



Tunisia
2.79

	Score	Weight
Consumer Infrastructure	0.34 (0.88)*	0.13
Consumer Usage and Skills	0.46 (0.70)*	0.13
Business Infrastructure	0.20 (0.64)*	0.52
Business Usage and Skills	0.33 (0.71)*	0.17
Public sector Infrastructure	0.35 (0.83)*	0.04
Public sector Usage and Skills	0.34 (0.68)*	0.01

*The score of the leading performer for this component

Table 1: Component Scores & Weights 2011

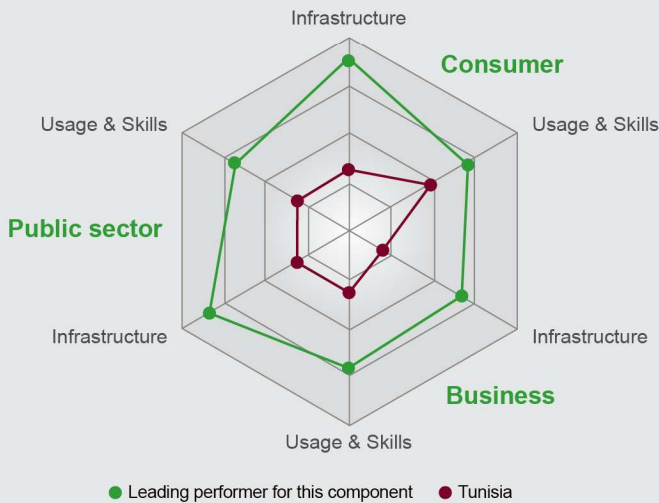


Fig 1: Component Scores 2011

Connectivity Scorecard 2011

Tunisia

Overview

Tunisia scores 2.79 and climbs one place to rank 12th among the resource and efficiency-driven¹ economies on the Connectivity Scorecard 2011 index.

With this performance, Tunisia outranks Asian super power China by two places, as well as its African peers Egypt, Kenya and Nigeria. Among the five African nations covered in the study, Tunisia is only outperformed by South Africa, which ranks 9th.

Tunisia's strength lies in the consumer component, with extensive mobile coverage; its network is among the most advanced telecommunications infrastructures in Northern Africa. However, the country performs quite moderately in the business infrastructure and public sector components, with poor ICT investments.

Strengths

Tunisia continues its strong performance in the consumer component again this year. As a result of heavy investments in the telecom sector since the mid-1990s, Tunisia has one of the most developed telecommunications infrastructures in Northern Africa, boasting some of the continent's highest market penetration rates.

With a near 100% mobile network coverage, the mobile sector is its biggest advantage. However, the country lags behind the leading resource and efficiency-driven economies such as Malaysia and Chile on broadband penetration, internet usage and subscriber levels, reflected in below-average scores on both consumer infrastructure (0.34), and usage and skills (0.46).

¹ As defined by The World Economic Forum www.weforum.org

Weaknesses

Tunisia performs moderately in the business infrastructure segment. While the country earns a relatively good score on secondary school enrolment rates (0.84), its performance remains just below the median. As a result, its performance in the business usage and skills component is marked by a moderate score of 0.33. Tunisia's business infrastructure score of only 0.20 reflects its poor performance on measures of PC penetration, secure internet servers, and business investment in computing equipment and software.

The country's performance in the public sector segment is also moderate, leading to low scores of 0.35 for public sector infrastructure and 0.34 for public sector usage and skills. However, since these metrics carry a low weight on the Connectivity Scorecard, they do not make any real impact on Tunisia's overall scores.

Conclusions

Tunisia continues to witness tremendous growth in the mobile sector. It is the 6th largest mobile market in Africa, having over 10 million mobile subscribers equating just over 100% penetration rate.

Competition between a number of service providers, supported by a nationwide fiber optic backbone network and international access via submarine and terrestrial fiber has led to some of the lowest broadband prices in Africa. The government is encouraging and promoting internet use but at the same time is keeping tight control by restricting access to certain websites. Going forward, the country has to focus on policies that incentivize wider ICT deployment and usage.

Tunisia stands in the first quarter of the 'Medium Human Development' countries as classified by the UN in its Human Development Index, and this is reflected in the findings of the Connectivity Scorecard 2011. To sum up, Tunisia's position is similar to most African and South Asian nations; its ICT and telecommunications can only develop in conjunction with other infrastructure and basic human capital.

