

Tunisia

National Urban Mobility Policies and Investment Programme

Completed

Basic information

Population	→	11,540,000
Growth rate	→	1.1%
Percentage of urban population	→	70%
GDP per capita	→	USD 3,317
Percentage of the population living below the national poverty line	→	15.5%
Modal share		
Formal public transport: 19%	→	8.2%
Informal public transport: 12%	→	N/A
Walking and cycling: 36%	→	58.3%
Motorised private transport: 27%	→	1.3%
National Determined Contribution	→	No mobility/transport-related NDC
CO2 Emissions (total in million tonnes CO2/ per capita in tonnes)	→	32.07 / 2.74
CO2 Transport Emissions (total in million tonnes CO2/ per capita in tonnes)	→	7.27 / 0.62
Proportion of transport-related GHG emissions	→	21%
Climate change exposure: HIGH	→	HIGH



Context

Tunisia's transport sector reflects broader trends in the Global South, with rapid urbanisation projected to bring 75% of the population into cities by 2030. Urban transport systems are already strained and have not kept pace with rising mobility needs. Public transport remains underfunded and underperforming, while road infrastructure continues to receive similar levels of state funding. Consequently, private vehicle use has increased, now accounting for 63% of motorised passenger trips. The vehicle fleet and paratransit services have expanded, leading to intensified congestion in major cities and peak speeds in Tunis falling to 7 km/h. The reliance on road-based transport has resulted in high environmental and economic costs, with the sector responsible for 21% of national GHG emissions and congestion and air pollution costing up to 2–10% of GDP.

Support from the Partnership

Technical Assistance: Support to develop a National Urban Mobility Policy and Investment Programme (NUMP)

Type of NUMP: Policy NUMP

Funded by: Fonds Français pour l'Environnement Mondial (FFEM) and BMU-ICI

Funding amount: EUR 300,000 (FFEM), 100,000 (Cerema) and 200,00 (BMU-ICI)

Implemented by: Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ), Agence Française de Développement (AFD), Coopération pour le Développement et l'Amélioration des Transports Urbains et Périurbains (CODATU) and Cerema

Local counterpart: Ministry of Transport

NUMP Summary

Status	Adopted
NUMP Development Timeline	Morocco joined MobiliseYourCity: 2016 Q4 Project start: 2017 Project completion: 2019 NUMP adoption:
NUMP Vision	The NUMP offers cities a general enabling framework for SUMP
Key expected results (GHG, modal share and access)	<ul style="list-style-type: none">• GHG: Reduction aligned with national climate commitments (~13% transport sector emissions vs. BAU) by 20230.• Car modal share: Maintain automobile share at ~16% of daily trips by 2030• Commute time: < 35 minutes average homework/study trip by 2030• Access to public transport: > 80% of urban population within 500 m of a bus stop with ≥3 buses/hour by 2030
Total NUMP Investment Requirement	N/A

Methodological framework

The methodological framework adopted for preparing the NUMP is based on an integrated, systemic approach to urban mobility. It recognises mobility as a cross-cutting policy area that interacts with urban planning, environmental policy, social development, energy and economic competitiveness. The methodology therefore combines sectoral analysis with an overarching framework that links transport supply, land use, governance and financing.

The process was structured around three main phases. The first phase focused on establishing a national-level diagnostic, drawing on existing studies, sectoral reports and stakeholder inputs to identify key dysfunctions, trends and structural constraints. The second phase translated the diagnostic into a shared vision and a set of strategic objectives, using a structured approach inspired by the "Avoid-Shift-Improve" (EASI) framework to address demand management, modal shift, and system efficiency. The third phase consisted of developing a detailed action plan, specifying short- and medium-term measures, responsible institutions, required resources and implementation timelines.

Throughout the process, emphasis was placed on feasibility, institutional realism and alignment with Tunisia's socio-political context. The methodology also integrates monitoring and evaluation by defining indicators and proposing the establishment of a national urban mobility observatory. This framework is intended to ensure that the NUMP is not only strategic but also operational, measurable, and adaptable over time.

The NUMP preparation process and stakeholders' involvement

The preparation of Tunisia's NUMP followed a structured, progressive process that combined technical analysis and stakeholder consultation. The process was organised around a series of clearly defined steps, beginning with a comprehensive diagnostic of urban mobility across Tunisian agglomerations, followed by the formulation of a shared vision and strategic objectives, and culminating in the development of an operational action plan. This approach was designed to ensure coherence between analysis, strategic orientation and implementation.

