



CEDEFOP

European Centre for the Development
of Vocational Training

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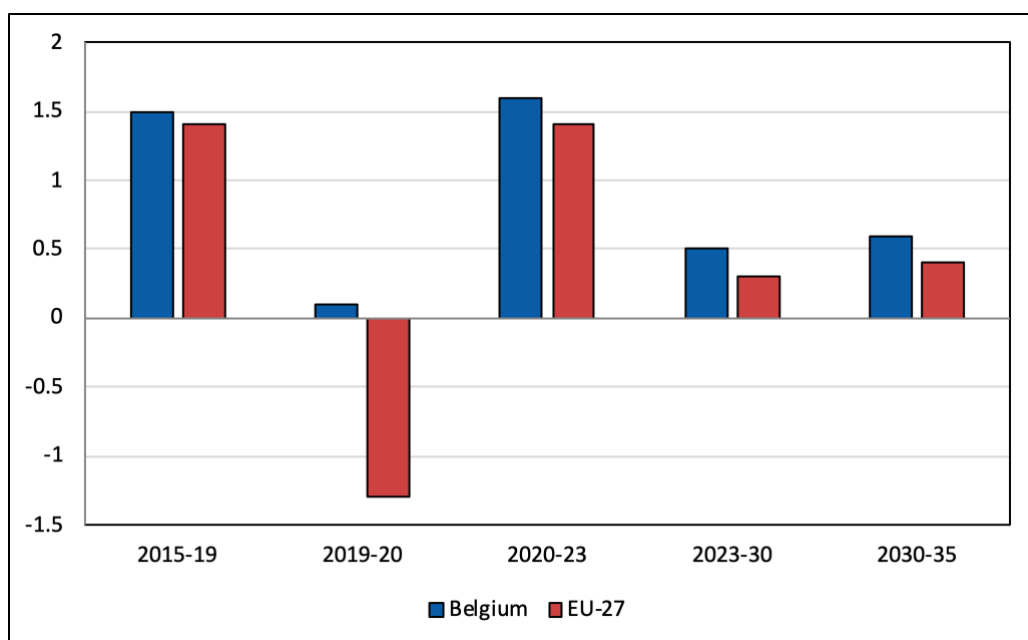
2025 skills forecast Belgium



1. Employment outlook

Employment in Belgium is forecast to continue growing over 2023-35, albeit at slower rates than seen over 2015-19. Figure 1 shows that employment in Belgium remained stable in 2020, despite the start of the Covid-19 pandemic, which led to a fall of almost 1.5% in the EU-27 as a whole in the same year. Across the forecast period, employment in Belgium is forecast to grow somewhat faster than the EU-27 average, and growth is expected to accelerate slightly in the longer term (2030-35).

Figure 1. **Annual percentage employment growth in Belgium and the EU-27, 2015-35**



Source: Cedefop (2025 Skills Forecast).

