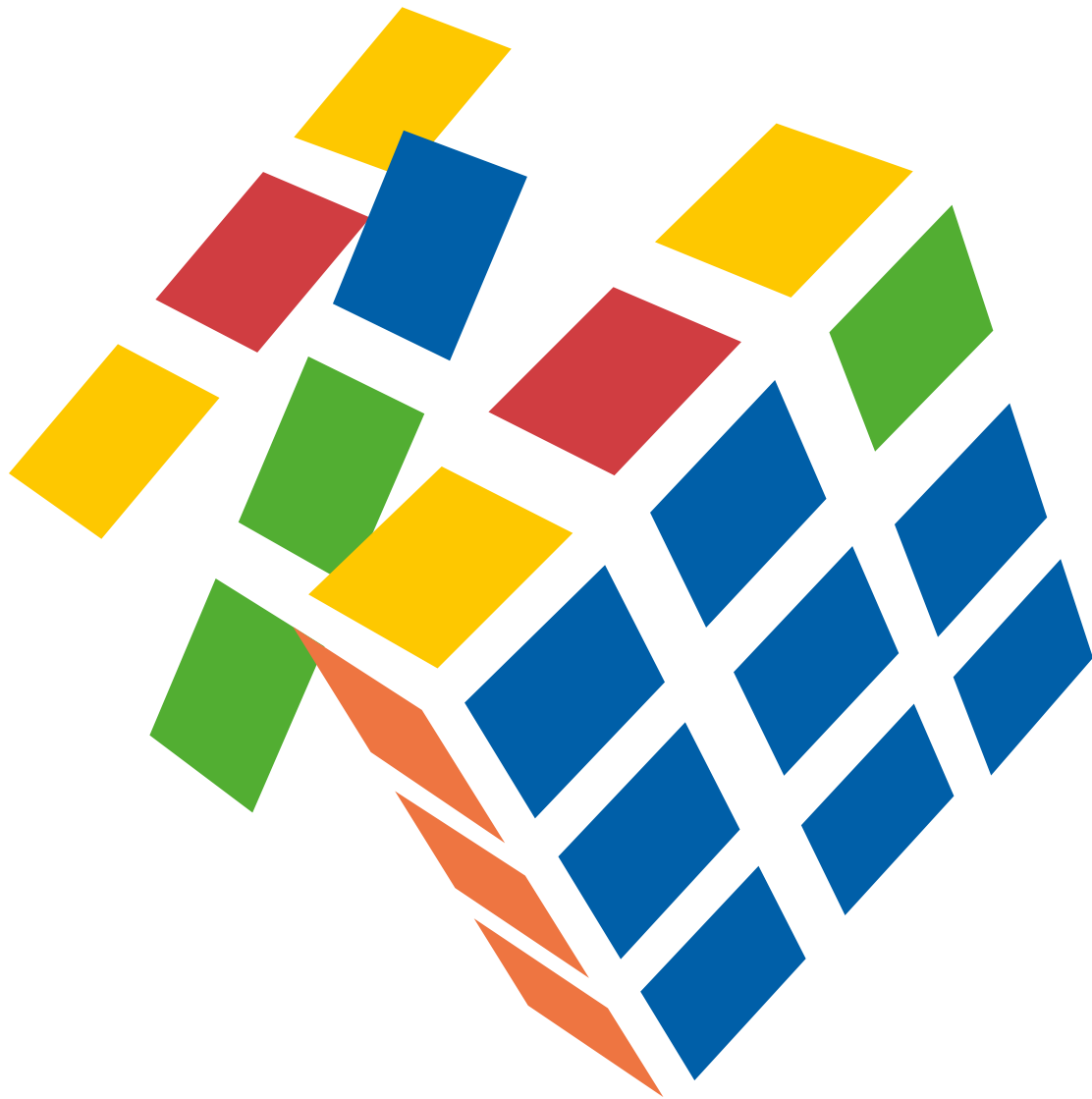




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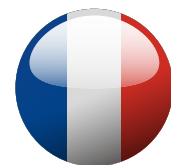
European Centre for the Development
of Vocational Training

