This action has received funding from the European Union
(DG Employment, Social Affairs and Inclusion)

DIRESOC

WP1: Literature review and expert interviews

COUNTRY REPORT FRANCE

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ASTREES

Working paper
14th November 2018

1. Introduction

Digitalisation of the economy is for sure a huge topic for debates and initiatives in France nowadays. The impacts of digitalisation on work and employment are more and more part of our national debate and that is precisely why trying to analyse the relationships between digitalisation, restructuring and social dialogue makes sense in the French context. But let's come back to the words backing the DIRESOC project: social dialogue, restructuring and digitalisation. In this introduction, we'll intend to briefly mention or remind some of the key points to be considered while approaching the French situation.

1.1 Social Dialogue

General features of the French industrial relations system are described by Eurofound: https://www.eurofound.europa.eu/country/france#actors-and-institutions

In the framework of this country report, one might just remind that "Trade unions, employers' organisations and public institutions play a key role in the governance of the employment relationship, working conditions and industrial relations structures. They are interlocking parts in a multilevel system of governance that includes the European, national, sectoral, regional (provincial or local) and company levels. (Eurofound)". This especially means that the State traditionally plays an important role in framing the roles and prerogatives of trade unions and employer organisations at various levels. This also refers to the existence of different levels for both collective bargaining and workers representation. In a context of pluralism, there are several unions and employer organisations but only representative organisations are allowed to collectively bargain and thus to conclude collective agreements, especially at sectoral and company level. There are five representative trade unions at cross sectoral level according to the last evaluation made in 2017: CGT, CFDT, CGT-FO, CFTC and CFE-CGC. Other unions exist but might be representative only at sectoral level (therefore depending on the sector/branch considered). On employers' side there are 3 representative employer organisations at cross sectoral level: MEDEF, U2P and CPME

In this context, the main recent trends regarding the evolution of IR in France are the following:

- A clear and old trend towards decentralisation of collective bargaining to company level which has been pushed forward by the last reform of the Labour Code (2017) so that companies and workers representatives get more opportunities to deviate from "upper" rules, especially legal rules and branch collective agreements
- The merger of the numerous existing branches in order to make sectoral social dialogue more efficient. There were around 700 different branches in 2015 in France; they should be 200 in 2019.
- A deep restructuring of worker representation at company level by putting in place only one body for employee representation (the Conseil Social et Economique) instead of several (staff delegates, health and safety committees, works councils)

1.2. Restructuring

As mentioned in our Moliere report (Teissier, Triomphe 2014 http://responsible-restructuring.eu/wp-content/uploads/2014/10/Irene-policy-paper-No-6-France-copy.pdf), "In France, restructuring has been a concern for 40 years. This led to a very complex system, aiming both at anticipating and managing restructuring and involving a wide range of tools and actors". In this context, it's worth highlighting two general trends:

- An increasing role of company collective bargaining to manage restructuring, from the negotiation of the social plan (required, as a matter of principle, since 2013) to the introduction of new kinds of collective agreements to adjust working time and wages in case of necessity (collective performance agreements) or simply to manage the termination of employment contracts without using collective dismissals on economic grounds (Collective termination by mutual agreement) by the recent reform of the Labour Code.

- "An increasing emphasis on measures to support qualitative adjustment, both in terms of legal provisions and measures to support transition to new jobs", as highlighted by O. Bergstrom in the synthesis report of the Moliere project (2014 - http://responsible-restructuring.eu/wp-content/uploads/2014/10/Irene-Policy-paper-No-14-MOLIERE-Synthesis-report.pdf). This is for sure a very significant and long term trend, which especially inspires the very recent reform of vocational training by Law n°2018-771 of 5th September 2018.

1.3 Digitalisation and its impacts on work and employment

This notion has clearly become significant in the national debate and puts under the spotlights all of the issues mentioned in international literature regarding the possible impacts of digitalization, from the changes in jobs and tasks possibly leading to downsizing or reskilling processes to the raise of "new" forms of self employed workers and economic actors (the platform economy in its diversity) and the related problems/issues –workers 'status, social protection, workers organisation etc. In this context, the employment issues raised by the AI have become prominent in the last period, giving birth to different reports aiming to identify changes AI already produces or could produce[1].

We'll come back to these aspects in the first part of this report (section 3.1) but what is key to mention at this stage is that digitalization puts into question changes affecting not only employment levels but also concrete work activities and work organisation, leading us to confirm the relevance of the "wider" concept of restructuring the DIRESOC project has opted for.

[1] Benhamou, S. & Janin (2018), L. Intelligence artificielle et travail, *Rapport à la ministre du travail et au secrétaire d'Etat auprès du Premier Ministre, chargé du numérique, France Stratégie*

2. Methodology

This short report is both based on desk research as well as on face to face interviewees with key informants carried out from July to September 2018. It aims at briefly reflecting the role of social dialogue, especially at cross sectoral and sectoral level, in dealing with restructuring due to digitalisation. The interviews were made on the basis of general guidelines provided by the DIRESOC project coordinators. Beyond this set of questions, we mainly tried to inform on two main issues:

- Is social dialogue (actors, processes, areas, tools) currently impacted by digitalisation and in what extent?
- Are "classical" tools and practices used to anticipate and manage restructuring affected by changes on work and employment due to digitalisation?

This report is structured as follows. Section 3 first provides with a general overview at national and cross sectoral level, followed by a short exam of four sectors: banking, postal services, metalworking and tourism. Section 4 presents first general and provisional conclusions resulting from the research made. Section 5 lists selected references used.

Ten interviews were carried out face-to-face. Each interview lasted one hour and thirty minutes on average. Due to the short timetable available to achieve this report, we did not have the possibility to meet all representative unions at cross sectoral level and in the various sectors under scrutiny. We thus privileged unions federations affiliated to the Union Confederation supporting the DIRESOC project in France, i.e. the CFDT confederation. This is obviously a first limit to this report.

As a matter of principle, we tried to meet both the employer side and the employee side at all levels and in all sectors. However, it proved to be impossible, in the timetable of this study, to hold interview with employers' organisations in two sectors: banking and tourism[2]. This is of course another limit to this report.

List of key informants interviewed

- **National and cross sectoral level:**
  - Deputy director, Mission Anticipation et développement de l'emploi, Direction Générale à l'Emploi et à la Formation Professionnelle (DGEFP), Ministry of Labour, 10th July 2018
  - Deputy director of the Work, Employment and Skills department and Project manager "Prospective, occupations and qualification", France Stratégie , 12th July 2018
  - Nat. officer Confederation CFDT, 26th September 2018
  - Head of project, General management – Social policies, MEDEF, 17th July 2018

[2] Despite several attempts and reminders sent out to key informants selected, ie the Association Française des Banques in the banking sector and the "Entreprises du Voyage" in the tourism sector, no interview could finally be organized on time.

Banking sector

- General secretary, FBA CFDT, 10th July 2018

Postal services

- National secretary , F3C CFDT, 16th July 2018
- Director for industrial relations, Branche Services, Courrier, Colis, La Poste group, 30th July 2018

Metalworking

- National secretary, FGMM CFDT, 18th July 2018
- Labour Law Director, UIMM, 25th September 2018

Tourism

- Federal secretary (travel agencies, social tourism, tourism information offices and casinos) and National secretary (responsible for digitisation), CFDT Services, 26th July 2018

3. Digitalisation related restructuring and Social Dialogue in selected sectors

3. 1 National situation in short

3.1.1 Digitalisation and restructuring

At national level, the impacts of digitalisation have initially been approached through attempts to assess its consequences on employment as a whole, its volume, structure and location. This was the topic of the 1st part of a report published in January 2017 by the "Employment Orientation Council" (Conseil d'Orientation sur l'Emploi- COE)[3]. This report is often seen as one of the main source of general information about digitisation/digitalisation, especially by the social partners 'representatives we met in the framework of this study. Based on the international literature published since 2013 (Osborne and Frey report (2013), etc.), the report aimed at clarifying as much as possible the possible impacts of digitalisation on employment in order to point out possible reforms to be implemented. It is based on a statistical study aiming at:

- Identifying and assessing globally the jobs at threat due to new technologies, ie; jobs at risk of being destroyed by automation but also jobs which could be transformed due to the increasing use of automation

