

CREACT  **MED**

CREATIVE MEDITERRANEAN

Cultural & Creative Industries in Tunisia

Salient Features

<https://creativemediterranean.org/> creact4med@euromed-economists.org

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Creact4med

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This report is produced by The Euro-Mediterranean Economists Association (EMEA) as part of the mapping of the Cultural and Creative Industries (CCI) carried out under the CREAT4MED project funded by European Union (EU) and coordinated by EMEA.

The report is coordinated by Yeganeh Forouheshfar, Researcher at EMEA, based on the contributions from the members of the CREAT4MED Technical Expert Group (TEG): Sahar Mechri, Douja Gharbi, Rim Mouelhi, Talel Sahmim, Chahira Mehouchi, EMEA experts, and Boutheina Lassadi, an expert with BUSINESSMED.

This report was reviewed by Prof. Rym Ayadi, President of EMEA and Director of the CREAT4MED project.

Editing and design by Rob Attree, Alanna Irving and Nektar Baziotis

CREACT4MED engages CCI players to enhance networking, collaboration, visibility, financial opportunities and market access. Join the CREAT4MED community at:

<https://platform.creativemediterranean.org/>

A GENERAL OVERVIEW

Population size: 11.81 million in 2020

GDP: \$39.23 billion (USD) in 2020

GDP per capita: \$3319.81 (USD) in 2020

GDP growth rate: 1.04% in 2019 and -8.6% in 2020

Inflation rate: 5.6% in 2020 (consumer prices)

Unemployment rate: 16.69 % of total labour force in 2020 (modelled on ILO estimate)

Youth unemployment rate: 35.78% of total labour force aged 15-24 in 2019 (modelled on ILO estimate)

Female unemployment rate: 22.41% of female labour force in 2019 (modelled on ILO estimate)

Female labour force participation rate: 24.89% of female population aged 15+ in 2019 (modelled on ILO estimate)

Rank in the Global Gender Gap Index: 126 out of 156 countries (2020)*

Source:

World Development Indicators (WB) (<https://databank.worldbank.org/source/world-development-indicators>)

*World Economic Forum's Global Gender Gap Report 2021 (<https://www.weforum.org/reports/global-gender-gap-report-2021>)

*The countries at the bottom of the ranking have longer distance from gender parity



Overall Context

Tunisia has been going through a democratisation process since 2011. A new Constitution was adopted in 2014, introducing democratic legislative and presidential elections. The first municipal elections took place in May 2018.

The economic situation remains very fragile in an overall context of political instability, rising inflation and external debt, sluggish growth and with persistently high unemployment rates, especially among young people. Female participation rate in the labour force is as low as 25%, and female unemployment remains higher than male unemployment.

The COVID-19 crisis has exacerbated an already unfavourable economic climate, calling for further restructuring of public administration.

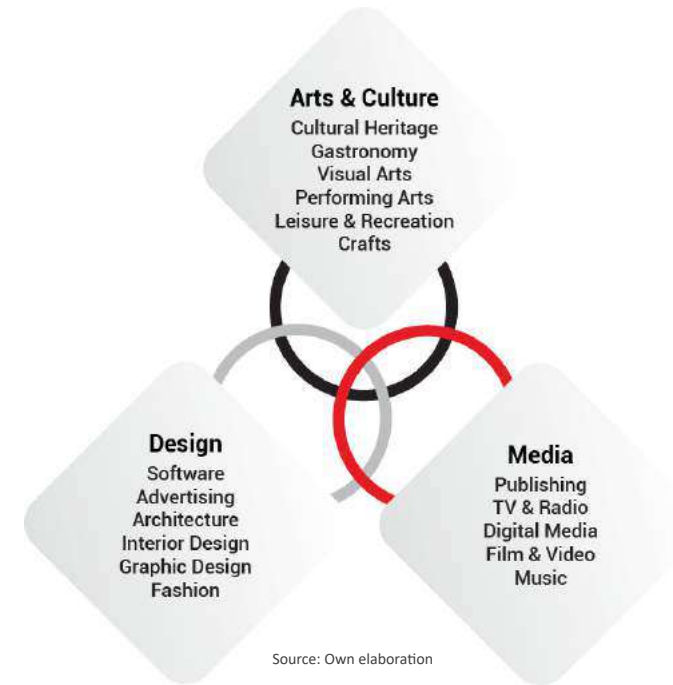
On July 25 2021, the country fell into a political crisis when the President dismissed the Prime Minister and froze Parliament.

Key CCI Figures⁺ in Tunisia

CCIs in Tunisia have the potential to be an engine of economic growth and social well-being. Culture is recognised by the Tunisian government as one of the strategic axes for development: in the strategic note of the five-year development plan 2016-2020¹, culture appears under the policy axis "Human Development and Social Inclusion," and the objective related to the "cultural dimension, between creation, openness and rootedness." In spite of this dedication to culture, there is no official recognition of CCIs by public authorities.

