

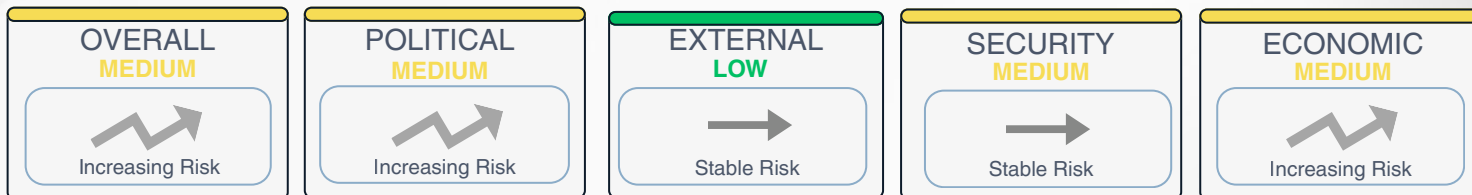
**August
2026**

MONTHLY BRIEF

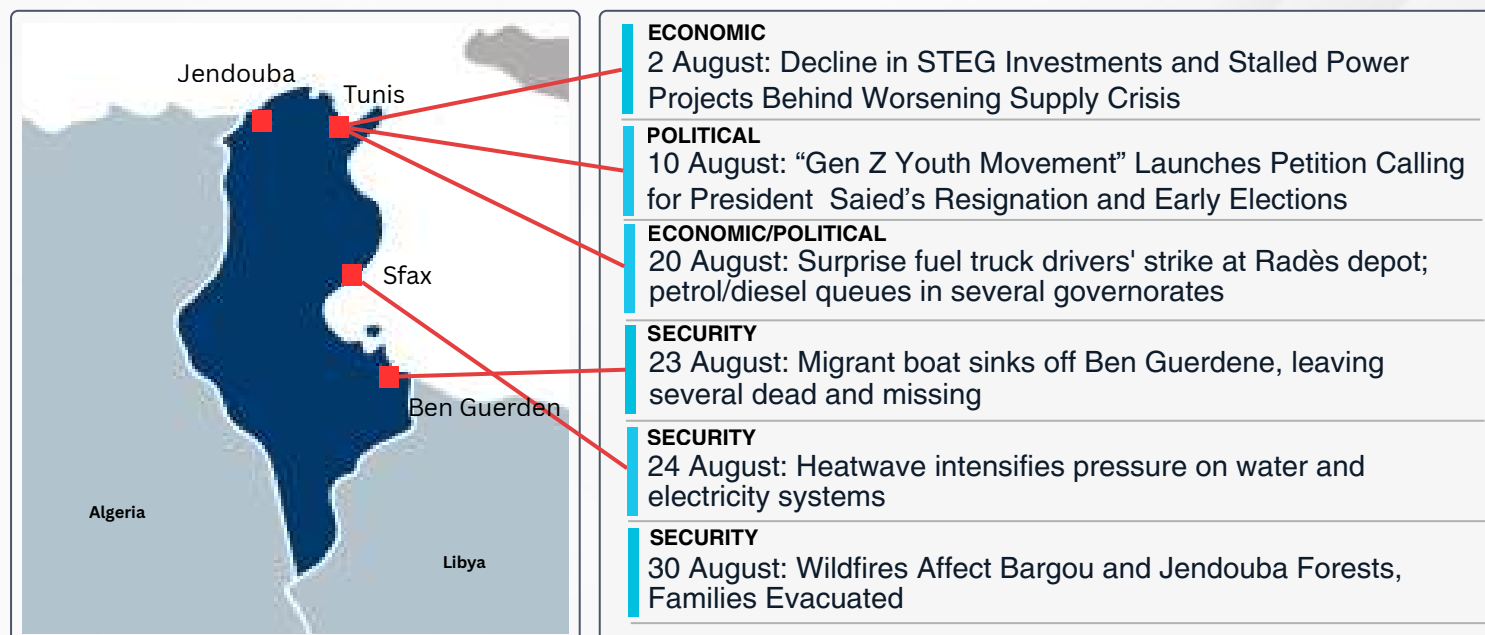
Tunisia Risk Environment

SUMMARY

TUNISIA-WIDE RISK DASHBOARD



KEY DEVELOPMENTS



REGIONAL DEVELOPMENTS

Tunis (Capital Region)	Coastal Tunisia	Interior/Inland Tunisia
Tunis - Ariana - Ben Arous - Manouba La Marsa - Gammarth - Lac	Bizerte - Nabeul - Hammamet - Sousse Monastir - Sfax - Gabes - Djerba	Tatouaine - Medenine - Tozeur Kasserine - Beja - Sidi Bouzid
SECURITY 14 Aug: Former Italian Intelligence Officer Dies in Mornag Prison 19 Aug: Police Arrest 15 Wanted Suspects in Tunis Security Sweep 24 Aug: Knife Fight in Boumhal Triggers Multiple Arrests POLITICAL 10 Aug: Ongoing Health Concerns for Imprisoned Opposition Leaders 20 Aug: Nafas Movement Leads Tunis Rally Calling for Saied’s Departure and Political Prisoner Releases 20 Aug: Persistent Fuel, Power and Water Shortages Fuel Anger at Government	SECURITY 6 Aug: Armed Daylight Robbery at a Currency Exchange Office in Hammamet 18 Aug: Sousse Drug Trafficking and Money Laundering Network Dismantled, Three Arrested POLITICAL 10–11 Aug: President Kais Saied Visits Gabes to Assess Pollution Crisis and Reassure Residents 14 Aug: 12 Arrested in Mahdia Over Water Protests, Including Minors 24 Aug: Power Outage Disrupts Water Supply in Parts of Mahdia and Sfax	SECURITY 20 Aug: Hassi El Ferid Protesters Block Road over Water and Development Delays 22 Aug: Migrant Boat Sinks Off Ben Guerden, Several Dead and Missing 23 Aug: Boat Tragedy Protesters in Ben Guerden Clash with Police POLITICAL 4 Aug: Protests over Socioeconomic Grievances Spread from Mining Basin to Tataouine 17 Aug: CPG Workers Announce September Strike in Gafsa

POLITICAL RISK



ANALYST COMMENTARY

- The Political Risk rating for Tunisia in August 2026 was **Medium** with a trend toward increasing risk.
- Rising temperatures and persistent power cuts have driven growing public frustration, with increasing criticism of the administration's lack of response and explanation that the cuts were caused by unspecified "premeditated acts."
- Consecutive heatwaves throughout the month of August increased focus on power cuts and shortages of bottled drinking water, in some cases driving localized protests as cuts extended beyond a week in some governorates.
- Multiple reports of deaths at Tunisian prisons due to heat and dehydration have sparked controversy, particularly deaths of prisoners who had to yet to be tried and were awaiting administrative procedures.
- The presence of a significant number of Tunisians residing abroad during the summer months increased public and social media attention on Tunisia's infrastructure challenges, drawing greater attention both domestically and internationally.
- Differing accounts from government entities about the cause of the power outages contributed to further public frustration and increased the potential for localized protests. As of the time of reporting, the overall situation remains stable as temperatures have cooled slightly along with government plans to provide emergency water supplies to certain areas. However, the underlying systemic challenges remain.
- Concerns over possible strikes in the fuel sector added additional uncertainty, with a surprise fuel transport strike disrupting distribution in Tunis.