2. Labour force overview

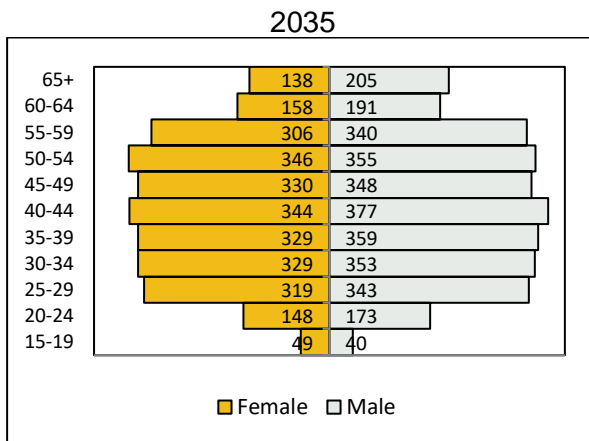
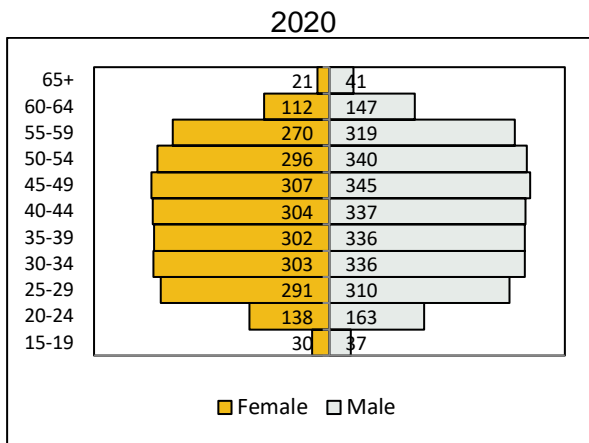
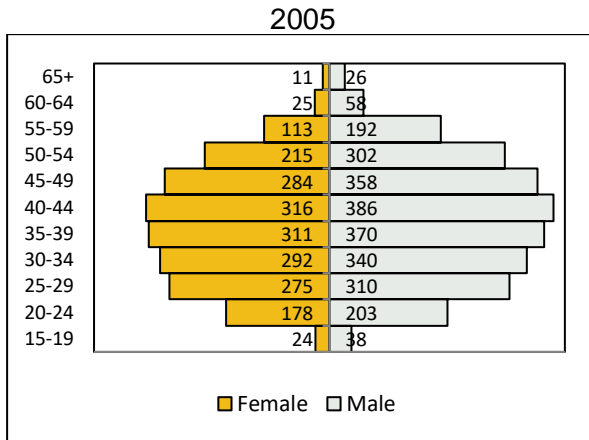
Figure 2 shows Belgium's labour force by age group in 2005, 2020 and 2035. The labour force in Belgium is expected to continue growing strongly over 2020-35, increasing by almost 16% (compared with just under 10% for the EU-27) over this period compared with an increase of just under 10% (just under 5% for the EU-27) over 2005-20. This reflects increasing participation rates in all age groups, except 20-24 year olds, with particularly strong increases for those aged 50 and above. The total participation rate is forecast to increase by 4 pp over 2020-35. Although total population is forecast to grow over this period by just over 8%, this compares with an increase of almost 11% over 2005-20.

The picture amongst the different age groups is mixed. Apart from 50-59 year olds, the population for all age groups is forecast to increase in Belgium over 2020-35, reflecting trends in the relevant younger cohorts in preceding periods. Generally, the population in Belgium is not ageing as strongly as elsewhere in the EU-27, although the share of the labour force aged 65 or more is forecast to increase from just over 1% in 2020 to almost 6% in 2035, due to a rapid increase in both population and the participation rate of that age group.

The decline in the participation rate of 20-24 year olds in Belgium reflects the continued trend of an increase in the number of years spent in education, although the decline of 2 pp in the participation rate for this age group over 2020-35 is much less than the decline of 14 pp that was seen over 2005-20. The other age groups between 25 and 39, which also saw declining participation rates over 2005-20 are expected to see a reverse in this trend over 2020-35.

For those aged 50 or more, participation rates are expected to show a significant increase of at least 9 percentage points (pp) over 2020-35, consistent with increases in retirement age, ageing of previous cohorts with higher average levels of education, and the dismantling of early retirement schemes being implemented in Belgium. The male participation rate is forecast to increase by 3 pp over 2020-35, while the female rate is forecast to increase by 4 pp over the same period, so that in 2035, the male rate is expected to be 61%, and the female rate 53%.