To assess CCI, we adopt a broad definition inspired from different sources.² We categorise CCI into 3 main groups: Arts and Culture, Media, and Design.

According to the CREAT4MED TEG³, Crafts, Gaming and Cultural Heritage are Tunisia's most important CCI sub-industries.



The handicraft market is quite saturated and the sector is moving towards digitalisation. The gaming industry presents enormous potential: over the last few years, their offering has exploded. The 'League of Legends' game alone has garnered over 100,000 players in Tunisia.⁴ Cultural Heritage also has outstanding potential, and requires long-term strategies to be initiated mainly by the State, through sponsorship actions (Azouzi, Ahmed Ammine, 2018).

¹ http://www.mdici.gov.tn/wp-content/uploads/2017/02/Note_d_Orientation_2016_2020_VF.PDF

² Amongst numerous CCI classifications available in the literature we are mainly inspired by the ones of UN (EY, 2015), UK (DCMS, 2019), Singapore (ERC-CI, 2002) and the European Commission (EC, 2010).

³ Technical Expert Group (TEG) is a group of renowned regional and local experts aimed at bringing a multi-disciplinary approach to the mapping process under the CREAT4MED project. This group is composed of external experts, project partners and observers. 5 TEG meetings were held between November 18, 2020 and February 25, 2021. Sahar Mechri, Douja Gharbi, Rim Mouelhi, Talel Sahnim, Chahira Mehouchi and Boutheina Lassadi are the TEG members for Tunisia.

⁴ <https://euw.leagueoflegends.com/en-gb/>

Cultural & Creative Industry in Tunisia

In terms of job creation, based on the number of professional charters, employees of associations and the Ministry of Culture, and the private sector, in 2014, CCIs employ about 25,000 workers. The number of full-time employees may be around 14,000 (AFDB, 2019).

In 2015, CCI exports in Tunisia exceeded \$228 million USD, with 57% of them being related to the "Design" sector, which includes architecture, fashion, interior, toys and jewellery. "New Media", which accounted for 29% of CCI exports in 2015, has seen a significant upswing since 2005, with an average annual growth rate of 125%, rising from \$5.7 million USD in 2005 to \$67.1 million USD in 2015 (UNCTAD).

The total number of national featured films produced is 11 in 2015, with one film being 100% nationally produced (UNESCO Institute for Statistics, UIS).

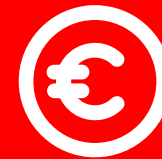


Creative Goods Exports 2015



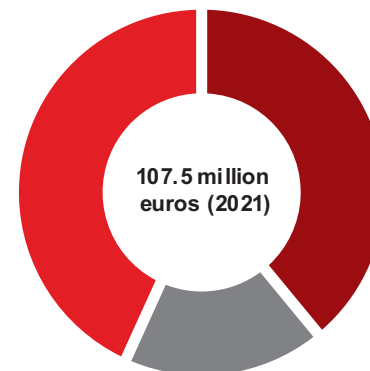
- Art Crafts 10%
- Audiovisuals 1%
- Design 57%
- New Media (Software, Videogames, etc) 29%
- Performing Arts 0%
- Publishing 2%
- Visual Arts 1%