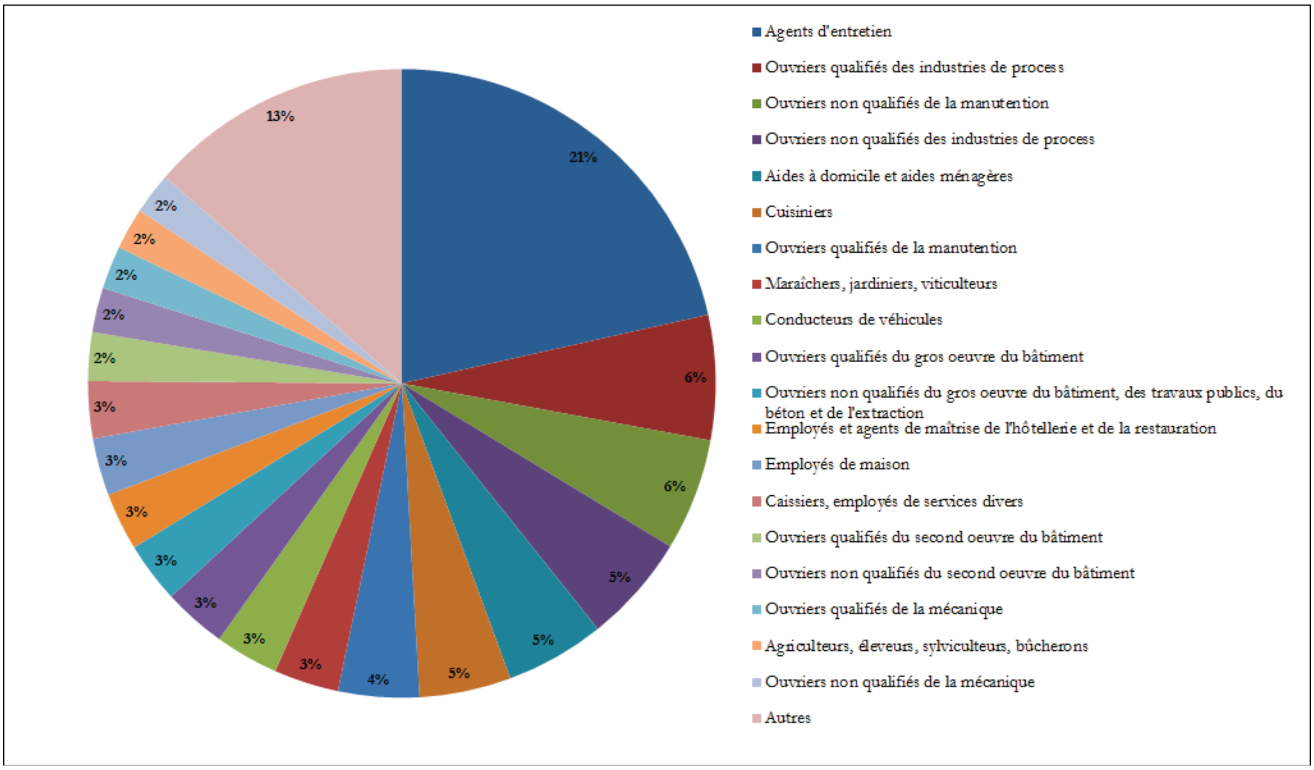
[3] The COE is a national advisory body placed under the supervision of the Prime Minister and set up in 2005. It brings together different stakeholders (social partners, experts, public employment service, etc.) in order to draft shared diagnosis and reform proposals in the field of work and employment

- Identifying more precisely the occupations at risk (destruction or transformation).

Under the notion of digitalisation, the report especially includes new technologies Eurofound ranges under the concept of “digital revolution“, i.e. “*a general acceleration in the pace of technological change in the economy, driven by a massive expansion of our capacity to store, process and communicate information using electronic devices”*. In that extent new developments in Robotics (cobots), Internet of Things, 3D printing, but also big data, machine learning and artificial intelligence and the possible combinations of all, are considered as powerful drivers for changes in employment.
Taking into account the uncertainties linked to future technological developments (and to the combinations of different technologies) the general conclusions of this study were the following:

- Globally, less than 10% of existing jobs are at risk of being destroyed due to automation and digitisation
- But, 50% of the existing jobs are likely to be transformed in their content (tasks, working methods) in a large extent
- Technological progress is likely to foster skilled or/and high skilled jobs, jobs most at risk being no or low skill jobs.

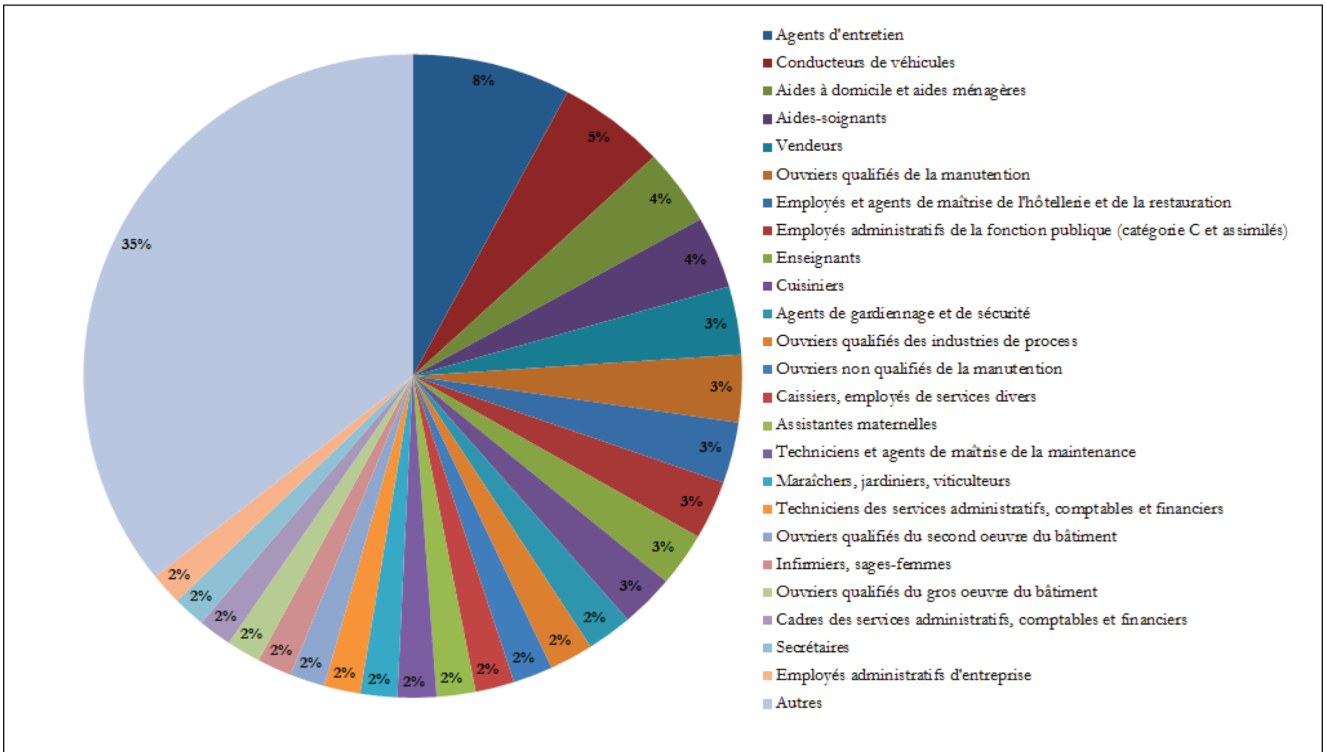
The following figure provides details of the analysis made about the possible impacts of digitalisation on employment categories seen as most at risk of automation[4]



[4] Each percentage per category represents the share in the total of jobs at risk of automation

Source: Secrétariat Général du COE

This other graph shows the jobs most at risk of being “transformed” (tasks, working methods) due to digitalisation /automation.



Source: Secrétariat Général du COE

This figure shows that “Among those jobs that are most "likely to evolve", the occupations that are proportionally the most represented in relation to their share in total paid employment are also often manual and low-skilled jobs, but they are more in the services sector than the trades. The most "exposed" being drivers, cashiers, transport operators, employees and supervisors of hotels and restaurants and home helpers, for example”.

In light of these general conclusions, we should notice that the French debate about digitalisation **quickly shifted from concerns about possible job destructions to questions related to the actual and future impacts of new technologies on skills and competencies**. In other words, it is considered that new technologies should trigger the development of new skills, the latter not being subject to automation: what skills do workers need at the digital age?

This is confirmed by our interview with a national representative of the CFDT Confederation: “*One does not really know how many jobs will disappear but digitalisation will for sure bring changes to almost all existing jobs. There’s also a risk of an increasing job polarisation on the labour market, with low skilled jobs on one hand and highly qualified jobs on the other. In addition, new technologies also blur the borders between economic sectors, i.e. especially between industry and services, reshaping the value creation process*”.

This question has of course a lot to do with what may be called the anticipation of restructuring and the related existing tools: reskilling, vocational training, etc. but also to work organisation – how to adjust workers' skills and work organisation in the context of an increasing automation of tasks?
But it is also related to job creations and skills people need and will need to get the "new jobs available". In this respect, recent works carried out about the development of AI are especially worth mentioning. In the report, "Intelligence artificielle et travail"[5], the French public think tank France Stratégie[6] notices that *"AI has made spectacular progress in recent years". "Even, if its development and spreading among sectors and occupations is still ongoing and limited, AI is likely to perform complicated tasks but repetitive or very regular, which will logically affect jobs including these tasks"*.
In that extent, in several sectors, one may already guess what the impacts of AI on specific occupations could be in the short, mid or long-term: what about the drivers when autonomous vehicles will really be working? What about bank advisors in retail banking when chatbots will be fully here?

