



BUILDING SECTOR BRIEF: TUNISIA

Status: March 2019

Tunisia's regulative framework on energy efficiency in buildings is impressive and includes several incentive mechanisms. To reach the ambitious NDC targets, further refinement is needed to propel large-scale transformation in the residential and public sectors.

CURRENT CLIMATE TARGETS

The NDC 2030 objective is to reduce total carbon intensity by 41% compared to 2010. In the energy sector, carbon intensity will have to be reduced by 46% - mostly by increasing energy efficiency. In fact, more than 30% of the projected reductions within the energy sector will need to happen in the buildings sector. This makes the buildings sector the most important source of emission reductions within the energy sector, bypassing even installation of additional renewable energy electricity capacity.¹ Five sectoral NAMAs, among which one in the buildings sector, are at various stages of development and implementation.

BUILDINGS SECTOR GROWTH

The building sector is expected to grow by a quarter in 15 years: With almost 2.4 million housing

units in 2014, and an estimated need of approximately 40 000 new units a year, Tunisia's housing stock will reach 3.2 million units in 2030².

Individual households' investment in housing made up 18% of total capital investment in Tunisia in 2016.. In 2017, 79% of new construction permits were issued to individuals, and only 19% and 2% respectively to private and public real estate developers³.

Housing is an important concern for large parts of society, and at a 12% annual increase in (urban) housing prices in the 2012-2015 period, affordability is the key question. Access to housing is on the government's agenda and reforms, incentives and programs are regularly set up. Yet they have not been sufficiently able to address the middle and lower income class segments, leading to informal housing conditions that offer low comfort to residents and increase the burden on the government budget in the long run⁴.

BUILDINGS SECTOR ENERGY DEMAND

More than a third of total final energy consumption already occurred in the buildings sector in 2016 (26% in the residential and 8% in the commercial and public services sector).

¹ Intended Nationally Determined Contribution, Republic of Tunisia, Ministry of Environment and Sustainable Development, 2015.

² ALCOR, 2017

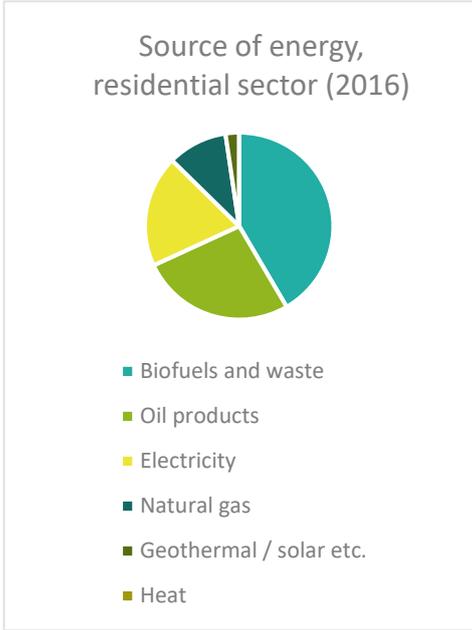
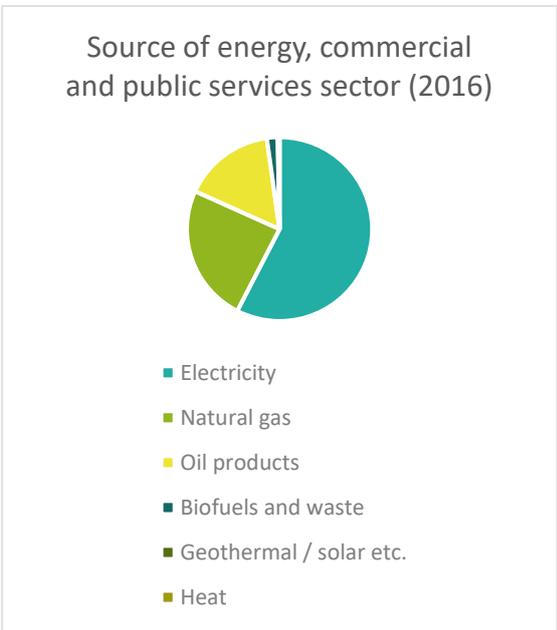
³ Building Permit Statistics, Ministry of Equipment, Housing, and National Planning, 2018.

⁴ Economic Studies of the OECD: Tunisia, 2018.

In the residential sector, electrical appliance ownership and, by consequence, electricity consumption has been continuously rising as comfort levels increase. As of 2014, 35% of housing units were equipped with an AC device. Almost all households own a TV, radio, and fridge, and a large majority own washing machines and stoves with an oven. Yet, according to the energy balance, over 40% of energy used by households still stems from biofuels and waste⁵

In the commercial and public services sector, the large majority of energy consumption is electric

(according to 2010 estimates). Tourism, public offices, trade, and health are the largest energy consumers. Usage of air conditioning in the tourism sector specifically pulls up this figure for Tunisia. The same data shows average electricity consumption of just below 20kWh/room/night for hotels and of 41kWh/bed/night for the health sector; however, this does not take into account significant variations due to heterogeneity of services offered⁶.



⁵ Country Energy Balance for Tunisia, IEA, 2018.

⁶ Tendances d'efficacité énergétique dans les pays Méditerranéens, MEDENER, 2013.



On behalf of:



Federal Ministry for the Environment, Nature Conservation, Building and Nuclear Safety

of the Federal Republic of Germany



MINISTÈRE DE LA TRANSITION ÉCOLOGIQUE ET SOLIDAIRE



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French Environment & Energy Management Agency



AGENCE FRANÇAISE DE DÉVELOPPEMENT



Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH

The Programme for Energy Efficiency in Buildings (PEEB) is currently funded by the German Federal Ministry for the Environment, Nature Conservation and Nuclear Safety (BMU), the French Ministère de la Transition écologique et solidaire (MTES), Agence Française de Développement (AFD) and the Fonds français pour l'environnement mondial (FFEM).

This project is part of the International Climate Initiative (IKI). The German Federal Ministry for the Environment, Nature Conservation and Nuclear Safety (BMU) supports this initiative on the basis of a decision adopted by the German Bundestag.

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PEEB is implemented by
Agence de l'Environnement et de la Maîtrise de l'Énergie (ADEME)

Agence Française de Développement (AFD)

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Programme for Energy Efficiency in Buildings (PEEB) Secretariat

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Published
March 2019