Source: UNCTAD global database on creative economy



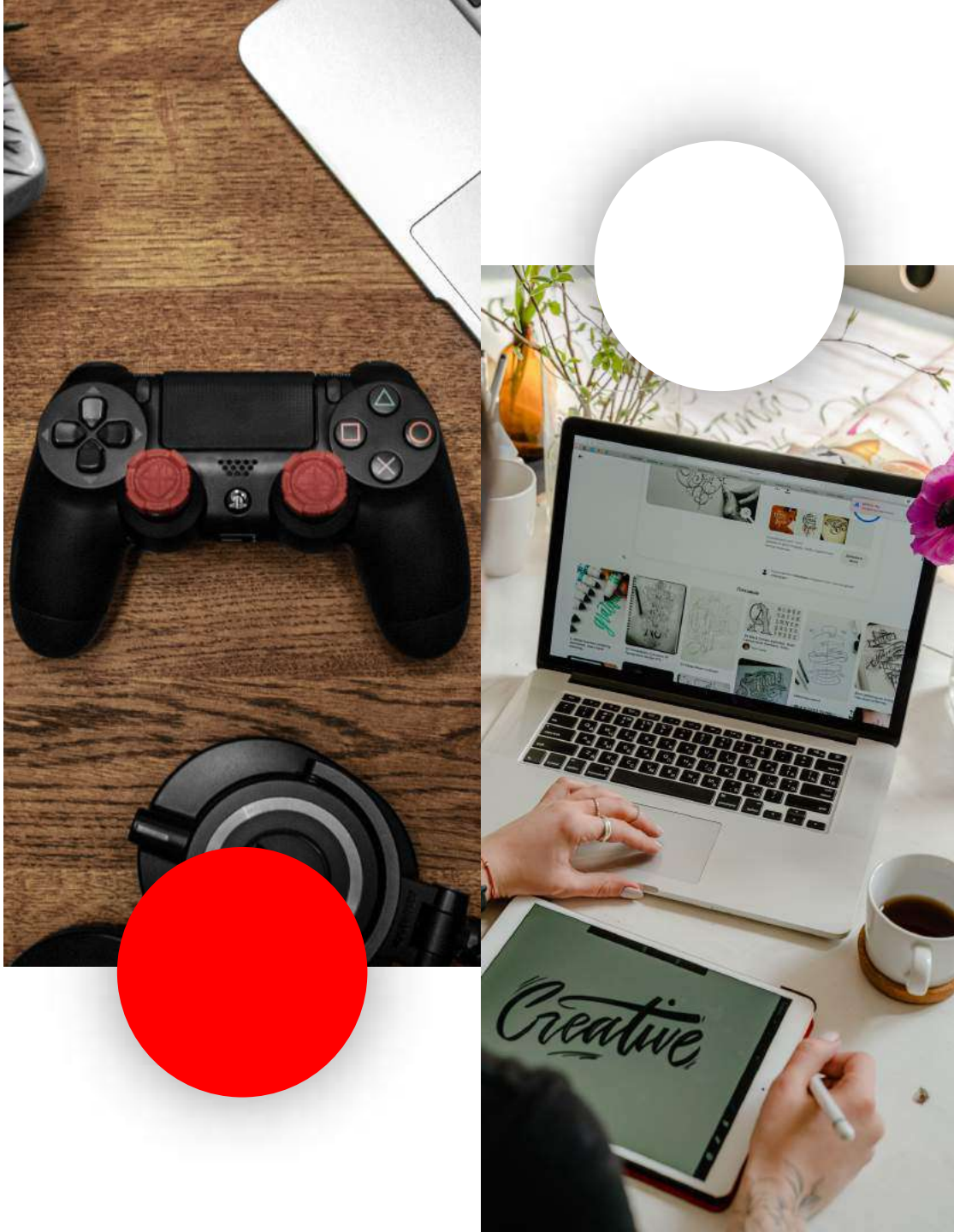
Budget of the Ministry of Cultural Affairs: €107.5 million euros (2021), 0.68% of the general government budget

Breakdown of the budget of the Ministry of Cultural Affairs



- Management and Support 43%
- Cultural Activity 39%
- Cultural Heritage 18%

Source: Ministry of Finance
http://www.finances.gov.tn/fr/budgets_ministeres
 adopted exchange rate 1 dinar equivalent to 0.30 euro



Positive spill-over effects⁺ of CCI on the **economy and society**

- Promotes the knowledge economy by encouraging business development in the creative sector
- Boosts youth and female employment by increasing awareness in creative entrepreneurship
- Enhances economic competitiveness and increases regional economic resilience, through income generation and diversification from traditional sectors to creative and innovative sectors with higher value-added potential, such as the gaming industry

CULTURAL INFRASTRUCTURE



25 Museums



49 Theaters



18 Cinemas



1 Opera House



376 Festivals & Concerts



230 Cultural houses



423 Libraries

Numbers up to the end of 2020, non-exhaustive list based on inputs provided by CREAT4MED Technical Experts for Tunisia

Cinemas

There has been a sharp decline in the number of cinemas, of which there were around 200 in the 1970s. This may be due to low quality of projectors and rooms and lack of artistic display, as well as the competition international media provides through widespread internet access and digital piracy (Med-Culture, 2018).

City of Culture



Inaugurated in 2018, City of Culture is the largest public cultural structure in terms of budget and cultural activities and outreach. The Centre consists of three theatres, a museum of modern and contemporary art, three exhibition halls, a cinematheque (small archive cinema), an archive for letters and books, a centre for the cultural digital economy, and an area dedicated to the institutions of scenic arts, visual and cinematographic arts.



<http://www.citedelaculture.gov.tn/en>



[https://fr.wikipedia.org/wiki/Cit%C3%A9_de_la_Culture_\(Tunisie\)](https://fr.wikipedia.org/wiki/Cit%C3%A9_de_la_Culture_(Tunisie))