EN



2023 skills forecast

France





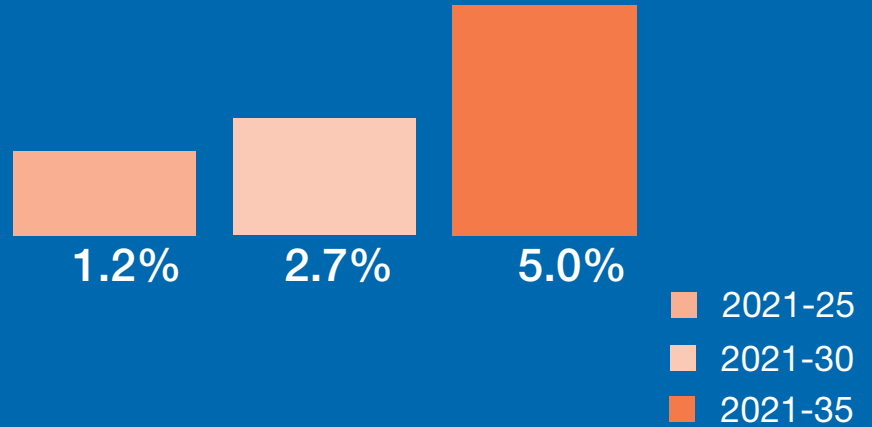
Employment in 2035

30 183 000



increase 2021-35

% Employment growth 2021-35



Fastest-growing sectors

2021-35% growth



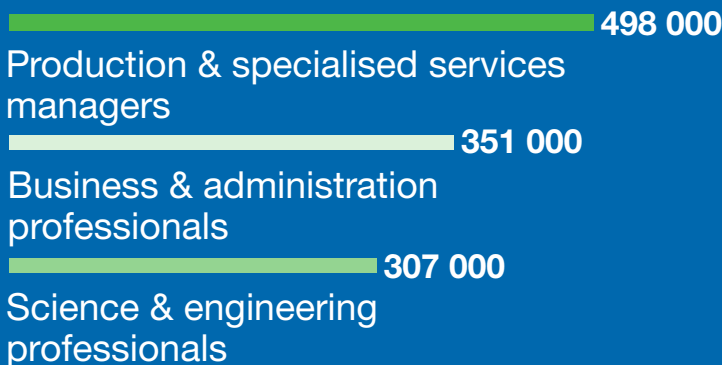
Total job openings, 2021-35

18 128 000

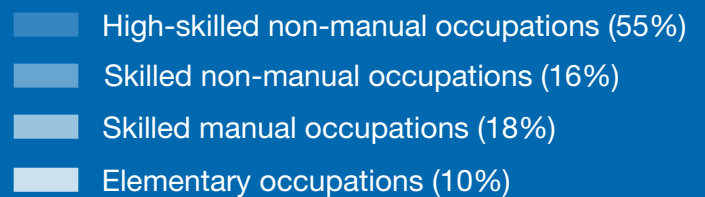


Highest-demand occupations

Largest creation of new jobs, 2021-35



Total job openings by skill level 2021-35



increase in high-skilled labour demand 2021-35

38%



3.4% employment increase in 2021-35



Fastest growing occupation
Legal, social and cultural professionals



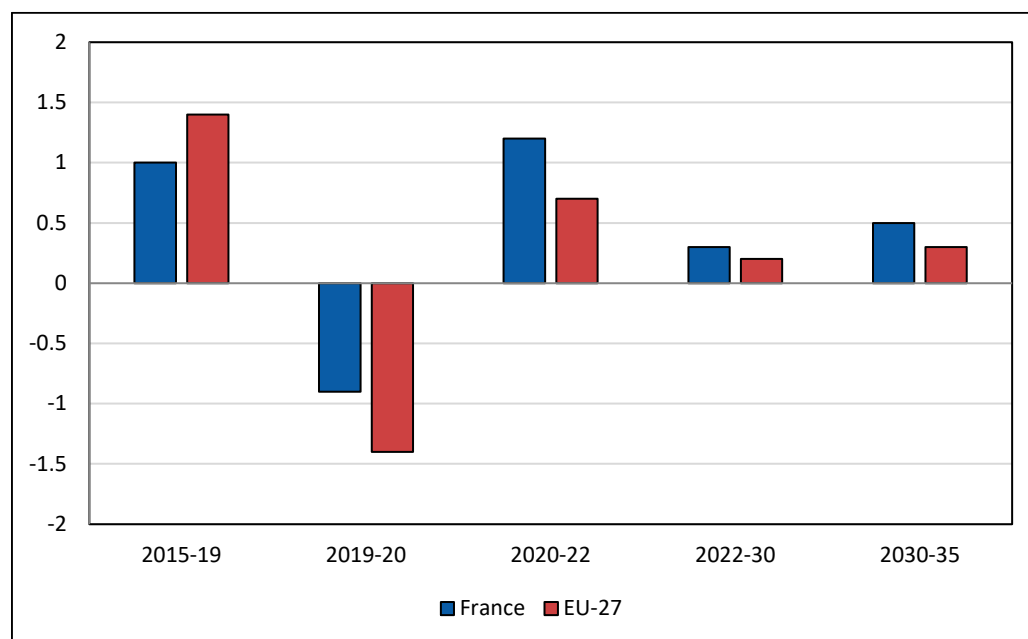
Fastest growing sector
Information and communication