The report therefore mentions that those evolutions will very probably suppose, not necessarily brutal transformations, but rather progressive changes in working tasks towards tasks not likely to be automated (purely human, supervision, direct human to human relationships, etc…). As a result, for the authors of this report, it seems necessary to:

- "carry out, at the level of the branch or the sector, prospective work on the potential of artificial intelligence, to ensure a good level of information and anticipation of the actors;
- ensure the training of workers in the challenges of tomorrow: train highly qualified workers to produce AI and workers who are aware of technical, legal, economic or ethical issues raised by the use of tools based on artificial intelligence;
- reinforce mechanisms for securing career paths for some sectors or sub-sectors that would be heavily impacted by the risk automation".

Beyond or alongside issues related to the evolution of workers tasks and skills made necessary by digitalisation, we should also take into account that working conditions as such are also taken into account in the French debate. In short, we can report different issues:

- How to organise a fruitful cooperation between humans and machines (human/machine interface) as this situation is likely to become more and more frequent in both industry and services?
- How to deal with possible impacts of new technologies on workers health and safety?[7]
- More generally, according to the CFDT Confederation, digitalisation imposes to really reconsider "work" (and not only employment) as it is today and will be in the future and

[5] Benhamou, S. & Janin (2018), L. Intelligence artificielle et travail, *Rapport à la ministre du travail et au secrétaire d'Etat auprès du Premier Ministre, chargé du numérique, France Stratégie*
[6] A service of the Prime minister in charge of supporting policy making by producing knowledge and expertise on a large range of issues, also specifically covering work and employment issues.
[7] INRS (2018), Les objets connectés, *décryptage*, avril 2018

therefore to put into question old frameworks or ways of considering it for instance in the Labour Code (subordination bond, working time organisation and more generally workers protection regulations)

What can we learn from this very short overview?

It‘s clear, considering the French context, that digitalisation (and the different and often interlinked technologies it refers to) has to deal with restructuring in a comprehensive way, as defined in the DIRESOC project[8]. Generally speaking, digitalisation is not considered in France only as a driver of job destructions but also, and perhaps first, as potentially huge and ongoing transformations of jobs, occupations and work organisation as well as a driver for job creations. In other words, the French context seems to be ripe for anticipation of the effects of digitalisation on work and employment. A perfect topic for social dialogue?

3.1.2 Digitalisation, restructuring and social dialogue

General perspective

Coming to the ways to anticipate restructuring, or simply changes[9], it's worth highlighting that some public reports insist on the need to foster social dialogue on those issues. It's especially true as regards the most prominent and new revolution perceived, i.e. AI and its developments. A report entitled "Intelligence artificielle et capital humain[10] , made on the basis of a survey of both managers and workers carried out from November to December 2017, especially recommends to HR managers to "include AI in social dialogue" and to "engage in a collective work with branches and territories to manage the transformation".

The actors and experts we met at national and cross sectoral level (see section 2.) all seem to agree on what digitalisation is, in general terms, as regards its impacts on work and employment: a revolution which we can already experience concretely in all sectors and companies and which is both fast and still ongoing with uncertain impacts. In addition, all of them agree on the fact, also underlined by many international and national reports[11], that all changes allowed by technological innovations do not have to be "automatically" put in place, i.e. that the transformation also supposes to be socially accepted. In this perspective, we could assume that social dialogue is a relevant set of tools and practices to better anticipate and manage changes jointly and in a continuous way, i.e. a way to build shared diagnosis and then to manage changes in an efficient economic and social way. But it's probably not so easy!

[8] The DIRESOC project use "restructuring as a unifying concept for all types of changes that, from the point of view of the individual worker, implies a change in employment status or working conditions".
[9] The representative of the national employer organisation we interviewed on 17th July (see section 2) was not keen on talking about "restructuring" as regards transformations implied by digitalization. In her view, this notion is too much linked to collective dismissals and does not allow to really take into account the challenges raised by digitalisation
[10] Giblas, D., Godon, A-S, Fargeas, M., Duranton, S., Gard, J-C, Audier, A….Buffard, P-E. (2018), Intelligence artificielle et capital humain, Quels défis pour les entreprises ?, Malakoff Médéric and the Boston Consulting Group (BCG)
[11] See for instance, Eurofound (2018) *Automation, digitalisation and platforms: Implications for work and employment*, Publications Office of the European Union, Luxembourg.

It's clear that actors and experts we met are aware of the challenges raised by the digitalisation of the economy.

For the representative of a nationwide employer organisation, "*When we talk about digitalisation, we talk about different phenomena whose level of advancement also differs: robotisation, artificial intelligence but also business model changes, (by reference to what we call the "platform economy", which in fact means new ways of producing). Beyond that, we know that in a few years, the number of connected objects will be multiplied (50 billion!), which concretely means a different economy and a different society! It is the magnitude of this transformation that must be apprehended".*

More precisely, according to this interviewee, digitalisation raises different kind of challenges/topics:

As for robotisation, it's not a new phenomenon, even though it is accelerating; here, the challenge is clearly that of the transformation of jobs and skills in a multidimensional perspective. This major issue is by nature a collective one and especially relates to the need for prospective analysis of skills needed.

As for AI, what is at stake is a profound change in what drives value creation (data!). It would thus presuppose a change in the economic model and society. The report commissioned by the government[12] clearly questioned the topics and even made recommendations. "*The limit is that this report did not spark a genuine debate. If these topics are to fuel economic growth, pedagogy and debate are absolutely necessary (and not yet very present today!)"*

As for the so called platform economy, questions raised are the evolutions of the forms of employment but also distortions of competition, in particular with regard to the GAFA or equivalent. *"Regarding the employment status, it is not necessarily a priority to change all self-employed in employees. On the other hand, the multi-activity of many new self-employed raises the question of the risk of poverty and constitutes a major problem for social cohesion as well as it challenges the evolution and financing of the social protection system".*

Another hot issue is that of the digital divide, which is directly related to the perspectives open to jobseekers in increasingly "disintermediated" systems. This issue is also important for companies: identifying the "digital excluded", the *"illectronism"* within companies, also makes sense in the context of the digital transformation (for the adaptation of jobs and skills). On this subject, the MEDEF is coordinating the French digital coalition[13], which aims precisely to address these issues. *"There is indeed a strong risk of a dualisation of the labor market which is likely to lead to "unemployable" groups of individuals".*

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[12] Villani, C. (2018), *Donner un sens à l'intelligence artificielle : pour une stratégie nationale et européenne*, Rapport au Premier Ministre, la Documentation Française

[13] See here for more details : http://www.french-digital-coalition.fr/?page_id=1244

What about social dialogue and restructuring?

Generally speaking, we can notice some questions regarding the ways social dialogue should deal with digital changes. A publication issued by France Stratégie [14] states that *"While awareness of these changes seems to be on the right track in many sectors of the economy, the ability of companies to make it a real challenge for social dialogue is more uncertain".* According to the authors, social dialogue about digital transformation of companies still needs to be developed. It could first suppose that companies and workers reps accept to share the uncertainties linked to the digitalisation. Furthermore, as the digital transformation is continuous, social dialogue should probably also be continuous. In this respect, usual/existing procedures of social dialogue at company level are possibly not very suitable and thus the question could be to set up or invest in new tools and areas for social dialogue, beyond and alongside already existing schemes.

This point seems to be shared by some social partners at national level. For a representative of an employer organisation *" there is need to build, if not a "formal" social dialogue, at least a genuine dialogue, even unstructured and including in businesses, upstream of the formal dialogue (mandatory, prerogatives of the employee reps, etc.). This is where social innovation is, making common diagnoses and finding areas to do this".*

As an example of such perspective, let's mention a "discussion statement" adopted in March 2016 at national and cross sectoral level by all employer organisations and representative unions but the CGT. This document is related to the "socio-economic impacts of digitisation" and looks like a shared diagnosis/analysis about the main issues raised by digitalisation[15]. However, the CFDT Confederation regrets that nothing new has occurred in this respect since 2016.

All in all, one might indeed assume that there's a need to build common/joint approaches of digitalisation and its consequences especially on employment and skills, This role seems to be especially meaningful considering sectoral social dialogue, considered as a suitable level of dialogue for supporting companies in the anticipation of changes in jobs and skills, especially through human resources planning exercises and agreements (GPEC) This could also mean that the usual existing tools to anticipate and manage restructuring in France would not need, as such, to be amended or modified, whether we talk about social plans or human resources planning among other things, but that concrete possibilities to develop joint approaches between social partners are made necessary by digital changes.

