

The Major Transformations of the French Labour Market Since the Early 1960s

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Abstract – This paper looks at the major changes in the French labour market since the 1960s. Over this period, the labour force has steadily increased, primarily owing to demographics (the post-war baby boom). The labour force also saw increasing female employment, higher qualifications and a reduction in the length of working life at both ends. Three factors have driven changes in labour market trends in the last 50 years: economic globalisation, the emergence of ICT and development of automation, and the growth of the service economy, particularly financial services. For their part, employment policies have sought to “enrich” the employment content of growth. After the 1974 break in the growth trend, the interaction of labour supply and demand led to rising unemployment and increasing diversity in employment statuses. The growth of short-term and very-short-term contracts, as well as arrangements falling between salaried- and non-salaried employment, illustrate a significant increase in employment precariousness.

JEL Classification: E23, E24, J11, J21, J23, J24, J26, J64, J80

Keywords: working population, employment, unemployment, labour market, employment status

Reminder:

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Between 1960 and 2018, the number of jobs in metropolitan France increased from 20 million (including conscripts) to over 27 million, while the workforce grew from 20 to 30 million over the same period. Unemployment, which hovered around 250,000 in the early 1960s, increased by a factor of 10, and frictional unemployment became mass unemployment.

Over half a century, the labour market has seen significant change. In the early 1960s, France was experiencing full employment, with periodic strains on productive capacity due to a shortage of available labour. The labour force at that time was overwhelmingly male and with large shares of manual workers with limited qualifications. The large industrial enterprise, with working arrangements inspired by Fordism and Taylorism, was the dominant model. Furthermore, permanent and full-time employment contract, for a single employer, was the norm.

Today, the working population includes a much higher proportion of women (over 48%) and has become more service-oriented (over 80%); it has also become more qualified but it has aged. The unemployment rate stood at over 9% in mid-2018; labour market activity that falls between employment and unemployment has become much more common, working hours are less uniform, and production units are more decentralised: in one word, employment seems more “fragmented”. The constraints associated with work have gradually changed as employment has become more flexible (e.g. employment status, working hours, working arrangements, etc.) and the established notion of job security has been challenged.

Starting from these snapshots of the labour market, taken 50 years apart, the aim of this article is to retrace how we have moved from one to the other. To this aim, we review the profound changes in the working population, the shifts in employment trends linked to structural changes in the economy, before looking at the profile of today’s labour market.

Changes in the Labour Force

Having plateaued for 50 years until the early 1960s, the labour force in France began growing at a rapid rate. Two key factors drove this growth until the late 1990s: first, the arrival of baby boomers into the labour market and, in the early stages, significant levels of immigration; second, increasing numbers of women in intermediate

age-group entering the labour market. On the other hand, falling labour market participation among younger and older age groups had curbed this growth. The 2000s are characterised by a reversal of demographic trends, which became negative by the end of the decade, as well as a sharp slowdown in the growth of female labour force participation, the impact of which was cancelled out by the early 2010s. The two key engines of labour force growth have therefore stalled, but they have been largely replaced by increases in the participation rates of older workers, the effect of which became positive from the 2000s onwards. A breakdown of variations in the active population highlights these marked trends (Table 1).

The Baby Boomers Wave

In terms of demographics, the early 1960s represented a shift from previous years labour market, with the arrival of baby boomers in place of the earlier generations who were much fewer in number, as well as returnees from Algeria (almost 300,000 entered the workforce in 1962) and foreign workers in significant numbers, at least until 1975. However, changes in the supply side of the French labour market over the last 60 years have been primarily driven by demographics; the trajectory of the early baby boomers, those born just before 1950 and now aged around 70, is an illustration of this. They completed secondary-level education at the end of the 1950s and entered the labour market in the early 1960s, which, alongside immigration and the arrival of returnees from Algeria, alleviated supply-side pressures related to a shortage of labour. However, this continued momentum had other consequences, initially on the school and university system (including the outburst of “May 68”) and subsequently on the employment system. Gradually, the younger generation took the place of the earlier generation who had not yet left the labour force. In the 1990s and 2000s, it limited the opportunities for subsequent generations to enter the labour market. The shock wave continued, as the pensions of baby boomers weighed on their children, who were born in the 1970s and 1980s and were fewer in number.

Significant Reduction in the Length of Active Life at Both Ends until the Early 2000s

On account of demographics and changes in labour market participation, the composition of the active population has changed considerably

since the early 1960s (Figure I)¹. In line with the sharp increase in educational attainment that characterised the period, the proportion of people aged 15-24 in the labour force fell considerably, from roughly one in five in the 1960s to less than one in ten (9.6%) in 2018; most of this reduction was observed between 1970 and 1995. At the other extreme, until the late 1990s,

older employees had strong incentives to exit the labour market before the normal retirement age, which fell from 65 to 60 in 1983. The proportion of the active population aged 55 or over fell from

1. A detailed presentation of the data used in the article can be found in the Online complement C1. Link to Online complements at the end of the article.

Tableau 1
Contributions of Demographics and Participation Rates to Changes in the Working Population

(Average annual change, in %)

	Labour force	Demographic effect	Participation effect				
	Total	Total	Total	Aged 15-24	Men Aged 25-54	Women Aged 25-54	Aged 55-69 *
1962-1968	+0.7	+1.3	-0.5	-0.2	-0.0	+0.1	-0.4
1968-1975	+1.0	+1.1	-0.1	-0.3	+ 0.0	+0.6	-0.4
1976-1985	+0.9	+1.0	-0.1	-0.2	-0.0	+0.5	-0.3
1986-1995	+0.5	+0.7	-0.2	-0.5	-0.0	+0.4	-0.0
1996-2008	+0.9	+0.6	+0.4	+0.1	-0.0	+0.2	+0.2
2009-2018	+0.4	-0.1	+0.5	+0.0	-0.1	+0.0	+0.5

* 55 and over until 1975.

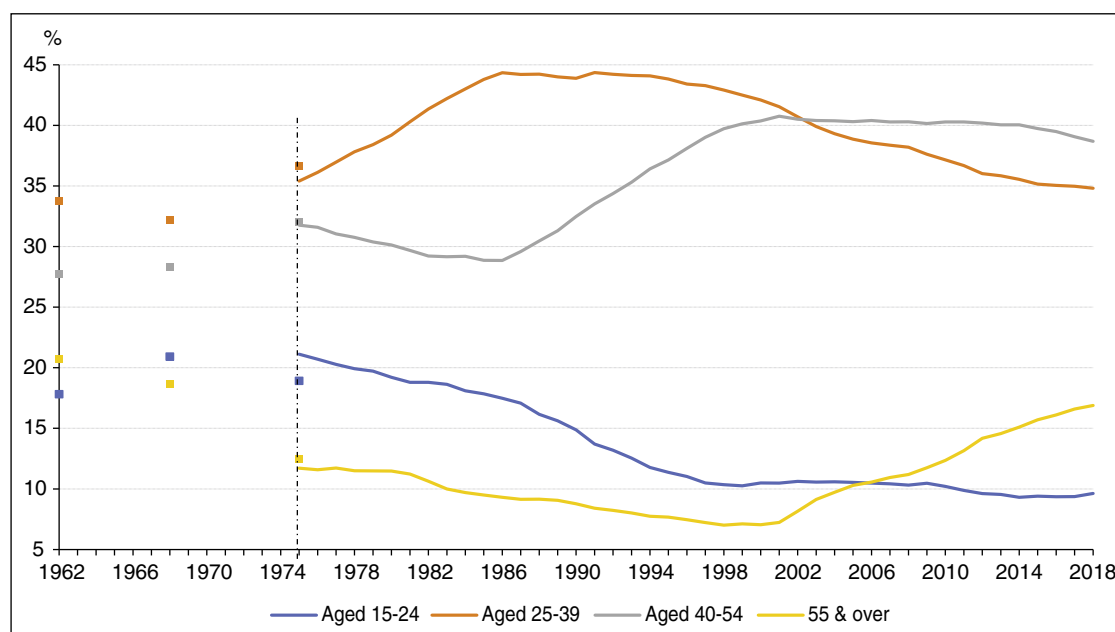
Notes: The population is broken down by five-year age group and by sex, applying the participation rate at the start of the period to annual changes in the total population, and the total population at the end of the period to annual changes in the participation rate. Employment status as reported at the time of the Population census until 1975, in the ILO meaning after. Before 1976, changes in the active population are measured between two Population censuses and averaged per year; then after the changes correspond to the average yearly change (e.g. average annual change from 1976/1975 to 1985/1984 for the period 1976-1985).