Cedefop skills forecast: France

1. Employment outlook

Employment in France is forecast to grow slightly faster than the EU-27 average, albeit slower than seen in 2015-19. Figure 1 shows that employment in France grew slightly slower than the EU-27 average over 2015-19, but also fell slightly less sharply in 2020 as the Covid-19 pandemic hit. Employment in France is also estimated to have bounced back more strongly than the EU-27 over 2020-22. Across the forecast period, employment in France is forecast to grow by around 0.3-0.5% pa compared with growth of 0.2-0.3% pa for the EU-27.

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



Source: Cedefop (2022 Skills Forecast).

2. Labour force overview

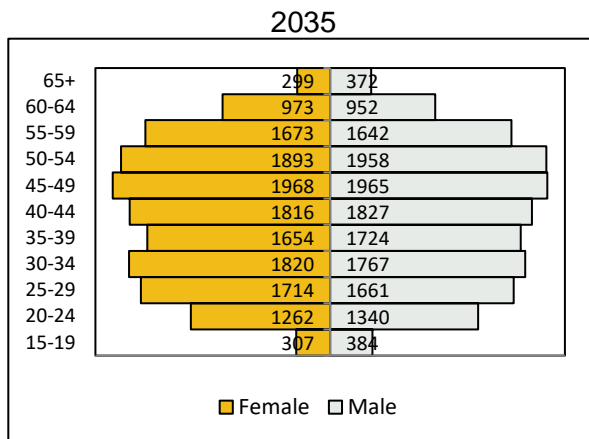
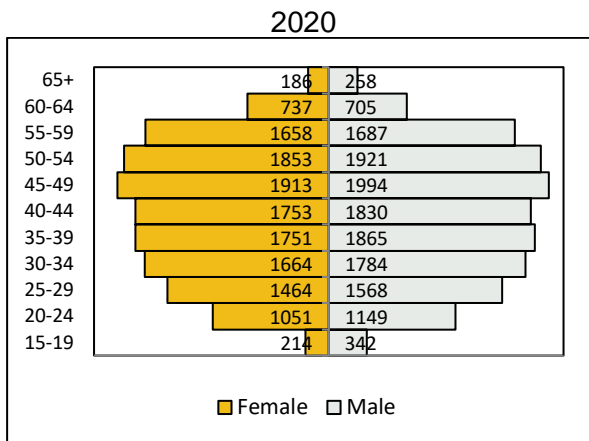
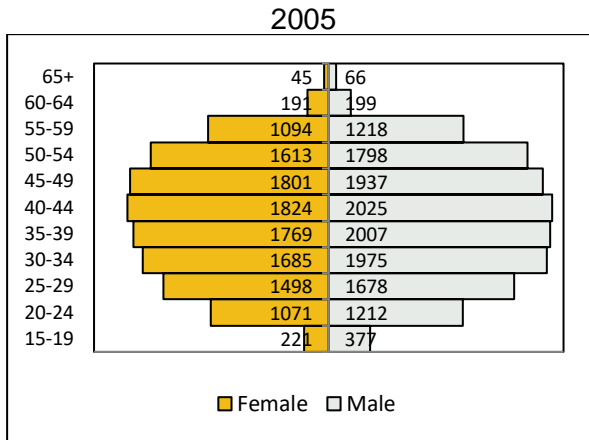
Figure 2 shows France's labour force by age group in 2005, 2020 and 2035. Changes in the labour force in France over the forecast period will continue to be driven by the ageing population and increasing participation rates in most age groups. The total labour force in France is projected to increase by around 5.5% over 2020-35, compared with growth of 7.5% over the previous 15 years. This compares with an expected increase in the labour force of just under 3% over 2020-35 for the EU-27. The total participation rate in France is forecast to remain static over 2020-35, compared with an increase of 1 pp for the EU-27 as a whole. Total population is forecast to grow by around 5.5% over 2020-35, compared with growth of just over 8% over 2005-20.