A central element of the preparation process was the establishment of a multi-sectoral working group, chaired by the Ministry of Transport and composed of senior representatives from key ministries involved in mobility, urban development, finance, energy, environment and local governance. These representatives were appointed at a high administrative level to ensure technical legitimacy and institutional ownership. The working group played a continuous role throughout the process, validating intermediate outputs, contributing to strategic discussions and ensuring alignment with national priorities.



Figure 2 : Working group held on 19 October 2018 in Tunis.

Stakeholder involvement was further reinforced through participatory workshops organised at key milestones of the process. These workshops brought together a broad range of actors, including central and local administrations, public transport operators, private-sector representatives, civil society organisations, academic institutions, and development partners. The participatory approach aimed to foster shared understanding of mobility challenges, encourage dialogue across sectors and build consensus around proposed reforms. Although the creation of a high-level political steering committee was envisaged, this body was not formally established; nevertheless, strong technical leadership by the Ministry of Transport ensured continuity and completion of the process.

Diagnosis of urban mobility in Tunisia

Urban and territorial context:

Tunisia is undergoing rapid urbanisation, with more than two-thirds of the population now living in urban areas and projections indicating a continued increase in the coming decades. This growth is largely characterised by uncontrolled peri-urbanisation and urban sprawl, particularly around the largest agglomerations such as Greater Tunis, Sfax and Sousse. Urban growth has extended well beyond administrative boundaries, while functional urban areas are not clearly defined or institutionally recognised. This situation complicates mobility planning and service provision, as daily travel patterns increasingly operate at the scale of metropolitan areas rather than at the

level of individual municipalities. In addition, the lack of consolidated, up-to-date data on urban dynamics limits public authorities' capacity to anticipate mobility needs and plan effectively.

Land use and urban development:

Urban development in Tunisia has been weakly coordinated with transport planning. Low-density expansion and functional segregation of land uses have increased travel distances and times, making daily mobility more complex and costly. Urban sprawl has reduced the efficiency and financial viability of public transport services, which struggle to serve dispersed and under-densified areas. The absence of systematic coordination between spatial planning instruments and mobility plans has also resulted in missed opportunities to protect corridors for public transport and to promote compact, mixed-use development. As a result, urban form increasingly reinforces car dependency rather than supporting walking, cycling and public transport.

Mobility and transport services:

A structural imbalance between supply and demand marks the current mobility system in Tunisian cities. Public transport services suffer from chronic underinvestment, ageing fleets, declining service quality and insufficient capacity, particularly during peak hours. Operational performance is poorly monitored due to a lack of indicators and reliable data. In response to these shortcomings, non-regular and informal transport services have expanded rapidly, partially filling service gaps but also contributing to congestion and inefficiencies. At the same time, decades of public policies favouring private cars and road infrastructure have reinforced automobile dependency, while investment in public transport and alternative modes has remained insufficient. The lack of physical, operational and tariff integration between modes further weakens the attractiveness and effectiveness of the overall transport system.

Safety and Comfort:

Road safety remains a critical challenge in Tunisian urban areas, where road crashes represent a significant social and economic burden, estimated at around 1.5% of national GDP. Pedestrians and users of two-wheel modes account for a disproportionately high share of traffic fatalities, reflecting the vulnerability of non-motorised users in urban traffic. Public space is poorly adapted for safe, comfortable movement: sidewalks are frequently encroached upon, discontinuous, or poorly maintained, and pedestrian crossings are often inadequately secured. In major cities such as Tunis, Sousse and Sfax, pedestrians account for approximately 30–36% of daily trips, and in medium-sized cities, walking exceeds 50% of trips. Yet, infrastructure quality does not reflect this modal importance. These shortcomings are particularly severe for persons with reduced mobility, older adults and children, making everyday travel risky and discouraging the uptake of active modes.

Socioeconomic and gender inequality

Mobility inequalities in Tunisia have direct social and economic consequences. Unequal access to reliable and affordable transport services limits access to employment, education, healthcare and essential services, particularly for residents of peripheral and underserved areas. Women, low-income households, older adults, and persons with reduced mobility face compounded barriers, including safety concerns, inadequate accessibility of vehicles and infrastructure, and limited transport options. Gender-specific issues such as harassment and insecurity in public transport further constrain women's mobility. Overall, mobility shortcomings exacerbate existing social and territorial inequalities and undermine social inclusion.