Reading Note: Between 2009 and 2018, the active population aged 15-69 increased by a yearly rate of 0.4%, resulting from -0.1% due to the demographic effect and +0.5% due to the participation effect.

Coverage: Metropolitan France, population aged 15 or over (age on 31 December) until 1975, France excl. Mayotte, population aged from 15 to 69 (exact age) from 1975 onwards.

Sources: Insee, Population census (1962, 1968, 1975), and Employment survey long series (1975 onwards).

Figure I
Working population by age



Coverage: Metropolitan France until 1975, France excluding Mayotte, from 1975 onwards.

Sources: Insee, Population census until 1975, Employment survey long series (*enquêtes Emploi*) from 1975 onwards.

approximately 20% in the early 1960s, to 7% in 2000. It subsequently rebounded to around 17% in 2018, as the baby boomer generation gradually entered the older age groups and as government reforms of both early retirement for older workers (introduced from the 1970s onwards) and pensions (reforms in 1993, 2003, 2010, 2013) took place, their full impact on the participation rate among those aged 55-64 being reached in 2008 to 2012 (Minni, 2019). Participation among seniors therefore increased sharply, with an average annual increase in the workforce since 2009 of 154,000; this has caused the total working population to continue to increase in the last decade, at an average rate of 0.4% per year (117,000).

Until 2000 in France, and to a far greater extent than in other developed countries, we observe an increasing concentration of the population of working age in intermediate age groups (see Box). In the late 1990s, 82.5% of French people of working age were aged between 25 and 54, as opposed to 60% in 1962. While this proportion amounted to 73.5% in 2018 due to the effects of demographics and labour market participation among seniors, we can speak here of a particular French-style model of age management, in which, schematically, only one generation works at a time, that of the 25-54 age group (Elbaum & Marchand, 1993).

In addition to this increasing concentration of the labour force in the 25-54 age group, we should

also note the increase, from the mid-1980s onwards, in the share of the active population aged 40-54. This ageing of the labour force required companies to make substantive changes in their management of future employment requirements and skills needs.

Sharp Increase in Female Participation: Towards Parity

The upturn in paid employment among women in intermediate age groups started in the mid-1960s, alongside the decline in fertility rates. The proportion of women in the working population is now close to parity (48.3% in 2018), up from approximately one-third in the 1960s. The significant increase in the proportion of women in the labour force, which continued for as long as the generations born after 1945 had not fully replaced their elders in the labour market, resulted from factors related to the needs of businesses in certain sectors or certain occupations, and the expectations of women themselves as a result of their higher levels of education and training.

The increase was the result not only of a larger proportion of young women entering paid employment, but also greater continuity in their careers: unlike the previous generation, young women in the labour force interrupted their careers less often and for shorter periods when having children (and better “juggled” career and family life by working part-time).

Box – Entry and Exit From the Labour Force

On the basis of a three-stage schematic model (education - employment - retirement), we use Insee employment survey data to calculate an average age of entry into the labour market based on observing the initial transition from economically inactive to economically active (unemployment or employment), and, analogously, an average retirement age. The average duration of “working life” i.e. the number of years of activity (employment or unemployment) is then measured by the difference between both ages. Figure A below shows the progression of what we could call the “current” average career duration, i.e. the difference between the average age of entering the labour market and the average retirement age on a given date. It is a notional duration (by analogy with life expectancy in demographics, for example) as it is not the same people observed on entry and on retirement, and which implicitly relates to only those who have a full and uninterrupted career.

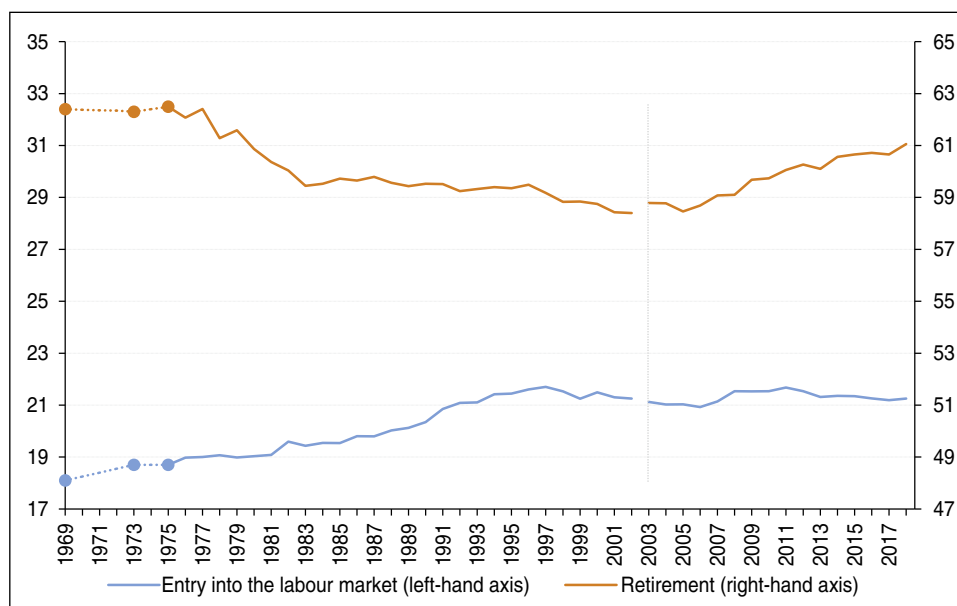
On this basis, we observe that, from the late 1960s to the early 2000s, the “current” average career duration

fell from over 44 years to 37 years. It subsequently stabilised and even slightly increased in the last ten years due to the increase in the average observed retirement age (one-and-a-half years later in 2018 than in 2008 for the general pension scheme according to the CNAV). 60% of this reduction in 30 years can be explained by reductions in the average retirement age; 40% by the increase in the average age of entry into the labour market. The first factor was influential between 1977 and 1983, when early retirement arrangements peaked; the second factor at the start of the period (extension of compulsory schooling from 14 to 16) and between 1985 and 1995 (voluntary continuation of initial education).

The three stages in the schematic model have changed length considerably over the last 50 years. As well as the marked reduction in the length of economic activity (the composition of which has seen an increase in the share of unemployment), the start and end points of a working life have become less straightforward. For young people, the process of entering the labour market occurs later, →

Box (contd.)

Figure A
Average age of labour market entry and retirement, 1969-2018



Notes: Occupation as reported in the employment survey (*enquête Emploi*); exact age; data on the date of survey until 2002, annual average thereafter. Those leaving (entering) the labour market are defined as persons aged 50 or over (30 or under) in the labour force (in training, unpaid training, military contingent) 11 months prior to survey (12 months before 2003) and inactive (active) on the date of survey. Linear interpolation between 1969 and 1973 and between 1973 and 1975.

Reading note: In 2018, the average age of persons (aged 30 or under) entering the labour market is 21.3 years, and the average age of persons (aged 50 or over) leaving the labour market is 61.1 years, compared to 18.7 and 62.5 respectively in 1975.

Coverage: Metropolitan France.

Sources: Insee, 1969, 1973, 1975-2018 Employment surveys (*enquêtes Emploi*).

is longer and more chaotic, often with movements back and forth between the labour market and education, which makes the age at which someone leaves education and enters the labour market somewhat blurry.

In addition, final departures from the labour market, which used to typically involve a direct transition from employment to retirement at the statutory age, can now involve processes that are more complex and prolonged. This is largely due to the increase in unemployment and the introduction of measures to accompany the end of working life (e.g. state schemes or negotiated early retirement schemes). The gap has widened between the age of cessation of employment, which has fallen, and the age of drawing a pension, which was largely unchanged

on 1983 (the year in which the normal retirement age fell from 65 to 60) in the early 2010s. Lastly, although still a largely uncommon practice, those who receive a pension or benefit from early retirement schemes may also engage in occupational activity: in 2018, this was the case for 6% of those in retirement or early retirement and aged between 60 and 69.

