, in line with the requirements of the private sector. Particularly important in this context are the practical application and deepening of theoretical expertise. One of the essential components of German consulting activities should be the integration and inclusion of the countries' private sectors when it comes to the education system.

Fourthly, Germany and the European Union should place more emphasis on the potential of free trade initiatives and the need for economic diversification and regional integration, which has already been explained in more detail above. The delayed impact of the European financial crisis, particularly in the case of Tunisia, has demonstrated yet again how important sustainable economic diversification can be. To date, 65 per cent of the trade in the Maghreb states is conducted exclusively with Europe. In Morocco and Tunisia, this even amounts to 80 per cent.

Towards the end of 2012, in the framework of the 9th session of the EU-Tunisia Association Council, Tunisia signed an agreement on a "Privileged Partnership" (*statut avancé*) with the European Union (as the second North African country



after Morocco), which had been an aspiration for some time. Simultaneously, the New Action Plan for the period 2013-2017 was approved. In the coming years, the main objective must be the implementation of the prospects arising in this context as well as the countries need to move forward with respect to the long-awaited Deep and Comprehensive Free Trade Agreement (DCFTA). Morocco has so far made most progress in this area and has also entered into a free trade agreement with the USA.

Fifthly, the political upheavals in the region of North Africa have demonstrated once again that sustainable economic liberalization can only succeed if it is complemented by political action based on the principles of democracy and the rule of law. Crucial steps for economic liberalization have thus failed in the past because of an inadequate political (regulatory) framework characterized by widespread corruption and a lack of transparency in the administration. German policy should rely on suitable and experienced partners (who also have their own structures in the Maghreb countries) in order to be able to provide long-term support in political transformation. Improved coordination between value-based German development cooperation and German foreign trade support should underpin these measures.

Lastly, the security situation in the countries of the Maghreb inevitably needs to improve. Stability and security are of crucial importance for investment decisions. The increasing transnational terrorist threat as well as the cross-border trade in drugs and arms can only be controlled by comprehensive action based on a long-term approach. This must include greater security cooperation with Europe and the states of the African continent. In this context, increasing emphasis should be placed on cooperation with international organizations, especially with the World Bank, the African Development Bank, the European Bank for Reconstruction and Development as well as the African Union.

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FURTHER SOURCES (INTERNET)

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