2011 vs. 2010

Tunisia scores 2.79 and ranks 12th on this year's Connectivity Scorecard compared to a score of 3.87 and a rank of 13th in 2010. For the resource and efficiency economies, two major differences drive the

Rank [*]	Country	Connectivity Score
1 [1]	Malaysia	6.61
2 [3]	Chile	6.21
3 [5]	Russia	5.68
4 [7]	Turkey	5.51
5 [4]	Argentina	5.46
6 [6]	Brazil	5.14
7 [8]	Mexico	4.87
8 [10]	Ukraine	4.81
9 [2]	South Africa	4.68
10 [9]	Colombia	4.06
11 [12]	Thailand	3.68
12 [13]	Tunisia	2.79
13 [15]	Vietnam	2.73
14 [17]	China	2.72
15 [14]	Iran	2.41
16 [19]	Philippines	2.15
17 [n/a]	Syria	2.11
18 [20]	Indonesia	2.01
19 [16]	Sri Lanka	2.01
20 [18]	Egypt	1.89
21 [21]	India	1.25
22 [25]	Pakistan	1.14
23 [23]	Nigeria	1.09
24 [22]	Kenya	0.95
25 [24]	Bangladesh	0.90

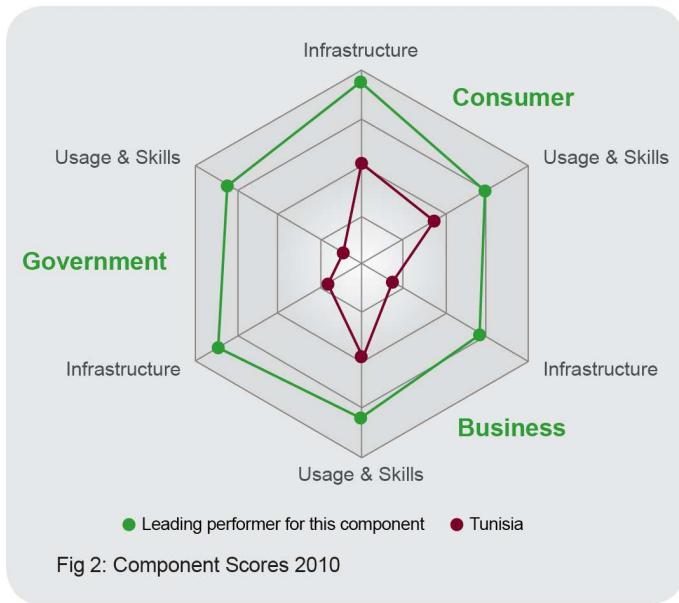
*last year's rank in parenthesis

Table 2: Connectivity Scorecard 2011 Results – Resource & Efficiency-driven Economies

difference in scores and rankings this year². First, there is the use of new weights that have a particular effect on the split between “infrastructure” and “usage and skills” in the business and public sector components of the Scorecard. Using Conference Board data, it is possible to obtain weights specifically for the relative contributions of ICT capital and labour force improvements to economic growth, from which the split between infrastructure (capital) and usage and skills is derived. In general, this change has resulted in more weight put on the “business infrastructure” component than in previous editions of the Scorecard. Further, the inclusion of new indicators has made a significant difference to countries' relative performance on the business components of the Scorecard. This has been discussed in detail above.

The Connectivity Scorecard is based on comparative

² For more information download the Connectivity Scorecard 2011 Report from www.connectivityscorecard.org



scores between countries, and, therefore, each country's performance is measured in relation to the best performing nation in each segment at a given point of time. As with other indices of relative rankings, it is difficult to interpret the Scorecard in terms of absolute "improvements" or "deteriorations" and to make comparisons of scores over time.

About Connectivity Scorecard

The Connectivity Scorecard is a global ICT index which, unlike other available research, is the first of its kind to rank countries in terms of "useful connectivity". That is, not only on the deployment of ICT infrastructure but also to measure the extent to which consumers, businesses and the public sector "make use" of connectivity

technologies to enhance social and economic prosperity. This "useful connectivity" is defined as the bundle of infrastructure, complementary skills, software and informed usage that makes ICT the key driver of productivity and economic growth.

Commissioned by Nokia Siemens Networks, the study was created by Professor Leonard Waverman, Dean, Haskayne School of Business, University of Calgary, and Fellow, London Business School. The study was conducted by the consulting firms Berkeley Research Group and Communicea.

For more information on the Connectivity Scorecard, visit www.connectivityscorecard.org

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