Finally, if we take into account that mobility during working life has also become more frequent, we can conclude that in 50 years, instability has been growing at all stages of working life. But this has affected various categories of population to very different degrees, depending in particular on their gender, level of training or qualification and the social affiliation that is often linked to it.

Rising Educational Attainment

From the early 1960s until the mid-1990s, labour force participation among those aged under 25 fell for both men and women. The extension of compulsory schooling from 14 to 16, which took effect in 1967-1968, was an initial factor; from the mid-1980s onwards, the effect of soaring educational attainment at secondary and tertiary level began to take hold². The increase in the level

of initial training among the wider population is reflected in the average age for completion of studies, which went from 14.5 around 1960 to over 20 today – with girls having largely outperformed boys during these years. The percentage of people of working age with a qualification equivalent to

2. The rapid increase in vocational training schemes is also notable (measured from 1975 onwards): by 1993, the number of young people aged under 26 in vocational training had reached 128,000 (DARES, 1996).

or higher than baccalaureate level increased from under 10% in 1962 to 60% in 2018 – again with girls outperforming boys (Figure II).

However, this marked increase in educational attainment is only partly reflected across the whole labour force, because the replacement of older workers with fewer qualifications by younger, more qualified workers, occurs only slowly. Furthermore, over this period, the system of continuous training and education did not play a full part, notably with respect to older workers and those with few qualifications. In France, the bulk of education and training is delivered within the education system, with little or no continuation in learning and training in the first years of employment, or even throughout one’s working life. The transformation in qualification levels among the French labour force is not yet complete, but it does attest to the scale of investment allocated to education, which has helped to close the gap between the working population in France in the middle of the last century and many other developed countries (OECD, 2017).

The Rising Share of Skilled Occupations

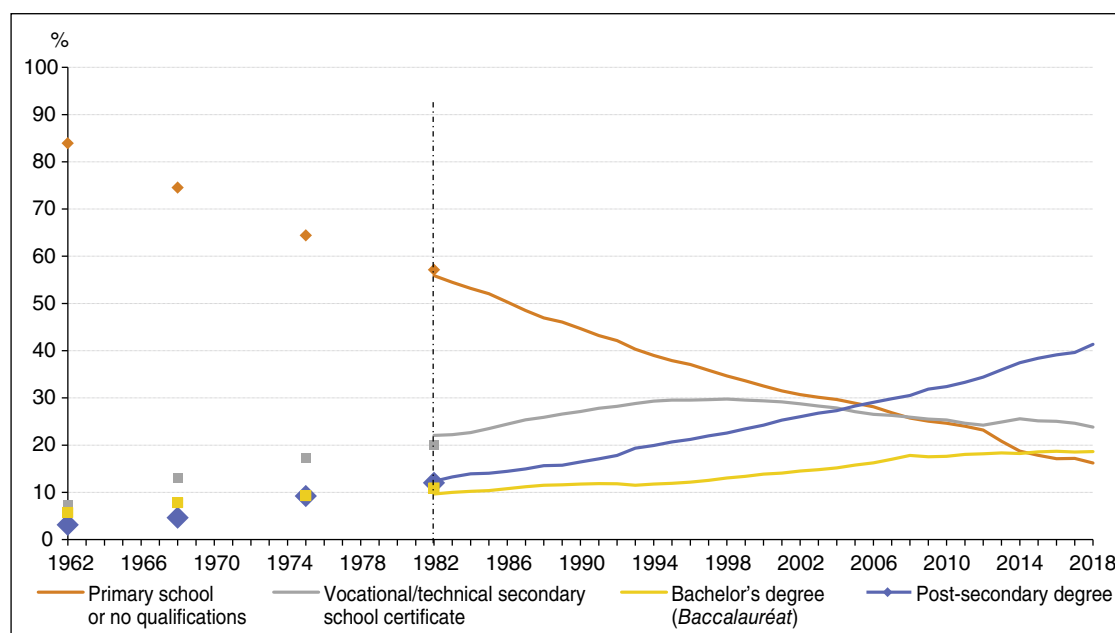
The increase in female labour market participation and the significant improvement in levels of education among the working population are

reflected by changes in the social structure: the number of manual workers, overwhelmingly male, fell by approximately one million between 1962 and 2018 and accounted for only 6.3 million, or 21.6%, of the labour force by 2018, down from almost 40% in 1962 (Figure III). The least qualified component of this group has shrunk the most. On the other hand, the number of clerical, sales and services employees, overwhelmingly female, increased from 3.5 million to 8.2 million and their respective proportions of the working population from 18% to 28%, reaching 30% during the 2000s. Associate professionals, and managers and senior intellectual workers increased further, accounting for 25.2% and 17.6% respectively of the active population in 2018 (by around 12 pct. points compared to 1962).

The increase in teachers, technicians, engineers and managers can be explained by the growth in information and communication technologies, demand for efficient human resource management, expansion of commercial and/or sales and technical operations within companies and investment in education, health and social services.

Lastly, with the number of farmers continuing to fall, along with the number of craftspeople, shopkeepers and company managers, the self-employed categories have seen a marked overall

Figure II
Working population by level of qualification



Notes: Activity status as reported in the survey, age on 31 December until 1982; ILO definition for annual average from 1982 onwards. Coverage: Metropolitan France until 1982, France excl. Mayotte from 1982 onwards. Sources: Insee, *division Emploi* (1987) until 1982; Employment survey long series (*enquêtes Emploi*) from 1982 onwards.

decline over the period, particularly before the mid-1970s, but less so subsequently. The proportion of this group stabilised at around 7-8% in the 2000s, having accounted for more than one quarter of the active population in the early 1960s. However, in some sectors, such as services and construction, self-employment has held firm since the 1980s and has even risen slightly since the mid-2000s, challenging the idea of a fully salaried workforce as envisaged in the last century.

A Radically Different Context

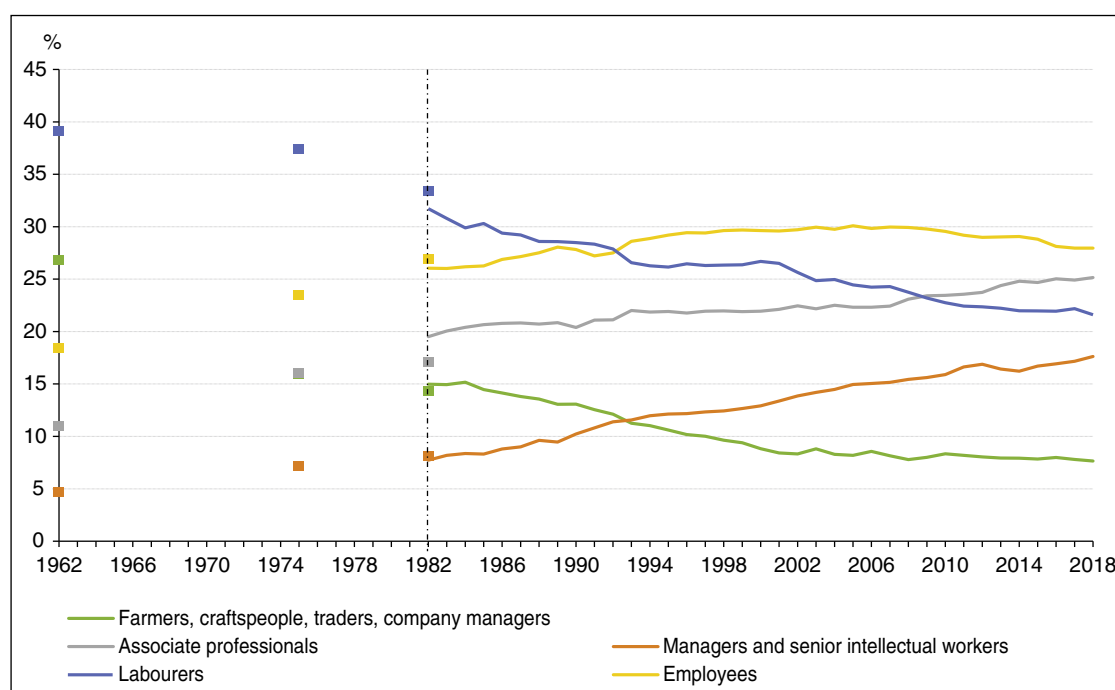
In the background of the profound changes in the labour force described above, three key factors have radically altered the system of production: globalisation, information and communication technology, and the growth of the service economy. Alongside this, productivity growth stalled, while employment policies took a decisive turn in the mid-1970s.