Figure 2. Distribution of the labour force (thousands), 2005-35

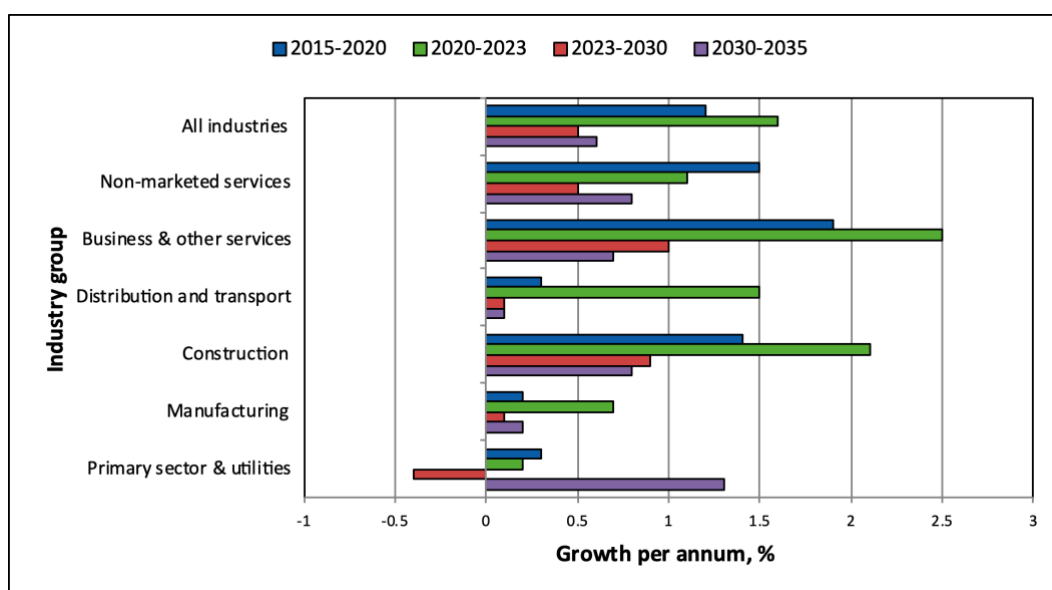


Source: Cedefop (2025 Skills Forecast).

3. Sectoral employment trends

Figure 3 shows annual average employment growth by broad sector in Belgium between 2015 and 2035. Employment is expected to increase in all broad sectors during the forecast period, apart from *Primary sector & utilities* over 2023-30, albeit generally more slowly than was seen over 2015-20 (which includes any impacts of the start of the Covid-19 pandemic in 2020) and 2020-23 (which includes some bounce back). The strongest growth is expected in *Business & other services* and *Construction*, with employment growth of around 1% pa over 2023-30. Employment in the *Primary sector & utilities* is forecast to decline by 0.4% pa over 2023-30, but this is forecast to be followed by growth of 1.3% pa over 2030-35. Growth in employment in *Manufacturing* and *Distribution & transport* is forecast to be very slow over the whole forecast period.

Figure 3. Employment growth by broad sector of economic activity, 2015-35



Source: Cedefop (2025 Skills Forecast).

In terms of sub-sectors (i.e. below the level of the six broad sectors discussed above), services such as *architectural & engineering services*, *administrative & support services*, *legal, accounting & consulting services*, *media* and *market research & other professional services* are expected to be among the fastest growing sectors, thus driving the increase in *Business & other services* as a whole. Within *Non-marketed services*, employment growth in the *health* sector is forecast to be relatively strong, reflecting increasing requirements due to the ageing of the population, while a slight decline in *education* will reflect the evolution of the school-

age population. *Within Manufacturing*, employment growth in *electrical equipment*, *pharmaceuticals* and *motor vehicles* is forecast by the model to be relatively strong. The slow growth forecast for the broad sector of *Distribution & transport* is expected to be driven primarily by slow growth in *distribution*. The forecast decline in employment in *Primary sector & utilities* over 2023-30 is due to a strong forecast decline in employment in *agriculture*, and although employment in *agriculture* is expected to continue to decline over 2030-35, employment growth in the broad sector as a whole is forecast to pick up, driven by strong growth in *electricity* over 2030-35 as a result of a greening of the economy and the resulting changes to the electricity sector.

Cedefop skills forecasts estimate the total job openings by occupational group as the sum of net employment change and replacement needs. Net employment change refers to new jobs created or lost due to the expansion or contraction of employment in that sector or occupation. Replacement needs arise as the workforce leaves the occupation due to retirement or career changes. Replacement needs, generally, provide more job opportunities than new jobs, meaning that significant job opportunities arise even in occupations declining in size (i.e. agricultural workers are a typical example, as ageing workers employed in the sector will need to be replaced).

4. Job openings by occupational group

Figure 4 shows the total job openings by broad occupational group over 2022-35. The number of job openings indicates the number of jobs required to be filled due to lost/newly created jobs and those that are expected to need replacement workers.

