



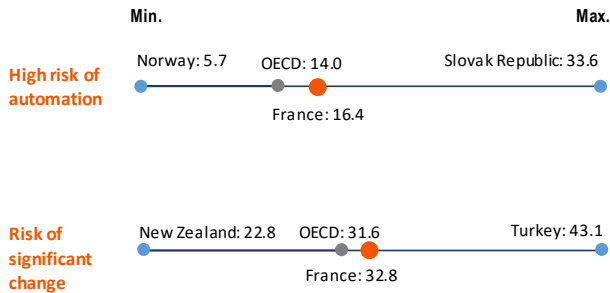
THE FUTURE OF WORK

How does FRANCE compare?

OECD Employment Outlook 2019



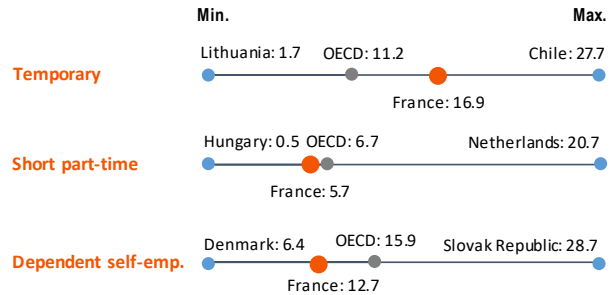
Jobs at risk of automation



Note: High risk of automation corresponds to a likelihood of automation of 70% or more. Jobs at risk of significant change are those with likelihood of automation between 50 and 70%. Percentages. Data refer to 2012 or 2015, depending on the country.

Source: OECD Employment Outlook 2019: The Future of Work, <https://doi.org/10.1787/9ee00155-en>.

Non-standard forms of work



Note: Temporary employment as a % of dependent employment. Short part-time (i.e. working 1-19 hours per week) as % of dependent employment. Dependent self-employment: incidence of own-account workers who generally have one dominant client as a % of total self-employment. Data refer to 2017.

Source: OECD Employment Outlook 2019: The Future of Work, <https://doi.org/10.1787/9ee00155-en>.

The quantity of jobs may not fall, but job quality and disparities among workers may worsen

Despite widespread anxiety about job destruction driven by technological change and globalisation, a sharp decline in overall employment is unlikely. While certain jobs may disappear (14% are at high risk of automation in the OECD), others will emerge, and employment has been growing overall. However, transitions will not be easy. There are concerns about the quality of some of the emerging new jobs and, without immediate action, labour market disparities may grow, as certain groups of workers face greater risks than others.

- In France, jobs at high risk of automation are slightly above the OECD average: 16.4% of jobs have a risk higher than 70% of being completely redefined. In addition, 32.8% of jobs are at risk of substantial changes in their content and method of execution (figure).
- Among OECD countries, France has a high level of underemployment (9% in 2017), as well as a strong dualisation of the labour market. The share of temporary jobs and fixed-term contracts is high (16.9%), the latter being characterised by a marked increase in very short-term contracts.

- The share of economically dependent self-employed workers is slightly below the OECD average but still quite high at 12.7%. Some of these workers are in situations very similar to those of employees.
- Possible ways to remedy this situation include: i) reducing incentives to accept and offer very short contracts; ii) addressing the problem of false self-employment; iii) extending certain protections to workers in the grey zone between self-employment and employment (including many platform workers); and (iv) correcting imbalances in the event of excessive market power by some employers.

Adult learning is key to help the most vulnerable navigate a changing labour market

Adult learning is becoming increasingly important to help individuals to maintain and upgrade their skills throughout their working lives. Yet most adult learning systems are ill equipped for this challenge. 40% of adults train in a given year on average across the OECD, but those who need training the most, including non-standard workers, train the least and training is not always of good quality.

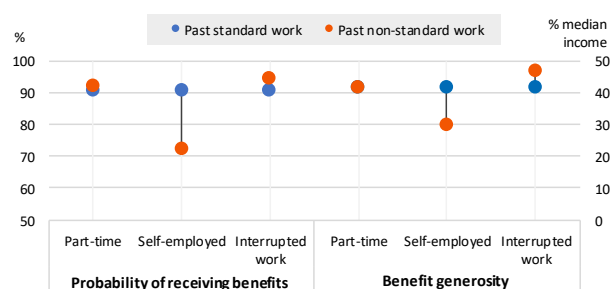
- In France, only 31.6% of adults have received vocational training in the last twelve months. In addition, the participation gap between the low and high skilled is 40 percentage points (pp), just above the OECD average (39.3 pp). This is all the more worrying since France spends considerable amounts on vocational training.
- The creation of the individual learning account is an opportunity to increase the rights of the low skilled, but individual counselling will be needed for the most disadvantaged to use them.

Collective bargaining, though under strain, can help shape the future of work

Collective bargaining can help workers and companies define new rights, adopt and regulate new technologies and foster labour market security and adaptability. Yet it is challenged by increases in non-standard work, on top of a decades-long weakening of union representation leaving employers without a clear counterpart. Better including non-standard workers calls for tailored adaptation of regulations and stronger efforts by social partners.

- France has one of the lowest union density rates: 7.9% compared to 17% on average in the OECD. Despite this, almost all employees are covered by collective agreements thanks to the extension of branch level collective agreements.
- Taking into account the interests of non-standard workers and the diversity of companies within sectors is an important issue, but also an opportunity for social partners. In this sense, recent reforms of social dialogue in France could help make the labour market more inclusive.

Income support packages differ between different types of non-standard workers in France



Note: Benefit generosity as a % of median income. Estimates refer to able-bodied working age adults who were out of work and lived in two-adult low-income households without children in 2014-15 and with median earnings in the preceding two years. Past standard work refers to uninterrupted full-time dependent employment. For details on method, see Figure 7.6 in *OECD Employment Outlook 2019*.

Source: *OECD Employment Outlook 2019: The Future of Work*, <https://doi.org/10.1787/9ee00155-en>.

Accessing social protection can be very difficult for non-standard workers

Social support may not be available to workers in less secure forms of employment. In some countries, workers engaged in independent work or short-duration or part-time employment are 40-50% less likely to receive any form of income support during an out-of-work spell than standard employees. Unless access gaps are closed, further increases in non-standard employment will have negative consequences for inclusiveness and equity.

- France performs rather well in terms of coverage of non-standard workers, particularly for workers on fixed-term contracts, thanks to generous eligibility criteria for unemployment benefits, combined with the possibility of accruing and retaining unused entitlements.
- On the other hand, there is a gap between the self-employed and employees, the former not being entitled to unemployment insurance (figure).

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