[14] Jolly, C., Naboulet, A. (2017), *Mutations digitales et dialogue social*, Note de synthèse, France Stratégie
[15] Dialogue économique (2016*), Impacts socio-économiques du numérique*, Relevé de discussion des partenaires sociaux

For the CFDT Confederation, "*to really deal with digital changes, the relevant level is probably the company level. But it means that common diagnosis between employer and employee reps should be made at this level which makes necessary to find ways to do this.*
This requests not only a formal social dialogue or other/new legal duties to collectively bargain[16], but rather trust and the capacity to experiment /test different scenarios and to agree on methods to jointly manage changes"[17]

In this respect, the State already plays a role, as shown by our interview with the DGFEP (see section 2.). Generally speaking, the Ministry of Labour has been searching for fostering the dialogue between social partners at branch/sectoral level on the impacts of digital changes. Using some specific tools named ADEC, the idea has been and still is to incent social partners from different sectors to engage in a genuine dialogue about human resources planning in the view of supporting SMEs in their sectors. The idea is therefore to support the development of social dialogue in structuring it, with the hope that it might go further beyond the ADEC. More precisely, EDEC / ADEC[18] are « old » tools whose objective is to support all active people (employees but also craftsmen, farmers and managers of SMEs), especially within SMEs to anticipate changes and to facilitate professional transitions. These actions are to be planned by framework contracts negotiated between the State and social partners (employers' organisations and unions at sectoral level) either at national or regional level. Other public or private bodies may be involved in such contracts depending on the project considered. When such an agreement is concluded, the State co finances the costs of measures planned (up to 30% of the global and provisional costs). Recently, this tool has been used in respect to the the challenges raised by digitalisation on employment and skills. In 2 years, 10 ADEC have been concluded, putting together some social partners from 50 different branches/sectors but depending on the same vocational training fund. Actions planned in these agreements vary depending on the sectors covered but globally include two kinds of provisions /actions:

- Actions aiming at making a precise diagnosis of the impacts of digital changes on employment and skills
- Actions aiming at supporting the development of workers skills, ie especially formalisation and recognition of skills (creation of new sectoral qualifications, review of training bases…).

Retail sector, textile or tourism are some of the branches involved in such agreements. What is interesting here is that those agreements might be seen, as such, as forms of social dialogue regarding digitalisation and restructuring.

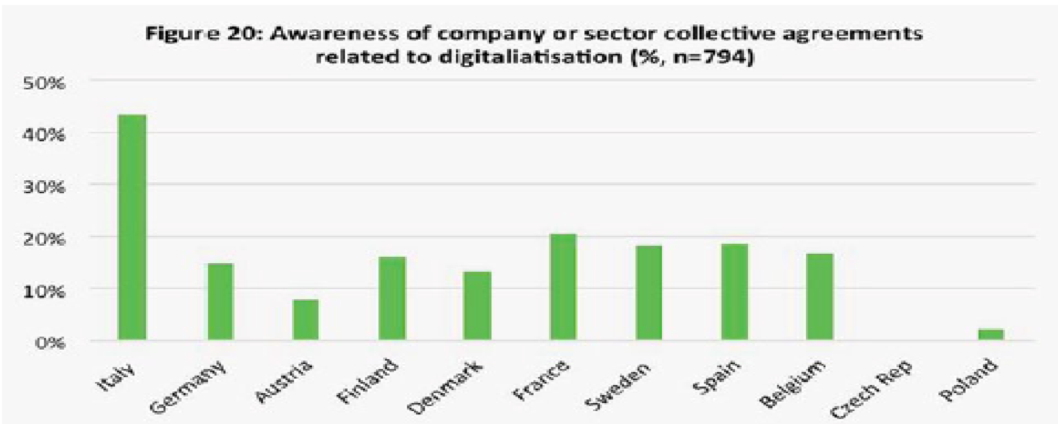
[16] The existence of legal duties/incentives to initiate collective bargaining processes, especially at company level, has become a significant phenomenon to support decentralization of collective bargaining for years, see Berthier, P-E., Leclerc, O. (2018) How can decentralisation of collective bargaining be achieved? A typology of legal incentives, Bulletin of Comparative Labour Relations, 99
[17] This idea seems to us quite close to the concrete initiative developed by some social partners in the metalworking sector, see below section 3.2.4
[18] Engagement de Développement de l'Emploi et des Compétences/ Accord de Développement de l'Emploi et des Compétences

In the view of the DGEFP, they allow to go much further than "usual" human resources planning agreements concluded at sectoral level which, very often, only copy/paste the legal requirements in this field, in order to enable sectors to support digital change in SMEs. The idea is not only to manage changes impacting existing employees but also to facilitate job creation by SMEs. These agreements benefit from a specific follow up involving both the State and the signatories (social partners). The number of ADEC concluded related to the digital transformation as well as some existing projects (especially in aeronautics) show that a lot of different sectors are already active on our issue. In case such an agreement cannot be immediately concluded (especially because unions may fear the destruction of specific occupations in a specific sector), and in order to build up shared diagnosis about the evolution of employment, it is also possible for the State to conclude with social partners either at sectoral or regional level some **Studies contracts on future prospects related to employment and skills (Contrats d'études prospectives).** These are Framework contracts aiming to produce analysis about trends and evolutions in employment and skills and to propose actions to better support the development of employment and skills. They can be a first step before engaging the negotiation of an ADEC.

In addition to these tools, the Labour Ministry issued in April 2018 a call for tenders[19] that aims to anticipate and accompany the profound transformations of our economy and its impacts on jobs and skills. The call is to support initiatives to identify, by sector, future developments in terms of jobs and skills and to develop a framework for shared, operational action. In the call requirements, social dialogue is a crucial element to be included in all proposals. It's of course too early to take stock of this initiative but the Ministry received 24 proposals which are currently under assessment.

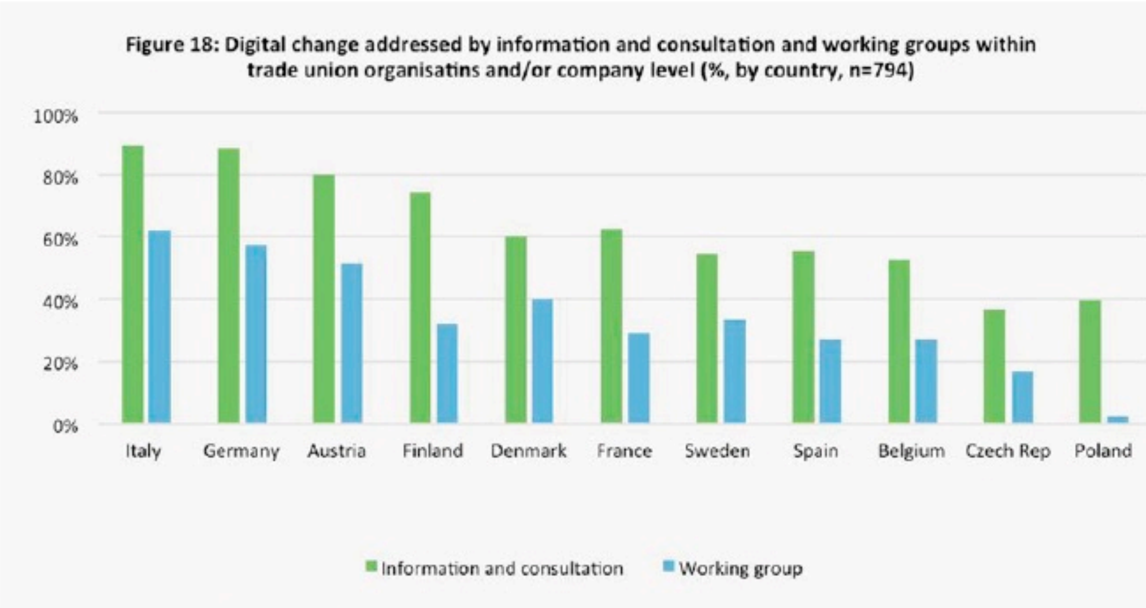
Globally, how does social dialogue facing digitalisation currently look like?

A recent study carried out by the ETUC (2018), based on questionnaires with a number of trade unionists from different EU Member States, provides with additional and global information about it. Despite its limits, some of the results could help to put previous and following developments of this short report into perspective. According to the report, France stands in second place as for the awareness of collective agreements related to digitalization



[19] In the framework of the so called PIC (Plan d'Investissement National dans les Compétences)

About digital change addressed by information and consultation rights or by dedicated working groups, French trade union organizations and/or workplace representatives, are the fourth of the list, far behind Italy and Germany



At last, as for workers participation as a whole, the survey especially shows a weak role of collective bargaining to deal with changes in the business models, strategy of the company or sector due to digitalization.

Let's now have a quick look at the four different sectors the DIRESOC project is focused on.

3.2 Digitalisation related restructuring and Social Dialogue in selected sectors

3.2.1 Tourism

The sector in short

The tourism sector in France is weighty considering its contribution to the national GDP. The part of the domestic tourism consumption was estimated at 7, 13 % of the GDP in 2016. The sector is much diversified. National statistics related to tourism thus refer to a range of different economic activities. Available employment data (from the ACOSS) in this context cover employment in the "characteristic" sectors of tourism: accommodation; restaurants; non-urban transport; short-term rental of cars or recreational and sports items; tour operators and travel agencies; museums, shows and other cultural activities; amusement parks and other recreational services; organisation of games of chance and money and finally cable cars and ski lifts. Considering this wide scope, in 2015, approximately 1 038 000 employees in full time equivalent worked in the tourism in around 303 000 companies[20]. One significant characteristic of tourism, globally speaking, is that it is made up of a majority of very small or small companies. Employment trends are not homogeneous and vary considering the specific activities considered. For instance from 2012 to 2016, employment in hotels and other accommodations has remained steady (around 170 000 employees overall) while it has increased in the fast foods (from approximately 170 000 in 2012 to around 210 000 in 2016) and decreased in travel agencies (from around 27 000 in 2012 to 25 736 in 2016).