The Population aged 15-19 and 30-59 in France is forecast to decline during 2020-35, while the population in the remaining age groups is forecast to increase, reflecting trends in the relevant younger cohorts in preceding periods.

The participation rates of all age groups in France are forecast to remain static over 2020-35, the increase in older people's participation being offset by the decline of the youngest ones.

The differences between male and female participation rates in France are not as great as the EU-27 average. However, like the EU-27 average, female participation rates in France are generally forecast to increase more than male rates. Overall, the total participation rate for females is forecast to increase by 1 pp and for males is forecast to fall by 1 pp, over 2020-35.

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

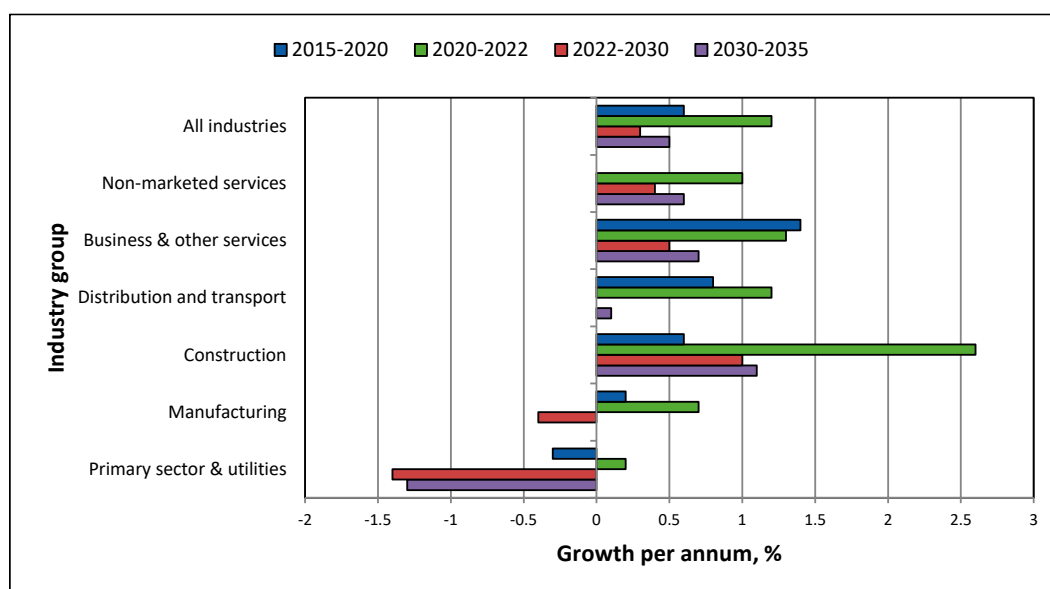


Source: Cedefop (2022 Skills Forecast).

3. Sectoral employment trends

Figure 3 shows annual average employment growth by broad sector in France between 2015 and 2035. Employment in France is forecast to increase in three out of the six broad sectors, only declining in *Primary sector & utilities* (by just over 1% pa over the whole forecast period) and *Manufacturing* (-0.4% pa over 2022-30 and remaining static over 2030-35). Employment growth is forecast to be strongest in *Construction* (around 1% pa), followed by *Business & other services* and *Non-marketed services* (around 0.5% pa for both). Employment in *Distribution & transport* is forecast to remain broadly static over 2022-35.

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



Source: Cedefop (2022 Skills Forecast).

In terms of sub-sectors (i.e. below the level of the six broad sectors discussed above), employment growth in *Business & other services* is forecast to be driven by growth in *research & development*, *architectural & engineering services*, *other services*, *computer programming & information services*, and *legal, accounting & consulting services*, with growth of 1% pa or more over 2022-30. Employment growth in *Non-marketed services* is forecast to be driven by *health*, while in *Distribution & transport*, the relatively large sub-sector of *accommodation & catering services* (accounting for more than 4% of total employment in France in 2020) is forecast to grow quite strongly. Despite the overall fall in employment forecast for *Primary sector & utilities*, the sub-sector of *electricity supply* is expected to see some, albeit slow, growth over this period, but the large sub-sector

of *agriculture* is forecast to see a substantial decline. Within *Manufacturing*, employment in *food, drink & tobacco* and *motor vehicles* is forecast to see relatively strong growth, countering some declining employment in other manufacturing sub-sectors.