MAIN CCI ACTORS

CCI Ecosystem

01

Governmental

02

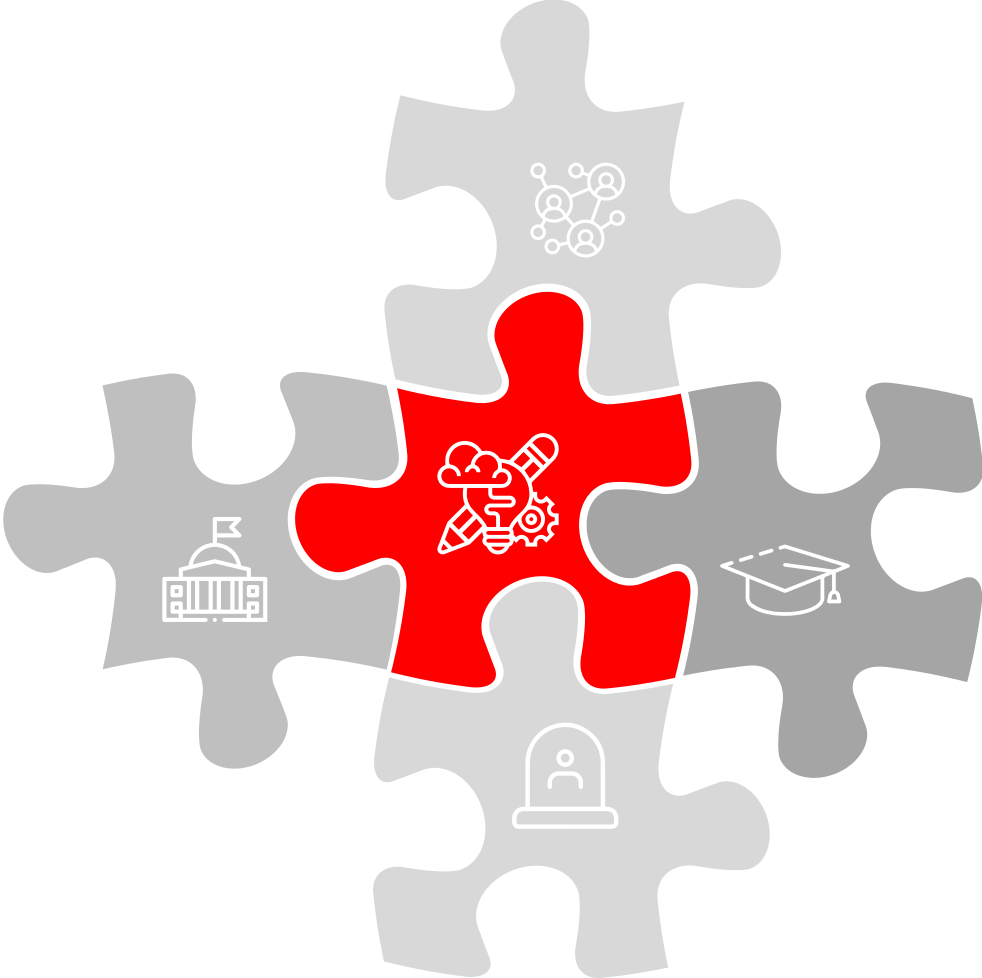
Private Sector

03

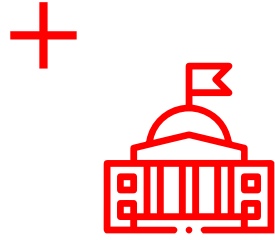
Associations & NGOs

04

Academia



Governmental Actors



The government is the leading actor within CCI in Tunisia. It continues to inject financial resources into a small pool of already existing talents and to support market access for young artisans through participation in fairs. The following is a non-exhaustive list of public CCI actors:

- Ministry of Cultural Affairs (<https://www.culture.gov.tn/>)
- Ministry of Tourism and Handicraft
(<http://www.tourisme.gov.tn/en/home.html>)
- Le centre national du cinéma et de l'image - CNCI
(<https://www.facebook.com/centre.national.du.cinema.et.de.limage/>)
- Tunis International Centre for the Digital Cultural Economy - TICDCE
(https://www.facebook.com/TICDCE2018/?ref=page_internal)

- The Heritage Development and Cultural Promotion Agency/L'Agence de Mise en Valeur du Patrimoine et de Promotion Culturelle -AMVPPC
(<https://www.tunisiepatrimoine.tn/>)
- National Office of Tunisian Handicraft/Office National de l'Artisanat Tunisien – ONAT (<http://www.artisanat.nat.tn/en/welcome/>)
- National Library of Tunisia
(<https://www.bnt.nat.tn/uhtbin/cgisirsi.exe/WJnj4UC8C8/BNT/270260004/60/502/X>)
- National Heritage Institute (<http://www.inp.rnrt.tn/index.php?lang=en>)
- National Centre for Cultural Communication/Centre National de Communication Culturelle - CNCC
(<http://www.openculture.gov.tn/organization/centre-national-de-communication-culturelle>)
- Tunisian National Theatre/Théâtre National Tunisien
(<http://www.openculture.gov.tn/organization/about/theatre-national-tunisien>)
- The National Institution promoting festivals and cultural and artistic events/L'établissement national de promotion des festivals et des événements culturels et artistiques (<http://www.enpfmca.gov.tn/>)
- International Cultural Centre of Hammamet / Centre Culturel International de Hammamet (<https://www.facebook.com/ccihmmca/>)

Governmental⁺ Actors (continued)



- The National Centre for Music and Popular Arts/Le Centre National de Musique et des Arts Populaires - CNMAP
- The National Centre of Cinema and Image/Le Centre National du Cinéma et de l'Image – CNCI
(<https://www.facebook.com/centre.national.du.cinema.et.de.limage/>)
- The Centre for Arab and Mediterranean Music/Le Centre des Musiques Arabes et Méditerranéenne - CMAM
(<http://www.openculture.gov.tn/organization/about/centre-des-musiques-arabes-et-mediterraneennes-ennejma-ezzahra>)
- National Institute of Music/Institut National de Musique - INM
- National Translation Centre/Centre National de la Traduction (<http://www.openculture.gov.tn/organization/about/centre-national-de-la-traduction-tunisie>)

We did not observe any systematic coordination to further develop CCI among these actors.