Globalisation, Advances in Technology, Rise of Services

Throughout the 1960s and early 1970s, France's increasing economic openness (following the creation of the European Economic Community

in 1957), combined with the emergence of a consumer-oriented internal market, initially stimulated growth in the supply and demand for labour. This development was accompanied by major sectoral and geographic restructuring by companies to face increasing international competition, with a focus on objectives of profitability and competitiveness. This restructuring, encouraged by State support, led to an increase in both occupational mobility and (often temporary) unemployment, and a broadening of the available labour pool (e.g. young people, women, immigrants). The oil crises in the 1970s would lead to a prolonged slowdown in global economic growth, while the globalisation in trade, which increased, intensified competition between economies. The 1990s represented the next stage in the process, marked by the acceleration of the implementation of the European single market, the 1992 signing of NAFTA (North American Free Trade Agreement) and the creation of the WTO in 1995 (World Trade Organization, replacing the GATT – joined by China in 2001). France, which was not adequately prepared for international competition, saw a profound transformation of its productive system, completely changing its employment and skills needs. Gradually, globalisation led to outsourcing and relocation of low-skilled, labour-intensive industries such

Figure III
Working population by socio-professional group



Coverage: Metropolitan France until 1982, France excl. Mayotte from 1982 onwards.
Sources: Insee, *division Emploi* (1987) until 1982; Employment survey long series (*enquêtes Emploi*) from 1982 onwards.

as textiles, and to new employment management, in particular increased flexibility which resulted in widening inequality among employees.

The second decisive factor in companies' changing labour demand began to have an impact in the United States before reaching Europe: the "third industrial revolution", i.e. the growth and spread of information and communication technologies (ICT). Earlier technological advances towards automation and computerisation in the 1970s and 1980s had often led to reduction in labour-intensive production, reassigning a portion of employment to tasks such as design (upstream) or maintenance and monitoring (downstream). The combined effect of the technological changes of the last 30 years and globalisation are even more conducive to fundamental changes in employment. Both phenomena are mutually reinforcing and have a more structural impact, intensifying labour market polarisation with, at one extreme, a small number of highly skilled (e.g. knowledge-based jobs, conception), highly paid and high-productivity jobs, and, on the other, low-skilled service jobs that are often insecure and poorly paid, which feature tasks that are difficult to be automated (e.g. services to individuals, caregivers, etc.). Of the two phenomena, advances in technology have narrowed the scope of occupations, evidenced by secretarial jobs or service roles in banking.

However, there is ongoing debate regarding the trend affecting the proportion of low-skilled professions in France over the last 30 years. Verdugo (2017) observes that between 1993 and 2010, both low-skilled and high-skilled groups saw their share of employment increase at the same rate (4 percentage points), at the expense of middle-ranking jobs (-8 percentage points). On the other hand, Berger & Pora (2012) argue that those at the lowest end of earnings or skills in France have lost out between 1988 and 2014, unlike those in countries such as the United States. But they do not take employees of private employers, which is a fast-moving sector, into account: domestic help and childcare assistants saw the largest increases in employment over that period. Providing an answer to the question regarding the change in low-skilled employment then depends on the scope, the period under consideration and the source used. Using the classification for socio-professional categories at aggregate level and differentiating between skilled and unskilled white collar and blue collar workers (Chardon, 2002), we observe that the proportion of the skilled white collar sub-group (managers and senior intellectual workers)

recorded constant growth over the period 1982-2018 (10 percentage points). For the less skilled (lower level white collar employees and unskilled manual workers), the conclusion is less clear³: after falling by more than three percentage points between 1982 and the early 1990s, their share remained constant at around 21%.

A third significant development in the last 50 years, linked to globalisation, is the increasing role of service sectors, particularly financial services, in the regulation of the economy. Related to the globalisation of trade and the free mobility of capital, the increasing role of financial services in the economy has radically altered the principles and norms on which the global economy operates. Financial performance indicators inform decision making at all levels of the business (Chambost, 2013) and financial markets heavily influence management practices at companies. To the extent that this new form of "corporate governance" often favours investments with short-term returns over long-term programmes, national interests, in particular jobs, have become expendable: policies aimed at reducing costs and outsourcing non-core company operations often result in job losses.

The Overall Slowdown in Labour Productivity

The extent of annual job creation is closely linked to the growth rate in the wider economy: between 1962 and 1973, GDP in France increased by 5.7% annually while employment grew by 0.7%; between 1974 and 1991, during which time two oil crises occurred, GDP grew by just 2.6% annually and employment by 0.5%. Over the period 1992-2007, employment was boosted by measures aimed at reducing labour costs and by the economic upturn between 1997 and 2001 (2 million jobs created in four years), only to subsequently slow once more as growth conditions deteriorated. Lastly, the 2008 financial crisis has cast a shadow over the last ten years (Table 2).

We can thus observe the marked reversal in annual labour productivity growth (per capita GDP) which fell by 90% between the 1960s (5%) and the 2010s (0.5%). The reduction in average per capita productivity growth after the 1974 break is in part due to the change in the composition of employment among the major

3. See Goux & Maurin, in this issue.

sectors: continuous decline in industry from its high point in 1974, greater resilience in construction and the take-off of the tertiary sector; the “distribution” of gains between productivity and employment appears more favourable to the latter in the services sector than in construction and, even more, than in industry. However, within each major sector, the slowdown in productivity gains is the same. This is not unique to France and has been observed in almost all developed countries, reflecting the increasing interdependence of national economies (Sode, 2016).

In terms of hourly labour productivity (GDP per hour worked), the finding is slightly different on account of the fall in annual working hours linked to the transition from a 40-hour to a 39-hour working week and later to a 35-hour working week, as well as the growth in part-time work (on the evolution of work duration since the 1970s in France, cf. Raffin & Yildiz, 2019). This reduction raised productivity growth by half of a percentage point over the whole period, except in the last ten years during which annual working hours stopped falling. However, the findings converge over the long-term: whether in terms of per capita or hourly productivity, productivity gains have fallen between each sub-period, which suggests very limited potential growth.

The Role of Labour Market Policies

The fall in labour productivity growth was in part linked to policy measures which, from the 1990s onwards, aimed at increasing the employment contents of growth. This means that, for a given level of economic growth, the number of full-time and part-time jobs created was then much higher than in previous decades. This was driven by three main factors: first, measures to reduce labour costs introduced in 1993 and supplemented from 1995-1996; second,

incentives to reduce working hours, either through developing part-time work or through general reductions in working hours (introduced under the 1996 Robien Act and expanded under the Aubry Acts of 1998 and 2000); and third, the creation of jobs in non-market services (mainly youth employment contracts introduced in 1997).

More generally, the last 50 years have seen a scale-up in employment policy initiatives to accompany demographic, economic and social developments experienced in France over this period (see Online complement C3: “Cinquante ans de politiques d'emploi”). Until the first oil crisis, employment policy mostly consisted of measures to support changes in the productive system and in the labour market. However, the trend break of 1974-75 and the resultant increase in unemployment marked a key turning point in government policy. Once the conventional instruments to combat unemployment were perceived as ineffective and it was considered that a return to previous employment standards would not be possible, there was a radical change in the objectives and policy instruments, which rapidly increased in number and scope. Policies developed between 1975 and 1995 focused primarily on addressing the most urgent labour market imbalances and containing the increase in unemployment.

In the 1990s, it slowly became apparent that the government would need to supplement specific policies, which up to that point had consisted of high-level structural measures to reduce labour costs for all low-paid (assumed low-skilled) jobs. The focus of the employment policy shifted to initiatives that could contribute to this reduction: lowering employers' social contributions for low-wage jobs became a key policy instrument in France. Between 2000 and 2016, the cost of this policy initiative increased

Tableau 2
Growth, Productivity and Employment

	1962-1973	1974-1991	1992-2007	2008-2018
GDP	+5.7	+2.6	+2.1	+0.9
Employment	+0.7	+0.5	+0.8	+0.4
Productivity per capita	+5.0	+2.1	+1.3	+0.5
Hours worked per capita	-1.0	-0.9	-0.4	-0.2
Hourly productivity	+6.0	+3.0	+1.7	+0.8

Coverage: France.
Sources: Insee, National accounts – Base 2014 (2017 semi-def; 2018 provisional)

from €15bn to almost €50bn (at 2016 prices) while the cost of specific employment supports reached €10bn. In other words, general relief measures represented 85% of all supports in 2016 vs. 55% in 2000.