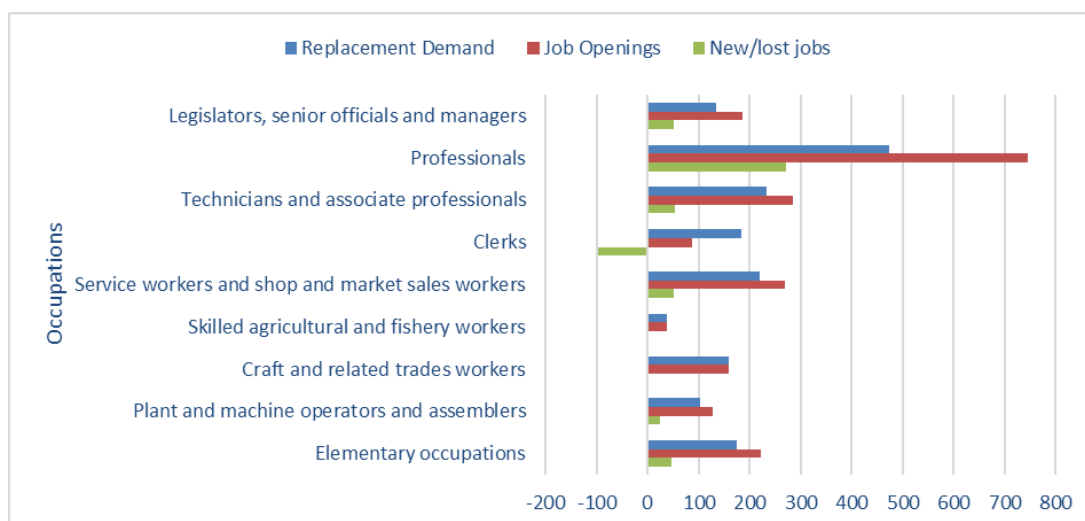
More than one-third of the job openings are forecast to be generated by the broad group of *Professionals* who benefit from strong employment growth. A similar, but smaller, group can be found in *Legislators, senior officials, and managers*, who are forecast to generate about 9% of the job openings between 2022 and 2035. *Technicians and associate professionals*, with 13% of the job openings, complete the higher-level occupations that strongly influence the overall job openings in Belgium. Among the intermediate-level occupations, *Service, shop, and market sales workers* represent almost 13% of expected job openings.

At the more detailed level, most job openings (taking both new/lost jobs and replacement needs together) as a share of all job openings are expected to be in

business and administration associate professionals (7.9%), *health professionals* (8.1%), and *Legal, social and cultural professionals* (7.3%).

Overall, job openings can be found among almost all major occupation groups thanks to the projected broad employment growth. Only among *clerks* and to a minor degree among *agricultural workers* is there an expected decline in employment numbers, such that job openings in the underlying occupations are only driven by replacement needs.

Figure 4. **Total job openings, 2022-35**



Source: Cedefop (2025 Skills Forecast).

5. Drivers of occupational change

Within the Cedefop skills forecast, future employment growth (or decline) of occupations is further broken down by separating national economic components from industrial and economic effects, helping to interpret what is driving the change. From this perspective, employment growth can be explained by three possible drivers: (a) overall economic trends (i.e., growth or decline), (b) shifts of employment between sectors, and (c) changes in the occupational structure within sectors (i.e., factors making some occupations more important than others).

An increasing specialisation in many sectors influences the occupational composition of employment in Belgium. This is reflected in stronger occupation-specific effects, leading to increasing shares of professionals and technicians and associate professionals in the economy. Often, there is a shift of importance from

associate professionals towards professionals. Mid-layer administrative tasks such as done by clerks are also diminishing strongly in importance within sectors. These changes reflect changes in job organisation in many sectors and, in many cases, an increasing specialisation. There is also a slight tendency towards lower-level occupations, usually replacing intermediate-level occupations.

Health professionals and associate health professionals benefit from the increase in the underlying health sector. Yet, not all of the increases in employment translate into higher employment in these important health occupations. An increasing specialisation will also lead to a larger share of other occupations in that sector.

Therefore, the overall effect of occupational change depends on several factors that must be considered together. Increasing digitalisation and moving towards a more service-oriented economy, including within manufacturing, will lead to a greater use of higher-level occupations. At the other end of the spectrum, lower-level occupations supporting production and the service sector are increasing at the cost of intermediate occupations. For example, the increasing importance of *food preparation assistants* goes along with a diminishing relative share of the higher level *Food processing, woodworking, garment and other craft and related trades*.