Job openings by occupational group

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 jobs 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).

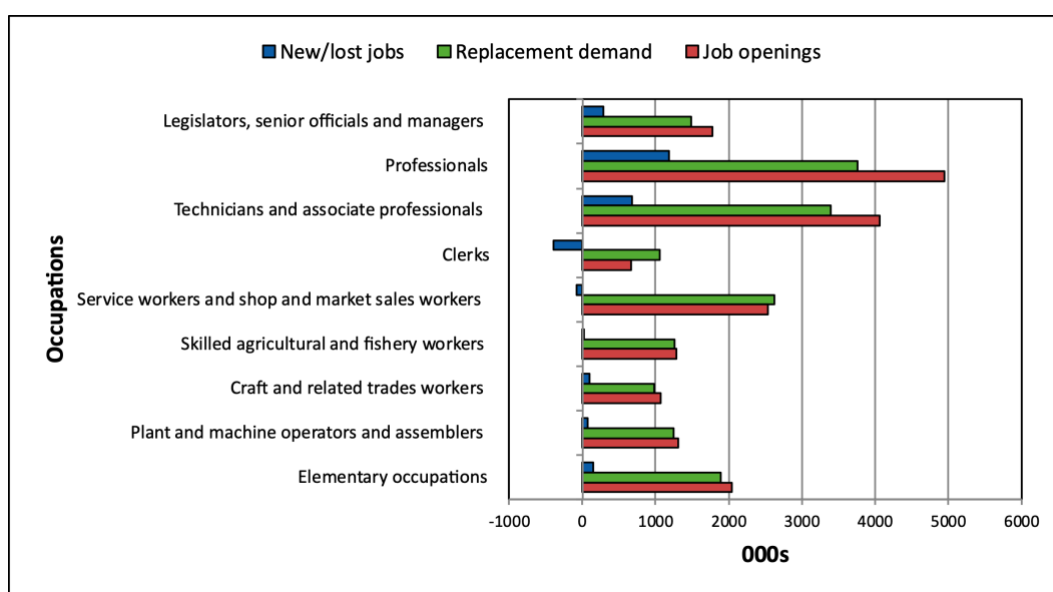
Figure 4 presents the total job openings by broad occupational group over 2020-35. The number of job openings is determined by the number of jobs lost/newly created and by the number of jobs that need to be filled following the retirement of older workers or the movements of workers to other occupations. Most jobs will come from this need to replace workers retiring or changing occupations.

Among the broad occupations, only *Craft & related trades workers* and *Service workers & shop & market sales workers* are forecast to see a decline in jobs over this period. However, several other broad occupations are forecast to see only low growth. All broad occupations are projected to see a fairly substantial replacement demand. *Professionals* are forecast to see a strong expansion of jobs and replacement demand, followed by *Technicians & associate professionals*. The number of jobs is forecast to increase by 1.9 million, while replacement demand is projected to be 17.7 million. So the total number of job openings is forecast to be almost 20 million.

At a more detailed level, most job openings (taking both new/lost jobs and replacement needs together) are generally expected to be in *high skilled non-manual occupations*, such as *production & specialised services managers*, *business & administration associate professionals*, *business & administration professionals*, *science & engineering associate professionals*, *science & engineering professionals* and *teaching professionals*, each of which is expected to account for 5% or more of all job openings. Even so, the elementary occupation of *cleaners & helpers* is expected to see a large number of job openings (7% of the total) through a job expansion and a strong replacement demand. Among

skilled non-manual occupations, sales workers are forecast to account for 5% of total job openings due to a relatively large number of new jobs and strong replacement demand. Among skilled manual occupations, there are expected to be many job openings for *drivers & mobile plant operators* and *building & related trades workers*, again driven by both expansion demand and replacement demand. Among *Elementary* occupations generally, other than *cleaners & helpers* as already mentioned, the number of job openings is expected to be lower, with a contraction in total jobs for some occupations, particularly *labourers*, combined with lower replacement demand.

Figure 4. Job openings by broad occupational group, 2020-35



Source: Cedefop (2022 Skills Forecast)

4. 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 regional 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 trends of the economy (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).