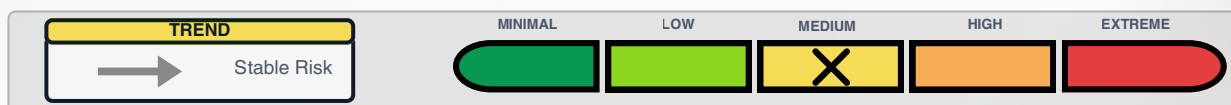
EXTERNAL RISK



ANALYST COMMENTARY

- The External Risk rating for Tunisia in August 2026 was **Low**.
- Tunisia's external environment remained broadly stable in August, with no meaningful deterioration in relations with its principal partners. The main vulnerability remains regional exposure rather than diplomatic friction, particularly Tunisia's vulnerability to developments in Libya.
- Tunisia has limited ability to shape Libya's security and political trajectory, leaving border security and cross-border commercial activity vulnerable to developments beyond Tunis' control.
- The broader regional risk is increasingly defined by spillover rather than direct bilateral tensions. Wildfires across the Algeria-Tunisia border illustrate how external shocks can create immediate operational pressures, encouraging practical coordination rather than political tensions.
- Relations with EU and Western partners remain steady, with no major shift in cooperation this month. Migration remains a key source of friction, alongside tensions over the EU Association Agreement and human rights concerns, but these remain issue-specific rather than indicative of broader deterioration.

SECURITY RISK



ANALYST COMMENTARY

- The Security Risk rating for Tunisia in August 2026 was **Medium**.
- Tunisia's security environment remained broadly stable in August. However, physical security risks around bottled water distribution points, including some supermarkets, increased as numerous physical altercations over water supplies were reported along with crowds surrounding water delivery vehicles.
- Additionally, localized protests were reported nationwide in response to extended power and water cuts, with some clashes with police.
- August also saw a growing number of reports of hospitalizations and deaths due to the heat and dehydration.
- Criminal activity, including drug trafficking and burglary, remained contained through regular enforcement, while migration related incidents led to some localized protests.
- The risk rating remains Medium because of continued and heightened public grievances and limited government responsiveness. August saw localized protests, but there is currently no indication of a broader deterioration in the security environment.



KEY SECURITY EVENTS

- | | |
|---|---|
| <p>1 4 Aug - Bardo: Driver arrested over theft of Bardo municipal vehicle; car recovered in El Mnhla</p> <p>2 7 Aug - Tunis / El Omrane: International drug-trafficking network dismantled; ~8,500 tablets seized</p> <p>3 10 Aug - Khaznadar: Suspect arrested over 20+ shop/home burglaries</p> | <p>4 20 Aug - Tunis: Nafas opposition protest against government</p> <p>5 28 Aug - Ariana: Citizens Raid Mineral Water Truck as Water Shortages Persist</p> <p>6 29 Aug - Jbal Lahmar: Protest, clashes with Police over Continued Power Cuts</p> |
|---|---|

ECONOMIC RISK



ANALYST COMMENTARY

- The Economic Risk rating for Tunisia in August 2026 was **Medium**, with a trend toward increasing risk.
- There was no major deterioration in Tunisia's economic position during August, but the tangible impacts on consumers from long-term systemic weaknesses were significantly heightened via outages and shortages.
- The bottled water shortage in particular shows the persistent vulnerabilities to global market disruptions (raw material imports disrupted at the Strait of Hormuz) and local management of supply and emergency distribution channels.
- Consumer prices continued to rise, while delays affecting investment and infrastructure projects continue to limit economic momentum.
- The current shortages and disruptions to key services reveal the limited progress made on upgrading key infrastructure. Slow project execution and pressure on purchasing power are restricting the government's ability to translate economic measures into tangible improvements.

ECONOMIC INDICATORS

INFLATION RATE

5.1%
July

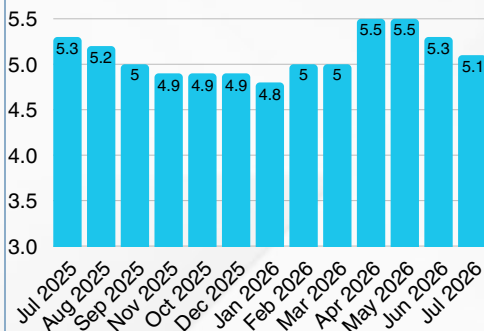
FOREIGN EXCHANGE RATE

USD = TND = EURO
2.90 = 1.00 = 3.39

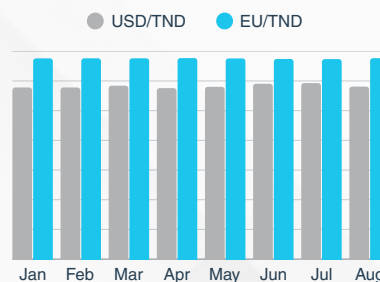
CONSUMER PRICE INDEX (CPI)