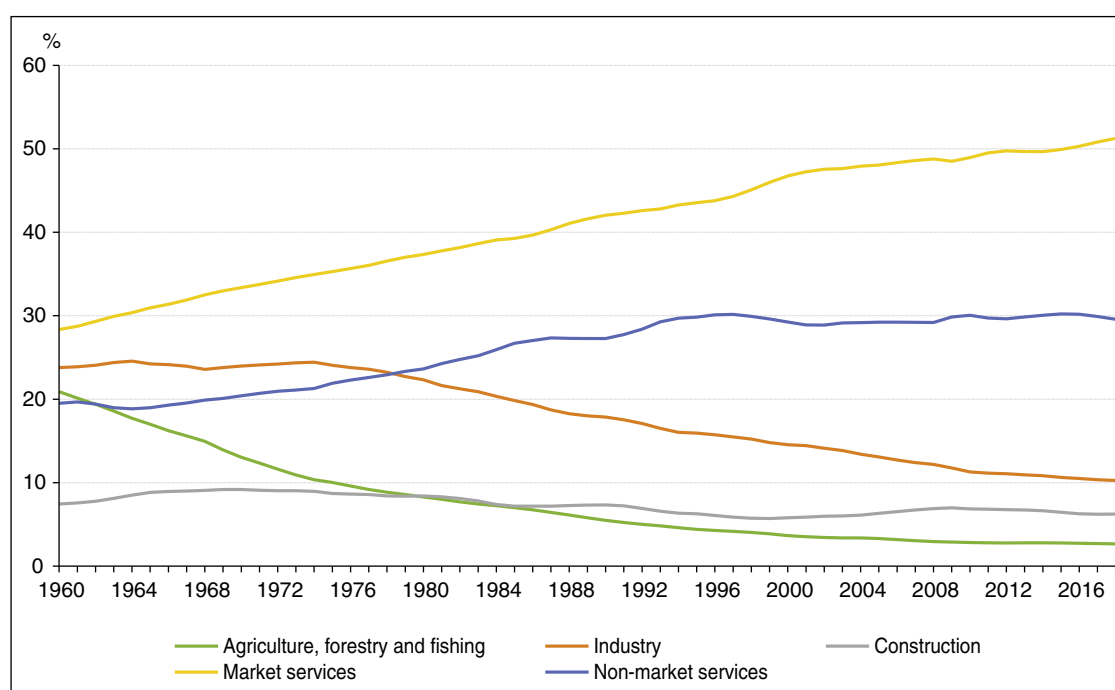
Effects on employment: from large industrial companies to service SMEs

France's transition from a rural, agrarian society to a post-industrial society where the vast majority of workers are employed in services took place over almost two centuries (Marchand & Thélot, 1997). Today, the service sector accounts for around 80% of jobs, industry and construction 17% and agriculture 3%, as opposed to 48%, 31% and 21% respectively in the early 1960s (Figure IV). In terms of numbers employed, this represents a loss of over three million jobs in the primary sector and one million in the secondary sector, while 13 million jobs were created in the tertiary sector. Part of this movement is however attributable to outsourcing tertiary operations formerly carried out in-house by manufacturing companies.

The Rise of Services in the Economy

Industry saw continuous reductions in employment from late 1974 onwards (2.5 million fewer jobs by 2018); however, this trend appears to be reversing in recent years. The few industrial branches seeing their employment numbers increase over the period 1960-2018 include the “energy, water, waste management and remediation” branch (63%); agri-food, which saw a fairly steady but modest increase (12%) despite public health incidents affecting a number of sub-sectors; and pharmaceuticals, where employment numbers have held steady since 1978 after increasing by half over the previous 18 years. Textiles, clothing and leather-footwear, coking and refining, and extractive industries all saw sharp falls in employment since 1960. In other branches, employment fell steadily from 1975 onwards, having increased in earlier years, with total job losses of between one-third and one half since 1960. Employment in construction also entered a downturn in 1974 but, unlike industrial sectors, sharply increased once again in the second half of the 1980s (7%) and particularly in the ten years prior to the 2008 financial crisis (34%). Numbers fell again until 2017, but at a slower rate than in other industrial sectors, before a moderate increase in 2018.

Figure IV
Employment by sector of economic activity



Coverage: France.
Sources : Insee, National accounts - Base 2014 (2017 *semi-définitif* and 2018 *provisoire*).

Lastly, while the number of agricultural producers continues its relentless decline (400,000 today, down from over 3 million in 1960), albeit at a slower rate as the minimum threshold approaches, the number of salaried workers has remained stable at between 320,000 and 350,000 since 2008, significantly lower than almost one million in 1960.

When discussing the service sector, it is increasingly important to distinguish between market services, which accounted for 14.4 million salaried or non-salaried jobs in 2018, and non-market services (e.g. employment in state, regional government and hospitals and employment in private-sector education, health care and social action organisations), which accounted for 8.3 million. Within market services, there are also significant variations between sectors with high turnover (e.g. retail, services to individuals and businesses, etc.) and sectors where the average length of service among staff is considerably higher (e.g. major national companies, banks, insurance companies, etc.). The experiences of these different areas of the tertiary sector are in marked contrast. Market services remain the most dynamic, for both services to individuals and companies (with temporary employment). Non-market services, having seen significant employment growth until 1985, subsequently created increasingly fewer jobs – if we exclude

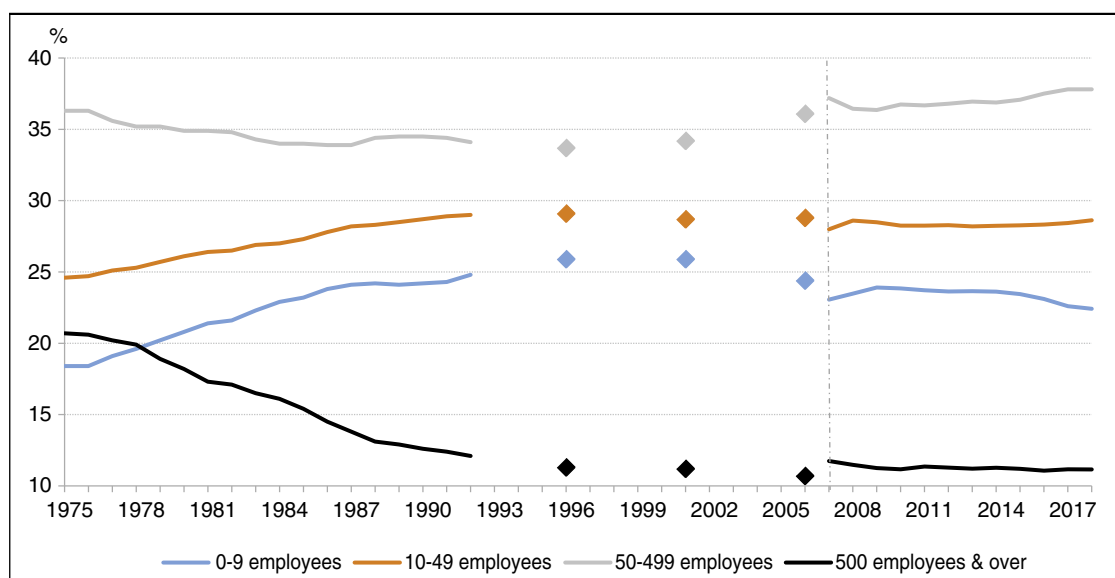
the major contribution of public employment schemes (e.g. community work, solidarity employment and in particular subsidised youth employment contracts). In financial services and insurance, the rate of job creation slowed dramatically between the 1980s and 2000, before increasing once more.

Decentralisation of Production

In line with the rise of the service economy, the share of small organisations in salaried employment increased in France after the first oil crisis, breaking with a secular trend – excluding the 1930s crisis (Figure V). The phenomenon was particularly pronounced in industrial sectors, where large units lost jobs and underwent restructuring (e.g. break-up, subsidiary creation rather than merging), outsourced or subcontracted their operations, or even closed in favour of small industrial or service units. This was reinforced by the transition of the economy towards services because, on average, industrial firms are considerably larger than service-oriented companies. However, the shift from large entities to SMEs also took place in industry, construction and market services.