Increasing specialisation in many sectors will influence the occupational composition of employment in France. The increasing specialisation is reflected in stronger occupation-specific effects, leading to an increased share of *professionals, managers, technicians and associate professionals*. These changes reflect changes in job organisation in many sectors and, in many cases, an increasing specialisation. Along with these specialisations, there is also a move towards managing these new work forms. High-skilled occupations that can benefit from this trend are, for example, *science and engineers, professionals, business and other professionals, managers in services*, as well as *legal, social, cultural and related associate professionals*. However, due to the negative change in the occupational specialisation and industry size effect, there might be decrease in the following high-skilled occupations is noticeable: *chief executives, senior officials and legislators*, and *administrative and commercial managers*.

Therefore, the overall effect of occupational change depends on several factors that need to be considered together. Increasing automation and digitisation, moves toward a service-oriented economy, including within manufacturing, will lead to a greater use of higher-level occupations at the cost of some intermediate and lower-level occupations.

Only cleaners, refuse, street and related service occupations are expected to increase among lower-level occupations. The strength of intermediate occupations relies on some occupations, such as *customer services clerks*, but the overall decrease among intermediate qualified occupations is evident.

However, the overall increase in occupations, especially high-skilled occupations, is enough to ensure growth for all occupations combined.

5. Demand for and supply of skills

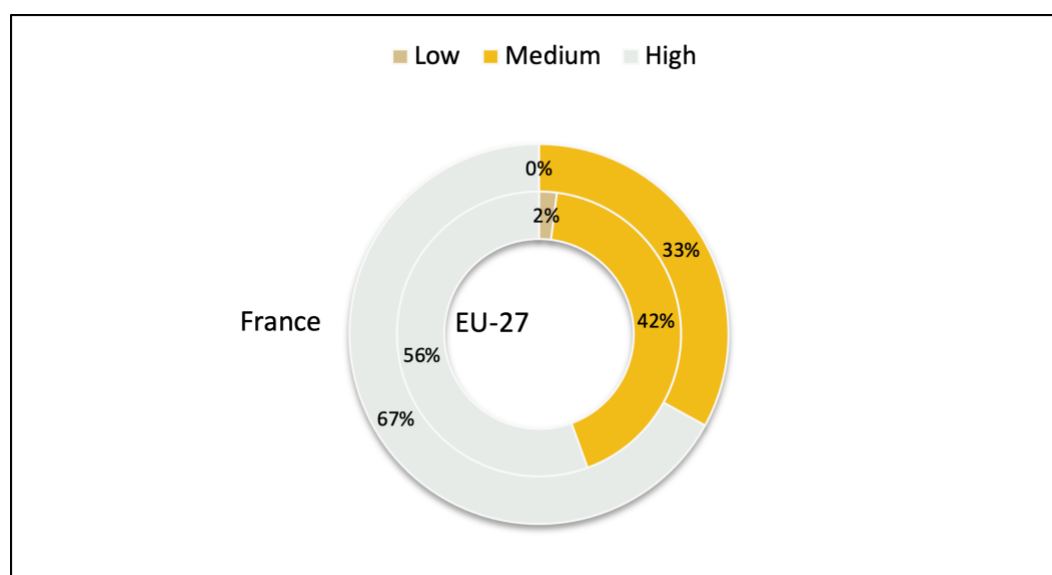
Within the Cedefop skills forecast, skills are proxied by the highest level of qualification held by individuals in the labour force and in employment. Three levels are distinguished, high, medium, and low, which correspond to the official ISCED classification. The occupational group also offers an indication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

In France, the past increase towards higher education is projected to continue. How far this increase in higher education supply is realised or slightly lower is hard to gauge. The forecasting suggests a stronger increase which might be exaggerated somewhat.

Two-thirds (67%) of the total job openings expected to be created in France from 2035 will require high qualifications, about 11 pp more than the EU-27 average (see Figure 5). One-third of total job openings will require medium qualifications (33%), and near to no low qualifications.

Total job openings are highest among *Production and specialised services managers, Business and administration associate professionals, and Cleaners and helpers*.