Environmental and climate change impacts

The transport sector is a major contributor to Tunisia's environmental and climate challenges. It is one of the largest consumers of energy and the dominant consumer of petroleum products, with road transport accounting for the vast majority of this consumption. Private cars play a particularly significant role in energy use and emissions. Urban road traffic is also a major source of air pollution, with frequent exceedances of national air quality standards for pollutants such as

nitrogen dioxide and particulate matter in densely trafficked areas. These impacts pose serious risks to public health and contribute significantly to greenhouse gas emissions, making urban mobility a key sector for climate mitigation and adaptation efforts.

High transport costs:

The economic cost of dysfunctional urban mobility in Tunisia is very high. Traffic congestion, air pollution and road accidents together represent a substantial burden on the national economy, amounting to several percentage points of GDP. Public finances are under significant strain due to fuel subsidies and the chronic deficits of public transport operators, whose financial situation has continued to deteriorate despite substantial state support. At the household level, transport costs are increasing, particularly for captive users who depend on inefficient or unreliable services. These costs reduce purchasing power and further reinforce social inequalities.

Institutional and financial constraints:

Urban mobility governance in Tunisia is characterised by fragmented responsibilities, unclear allocation of competences, and weak coordination across national, regional, and local levels. Most cities lack dedicated mobility authorities capable of planning, organising and regulating transport services at the appropriate scale. Strategic planning tools such as PMUD are scarce, and systems for data collection, monitoring and evaluation remain underdeveloped. Financially, the current model is unsustainable, relying heavily on state subsidies, annual budget arbitrations and low, centrally regulated tariffs that do not reflect operating costs. This context limits institutions' ability to plan long-term investments and implement coherent mobility strategies.

NUMP visions and goals

"Establish a sustainable, inclusive and efficient urban mobility system that supports economic development, social equity and environmental protection. It seeks to fundamentally transform the way mobility is planned, financed and managed by moving away from a car-oriented development model towards a balanced, multimodal system that prioritises accessibility, efficiency and quality of life for all users."

Therefore, the NUMP seeks to fundamentally transform the way mobility is planned, financed and managed, moving away from a car-oriented model towards a balanced, multimodal system that prioritises accessibility and quality of life for all users.

Based on the diagnostic findings, the NUMP defines a set of strategic goals that reflect the multidimensional nature of urban mobility challenges in Tunisia. These goals include reducing greenhouse gas emissions and energy consumption from urban transport, improving accessibility to jobs and services for all population groups, enhancing road safety in urban areas, and strengthening the resilience and performance of public transport systems. Social inclusion is a central objective, with particular attention to vulnerable groups, including women, low-income households, older people, and persons with reduced mobility.

Institutional and financial sustainability also form core components of the vision. The NUMP aims to support decentralisation by empowering local authorities and metropolitan entities, while clarifying roles and responsibilities across levels of government. Strengthening governance capacities, ensuring predictable and sustainable financing mechanisms, and restoring the financial and operational viability of public transport operators are identified as essential conditions for achieving the policy's long-term goals.

NUMP key measures

The NUMP measures and their implementation horizons are presented, but quantified cost estimates for the proposed measures are not provided.

Cluster	Measure (brief description)	Cost estimate (EUR)	Proposed financing source	Implementation schedule
Governance Reform	Creation of National Urban Mobility Commission (CNMU)	N/A	State budget	2020–2021
	Creation of Central Technical Unit (UTAC)	N/A	State budget	2020–2021
	Establishment of Metropolitan Mobility Authorities (AMMU/DMU)	N/A	State budget + future FNMU support	2020–2023
	Development of Urban Mobility Plans (PDU) in major agglomerations	N/A	State budget + FNMU	2020–2025
	Creation of National Urban Mobility Observatory (ONMU)	N/A	State budget	2020–2022
Capacity Building	Training program for ~150 mobility professionals	N/A	State budget	2020–2024
	Integration of mobility into university curricula and creation of Master program	N/A	State budget + academic institutions	2021–2024
Financing Reform	Establishment of National Urban Mobility Fund (FNMU)	N/A	Fuel tax reallocation, national fiscal resources	2021 onward
	Gradual fuel subsidy reform and reallocation to mobility	N/A	National fiscal reform	2021 onward
	Revision of public transport tariff policy	N/A	User fares + state compensation	2021–2025
Public Transport Reform	Development of Public Transport Rationalisation Plans (PRTC)	N/A	State budget + AMMU	2020–2022
	Introduction of Public Service Delegation (DSP) contracts	N/A	AMMU budgets + fare revenues	2021–2025
	Financial restructuring of public transport companies (e.g., STT)	N/A	State budget	2020–2023
Modal Shift & Infrastructure	Development of TCSP corridors and bus lanes	N/A	State budget + FNMU	2021–2025
	National Active Mobility Action Plan (PAMA)	N/A	State budget + local authorities	2021–2025
	Sidewalk rehabilitation campaign	N/A	Municipal budgets + State support	2021–2025
	Parking management and circulation plans	N/A	Municipal budgets	2021–2025
Safety & Inclusion	Road safety reforms (standards, Code updates, campaigns)	N/A	State budget	2021–2025
	Accessibility upgrades for PMR in public transport	N/A	State + Operators	2021–2025
Digital & Innovation	Implementation of "Smart Mobility Tunisia" strategy	N/A	State budget + potential PPP	2021–2025