Restructuring and digitalisation in the sector

Several and different drivers for restructuring are to be mentioned in tourism, in link with new technologies. First of all, generally speaking, creating new services able to upgrade customers' experience is seen as a key innovation to be promoted. This raises a significant issue linked to the capacity of small companies to embark on such innovation processes, including digital changes[21].This concern is of course in line with changes in clients' behaviors towards more autonomy: Consumers can more and more realize by themselves and tailor their trips, thanks to algorithms combining different criteria (Simpki, Facilitatrip, Opwigo). The new online agencies also innovate by their specialisation on destinations (The South in True, GoBlady), customers (Covoyageurs, CrazyTravel or special forms of tourism (Cyclogo in cycling tourism). Second, the rise of so called collaborative and/or platform economy is clearly at stake in tourism: new and numerous start ups have emerged in the sector, especially regarding travels organisation and of course accommodation. A report from the « Direction Générale des Entreprises » of the Ministry of Economy provides with a detailed diagnosis and prospects about this issue.

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[20] DGE (2017), Mémento du Tourisme - Edition 2017, Ministère de l'Economie et des Finances

[21] In this respect, it's worth highlighting that a national Fund for the development of tourism (France Investissement Tourisme) was created in 2015 to support growth of companies in the tourism sector, including the digital transformation of "traditional actors". https://www.bpifrance.fr/A-la-une/Actualites/Fonds-France-Investissement-Tourisme-FIT-1er-bilan-35628 (retrieved 17th October 2018)

In this respect, it's worth pointing out that digital innovation is carried out both by companies in the sector and by « external companies » in link with the technological solutions considered. This means that there's a diversification of service providers impacting the traditional players. For instance, among companies in the tourism sector, travel agencies and booking services are especially concerned with such evolutions. In this activity, the development of online travel agencies such Expedia or Booking have revolutionised the world of distribution by creating digital platforms offering a single gateway reservation to the hotel offering, and rewarding by commissions on the transactions made. This upset the world of accommodation distribution, with some sites becoming unavoidable marketing channels for hotels, and levying commission rates impacting the operating accounts of the establishments.

All in all, considering these evolutions, many changes can be observed : Booking platforms, management of customer reviews (e-reputation), new booking management softwares, importance of marketing and e marketing innovations, digital distribution (via smart phones and applications in particular), big data and predictive marketing, all are in place or in development.

However, our interview with the CFDT union federation shows that a detailed description of ongoing changes might not be done without considering each specific sectors and occupations within the whole tourism sector, for instance:

- *"Workers in travel agencies have been using softwares for a long time but nowadays, dematerialisation of activities is more and more developed through the introduction of new booking softwares".* This concretely might result in fewer tasks carried out by travel advisors and to the development of new skills, especially computer skills.
- In social tourism branch, booking system is at stake. Prior to the raise of booking platforms, there was no intermediary between the client and the vacation village. Right now, even if all vacation villages have their own websites to allow people for direct booking, villages also use booking platforms in order to get more people and this has a consequence on their prices and profit margins. In addition, in order to be more attractive on these platforms, vacation villages shorten the possible duration of stays (from one or several weeks only in the past to 2/3 days nowadays) which also has an impact on work organisation.
- In tourist information offices, some new technologies have also been introduced to better welcome and support tourists, for instance through the I-Mobile system
- In casinos and gambling venues, some traditional games have been "digitalized/automated" to attract more customers, a successful economic evolution which also has consequences on work organisation

Globally speaking, according to CFDT services, it's difficult to exactly assess the impacts of digitalisation, under its various and concrete meanings, on employment and skills : *"We're quite sure some new skills are on the rise due to digitalisation but it's difficult to precisely define which ones and how".*

What about social dialogue in this context?

It's first significant to remind that tourism is splitted into a lot of different activities and therefore, considering social dialogue processes, in many different branches and sectoral collective agreements. As a result, there are several employer organisations covering the different branches considered and unions, just like the CFDT services, are also internally organised to cover those different branches. One might notice however that, in June 2017, the confederation of "tourism actors"[22] was launched. It brings together 14 employer organisations (including the UMIH for hotels and restaurants and les "Entreprises du Voyage" for travel agencies) representing different tourism sub sectors and aims at better representing the whole industry, but it does not take part in collective bargaining in the different branches.

In light of this diversity, according to the CFDT services, *"there are already a lot of negotiations on the table to be conducted in the different branches and it's thus difficult to go beyond and especially to work on other topics such as digitalisation and its impacts on work and employment"*. As a result, digitalisation is not directly addressed as a topic of its own but rather as an element in other negotiations: equality between men and women, psycho social risks… However it does not seem that, up to now at least, sectoral dialogue about job classifications has taken into account the impacts of digitalisation, especially to consider new digital skills of workers. One explanation for this state of play could be, according to CFDT services, the lack of strategic vision and planning in many companies: *"introduction of new technologies is fashionable and thus implemented without genuine strategic vision".*

This state of play might also be due to a recent awareness of the issues raised by digitalisation as shown by the "internal" initiatives of the CFDT services[23]. *"3 years ago, digitalisation was not in the work programme of the federation. Some initiatives have thus been taken to go forward about it. Our last national federal council (March 2018) was entirely dedicated to the topic of "AI and robots". We set up different working groups to work on it: "a robot as a colleague", "Management 2.0", "jobs for the future"… These works showed that our members approach those topics in very different ways especially depending on their age profiles. We also managed to envisage jobs for the future such as data traders, AI trainers….The first issue is therefore to embark everybody on those issues. What is at stake is a transition and we have to do our job as a union to really represent employees and develop the new regulations we might need"*

In spite of this, some initiatives directly linked to the employment impacts of digitalisation might be identified at sectoral level. One might mention especially the launch of a human resources planning process (GPEC) covering the sector of travel agencies. This process refers to several specific initiatives and tools implemented since 2011 in order to foster competitiveness of travel agencies, in link with the development of human resources planning.

[22] Confédération des acteurs du tourisme http://www.umih.fr/fr/Salle-de-presse/press-review/Le-secteur-du-tourisme-enfin-unifi-Lancement-de-la-Confdration-des-Acteurs-du-Tourisme

[23] Developments below are therefore not only related to tourism but refer to all the sectors covered by the CFDT services federation

This « process » especially led to the conclusion of an ADEC (2013-2016)[24]. Coordinated by the joint training fund OPCA Transports et Services, also covering travel agencies, this ADEC was implemented at regional level, in the Ile de France region[25], in order to support SMEs in the definition of their strategy in a changing environment. This action resulted in a detailed assessment/diagnosis of changes impacting the « traditional business models » in the sector (including changes in skills needed) as well as recommendations about the development of efficient business models in a new context, including the evolution of skills. In this framework, the changes analysed, impacting travel agencies, are mainly linked to the need to foster customer centric businesses. It therefore partly, but also directly (considering especially the impacts of online travel agencies), relates to the impact of new technologies at different levels[26]. The process first resulted in the publication, in October 2015, of a self assessment tool [27] which should allow travel agencies for evaluating their business model and skills and then implementing necessary corrective strategies and measures. This tool has been improved in 2017 and, when used by companies, the assessment made can lead to co financing of concrete measures (training measures and support by an external consultant) by the OPCA[28].

As regards the concrete impacts of such ADEC, the CFDT services[29] has a mixed perception: even if such tools are significant to launch a dialogue on human resources planning and to foster awareness about training needs, it does not seem to result in very valuable and concrete effects for workers.

At company level, the CFDT services globally regrets that a pro active social dialogue has not been developed yet, considering the significant and various impacts of new technologies on employment and working conditions, including some aspects such as the use of social networks by employees and employee reps or the increasing possibilities for employers to monitor employees through technologies (tracking etc.). For this organisation, when companies decide to implement new technologies, the dialogue is very often limited to formal information/consultation processes of employee reps and occurs lately, ie when decisions are already taken. There would thus be a need for more anticipation through social dialogue and recognition of unions by companies as a genuine lever for innovation, very especially to cope with the digital transition. This also confirms the need for unions to improve their capacity in being pro active actors.

[24] About ADEC see above section 3.0
[25] Where the most important part of off line travel agencies are located
[26] Direccte Ile de France (2015), Compétitivité des agences de voyage franciliennes et gestion prévisionnelle de l'emploi et des compétences, Action de Développement de l'Emploi et des Compétences, synthèse
[27] Kit d'auto diagnostic
[28] See details here https://issuu.com/grafikmente97/docs/rapport_d_activite__opca_agences_de (retrieved 17th October 2018)
[29] This federation is or has been involved in several ADEC focusing on different sectors

Lessons learnt

Our limited desk research and interviews show that, under different aspects, digitalisation is clearly among the drivers for restructuring in the tourism sector and will probably impact even more the sector in the future. Even if it's difficult, in the framework of our project, to provide with a comprehensive view of a very heterogeneous "sector" of activity, it seems clear that social partners are today aware of challenges raised by digitalisation, among other but often interlinked evolutions (environmental issues, changes in clients' behavior and expectations). The digitalisation of companies, in a sector made up of many small companies, is a challenge as such and explains some support measures to foster changes in business models and organisations. Despite interesting initiatives developed in some branches related to GPEC approaches, anticipation of changes through social dialogue still appears to be a work in progress, also reflecting the need for further evolutions of social dialogue actors themselves to jointly cope with an ongoing and partly unpredictable transition.