The overall trend seems to be fading out during the 1990s and halted in the 2000s: the proportion

Figure V
Shares of employees by company size



Coverage: France excl. Mayotte; market sector excl. agriculture, energy, armaments, public transport, postal services, telecommunications and public health until 2006; market sector, excl. agriculture, forestry and fishing, excl. extra-territorial activities and employees of private individuals employers from 2007 onwards.
Sources: Unedic until 2006, Acoess 2007 onwards.

of salaried employment in units with 500 or more employees fell from 21% to 11% between 1975 and 1996 before stabilising; at the same time, the proportion of employment in small units with under 50 employees increased from 43% to 55%, holding steady thereafter (Sources: UNEDIC until 2006; ACOSS 2006 onwards). Some tertiary sub-sectors such as retail or hotels, cafés and restaurants are an exception to this trend; small retail businesses were replaced by medium and large supermarkets, individual hotels by large chains, resulting in some homogenisation with a trend towards medium-sized units (50-500 employees).

Mass Unemployment and the Rise of New Forms of Employment

By definition, the number of unemployed is obtained ex post by the difference between the number of people in the labour force and the number of people in employment. But unemployment is not just a balance: its level can influence participation decisions, as well as employment conditions. Mass unemployment has thus disrupted the behaviour of job providers and job seekers, and extended the “halo” around unemployment.

Towards Mass Unemployment After the Growth Trend Break of 1974

Changes in the working population, which grew uninterrupted for 50 years, and in employment, were reflected by sharp increases in unemployment. While unemployment stood at just 2% in the mid-1960s, it increased moderately from 1967 onwards (Figure VI-A), but with a reduction in its average duration, suggesting that most unemployment was frictional. The unemployment rate would subsequently soar in after the first oil crisis of 1973, passing the one-million mark in 1977 (4.3% of the workforce) and the two-million mark (8.4%) in 1984 after the second oil crisis. The unemployment rate climbed to 9% in 1987, then to 10% from mid-1993 to mid-1999 (with the exception of the second semester of 1995), and between late 2012 to early 2016. At no point did it fall back below 7.5%, despite favourable economic conditions in the late 1980s and late 1990s, as well as in 2006 and 2007. Since 2015, however, the unemployment rate has been on a downward trend but still exceeds 9% on average in 2018. The contrast is stark, between the baby boomer generation who encountered no problems in entering the labour market on the one hand, and the subsequent

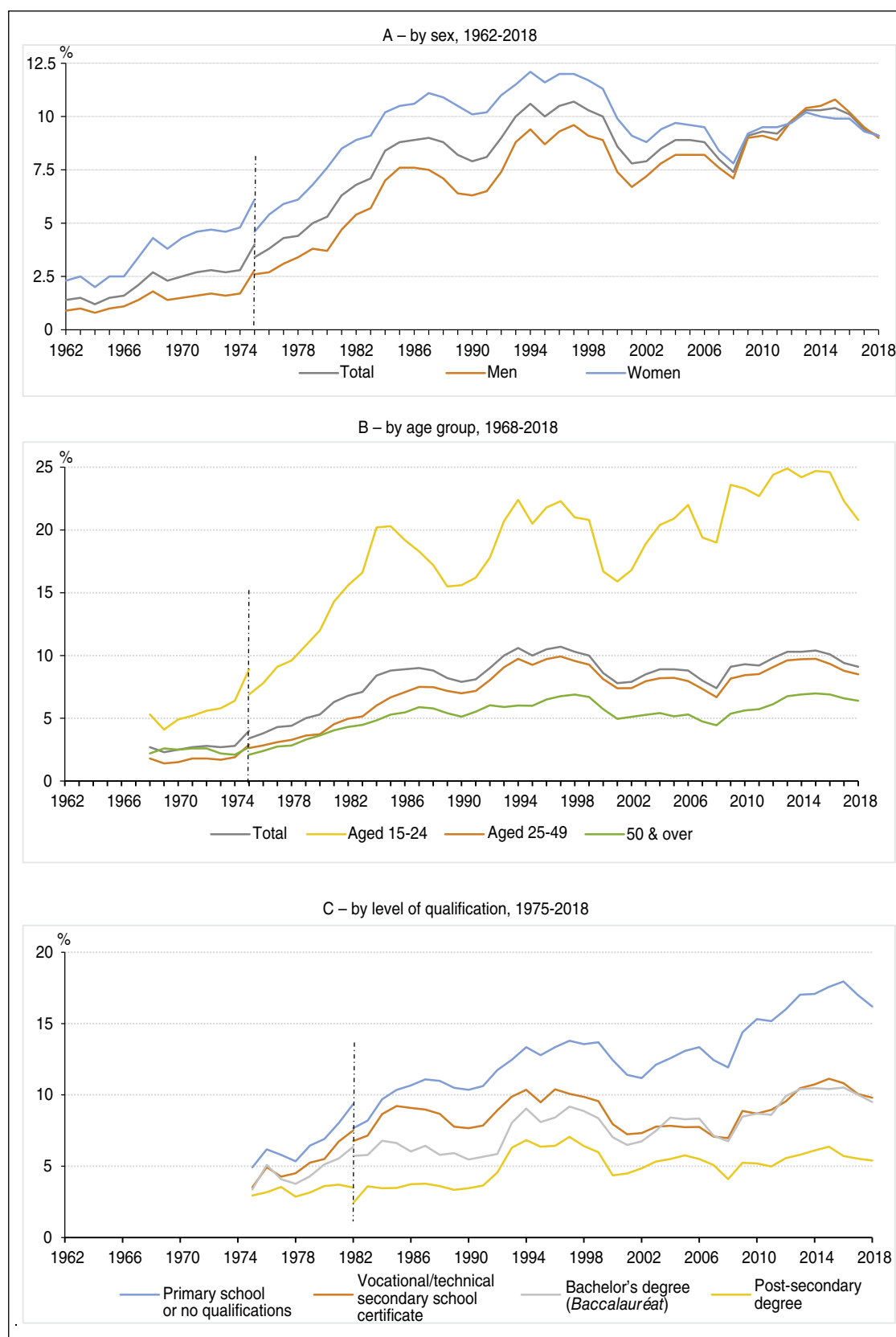
generation who experienced major difficulties in finding the stable employment to which it could aspire with their level of education on the other.

The different sub-groups of the population have been affected to varying degrees. One of the most striking developments of the recent period has been the convergence of men and women unemployment rates. While women have been at a structural disadvantage, the gap stood for a long time at three or four percentage points during periods of economic recovery. However, from the early 1990s onwards, the gap began to close, falling below two percentage points in 2002, to below one percentage point in 2007 and had even inverted by 2012 (Figure VI-B). This convergence can be explained by the higher level of education among women, and the increasing number of jobs in the tertiary sector where the share of women is than the average – or, particularly, in industrial sectors.

On the other hand, significant disparities remain in unemployment by age. Over the whole period, the youth unemployment rate has been higher than that for over-25s. However, this divergence became more pronounced after the economic trend break in 1974; despite measures introduced since the first *Pacte pour l'emploi des jeunes* (Youth employment pact) of 1977 to facilitate their entry into the labour market, the increase in unemployment has disproportionately affected young workers (Figure V-B). The youth unemployment rate also shows higher-than-average fluctuations; during each economic downturn, the unemployment rate among the under-25s rose above 20%, reaching close to 25% between 2013 and 2016. Yet it also fell rapidly during the second half of the 1980s, between 1997 and 2001, and most recently. Young people are overrepresented among job applicants and where they are employed, it is most often in sectors and with employment arrangements that are the most sensitive to short-term economic fluctuations: they therefore represent an adjustment variable for the labour market. It should however be noted that, for young people, the unemployment rate is much less significant than the share of unemployment, i.e. among all young people, not those in the workforce only (see Online complement C1). A majority of those aged 15-24 continue their studies without entering the labour market and, in 2018, just 7.8% of the age group as a whole were unemployed, almost the same as the proportion for those aged 25-49.