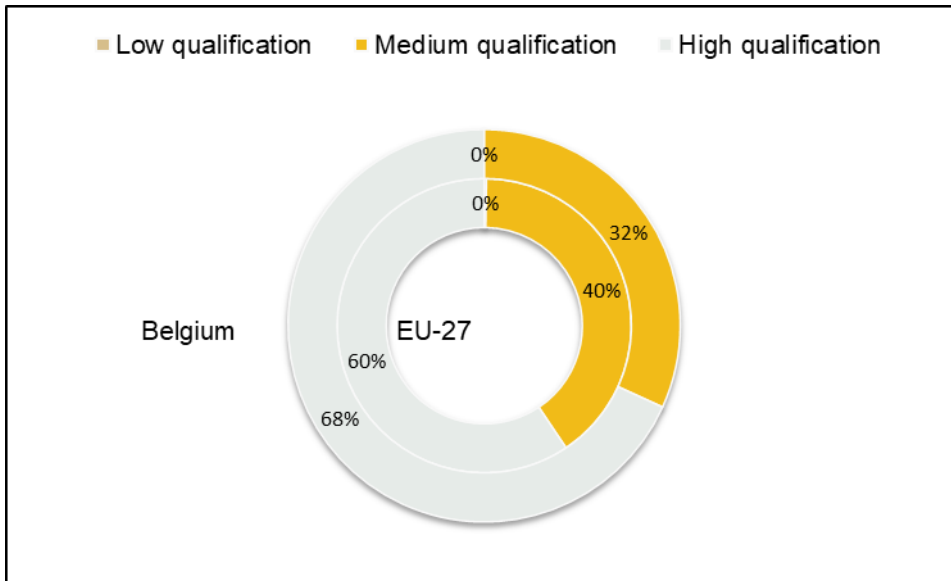
6. Demand for and supply of skills

Within the Cedefop skills forecast, skills are proxied by the highest level of qualification held by individuals in the labour force and employment. Three levels are distinguished: high, medium, and low, corresponding to the official ISCED classification. The occupational group also indicates the skill level required, as some occupations (e.g. professionals) typically require high-level skills, while others (e.g. elementary) typically require only basic ones. Therefore, occupational groups are also linked to a skill level.

Two-thirds (68%) of the total job openings in Belgium are expected to require high-level qualifications, about 8 percentage points higher than the EU-27 average (see Figure 5). This is, to some degree, the result of the economy and the forecast adjusting towards the higher qualified workforce, thus also filling lower-skilled jobs by medium and higher qualified.

This reflects the shift towards higher-level occupations and the increasing specialisation of the economy. The supply of higher-level educated people is also forecast to increase, while the medium level remains stable over time. Thus, Belgium is forecast to continue successfully increasing the overall qualification level by diminishing the share of low-qualified people, as seen in Figure 6.

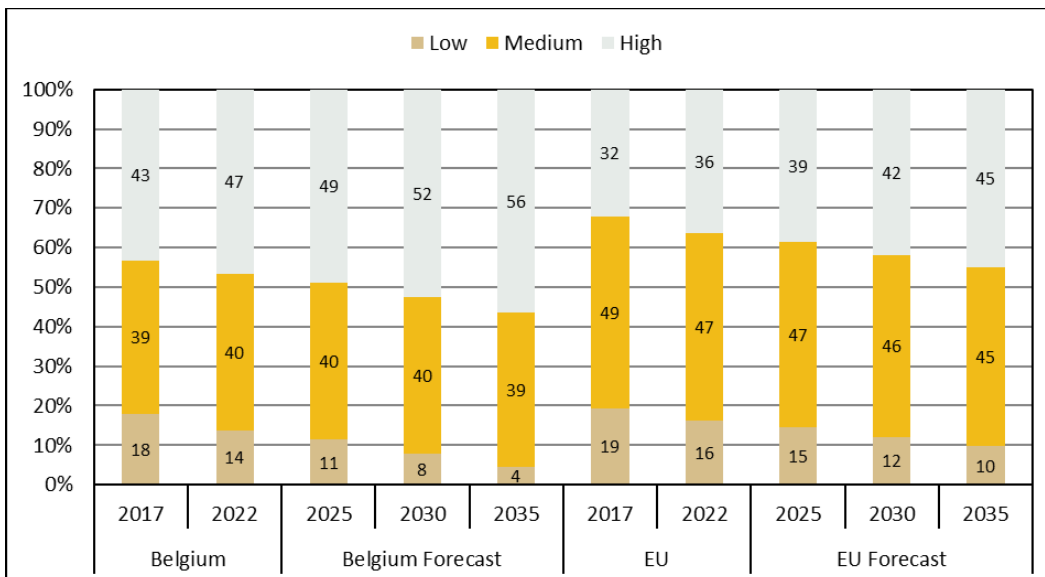
Figure 5. Shares of total job openings by level of qualification, 2022-35