3.2.2 The Banking sector

The sector in short

Banking has proven to be particularly weighty sector of the national economy. The sector includes, on one hand, the so-called merchant banks and, on the other, cooperative and mutualist banks. These two categories of credit institutions are organised and function under different principles, but they all include a variety of activities that repeat the prevailing universal bank model – that of the retail bank (66,7% of the net banking income of the main banks in 2016) and the funding and investment bank (19,1% in 2016). According to the FBF, banking activity in France generated about 2,5% of the national GDP in 2016. Moreover, in December 2017, the banking sector declared 965 billion in corporate loans. There are 347 banks listed in France, but the sector is dominated by large groups that have resulted from a strong concentration trend: BNP PARIBAS, Société Générale, the BPCE group, the Crédit Agricole group, the Crédit mutuel-CIC group, and Banque Postale.

The banking sector continues to be one of the largest employers in the private sector: in 2016, a total of 370 300 employees were working in the merchant and mutualist banks. Employment is concentrated in the large banking groups. The majority of the employees are occupied in the retail bank activities of their institutions (around 60% of the employees in the sector). The workforce in the sector grew consistently between the years 2000 and 2007. An inversion took place from the end of 2007 until 2011, and then another one, starting from 2012 but which has been slowly decreasing. However, the number of employees in banking has overall remained relatively stable at the mass level. Decreases in number are due notably to retirement of people since 2007, which has not been fully compensated for by recruitment of new staff. The executive staff has been growing continuously from 2011 while the share of technical staff has diminished since 2003[30].

[30] For more information about the employment profile of the banking sector (AFB branch) see AFB (2017) , *Profil de branche 2017*

Restructuring and digitalisation in the banking sector

The French banking sector has been facing changes constantly, ever since its beginnings, so there is nothing particularly new happening in this respect. Starting from the 1990s, restructuring in the banking sector have led to changes in the management of employment and occupations and in recruitment policies. In the recent period, more or less since the financial crisis occurred, several drivers for restructuring are to be considered : the impacts of banking regulations, the context of low interest rates, the raise of Fintechs, and last but not least the changes in the client behavior and expectations. In this respect, the retail banking is especially concerned as it represents the largest part of the workforce. In broad outline, the development of new technologies, as applied to online banking, enables conducting ordinary banking operations from a distance. The representative of CFDT sectoral federation also mentions " *the willingness of companies to automate the management of low value-added activities, such as cash processing, which led to the creation of dedicated spaces (so-called "money walls") in branches, that effectively "relegated" customers to these areas and accentuated their "disappearance" in bank branches".*

In addition to this, the clients now have more precise and narrowly focused demands, which have also been reshaped by the possibility of online access to many kinds of information: in brief, the client expects that his/her project will be concretely supported. This again leads to some important developments with regard to the occupations and competencies required from retail bank employees and globally the model of retail banking.

A report ordered by the Observatory for occupations, qualification, and professional equality between women and men in banking, presents employment and skills forecasts for this industry for 2020-2025[31]. It mentions three main drivers for the transformation of the sector:

- Low interest rates negatively impacting the margin of banks
- New banking regulations (Bâle III until 2019 and a project named Bâle IV) which lead to increase the costs supported by banks but also the two European directives on payment services in the internal market, especially the last one (DPS2), entered into force in January 2018. This text especially opens up the market to new players (the Fintech) by giving access to account information via a secure communication channel, and therefore increase the competitive pressure.
- The technological innovation, in the context of changes in clients' behavior and requirements.

This report also includes 5 different possible scenarios of evolution of the sector. In all of them, restructuring of the networks of bank branches is mentioned. This restructuring has already begun: From 2010 to 2015, a decrease of 3% in the number of bank branches has been reported with 37,570 left in 2015.

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[31] Des Robert, M-L (2017), La banque à 2020-2025 : Emploi et compétences, quelles orientations ?, BIPE, Observatoire des métiers, des qualifications et de l'égalité professionnelle entre les hommes et les femmes dans la banque

So, in this context, what impacts on jobs and skills? According to the representative of CFDT sectoral federation, introduction of technologies is not new at all *"the sector is used to deal with business disruption. When I arrived in the bank, there were many people who dealt with the species and bills of exchange. They accounted for 40% of the workforce, yet 40% of jobs were not eliminated!"*

There is therefore a certain habit of the sector and companies to manage transformations in a "smooth way": retirements due to a favourable age structure but also a tradition of internal mobility. Will this "model" survive to the digital transformation? Recent facts in the sector, such as the Société Générale plan to close down 300 branches by 2020 using collective dismissals or the new "collective termination by mutual agreement" might suggest it, even though the age structure will remain favourable in the sector up to 2025.

In fact, it seems that new technologies, especially the AI[32], reduce the part of technical skills needed while increasing the importance of so called "transversal and soft skills". According to the CFDT, the issue is that, traditionally in the banking sector, careers and mobility are based on technical skills: *"you start as a bank teller, then you can become account manager and then being in charge of wealth management. If, with the development of AI, we say that the technical skills are more and more in the tools and that we must be able to be a teacher for the customer, this raises a lot of questions about the jobs as they exist, but also about the vocational training system. Can we train for autonomy and empathy?"*

All in all, one might say that the development of digitalisation, and especially AI, allows companies to save time. The issue therefore could be: what do we do with this time saved?

According to the CFDT representative, two different kinds of answers exist in the sector at company level:

- The Crédit Mutuel would be an example of the first one. In this bank, Watson, the famous IBM IA solution, has been implemented for more than 1 year in the back offices of the company bank branches (to analyse emails and answer to technical questions of account managers). The president of the Crédit Mutuel declared that this solution allows to save "200 000 working days" and that this time saved should be and is used to improve/personalise customer relationships and increase products sales.
- Other banks, at the opposite, would rather consider that the time saved will allow reducing costs thanks to downsizing.

[32] Even if not fully developed at the moment, for further information about changes made possible/predictable by AI and its spreading in the banking sector , see Benhamou, S. & Janin (2018), L. Intelligence artificielle et travail, *Rapport à la ministre du travail et au secrétaire d'Etat auprès du Premier Ministre, chargé du numérique, France Stratégie, p.41-52*

Globally, it seems that the future of banking networks lies in the capacity of retail banking to fully convince clients that humans are still important to meet their needs. For the CFDT representative, it does not mean that the entire network should survive: *"the online Hello Bank developed by BNP PARIBAS is especially targeted at "low value" clients, in the future; it's likely that only the "valuable" clients could benefit from direct and personal (human) relationship with the bank"*

What about social dialogue in this context?

Let's first remind that the banking sector is equipped with the Observatory for occupations, qualification, and professional equality between women and men in banking [Observatoire des métiers, des qualifications et de l'égalité professionnelle entre les femmes et les hommes dans la banque]**.** It was established in July 2005 under a sectoral collective agreement. This is a joint labour/management body, and as such, its activity is placed under the management of a steering committee made up of equal parts of employers' and trade union representatives from all the representative organisations in the branch. The Observatory produces many target studies on the problem field for which it is responsible; its goal is foremost to provide clarifying information for the activities of the National Labour-Management Commission [Commission Paritaire Nationale de l'Emploi] in this branch. Hence, it builds annual social databases that provide detailed information on the banking staffs; the data are drawn from annual employment surveys conducted in banking organisations. It also publishes detailed job descriptions that show the activities, environment and competencies connected with each occupation. Finally, the Observatory organises surveys (occupation surveys, thematic surveys) and provides monitoring on topics for which it is responsible (especially questions related to professional mobility). In this respect, the Observatory recently ordered specific studies totally or partly related to digitalisation. Beyond the report "Bank 2020-2025" already mentioned, it also published a report dedicated to the impacts of AI on employment and skills[33].

Beyond the relevance of information provided through this body, the underlying interest of this type of instruments is related, of course, to the practical importance of this work for actors in the sector, particularly for actors involved in branch negotiations. Our interviewed trade union respondent expressed a rather negative assessment in this respect: *"the observatory is really active to support human resources planning, including about digitalisation, but it does not result in concrete impacts in companies and even in the dialogue between social partners at sectoral level"*

Is there a genuine social dialogue at sectoral and company level about the anticipation of restructuring linked to digitalisation?

