AEROSPACE INDUSTRY IN TUNISIA
Dynamism of the sector

Aeronautics in TUNISIA:
A booming industry with a track record of success stories.

The imports of aerospace industry are mainly production tools (machines) and raw materials, such as aluminum plates, bars and rods, copper alloys, stainless steel products, plates and rubber sheets, and composites.

AERONAUTICAL INDUSTRY IN TUNISIA FEATURES

- 65 companies employing more than 7,500 people;
- 1,000 employment positions created every year;
- The presence of internationally renowned actors like the LATECOERE Group, SABENA TECHNICS, ZODIAC AEROSPACE, AEROLIA member of the EADS group...;
- Activities with high added value ranging from the software / hardware engineering to the production of aeronautical systems through turning and machining of high precision components;
- 250 TND million from exports of products and services in 2012, representing an increase of 10% compared to 2011;
- An industry exporting more than 2/3 of its production to one of the most competitive markets, namely the European Union, with France being the first customer of Tunisia.

1 TND = 0.640 USD = 0.498 EUR (2012 average rate)

MAIN EXPORTED PRODUCTS IN 2012

- Electrical assemblies
- Electronic Components
- Equipment and aeronautical systems
- Wire harnesses: wiring, assembly of electronic subsystems
- Precision mechanical parts
- Precision sheet metal parts
- Technical plastic parts
- Computer Software
- Surface treatment
- Aeronautical structures...
Strength of the Sector

Aeronautics in TUNISIA: a Performing Supply-Chain.

"...It is clear that we find very appropriate profiles in TUNISIA in terms of professional experience, since there's a large number of industries which are already operating in aeronautics and automotive industry..."

Rémi MERLE, General Manager
LACROIX ELECTRONICS, TUNISIA

PRESENCE IN THE ENTIRE VALUE CHAIN OF OUTSOURCING

A range of highly specialized activities requiring great expertise is perfectly mastered by subcontracting companies in Tunisia in the fields below:

- **Engineering**: software development, electronic components.
  The main actors in this field are TELNET, AEROCONSEIL, ALTRAN, SOGECLAIR ...
- **Production**: electrical and wiring systems, composite materials, casting and machining, precision sheet metal, aircraft assembly, plastic parts, surface treatment... 
  The leaders in this field are: AEROLIA, AD INDUSTRIE, AEROSTANREW, AGBI, ASTF, CORSE COMPOSITE, EUROCAST, HUTCHINSON, LACROIX ELECTRONICS, MAP, MECANYVOIS, MECAHERS, SEGNERE, TECHNIPROTEC METAL, VIGNAL ARTRU, ZODIAC AEROSPACE...
- **Services**: engine repair, transformation and modification maintenance and other services.
  The operators are THALES, TUNISAIR TECHNICS, SITA, SABENA TECHNICS...

EMI: A PERFORMING SUPPORT SECTOR

The sector of mechanical and electrical industries, one of the major support sectors in aeronautics, is currently experiencing a strong development. Indeed, with about 1,000 companies and more than 110,000 employees, it is the first exporting sector and represents a share of about 35 % of total Tunisian exports in manufacturing industries.
Strength of the Sector

“We trust our teams from bottom to top of the hierarchy. They work independently, with a lot of commitment. This is the result of social dialogue, incentives to progress and openness to emerging ideas and talents.”

Gaby LOPEZ, Manager of ZODIAC EQUIPEMENTS - TUNISIA

In TUNISIA, the monthly average gross salary of an engineer is of about 1,200 euros and that of an advanced technician is of 600 euros.

AN ADEQUATE TRAINING SYSTEM AND SKILLED HUMAN RESOURCES

Tunisian human resources are available, responsive and multidisciplinary thanks to:

- the 15 sectoral training centers in the areas of metal construction, electronics, mechatronics, telecommunications, mechanical engineering, plastics, maintenance and power engineering;
- the Center of Excellence for Aerospace Industry and Professions “CEMIA”;
- the training structures in higher education offering a comprehensive program tailored to the needs of companies that provide every year the labor market with over 4,500 specialized engineers and advanced technicians: Engineering Schools, Higher Institutes of Technical Education, National Institute of Applied Sciences, Polytechnic School, Institute of Aeronautics Professions;
- the training center specializing in aerospace industry located at the aeropole of El Mghira dedicated to the fields of mechanics, electronics and information technology ...