Figure 5. Shares of total job openings by level of qualification, 2020-35



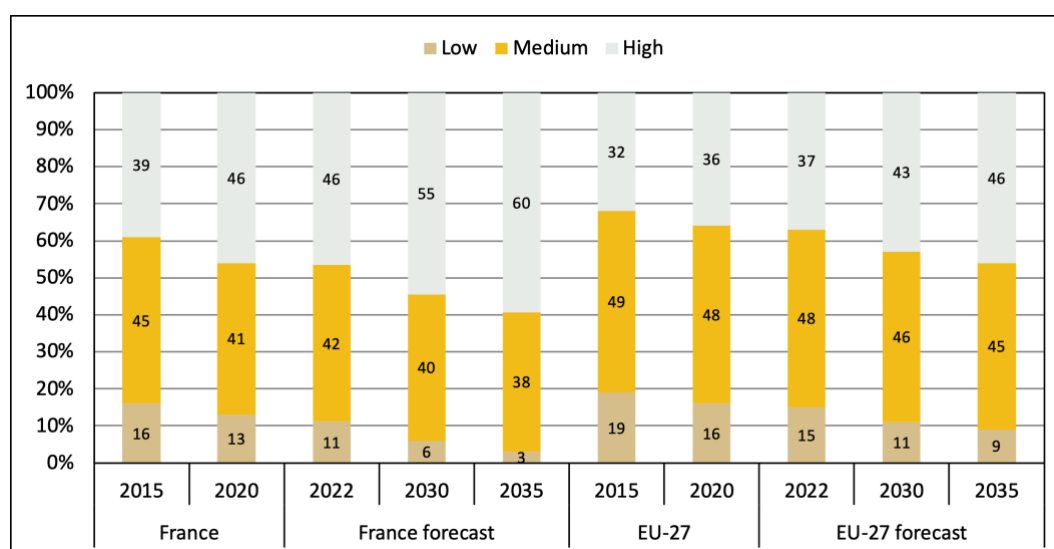
Source: Cedefop (2022 Skills Forecast).

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

In general, France is expected to experience changes over 2022-35 in shares of qualifications in the labour force, as seen in Figure 6. The share of people with high level qualifications in France is expected to increase over the period to 2035 up to 60%, becoming the largest qualifications group. The share of medium qualified labour force will decrease slightly, towards 38%, while remaining the second largest qualification group. Those with low levels of qualification are expected to decrease. In France, the share of the labour force with high level qualifications is expected to remain higher than the EU-27 average.

Overall, the movement towards higher qualifications in France suggests that there may be difficulty in filling open positions at the lower levels, particularly with the danger of a mismatch between skills demand and the qualifications in the labour market.