[33] Athling (2017), l'intelligence artificielle dans la banque : emploi et compétences, Observatoire des métiers, des qualifications et de l'égalité professionnelle entre les hommes et les femmes dans la banque

For the CFDT representative, the answer is clearly negative: *"No. We conclude some GPEC agreements, we comply with the formal/compulsory information /consultation of works councils about strategic orientations of companies but I do not know any company where the digital strategy has really been a topic for social dialogue! My feeling about it is that both companies and unions avoid the topic. The companies: because they are not really sure of what they want to achieve and refuse to acknowledge it and thus to open a dialogue. The unions: because, due to the technical aspects of digitalisation, they are afraid not being able to answer to the employer".*

It therefore seems that digitalisation and its impact on employment and skills are not really a topic for a strategic / early social dialogue[34]. The development of new "digital skills" by employees has however been a topic for dialogue with some concrete outputs. Training to acquire digital skills was identified in 2015 in a common statement signed by the employer organisation, the AFB and the CFDT sectoral federation[35]. On the basis of works carried out by the Observatory, a new professional certification entitled "Digital base of the banking sector" was set up in 2016. This certification is accessible to all employees in the banking sector but remains a *"basic one"* for the CFDT. Beyond, we can find out at company level some recent collective agreements aiming to take into account, in human resources planning policies, the impacts of technological innovations on jobs and skills. It's the case of the GPEC agreement concluded in the BPCE group in December 2017 but all will depend, as it's always the case, on its practical implementation.

More generally, the impacts of digitalisation raise some questions about the concrete possibility for sectoral social dialogue to influence what happens at company level. This concern is not entirely new as it is partly linked to the way social dialogue is structured in the banking sector. The French banking sector is structured around a plurality of branches, each of which conducts social dialogue within its scope. As concerns social dialogue, the banking sector is thus not homogenous. The first distinction to be drawn in this respect is between merchant banks and cooperative and mutualist banks. The commercial bank, as a professional branch, includes all the institutions that are members of the Association Française des Banques (AFB). In addition to the AFB and the merchant banks, there are various other banking branches, which cover different cooperative and mutualist bank networks. The latter represent separate professional branches, which, as such, have their own collective agreements. Falling under this category are some institutions of great socio-economic weight: Crédit Agricole, Crédit Mutuel and BPCE (since 2009). In this context, for the CFDT, *"how to expect a meaningful and productive social dialogue at sectoral level? Keeping in mind that large companies, some of which already constitute a branch in themselves, and the large companies members of the AFB, do no want to see a branch interfering with their own prerogatives".*

In addition, in the context of the ongoing legal reform of vocational training and considering the challenge digitalisation is, in terms of evolution of jobs and skills, some concern arise regarding concrete possibilities for branches to support workers in organizing their career.

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[34] In this respect, as explained in section 2, it was not possible to get the views from the Employers' organisation in the banking sector.

[35] Pacte de responsabilité et de solidarité, Relevé de conclusions, https://bit.ly/2v9xt0D

In this respect, digitalisation seems to highlight already old problems identified in the French context: how to efficiently support career transitions of workers? In this perspective, the last Congress (2017) of the CFDT Banking federation mentions the project to work on possibilities for this union to provide to its affiliates some specific services (career guidance, support to mobility etc.).

Lessons learnt

All in all, it's clear that digitalisation has impacts on jobs and skills in the sector and will probably further impact it in a near future, especially when thinking to the 'promises of AI". Despite the fact that all social partners at sectoral level seem perfectly aware of the challenges to be addressed and have developed detailed analysis and diagnosis around it, it's not sure at all that they can or want to go further. It thus seems that most of the concrete initiatives to be taken are left to the company level. Is it enough to jointly anticipate changes promised by the latest digital technologies, and especially AI?

3.3. Postal services

The sector

As we all know, the liberalisation of the postal services has been organised since 1997 by the European Union and is complete since 2012. As a result, new operators of postal service have emerged, alongside the traditional and historical French operator, i.e. La Poste. In this framework, the operators competing with La Poste for the distribution of items of correspondence on regular tours are subject to a permit system. At 31st December 2017, 43 operators of postal services were authorised and active in France. As for the French "domestic" market, putting La Poste aside, the main company is ADREXO which also covers almost all of the French territory. But few other operators exist on the market of mails and parcels (TCS, Médiapost, Neopress Direct…), the others being SMEs active only in specific territories at local level. However, La Poste remains the most significant company regarding postal services and also the main employer in France. In addition, as no branch "postal services"[36] really exists in France (see below) **we therefore decided to focus on the case of La Poste.**

Since 2010, la Poste SA is a public limited company. Public authorities are the shareholders of the company, the State owning around 73% of the capital share. La Poste SA is the parent company of the group La Poste which includes different subsidiaries. The Group operates different activities and is therefore organised in different business units. The 4 main business units of the group are:

- Service – Mails- Parcels (46,1 % of the Group revenue in 2017)
- Geopost (Courier Express Parcel- market, 28,1% of the group revenue)
- Banque postale (Banking – 23,4% of the Group revenue)
- Digital services (in charge of supporting the digitalisation of the group, 2,2% of the revenue)

[36] In relation to social dialogue and collective bargaining.

The Service-Mails-Parcels business unit (named BSCC) is the main contributor to the group revenue, referring to the heart of its activity and also represents the largest share of employees in the group. In 2017, there were more than 253.00 employees (full time equivalent within the group), 54,1% being employed in the BSCC all over the French territory.

Restructuring in La Poste BSCC

Drivers for restructuring

The BSCC business unit has been subject to a huge transformation since 2008. Indeed, from 2008, the mail market has begun to decrease continuously with of course impacts on the group revenue, leading to a decrease of 500 million Euros per year.

To deal with the decline affecting those activities, the Group decided to focus on 4 different action-levers in order to compensate this negative trend:

- Increase in postage rates, which has to be negotiated with the Regulation agency of the sector (ARCEP). Here, the increase is only focused on specific sub markets. The Group indeed want to safeguard the delivery of promotional/ advertising mails which is still relevant in an economic perspective
- The search for increasing the market share of the group on the parcel market. Up to 2014, the number of parcels operated by the Group did not increase despite the growth of the parcel market. As a result, La Poste's share on this market decreased. This growth of the parcel market is a recent phenomenon and since 2014, La Poste has been searching to win it back. As it is a very competitive market, this supposes the group can renew its offers and reduce its prices. Up to now however, this does not allow to fully compensate the decrease in mail activity.
- The development of new activities and services, especially on personal services by using the network of employees (the postmen) directly and daily in touch with people, consumers, citizens, but also by taking over external companies[37]
- The reduction of costs

These four areas for action are also the drivers for the restructuring of the BSCC unit and digitalisation is part of them or some of them.

Digitalisation and restructuring

In the context of the BSCC unit, one might say that digitalisation is both external and internal:

- ***"External" digitalisation***: major changes impacting La Poste and the BSCC are linked to the development of the e-commerce at global level. This especially relates to the strong increase in the volume of small parcels especially coming from Asian platforms, an increase which is likely to continue in the coming years. The growing digitalisation of relationships between businesses and public administrations and their clients/citizens also directly impact the mail market.

- ***"Internal" digitalisation***

[37] For instance, the Group recently took the control of ASTEN, a company specialized in the delivery of medical material at home

Here, a set of different evolutions are at stake. Globally it seems to be relevant to make a distinction between the two main “jobs” performed in the BSCC: mail and parcels sorting on one hand and mail/parcels delivery (postmen) on the other side.

Sorting is carried out through large industrial platforms. To lower its costs, the group strategy has been and still is to reduce the number of platforms (the network) while introducing more and more automation in their processes. There were 100 platforms 20 years ago, there are today 60 platforms and there should remain only 40 of them by 2020 (considering both platforms in charge of sorting mails and those in charge of sorting parcels).

The impacts on jobs and skills here relate to different challenges:

- organising the geographical mobility of workers affected
- providing training to employees in working environments with less and less manual tasks, allowing them to acquire more specialised skills
- ensuring a fair and financial recognition of employees in this context.

As for mails and parcels delivery: here, we speak about postmen and employees specialised in delivery, which is more than 50% of the staff employed in the BSCC. We also talk about a profound job transformation: The idea is that the postman should now spend most of his time outside the company (in direct contact with customers). Traditionally, the postman was preparing his tour before distributing; 20 years ago the postman therefore spent more than half of his day preparing for his tour before distributing, inside the company. Automation begun to change this by reducing the “pre-production” part of the tour: mail is delivered ready for distribution and this evolution is to go further: some people will soon be specialised in preparation only and others in distribution only. The impact on work schedules is clear: postmen were used to start very early in the morning but to finish their day at the beginning of the afternoon. Considering the current and ongoing transformation, the postman will start at 9am and work all the day. So this is a new social compromise which has to be set up, that is to shift from “I receive a relatively low pay but I benefit from an employment guarantee and I only work in the morning to “you always have a job guarantee but you work all day long….. In addition, working tasks are changing as well as the working conditions, beyond the working time organisation: postmen are to be able to carry out working processes through smartphones (Facteo program), to collect personal data from customers, to develop soft/relational skills and last but not least to cope with increasing occupational health and safety risks (working outside the company all day long……)

In other words, this is a complete “social pact” that has to be renewed in light of these evolutions.

Restructuring and social dialogue

The context

Social dialogue within the Group and in the BSCC is well developed in terms of workers representation at various levels of the group[38]. Various elected bodies for workers representation exist at local level, territorial level, business units' level and group level.