Furthermore, Tunisian competencies are very competitive: with the same levels of skills and training, the salary of a Tunisian engineer is one-fifth that of an engineer in the southern countries of Europe.
PERFORMANCE OF CONNECTIONS
TUNISIA has nine international airports covering the entire territory. The largest airport is Tunis Carthage.
One hundred foreign airlines provide more than 2,000 weekly flights from Tunisia to Europe.
Maritime infrastructure consists of seven commercial ports.
The road network consists of 20,000 km of paved roads and 360 km of highways across the country.
The railway network is 2,167 km long and covers the whole country.

HIGH QUALITY TECHNOLOGICAL INFRASTRUCTURE
TUNISIA has:

- an aeropole at El-Mghira which is an integrated industrial platform, located in the southern suburbs of Tunis and extends over an area of over 200 hectares of which 20 hectares are dedicated to AEROLIA Aerospace Park, a subsidiary of EADS / Airbus;
- a competitiveness cluster in Sousse (East Central) consisting of:
  - a technology park spanning 60 hectares, specializing in the fields of mechanics, electronics and computing;
  - an offshoring area devoted to services;
  - and an industrial zone in Enfidha covering an area of 142 hectares.
- two operational economic parks with high quality services: the Bizerta park located in the port of the city (60 km from the Tunis airport) and that of Zarzis which is located within half an hour form the Jerba airport,
- about a hundred industrial areas spread throughout the country.
TUNISIA signed 52 agreements to avoid double taxation and 54 bilateral agreements for the promotion and protection of investments.

INVESTMENT INCENTIVES
investors who chose TUNISIA to locate their business are granted the following incentives:

- freedom to invest in the field of aerospace components. Foreign investors are entitled to hold up to 100% of the project’s capital and have the opportunity to freely repatriate profits and proceeds from sale of invested capital in foreign currencies;
- simplified establishment procedures. They can be done at the one-stop desk ran by the Agency for the Promotion of Industry and Innovation “APII”;
- an investment incentives code that grants several advantages in terms of tax and duties exemption and of subsidies and premiums to investment, particularly for the establishment in regional development areas;
- an association agreement with the European Union that resulted in a free trade area since January 2008 and preferential agreements with North African and Arab countries;
- several bilateral and multilateral trade agreements ...

A TECHNICAL SUPPORT STRUCTURE
The Group of Tunisian Aeronautics and Space Industries (GITAS) was created to support industries and investors operating in aeronautics. It currently has 40 member companies (against 19 in 2009). The Tunisian authorities, in synergy with the relevant industries and GITAS are determined to work towards the development of the activities of aeronautics and space industries in Tunisia.
The aviation sector in **TUNISIA** provides real investment opportunities to be seized by companies looking for better performance.

- **Electrical assembly**: converters, battery chargers, wound elements, motors, generators, transformers, measuring instruments ...
- **Cable harnesses**: cabling assembly of sub-sets, card assembly ...
- **Mechanics**: Casting Parts in special alloys based on cobalt, nickel and stainless steel, precision mechanics ...
- **Thin sheet metal**: structural assemblies, structural riveting, shaping (CN bending, assembly, riveting, TIG welding).
- **Airplane assembly**: aircraft assembly.
- **Plastics**: injection of engineering thermoplastics, and maintenance of molds, integration of electrical and electromechanical subassemblies, wire cabling ...
- **Surface treatment**: chemical chromating of aluminum (Alodine 1200 and Surtec 650) passivation of stainless steel, anodic colorless and black sulfuric oxidation.
- **Software**: Embedded software for calculators, inertial central bank test simulators avionics

Other opportunities exist to strengthen the various actors:

- the diversification of the products offered in the industry through the introduction of new activities such as aircraft storage, aircraft dismantling, interior design, aeronautical textiles, manufacturing spare parts for old aircraft ...;
- the creation of Tunisian companies providing services to offshore companies that they subcontract;
- the improvement of the industrial fabric through a migration of Tunisian companies towards products and services with high added value.
Several Groups Have Already Trusted TUNISIA:
Support Institutions

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