Source: Cedefop (2025 Skills Forecast).

Future labour supply trends depend on the size of the working-age population (defined as those aged 15 or older), labour market participation rates, and the extent to which people acquire formal qualifications.

Figure 6. Labour force by qualification level



Source: Cedefop (2025 Skills Forecast).

Belgium's share of people with high-level qualifications is expected to increase to 56% by 2035. The share of the medium-level labour force is expected to remain fairly stable, declining marginally to 39% in 2035. Those with low levels of qualification are expected to diminish from 14% to only 4%. In Belgium, the proportion of the labour force with high-level qualifications is expected to remain significantly higher than the EU-27 average.

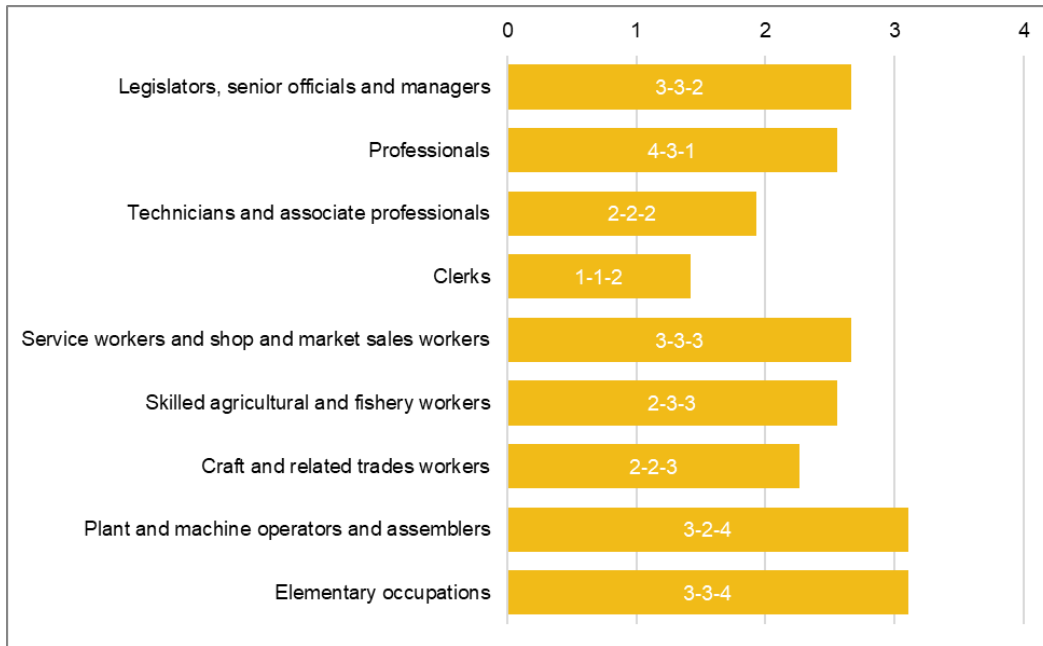
In Belgium, the supply of low- and medium-skill workers is expected to be below what is required by initial demand by 2035, while the supply of high-skill workers is expected to broadly meet the demand for those qualifications. The forecast adjusts the initial demand by filling lower skilled positions with higher qualified persons.