Projected impacts

Indicator	Impact 2030 (SUMP vs BAU)	Baseline – 2015	Projected 2030 BAU	Projected 2030 SUMP scenario
Total annual GHG emissions (Mt CO₂eq)	-3 300 000 tCO ₂ eq	9 200 000 tCO ₂ eq	15 300 000 tCO ₂ eq	12 000 000 tCO ₂ eq
Access Increase in the proportion of the population living 500 meters or less of a public transport stop	N/A	N/A	N/A	80%
Modal share Increase in the modal share of trips by public transport, walking and cycling	TOTAL: 31.4 %	TOTAL: 53.6 %	N/A	TOTAL: 85 %
Road safety Decrease in traffic fatalities in the urban area per 100,000 inhabitants	-50 %	-55 fatalities/100 000 hab	N/A	-22 fatalities/100 000 hab

NUMP Finance leverage

Financing resulting from the NUMP	Source	Type	Status	Amount (EUR)
NUMP implementation support	AFD	Grant	Secured	250,000
Grant fund to develop an urban mobility plan for the Greater Metropolitan Area of Tunis	Republic of Tunisia	Budget allocation	Secured	600,000
Grant funds to finance actions of the NUMP (studies, capacity building and tender support for NUMP implementation)	AFD	Grant	Secured	400,000

Insights from practice: lessons learned from NUMP development

A renewed multi-level governance architecture anchors NUMP implementation

Between 2021 and 2022, Tunisia operationalised a new governance framework for urban mobility with AFD-funded technical assistance to the Ministry of Transport. At the national level, the planned creation of a National Urban Mobility Commission (CNMU) is designed to secure high-level political backing for the NUMP and its structural reforms. At the same time, a Central Technical Support Unit (UTAC) will ensure day-to-day operationalisation. Initially hosted within the Ministry of Transport and later expected to become an independent public institution, UTAC is intended to

bridge strategy and execution. At the local level, Metropolitan Urban Mobility Authorities (AMMU) and Urban Mobility Departments (DMU) within municipalities are foreseen to strengthen planning capacity and manage public transport networks, with advanced discussions already underway for a SUMP in Greater Tunis.

Institutional reforms reveal the complexity of decentralisation and legal alignment.

The implementation of the new governance model highlights structural challenges within Tunisia's decentralisation process. Contradictions between the Local Authorities Code and Law 2004-33 on the organisation of land transport create legal ambiguity regarding competencies. In addition, defining the appropriate legal status of newly created national entities remains complex in a politically unstable context marked by limited fiscal space. The Tunisian experience illustrates that governance reform in urban mobility requires careful legal harmonisation and institutional sequencing to ensure durability.

A National Urban Mobility Fund is key to securing predictable and earmarked financing.

To address chronic instability in transport financing, the NUMP provides for the establishment of a National Urban Mobility Fund (FNMU). The fund is designed to channel earmarked national transport-related taxes, such as road taxes, alongside selected local tax revenues, thereby ensuring more stable and predictable funding streams for urban mobility investments. This institutionalisation of dedicated financing mechanisms reflects recognition that structural reforms require long-term fiscal instruments rather than ad hoc budget allocations.

Perspectives for implementation

Scaling up priority actions with external technical and financial support

Finally, the initial phase of NUMP implementation has demonstrated the importance of external support, notably the AFD grant (2020–2023), which has underpinned priority actions and helped operationalise the policy framework. Continued engagement with international partners, financial and technical, will be pivotal to scaling up implementation, especially in areas requiring specialised expertise or funding that exceeds national capacities. Sustained cooperation with development partners will also support the gradual transition toward more autonomous domestic implementation.

As for next steps, the NUMP aims to support the elaboration of Sustainable Urban Mobility Plans (PMUDs) in the Greater Tunis area, translating the national policy framework into concrete, city-level strategies and investment priorities.

Last updated December 2025