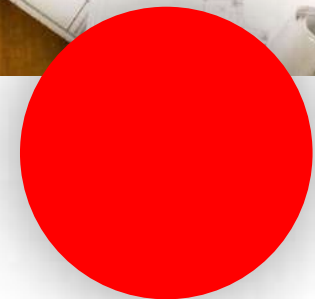
Private Sector



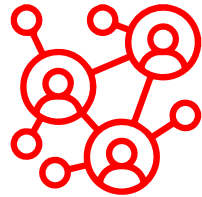
CCI actors in the private sector include not only artists, designers, writers, architects, musicians, film makers, etc., but also actors in the entrepreneurial ecosystem from which creative entrepreneurs and CCI startups can benefit. Business Support Organisations (BSOs), such as incubators and accelerators, play an important supportive role in the CCI ecosystem, even though they rarely specialise in the CCI. A non-exhaustive list of incubators with programmes dedicated to CCI is:

- MINASSA (<https://www.minassa.co/>)
- REDstart (<https://www.redstart.fr/>)
- AFKAR (<https://afkar.co/>)
- CORE creative hub (<http://www.rambourgfoundation.org/en/program/core-creative-hub>)
- BIATLABS (<https://www.biatlabs.com/>)
- LAB'ESS (<https://www.labess.tn/>)

We did not observe any systematic coordination to further develop CCI among these actors.



Associations & NGOs

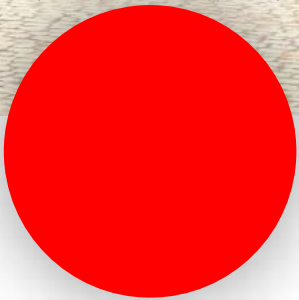


Various associations promote CCI in Tunisia, including:

- BIAT Foundation (<https://www.fondationbiat.org.tn/>), active since 2014
- Drosos Foundaton (<https://drosos.org/en/about/#tunisia>), active since 2013
- Collectif Créatif (<https://collectifcreatif.org/infos/>), active since 2016
- L'ART RUE (<https://lartrue.org/>), active since 2006
- Albadil (<https://al-badil.net/presentation/>), active since 2018
- Tunisian association for video games /Association tunisienne des jeux vidéos (<https://www.facebook.com/TGD2012/>), active since 2012
- The Rambourg Foundation (<http://www.rambourgfoundation.org/en>), active in Tunisia since 2015

We did not observe any systematic coordination to further develop CCI among these actors.





Academia

Tunisia has integrated entrepreneurial education into university curricula as part of its entrepreneurship promotion strategy since the early 2000s. Almost all academic disciplines, including artistic ones, offer entrepreneurship courses. Many public higher education institutions all over the country offer initial training in the fields of culture and arts, amongst which are the following:

- Higher Institute of Music
- Higher Institute of Dramatic Arts
- Higher Institute of Arts and Crafts
- Higher Institute of Arts
- Higher Institute of Arts and Multimedia
- High School of Design Sciences and Technology

We did not observe any systematic coordination to further develop CCI among these actors.

INITIATIVES TO ⁺ PROMOTE CCI

After the 2011 uprisings and the adoption of the new Constitution in 2014, Tunisia has paved the way for new opportunities within CCI. The CCI have become, more than ever, buoyant niches for income generation and job creation.

Since June 2020, a Recovery Fund for Culture (Fonds Relance Culture or FRC)⁵ has been dedicated to CCI actors hit by COVID-19. The Fund aims to enable artists, intermittent performers, operators and private cultural spaces to overcome economic difficulties, in particular a lack of cash flow, due to the pandemic and lockdown measures which slowed down and, in most cases, stopped the continuity of their artistic performances in events such as festivals, fairs and other types of gatherings.

The Creative Industries Fair, organised in January 2020, was oriented towards new technologies, the creative industries and the digital cultural economy. It was an important showcase that offered cultural promoters with innovative ideas the opportunity to interact with professionals and experts in the cultural field. The main objectives of the fair were to enhance partnerships and employability in the creative industries sector. It was organised jointly by the Ministry of Cultural Affairs and the Tunis International Centre for the Digital Cultural Economy (TICDCE).