At the opposite extreme, the unemployment rate among seniors is considerably lower than

Figure VI
Unemployment rate



Notes: ILO definitions as interpreted until 2002 and average age in the year for years 1968-1975; current interpretation of ILO definitions and exact age from 1975 onwards. 'Primary school or no qualifications' include holders of a certificate of primary education or lower secondary school certificate (formerly BEPC).

Coverage: Metropolitan France until 1975 (1982 by level of qualification), France excl. Mayotte from 1975 onwards.

Sources: Insee, Employment survey long series (1987 series until 1974, current series 1975 onwards).

for those aged 25-49, while there was almost no difference in the second half of the 1970s. The relative advantage of seniors became more pronounced until the mid-1990s, before moderating thereafter. By contrast with young people, older workers unemployment is not linked to higher risk of becoming unemployed (or vulnerability), but to major difficulties in finding a job if unemployed (low employability). Since the 1970s, the vulnerability of those aged 55 or over to unemployment remained very low, while the share of long-term unemployed in this age group increased significantly, from approximately 40% in the early 1970s to almost 60% in 2018.

After 1974, the increase in unemployment was also very uneven depending on the level of education (Figure VI-C), and between socio-professional groups. The range of unemployment rates widened considerably: for those with few or no qualifications, albeit increasingly few in number, the increase was high following the 1974 economic trend break and unemployment rates rose above 15% after the 2008 financial crisis; on the other hand, for those with higher education levels, rates have remained at around 5% since 2000. The unemployment rate among managers remained relatively low throughout the period: 1% in 1974, 3% in 1985, just over 5% at its highest between 1993 and 1998, and between 3 and 4% in the last 20 years. However, the rate for unskilled workers increased by around 15 percentage points over the same period, affecting one in five in the labour force in 2018. Essentially, since 1974, manual workers, particularly the least qualified, and, to a lesser extent, clerical, services and sales workers with no qualifications have been most affected by the increase in unemployment.

A Widening Unemployment “Halo” and More Frequent Short-Term Contracts

The new order of the productive system has challenged the concept of stable, full-time employment with strong social protection, as flexible employment have not affected the whole working population. It is in fact possible to distinguish, within new working arrangements and labour management practices that have emerged as the productive system has restructured, between internal and external flexibility. Internal flexibility that includes multi-skilling, occupational training, career development, mobility within the company and adaptation of working hours and conditions to economic constraints, have most often benefited a core of permanent

full-time staff. External flexibility, which involve recruitment on short-term contracts with the risk of unemployment at the end of fixed-term or temporary contracts, have most often affected older and younger workers.

However, an increasing number of those with no job and who are seeking work do not meet the ILO criteria to be classified as unemployed. Such circumstances on the fringe of unemployment have become much more common in recent decades, indeed to such an extent that an international definition of this “unemployment halo” was adopted by the International Conference of Labour Statisticians at the ILO in October 2013. The category is difficult to estimate statistically and standardised time-series only date back as far as 1990; in 2018, it accounted for 1.6 million people, 3.8% of those aged 15-64. Over the last 30 years, the number of people within this category has fluctuated cyclically but less than the numbers of unemployed. Between 1990 and 2018, both indicators increased in more or less the same way, but in the most recent period between mid-2015 and late 2018, the number of unemployed fell by 16% in metropolitan France, while the halo “expanded” by almost 3%. Women are more likely than men to be in this “halo” despite the fact that they are less impacted by unemployment than men since 2012. Seniors are less exposed to the risk of unemployment and are less likely to fall within the halo, while they are more likely to be found in the category of discouraged workers.

There is another space between employment and unemployment that has increased considerably as precarious employment and under-employment have continued to rise. Temporary employment contracts (short- and fixed-term contracts) became much more common from 1976 onwards, during the economic recovery following the first oil crisis. The share of these contracts in total employment increased in particular between 1982 and 2000 (6.7 percentage points, vs 1.5 percentage points between 2000 and 2018). Their increase is more a matter of hiring flows (9 out of 10 new hires are temporary contracts) than of existing jobs stocks; however, their share in total employment has increased from 5% in the early 1980s to 13.5% in 2018 (Figure VII). Their rise has been fuelled and strengthened by employment policy measures aimed at encouraging job seekers to (re-)enter the labour market as trainees or in short-term jobs. Within companies, temporary positions are currently used to adjust employment to fluctuations in activity. At the structural

level, this form of employment has become an increasingly common method of recruitment and is part of the management of companies' human resources, even for skilled positions.

Furthermore, over the past 15 years, fixed-term contracts, short-term contracts, i.e. contracts shorter than three months, and particularly those under one month, represent an increasing share of all appointments made in a year, most likely in connexion with the gradual expansion of the “*CCD d'usage*”, a de-regulated form of short-term contract introduced in the 1990s (Barlet & Minni, 2014). Among short-term contracts, single-day short-term contracts have increased sharply since 2001. However, over the same period, the proportion of people on short-term contracts has remained stable, which suggests a sharp increase in turnover during the period and therefore more frequent transitions between employment, unemployment and inactivity, affecting young people in particular (Jauneau & Vidalenc, 2019).

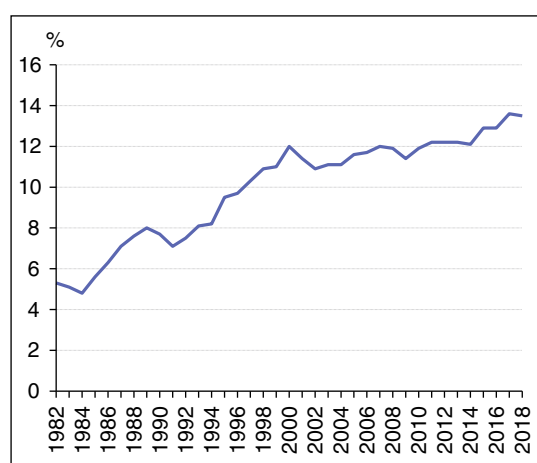
Part-Time Employment

Part-time employment is somewhat different, on account of its diversity and its high concentration on women (see Pak & Zilloniz, 2013; Milewski, 2013). Part-time work grew considerably between 1975 and 2000, contributing to the underlying trend of reduction in annual working hours. Almost non-existent in the

1960s, today it accounts for 18.5% of total employment (Figure VIII), and it is overwhelmingly female: over 80% of part-time positions are held by women, while almost 30% of women (as opposed to 8% of men) work part time. Its increasing prevalence, in particular in the 1990s, has contributed significantly to the rise in female labour force participation (see Afssa & Buffeteau, 2006) and to the increasing representation of women in paid employment (Meurs & Pora, this edition). Since the early 2000s, its progression is only due to men.

The “voluntary” or “unvoluntary” nature of part-time work has been the subject of much discussion in France (for a brief overview of the discussion, see CESE, 2014). There is no official definition of “constrained” part-time employment, but it is generally considered to be due to not being able to find a full-time position. Under this criterion, part-time employment is mostly “chosen”, but this is becoming less so. The growth of part-time employment has primarily affected low-skilled occupations in the tertiary sector (e.g. retail, hotels, cafés and restaurants, services to individuals, etc.), driven by the growing need for flexibility on the part of employers. Part-time employment in this case is often combined with fixed-term employment: in 2018, 23% of part-time employees were on fixed-term or temporary contracts, vs 13% of full-time workers.

Figure VII
Proportion of temporary contracts

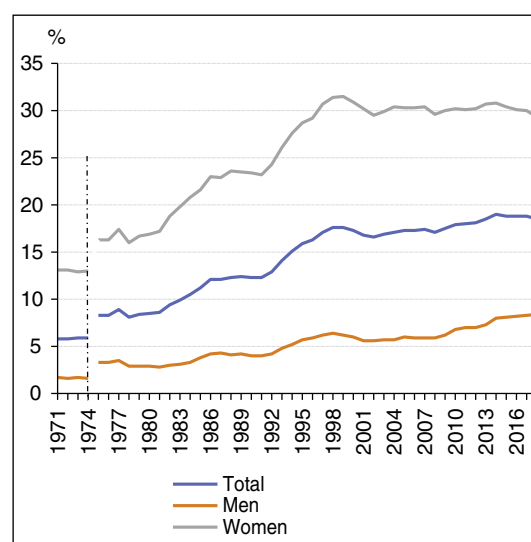


Notes: Temporary contracts: temporary and fixed-term contracts (including public service fixed-term contracts, apprentices and seasonal workers).