Figure 6. Labour force share by level of qualification, 2022-35

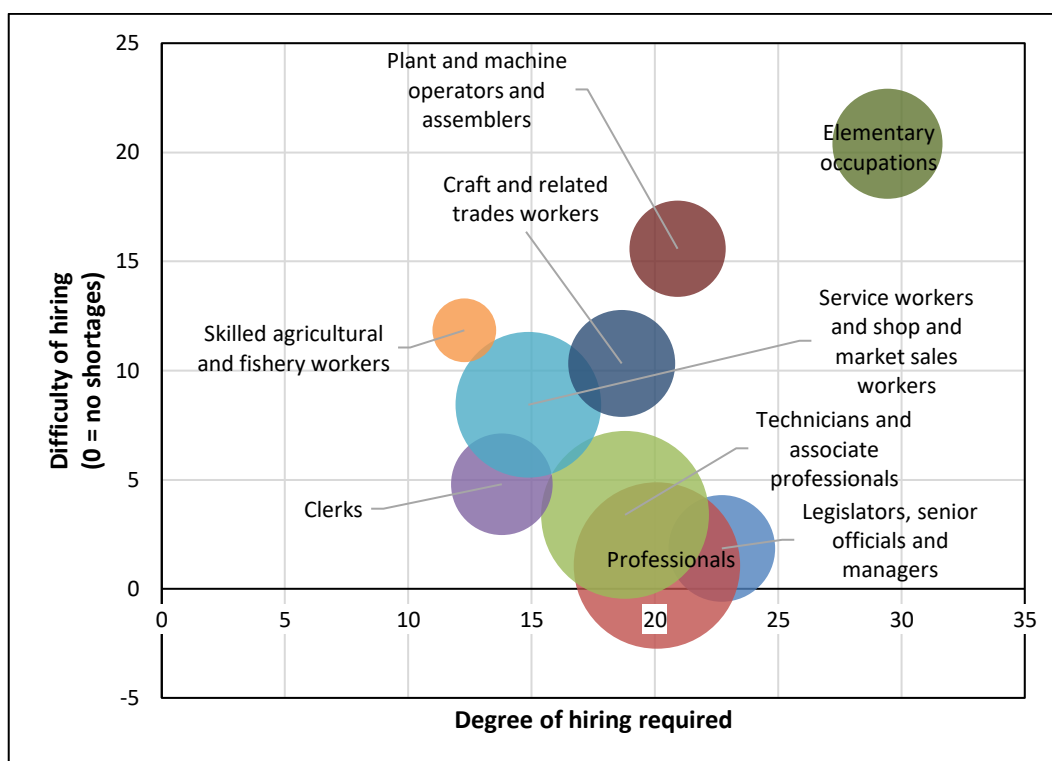


Source: Cedefop (2022 Skills Forecast).

Figure 7 shows an indicator, difficulty of hiring, whose aim is to approximate shortages of supply by qualifications and its impact on occupations. This measure, shown along the vertical axis, indicates increasing difficulties to fulfil demand given the available supply of qualifications used in the occupation. Along the horizontal axis, the degree of hiring required in the occupation is depicted. Higher values indicate that to reach the

forecast result that occupation will need to adjust more (in terms of workers with particular qualifications) relative to the base year (2018) levels. These changes (degree of hiring required) can be due to a change in the qualifications required or increases in the number employed. The size of the bubble indicates the overall employment level, bigger bubbles indicate more employment while smaller bubbles less employment. Occupations with both a high degree of hiring required and a high difficulty of hiring (i.e. towards the top right of the figure) are likely to have the most difficulties in achieving a suitable workforce.

Figure 7. Indicators of future hiring difficulties, 2018-30



Source: Cedefop (2020 Skills Forecast).

Note: Indicators were calculated at the level of the underlying 2-digit occupation groups. Aggregation was based on the employment weights within each 1-digit occupation group.

Figure 7 shows that the main problem lies within the lower qualification levels. The highest hiring difficulties are concentrated in lower occupations, with Elementary occupations at the highest position. The high degree of hiring is likely to reflect the change in qualification shares in this (and other lower level occupation) taking on overqualified medium and higher educated.

Higher level occupations show low hiring difficulties, while the degree of hiring reflects mainly employment growth along with remaining shifts towards higher qualified workers. The intermediate level occupations show intermediate positions, reflecting their intermediate share of low qualified and limited growth.

Hiring difficulties among *professionals* are very low across the underlying occupations. The degree hiring required differs, though, with *science and engineering professionals* (25) and *information and communications technology professionals* (21) being well above the average for *professionals* as a whole (14), while the degree of hiring required among *health professionals* (2) is well below the average.

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 May 2022. The European Economy experienced a sharp downturn in 2020 due to the global pandemic, and partially bounced back in 2021. However, the strength of the recovery in the short term is threatened by global factors such as supply chain disruptions, the consequences of the war in Ukraine and high inflation.

The key assumptions of the baseline scenario incorporate the Eurostat population forecast available in May 2022 (Europop 2019) ⁽¹⁾, and the short-term macroeconomic forecast produced by DG ECFIN in May 2022 ⁽²⁾. Several revisions to the data affect the Cedefop Skills forecast 2022, when compared to the 2019 update. For example, the population projections used in the 2022 update are generally more pessimistic than those used in the 2019 update (i.e. Europop 2015), with a corresponding impact on labour force figures. The source of historical labour force data is the European Labour Force Survey, which in 2021 underwent important methodological changes causing a break in the time series for several variables, including labour force. As a consequence, in many Member States the participation rates in 2021 are noticeably above/below historical trends, which causes the Cedefop Skills forecast 2022 to be revised in the same direction, compared to the 2019 update. Moreover, some Member States experienced significant revisions in the historical data series for sectoral employment from the National Accounts.

The Cedefop Skills forecast 2022 is made consistent with the objectives set by the European Green Deal by incorporating suitable assumptions in terms of 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, which therefore incorporate the recent surge in prices.

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

(2) https://ec.europa.eu/info/business-economy-euro/economic-performance-and-forecasts/economic-forecasts/spring-2022-economic-forecast_en

For the latest update and access to more detailed Cedefop skills forecast data visit our [Skills forecast project page](#).



The country fiche for France has been developed in collaboration with Cousin Camille French Ministry of Labour (Dares) and Jolly Cécile France Stratégie.

For more details, please contact Cedefop's Skills Forecast team at: Skills-Forecast@cedefop.europa.eu