⁵ <http://relance.culture.gov.tn/>

INITIATIVES TO PROMOTE CCI (continued)



CCI entrepreneurs can also benefit from other governmental initiatives, even those that do not target CCI directly, such as:

Startup ACT ⁶

The 2018 Startup Act gave more structure to the entrepreneurship ecosystem, giving benefits to entrepreneurs, startups and investors

Crowdfunding bill ⁸

Access to finance is one of the main barriers for CCI entrepreneurs, as cultural and artistic activities in general are not perceived as profitable businesses. The crowdfunding bill (Law n° 2020-37), passed on August 6 2020, created an opportunity for entrepreneurs to access new sources of funding.

Digital Tunisia 2020 ⁷

In collaboration with the African Development Bank, the National Strategic Plan (NSP) of “Digital Tunisia 2020” has been in place since 2016, with the goal of improving ICT access and usage in the country and making Tunisia an international digital destination. Enhancement of e-business is one pillar of the project, from which digital CCI can benefit.

Social and Solidarity Economy (SSE) Bill

The bill on social and solidarity economy (SSE) was adopted on June 17 2020. A reference framework for SSE has been set with the provision of financial support. Some CCIs can potentially benefit from these initiatives, as CCI activities have social impact and are geared towards enhancing social inclusion.

⁶ <https://www.startupact.tn/startupact.html#entrepreneurs>

⁷ <https://www.mtcen.gov.tn/index.php?id=14&L=560>

⁸ http://www.tunisieindustrie.nat.tn/fr/download/news/2020/Loi_Crowdfunding-n2020-37.pdf

⁹ The text of the law can be found: https://www.ilo.org/wcmsp5/groups/public/---ed_emp/---emp_ent/---coop/documents/legaldocument/wcms_750308.pdf

<https://www.startupact.tn/>



Startup Act

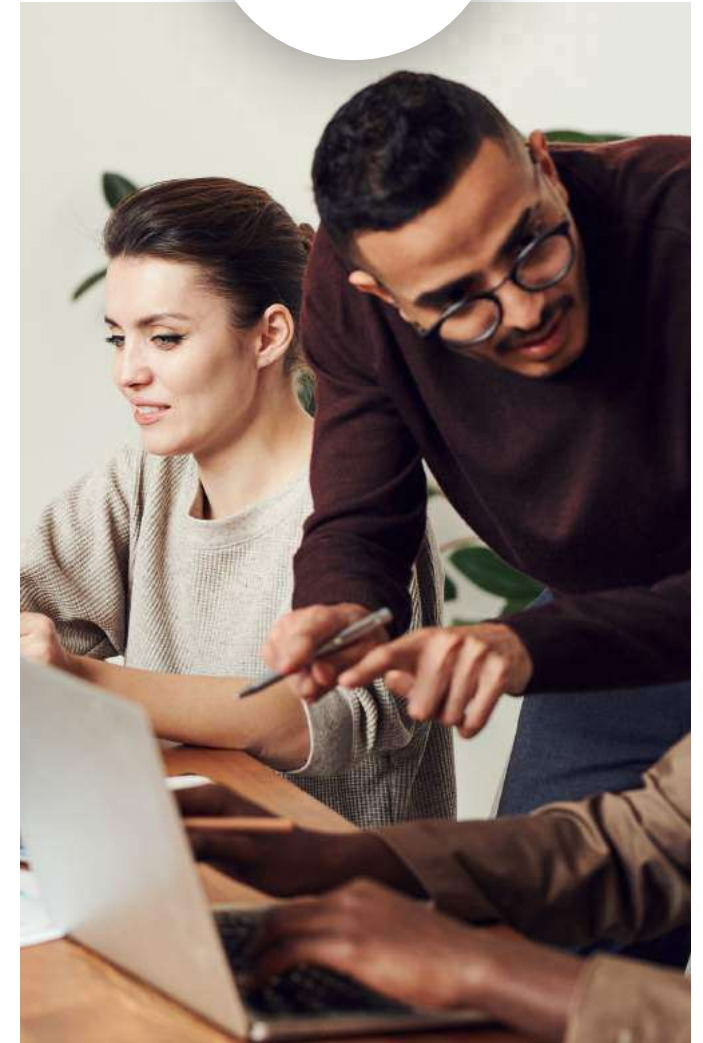
The Tunisian entrepreneurship ecosystem has become more structured since parliament passed the Tunisian Startup Act in April 2018. The Act gives benefits to entrepreneurs, startups and investors, such as:

- An allowance to cover living expenses for one year
- Government support for start-up patent registration procedures and fees at national and international levels
- One year's leave to dedicate themselves to the launch and development of a startup
- A portal to apply for start-up classification
- The right to open a special foreign currency account
- Exemption from corporate taxes
- Guarantee funds
- Tax exemption on capital gain of the investors

Between 2019 and 2020: 8.9% of labelled start-ups are active in creative industries, receiving 11.4% of capital funding (source: Start-up Act Annual report 2019-2020)



START
UP
ACT ↑





Intellectual Property Rights (IPR)