Coverage: Metropolitan France before 1975, France excl. Mayotte after. Employed people according to the ILO definition.

Sources: Insee, Employment survey long series (1987 series until 1974, current series 1975 onwards).

Figure VIII
Proportion of part-time employment



Coverage: Metropolitan France before 1975, France excl. Mayotte after. Employed people according to the ILO definition.

Sources: Insee, Employment survey long series (1987 series until 1974, current series 1975 onwards).

Underemployment related to working hours was defined by the ILO as consisting of two types of employment situation: those who work part-time and would like to work more and are available to do so, and those who are temporarily laid off at the time they are surveyed. In 2018, 1.6 million people were underemployed, in particular those with no qualifications, young people and women. Alongside the growth of part-time employment, their share in total employment increased from 4.0% in 1990 to 6.6% in 1999. It stood at 6.0% in 2018, down 0.7 percentage points on 2013.

Employees or Self-Employed: Increasingly Difficult to Separate

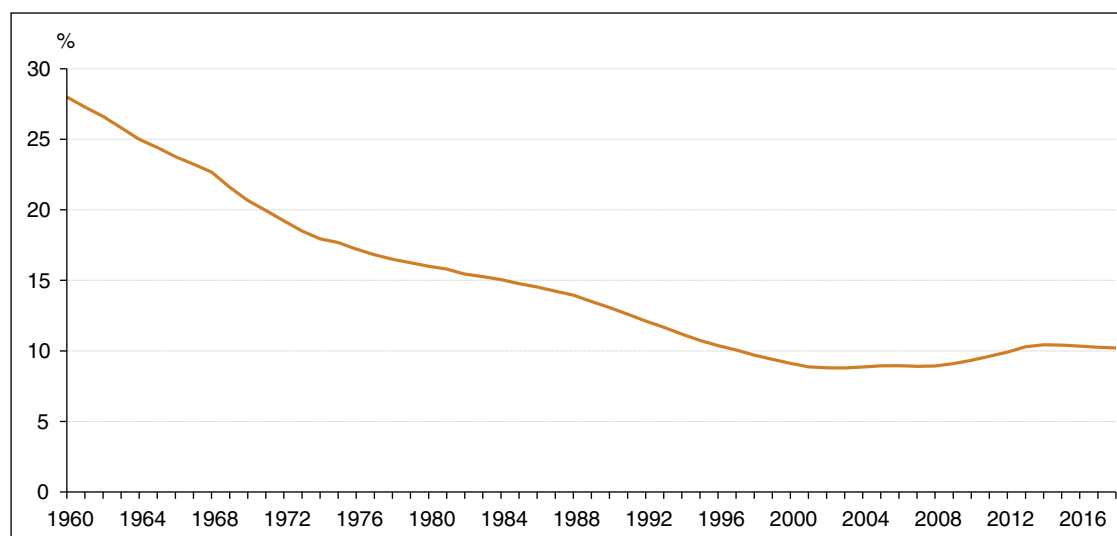
After a continuous decline from 1960 until the early 2000s, the share of self-employment stabilised at around 8% until 2010 before a slight recovery (Figure IX). Self-employment may have been a means of adapting to and escaping from mass unemployment. It has also led to the introduction of new corporate policies, for example some companies have reduced their staff numbers to focus on their core operations and outsourced peripheral operations to subcontractors. A number of public policies encouraging people to set up businesses have, since 2003, facilitated the creation of new companies (La Boetté, 2019). Lastly, the introduction in 2009 of the “*auto-entrepreneur*” status (re-labelled “*micro-entrepreneur*” in December 2014⁴) led to renewed growth in self-employment in service sectors and, in some professions, micro-entrepreneurs have, in just

a few years, come to occupy the space held by traditional forms of self-employment.

In the process, salaried employment and self-employed categories have become less differentiable: the notion of salaried employment is increasingly difficult to define, due to the growing challenge of establishing a clear subordinate relationship between the principal/customer and the worker, which is integral to correctly defining the contract between both parties. Both categories have changed in tandem, resulting in wide variety of situations poorly captured by statistics (CNIS, 2016) Employment on the fringes of salaried status has grown, either in the form of jobs that are increasingly loosely based on salaried status and the protections that it offers, or in the form of bogus self-employment or false subcontracting. For example, in construction, companies offered strong incentives to some of their workers to become self-employed, which may allowed to substantial reduction in labour costs by circumventing legal and regulatory requirements; however, those new self-employed remain most often fully tied to their former employer, who in effect is their sole customer. Situations such as these are common in other sectors such as haulage or large-scale retail. More recently,

4. In mid-2018, 1.35 million people were classed as micro-entrepreneurs, 780,000 of whom recorded positive turnover in the second quarter of 2018. Income generated by this new form of employment is usually meagre; three-quarters of micro-entrepreneurs who reported an income in 2016 earned less than €680 per month. These incomes are therefore often supplemented by income for salaried employment.

Figure IX
Share of self-employment



Coverage: France.
Source : Insee, National accounts – Base 2014 (2017 semi-définitif et 2018 provisoire).

various occupational arrangements have emerged, such as multiple employment, employers' groups, umbrella companies and digital brokerage platforms, often users of their micro-entrepreneur worker base, which raise the issue of social protection arrangements of these workers, which are weaker than those of salaried employees.

The diversification of employment arrangements has led the ILO to revise its 1993 definition by adopting a resolution concerning statistics on work relationships at the 20th International Conference of Labour Statisticians in 2018 (see Online complement C2 and ILO, 2018). The ILO, keeping the 10 basic categories of the International Classification of Status in Employment (ICSE) developed two new classifications: firstly, the "ICSE according to type of authority", which provides a high-level distinction between independent and dependent workers (which include salaried workers) by referring to socio-economic circumstances; secondly, the "ICSE according to type of economic risk", which makes a high-level distinction between workers who are in employment for profit and those who are in employment for pay (not all of whom are considered employees). The difference between these two classifications lies in how they address intermediate categories between traditional salaried and non-salaried workers, such as dependent contractors, family workers, company owner-managers. In both cases, the employee group is sub-divided into four categories according to the type and duration of the contractual relationship with their employer. The main challenge now consists of revising survey questionnaires in order to be able to measure the new categories in a way that facilitates international comparison. For an illustration of this, we can cite the recent study by Babet (2019) that uses an additional employment survey module regarding forms of self-employment: one in five self-employed people, more than 600,000 people, are economically dependent on another entity, whether this be a customer, upstream organisation or intermediary. This type of self-employment then imposes constraints, especially it limits autonomy as regards task content, working hours and price setting.

* *
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Over the past 50 years, the labour market has been profoundly transformed. Alongside the underlying trends (arrival of baby boomers onto the labour market, increasing levels of salaried employment among women, higher educational attainment, accelerated decline of agriculture, the onset of shorter working hours), a few key moments have led to profound changes: the first oil crisis represented the first trend break that ended the post-war economic boom, ushering in a prolonged period of weak growth after 1974. The sudden slowdown in GDP and labour productivity growth was accompanied by the steady increase in unemployment and the emergence of precarious employment. It also marked the beginning of the downturn in employment in industry and of the share of manual workers among the working population. The trend break of 1974 also marked the beginning of more substantive employment policies.

The second oil crisis led to significant shifts in economic policies, with in the early 1980s, policies aimed at containing unemployment, then in the mid-1990s the introduction of policies to enrich the employment content of growth. The 1990s ushered in the emergence of the so-called "new economy", based on knowledge, communication and information, with the online and digital revolutions disrupting the way companies operated and working arrangements. Lastly, the subprime crisis of 2008 had a brutal effect on the world economy and, in turn, the French economy, dashing earlier hopes of a return to "high-quality full employment" (Marchand, 2002). The last ten years have also seen an end to the positive contribution of demography to labour force growth, now only supported by increases in the retirement age – a further indication of the ageing labour force, albeit much less pronounced in France than in Southern or Eastern Europe, or further away, as in China or South Korea.

Many of the drivers of profound changes in the labour market described here have then declined in or came to a halt by the year 2000. They have left a labour market characterised by a high diversity in employment arrangements and circumstances, where insecurity has become more common. □

Link to the Online complements: https://www.insee.fr/fr/statistiques/fichier/4253035/510-511-512_Marchand_Minni_complements_FR.pdf

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