196.20 points
July

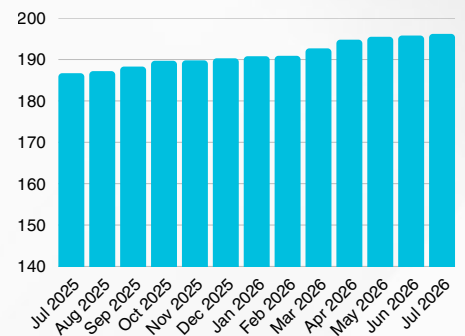
Monthly Inflation Rate



USD and EUR Exchange Rates



Tunisia CPI by Month



INFRASTRUCTURE UPDATES

LAND BORDERS

Ras Jedir (Libya)

Major disruptions reported in early August with 4-5 day delays reported for some crossings.

COMMERCIAL PORTS

Port of Radès

20 August, surprise fuel transport strike disrupted operations. Chronic operational issues remain, preventing full utilization.

OIL/ENERGY TERMINALS

STIR Refinery (Bizerte)

13 August, marine pollution incident activated internal emergency response plan.

Skhira Petroleum Zone (Sfax)

20 August, fuel transport strike disrupted transport operations.

AIRPORTS

Tunis-Carthage (TUN)

Occasional passport processing delays reported both on arrival and departure. Some viral social media posts highlighted frustrated over cancelled TunisAir flights.

IN-DEPTH

DISCONTENT DEEPENS AS POWER AND WATER CUTS COINCIDE WITH HEATWAVE

On 20 August 2026, hundreds of protestors gathered in downtown Tunis to demand President Kais Saied's resignation and the restoration of democracy in Tunisia after weeks of power cuts, water shortages, and mounting frustration. Organized by the newly formed Nafas movement which specifically advocates for speech and press freedoms, the demonstration also reflected wider grievances over the rising cost of living, shortages of essential goods, and recurring water and electricity disruptions that have created challenging conditions for many communities.

The 20 August protest came amid growing pressure on basic services. Tunisia experienced repeated power cuts during an exceptionally hot summer, while electricity disruptions also affected water-pumping operations, contributing to shortages in several regions. The government, and President Saied specifically, have attributed some of the disruptions to alleged “premeditated acts” of sabotage, although the scale of the outages has also highlighted broader fragilities in the country's electricity and water infrastructure.

Additionally, on 22 August, a migrant boat carrying around 15 people from the Ben Guerdane and Zarzis area sank off Tunisia's southeastern coast while reportedly heading towards Italy. At least 12 people died, with 14 of those aboard originating from Ben Guerdane, including multiple members of the same family.

The sinking subsequently triggered protests in Ben Guerdane, where residents blocked roads and burned tires. Smaller protests were held in solidarity with the Ben Geurdane families in Tunis and elsewhere.

Demonstrators linked the tragedy to the lack of economic opportunities in the region, arguing that deteriorating living conditions and limited employment prospects are pushing young people towards increasingly dangerous migration routes in hopes of a better life in Europe.

The convergence of these developments points to a broader challenge for the government: economic and service delivery failures are increasingly stoking political discontent. Unlike purely political mobilization, grievances over electricity, water, goods shortages and economic opportunity affect a much wider segment of the population and can generate localized protests independently of established opposition structures.

The main concern is therefore the cumulative effect of these pressures rather than any single episode of unrest. Continued deterioration in basic services, further high profile migration incidents or worsening economic conditions could reinforce perceptions of declining state capacity and broaden public mobilization beyond traditional opposition constituencies. While this does not currently indicate an imminent nationwide challenge to the government, it increases the likelihood of recurring, issue driven protests across different regions.



Traffic was stopped near downtown Tunis as individuals forcibly removed bottled water from a transport truck.

Photo Source: *Rassd Tunisia*



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