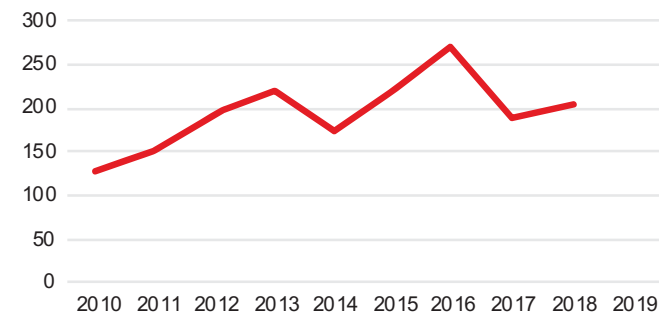
Intellectual property (IP) is a key component when it comes to creative industries. According to the World Intellectual Property Organisation (WIPO), IP refers to “creations of the mind, such as inventions; literary and artistic works; designs; and symbols, names and images used in commerce,”¹⁰ hence it goes hand in hand with creative industries. Tunisia joined the WIPO in 1975 and is an active member, developing 64 IP-related laws and signing 65 treaties.¹¹

National IP offices in Tunisia are:

- Tunisian Organisation of Copyright and Related Rights (OTDAV) (<http://www.otdav.tn/index.php/fr/>): founded in 1997 to issue permits for the exploitation of protected works of literature and art on behalf of its members
- Tunisian National Institute for Standardisation and Industrial Property (INNORPI) (<https://www.innorpi.tn/fr/>): created in 1982, it is placed under the supervision of the Ministry in Charge of Industry and is managed by a Works Council representing several ministries and civil society

The number of patent filings, which is regarded as proxy for innovation and creativity has risen over the past decade. It is expected that the number will continue to increase even further with the implementation of the Startup Act and the public support offered to the startups in their registration process.

Patent Filings (Resident + Abroad, Including Regional)



Source: WIPO statistics database. Last updated: January 2021

¹⁰ <https://www.wipo.int/about-ip/en/>

¹¹ <https://wipolex.wipo.int/en/members/profile/TN>

Contemporary Cultural Initiatives



Non-exhaustive list based on inputs provided by CREAT4MED Technical Experts for Tunisia



B'chira Art centre

<https://www.facebook.com/BACARTCENTER/>
Dedicated to the promotion of the visual arts



Ciné Mad'Art

<https://www.facebook.com/CineMadart/>
A cinema hall in Carthage with the goal of supporting Tunisian national cinema and the film-making industry



Dream City

<https://www.facebook.com/FestivalDreamCity/>
Biannual events including arts performance in public spaces



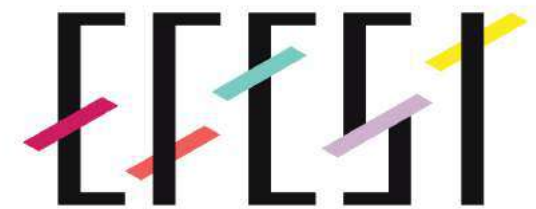
Laaroussa

<https://www.youtube.com/watch?v=C0YgSDia4SI>
Organised in 2012 by L'Art Rue, A know-how transfer on traditional pottery handicrafts, connecting women, and to honouring and promoting the traditional ceramic art of Sejnane, Tunisia



Arts Solution

<https://www.facebook.com/WeARTSolution/>
A new hip-hop NGO



B'chira Art centre

<https://www.lefest.org/>
An electronic music festival



TFANEN

<https://www.tfanen.org/>
2016-2021

Tfanen - Tunisie Créative is a project aiming to strengthen the cultural sector, financed by the European Union under the Support Programme for the Culture Sector in Tunisia (PACT) of the Ministry of Cultural Affairs. The project is a collaboration of the EUNIC network (National Cultural Institutes of the European Union), implemented by the British Council.



CREATIVE TUNISIA

<https://creativetunisia.tn/>
2020-2025

Creative Tunisia is an innovative platform that aims to support the entrepreneurial partnership within CCIs. Supported by UNIDO and funded by the European Union and the Italian Development Cooperation, the project targets the development of CCI clusters in the CCI in the Southern Mediterranean, also called Creative Mediterranean.



CREATIVE EUROPE DESK - TUNISIA

<https://creativeeurope.tn/presentation/>
2017-2020

Creative Europe Desks have been set up in all countries participating in the programme. Their mission is to support and inform about the new Creative Europe programme and about the cultural challenges of the European Union.



Programme d'Appui
au Secteur de la
Culture en Tunisie

PACT (Programme d'Appui au Secteur de la Culture en Tunisie)

<https://en.unesco.org/creativity/policy-monitoring-platform/programme-dappui-la-culture>
2016

PACT is a program funded by the European Union (EU) in cooperation with the Tunisian government, which aims to support the redefinition of cultural policy and restructuring of the cultural sector in the context of the new governance experienced in Tunisia today.