The **labour shortage index** is a method to summarise three elements of potential labour shortage: (1) employment growth, (2) replacement demand, and (3) Supply/Demand imbalance (FIOD). The outcomes at the occupation level are grouped into four quartiles: those with a low indication of shortage get the value 1, and those with the highest indication of shortage will get the value 4. The total outcome of the individual elements is a simple average of the elements. In Figure 6, the length of the bar gives the overall outcome, where higher levels indicate more shortage. The outcomes of the three elements are also given to quickly evaluate the influence of employment growth - replacement demand, and - supply-demand imbalances.

Belgium faces strong supply growth among the higher educated, while it does not increase among the intermediate qualified and diminishes strongly among the low qualified. Therefore, imbalances at the level of qualification occur, especially among the lower educated and somewhat at the intermediate level. It is thus not surprising that the labour shortage index, in its combined values, shows stronger shortages among lower-level occupation groups (see Figure 7).

The highest values of the labour shortage index can therefore be found among the lower-level occupations: *plant and machine operators and assemblers (3-2-4)* and *elementary occupations (3-3-4)*. Both are driven by being among the highest quantiles of imbalances as they employ the highest shares of lower qualified. But both occupations also have the second-highest level of employment growth and somewhat above the average level of replacement demand. Among the higher-level occupations, *legislators, senior officials and managers*, as well as *professionals*, stand out as a result of high employment growth levels and relatively high replacement needs. *Service, shop, and market sales workers* are among the intermediate-level occupations, with higher levels of shortage being around the second-highest level of employment growth, replacement needs, and imbalances.

Figure 7. Labour Shortage Index, 2022-35



Source: Cedefop (2025 Skills Forecast).

As the labour shortage index is calculated at the ISCO 2-digit level, it makes sense to compare the outcomes across the, more detailed, major occupation groups. Among the skilled manual occupations, the highest shortages are forecast by the model to be among *assemblers (4-2-4)*, who are among the highest for employment growth and imbalances.

Among the skilled non-manual occupations, the highest shortage is expected among *personal service workers (3-4-3)*. This is driven by being among the highest group for replacement demand, and second highest for employment growth and imbalances. Among the high-skilled workers, *legal, social and cultural professionals (4-4-1)* and *associate legal, social and cultural professionals (4-3-2)* have the highest labour shortages. While the shortage among professionals is driven by high employment growth and replacement demand, the replacement demand is slightly lower among associate professionals.

Cedefop methodology

The Cedefop Skills Forecast offers quantitative projections of future trends in employment, by sector of economic activity and occupational group. Future trends in the level of education of the population and the labour force are also estimated. Cedefop's forecast uses harmonised international data and a common methodological approach allowing cross-country comparisons between employment trends in sectors, occupations and qualifications. The forecast and methodology is validated by a group of national experts. The forecast does not substitute national forecasts, which often use more detailed methodologies and data, while they also incorporate in-depth knowledge of a country's labour market.

The latest round of the forecast covers the period up to 2035. The forecast takes account of global economic developments up to November 2023. The European Economy is expected to grow despite monetary tightening on phasing out of fiscal support.

The key assumptions of the baseline scenario incorporate the Eurostat population forecast available in June 2023 (Europop 2023) ⁽¹⁾, and the short-term macroeconomic forecast produced by DG ECFIN in November 2023 ⁽²⁾. The source of historical labour force data is the European Labour Force Survey, which in 2022 underwent important methodological changes, causing a break in the time series for several variables, including the labour force. Consequently, in many Member States, the participation rates in 2021 are noticeably above/below historical trends. Moreover, some Member States experienced significant revisions in the historical data series for sectoral employment from the National Accounts.

The Cedefop Skills forecast 2025 is consistent with the objectives set by the European Green Deal by incorporating suitable assumptions about additional investment, power sector technologies, energy balances, and carbon pricing.

Energy and commodity price forecasts from the World Bank and the IEA are used as inputs to the Cedefop Skills Forecast.

(1) <https://ec.europa.eu/eurostat/web/population-demography/population-projections/database>

(2) https://economy-finance.ec.europa.eu/economic-forecast-and-surveys/economic-forecasts/autumn-2023-economic-forecast-modest-recovery-ahead-after-challenging-year_en

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For more details, please contact Cedefop's Skills Forecast team at:

Skills-Forecast@cedefop.europa.eu