All Around Culture

<https://allaroundculture.com/>
2020-2024

Provides support to cultural institutions, initiatives and individuals to strengthen their capacities and increase their reach through funding, knowledge exchange and networking opportunities.



Afrique Créative

<https://afriquecreative.fr/en/afrique-creative-partnering-talent/>
2019-2023

Financed by the Agence Française de Développement (AFD), the goal of Afrique Créative is to identify high-potential cultural and creative entrepreneurs and to support, strengthen and network them, to accelerate the development of their organisations.



Patrimoine 3000

<https://www.expertisefrance.fr/fiche-projet?id=744266>
2019-2024

Funded by the EU and in collaboration with Expertise France and the Ministry of Culture, this project is part of the "Tounes Wijhetouna" programme ("Tunisia: our destination") which aims to enhance diversity in the tourism sector and to promote Tunisian cultural heritage.

CHALLENGES & OPPORTUNITIES

Challenges

- CCI is not perceived by the government as a high value-added, high impact sector, which leads to:
 - No unified definition for CCI
 - Lack of comparable data available to assess and monitor the contribution of CCI, in terms of value added and job creation
 - Absence of policy and regulatory legislative support for CCIs
- Weak IPRs: absence of adequate protection from copyright violation and counterfeiting
- Difficulty accessing finance, due to financial institutions' lack of knowledge about CCI potential
- Lack of access to market and limited export facilities and capabilities (international certifications, network, etc.)
- Limited management and entrepreneurial skills of CCI entrepreneurs

¹² For more information of the status of artist in Tunisia visit:

<http://www.openculture.gov.tn/dataset/le-statut-de-l-artiste-en-tunisie-en-2016/resource/c2ad3246-9bf1-47bb-b7e0-a5d0a531f917>
<https://www.webmanagercenter.com/2021/07/18/470711/tunisie-projet-de-loi-sur-le-statut-de-l-artiste/>

Opportunities

- Rich Tunisian cultural heritage can enhance the creation of innovative cultural and creative products and inspire cultural tourism
- A privileged geographical location close to the EU, Africa and the Middle East, offering cultural proximity and facilitating exchanges
- Qualified workforce at competitive costs, benefitting from a young and well-educated population
- Vivid and flourishing entrepreneurial ecosystem, marked by public support through the Startup Act, an increasing number of BSOs and numerous international initiatives
- The creation of the "status of the artist" ¹² approved by Parliament on July 16 2021, is a first step in tackling the informal and fragmented structure of CCI, which leaves many CCI workers with no access to social safety nets
- An active network of diaspora offers privileged collaboration opportunities and a bridge between different cultures
- COVID-19 has accelerated the digital transition worldwide: there has been a massive rise in digitalisation of content that facilitates international distribution at a low cost. Arts and Culture have also become more accessible through the use of IT tools.



POLICY

+

RECOMENDATIONS

Mainstream CCI in public policy

- Agree a national definition for CCI
- Harmonise data collection by the national statistical office on CCI to better assess their contribution and to mainstream CCI amongst key actors from the private sector and NGOs
- Target CCI through policies such as tax incentives or existing initiatives
- Enhance coordination and collaboration between CCI actors

Reinforce IPR

- Establish a clear and concise regulatory framework to discourage piracy, particularly digital piracy
- Develop IP helpdesks to help creatives become aware of the value of their work and able to take adequate measures to protect their creations

Invest in digital infrastructure

- Focus on the digitalisation of the cultural infrastructure to facilitate access to large groups of the population

Provide financial incentives in CCI

- Develop targeted, sustainable financial incentive mechanisms for BSOs and CCI entrepreneurs, with targeted actions for women and young people

Encourage Public-Private-Academia Partnerships (PPAP)

- Encourage PPAPs to enhance creativity, CCI capacity building and entrepreneurial skills for future CCI actors

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Creative + Mediterranean

The Creative Economy has become a strategic asset for innovative job creation around the world. Cultural and Creative Industries (CCI) represent nearly 30 million jobs worldwide and are major drivers of the economies of developed, as well as developing countries (UNESCO). CCI contributed as much as 7% to the global GDP and was estimated to be around 10% of the GDP in the MENA Region (World Bank 2017). In the CCI (mainly architecture, design and photography), there were 1.2 million cultural enterprises, generating 193 billion EUR of value added in the EU. It is a growing and promising industry that has become strategic, not only because of its impact on employment creation, but also due to its influence on the creativity of societies and social cohesion.

CREACT4MED is an EU Project funded by the EuropeAid Programme and is focused on strengthening CCI businesses and job creation, giving support to entrepreneurs, start-ups and SMEs in particular, and targeting young people and women in the Southern Neighbourhood of the European Union.

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Project Partners



COORDINATING INSTITUTION

EURO-MEDITERRANEAN ECONOMISTS ASSOCIATION (EMEA)

Carrer de Sant Antoni Maria Claret 167, 08025 Barcelona, Spain

Tel: +34 934462414

Email: info@euromed-economists.org

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