There are several representative unions within the BSCC:

- CGT, the majority union

- CFDT

- SUD

- FO

- CFCT, CGC and UNSA, smaller than the two others. These unions presented a common list for the last professional elections

- CGT influence has been decreasing since 2011 and the next elections to be held at the end of 2018 could change the union landscape. It's worth mentioning that unions are divided in two different "political groups":

- CGT and SUD, which today represent a little more than 50% of the staff, are against the transformation planned by the company

- CFDT, FO as well as the coalition of CFTC/ CGC/UNSA, are seen as "reformist". They do not refuse the transformation but want to be involved in it and are especially committed to ensure the future of postmen, including their job security, fair working conditions, financial recognition and protection of health and safety. This "reformist group" today represents around 48% of the staff.

There is therefore a balance between the 2 groups but it's worth noticing that this union split is recent and has emerged in link with the evolution of collective bargaining within the group.

In short, for few years, the management of La Poste has been willing to develop a negotiation policy regarding the transformation of the group. As a result, 3 major collective agreements were concluded in 2017, while there were none in the last 10 years (2007). This means that the BSCC experienced 10 years of declining mail market without a negotiation policy, which led to a convergence of the OS to jointly challenge the support of transformation by the management of the BSCC. Then, from 2015/2016, the Management worked to develop a systematic "contractual" policy on all the items, which resulted in the union division above-mentioned.

[38] We do not develop this point as it's not directly in link with the project topic.

Negotiating the transformation in a socially responsible way?

One might first mention that several significant collective agreements have been concluded since 2015 in link with the transformation of the group and of the BSCC:

- A first agreement: "**Un avenir pour chaque postier** », signed on 5th February 2015. This agreement appears to be a detailed framework of policies and tools to be implemented in order to anticipate changes within the group: human resources planning policy, regulation of mobilities, training and support to workers, etc.
- A second one, seen as very significant by the people we interviewed, is the agreement on "**l'amélioration des conditions de travail et sur l'évolution des métiers de la distribution et des services des facteurs et de leurs encadrants de proximité** », signed on 7th February 2017 ». This agreement especially intends to deal with the impacts on work and working conditions above mentioned.
- Two other agreements were signed, one (11^{th} October 2017) to organize bonuses to postmen linked to parcels delivery and the other (14^{th} June 2018) focused on support to workers in BSCC "support functions"

Globally speaking, these agreements, only signed by the "reformist unions group", intend to define and build up a "social pact" able to cope with the transformation of the group and based on the Group tradition. Main elements of this "social model" are the following:

- Maintain of Job security, secure jobs on a full time basis
- No collective dismissals
- Support to mobility and employability : training policy covering the different occupations, no forced geographical mobility, no short time work, development of significant career opportunities
- Employee recognition including in financial terms

According to the BSCC HR manager we met, these agreements, another one being currently negotiated, are to cover all the employees in the business unit and they will be adjusted over the time.

This orientation and general policy is shared by the CFDT representative we interviewed. He insists on the need for unions to develop a proactive attitude towards the ongoing transformation of the sector: in his view, unions have to take care of safeguarding a genuine social model in the context of transformation. *"It does not mean that all is perfect or will be perfect in the future. We have to be aware of some possible risks, for instance linked to the raise of new global competitors on our markets or to possible questioning of secured employment status through "uberisation".*

In this respect, CDFT federation F3C is involved in a European cofunded project recently launched by European social partners involved in European social dialogue (postal services sector – UNI Europa and PostEurop) entitled: ***"Trend research for the postal sector in 2030".*** This project has already begun and especially aims at drafting 3 to 5 scenarios on what will be the postal sector in Europe in 2030. This example shows the interest to adopt a European perspective on the sector in a view to better anticipate changes.

3.4. Manufacturing industries

The sector: a focus on metalworking

Manufacturing industries cover a very large range of various sectors, especially whether we consider social dialogue structures at branch level. In the framework of this project, we therefore chose to focus on metalworking industries. The reason for this is that, even if covering different industries, metalworking is usually seen in France as a very interesting branch, when thinking to social dialogue development. In short, sectoral social dialogue in metalworking is often seen as being very "active".

Metalworking is however a heterogeneous sector including a range of specific industries and the whole branch of metalworking refers to economic sectors as listed in the NAF statistical codes and sectors of business: codes 24 to 30, part of the code 32 and code 33[39], including especially:

- Automotive industry
- Aviation industry
- Steel industry
- Railway industry
- Shipbuilding
- Electronics
- etc.

At 31th December 2017, Metalworking employed 1 342 081 workers and 133 037 agency workers in full time equivalent. The website of the sectoral Occupations and skills Observatory[40] provide access to regularly updated information about the profile of the sectors covered[41], including employment trends in each of them. The sector is made up of few large companies and a majority of midcaps and, above all, SMEs, representing around 43.000 companies in total.

Globally speaking, for many years, the sector has been subjected to strong international competition from emerging countries (China, India, Russia), rising raw material prices and sluggish domestic demand and therefore companies have adapted to this context at the cost of restructuring, reorientation of their supply and significant organisational changes.

[39] Details about specific activities covered might be found here : https://www.insee.fr/fr/information/2120875
[40] Observatoire paritaire, prospectif et analytique des métiers et qualifications de la Métallurgie
[41] https://www.observatoire-metallurgie.fr/la-branche-de-la-metallurgie-en-france

The global financial and economic crisis (from 2008) also deeply affected the sector and sub sectors, even if in a different extent from one sub sector to another, and this also had an influence on the orientations of the sectoral social dialogue (see below) .

According to various evaluations and scenario exercises ordered by the Occupations and Skills Observatory, despite the unfavorable global context and the continued erosion of their workforce, the French companies in the metalworking sector will continue to recruit to compensate for retirements (around 30,000 departures per year between 2016 and 2025) but also thanks to the effects of the Responsibility Pact[42]: according to the various projections made by the Observatory, between 30,000 and 65,000 jobs could be preserved by 2025 because of a business investment shock linked to this device. In total, the branch anticipates a need of around 100,000 recruitments per year by 2025.
In light of this, employers in the sector regularly report their difficulties in recruiting qualified profiles and therefore sector attractiveness is seen a key issue by employer organisations. Restructuring, including job creations, job destructions but also job changes, is thus part of the sector profile.

Digitalisation and restructuring

Industry for the Future is probably the keyword pointing out the technological changes metalworking industries face. This notion indeed appears to be essential in the discourse and activities of social partners in the sector. It's especially the case considering a new initiative named « Alliance Industrie du Futur ». This not for profit organisation (association) was founded in 2015 and brings together 35 members including employer organisations (especially the UIMM), chambers of commerce (CCI France), universities and technology organisations. Its general purpose is to support companies and especially SMEs, so that the latter take part in the technological transformation of the industry. "Industry for the future" is also explicitly mentioned in the works of sectoral unions, such as the CFDT federation FGMM. In other words, social partners are clearly aware of digital changes and try to cope with them. One might identify several studies or publications especially dedicated to this issue. One of them entitled "Etudes filières – Industrie du Futur" was carried out by a consortium of partners including the Alliance Industrie du Futur. A synthesis of this study was published in June 2017 and summarizes the possible and positive impacts of new technologies on the evolution of 7 industries, including the aviation, automotive, shipbuilding and railway industries[43].

[42] The « Responsibility Pact » is a mix of tax and social security cuts benefiting to all companies employing staff. It includes different measures, especially the CICE (tax competitiveness credit). This plan was launched in 2014 by the French Government with the aim to reduce labour costs. Metalworking sector has benefited from this public support and has therefore been following up the implementation of these measures, see especially : Impact du CICE et du Pacte de responsabilité sur les entreprises de la branche métallurgie et actualisation des besoins en recrutement à horizon 2025, BIPE, Observatoire paritaire, prospectif et analytique des métiers et qualifications de la métallurgie, septembre 2017 https://bit.ly/2IbzAHs (retrieved 24th september 2018)

[43] Etudes filières industrie du futur, synthèse des impacts et des recommandations, 2017 https://bit.ly/2xCQdaI retrieved 25th September 2018

Globally speaking, it seems absolutely clear that digitalisation already impacts and will continue to impact jobs, skills and work in metalworking. Let's quote a publication from the Fabrique de l'Industrie[44] : *"The transition to the industry of the future represents a major challenge for companies. She rests on new production methods that make it possible to manufacture in a shorter, cleaner, sometimes "tailor-made" at the request of customers, and to offer new services "* and , a little further, *"The underlying technological and organisational changes affect the content of the employee tasks and their required skills. French industry will not be able to move up market and out of competition based on the cost of inputs (energy and raw materials, purchased services and especially the cost of labor) if it is not resolutely committed to this transformation. Beyond development and ownership of necessary technologies, it will have to rely on qualified employees, capable of acquiring new skills as technology advances. The latter will also have to work in more mobile, less hierarchical organizations and based on a much more dense communication"*.

For the FGMM CFDT, digitalisation and its possible impacts on jobs and working conditions refers to a set of new technologies raising both positive and possibly negative consequences. Robots are not new as such, but what is at stake are cobots. This new kind of collaborative machines directly put into question the relationships between men and robots and the risk for humans of being monitored by robots, including an impoverishment of jobs and tasks. More than AI[45], big data is also a challenge identified, even if not really assessed for the time being according to the FGMM CFDT. While big data can strongly improve data storage and lead to better and more efficient production processes, it might also result in stronger employee monitoring and/or in threats, for instance, on research jobs[46]. IoT, connected value chain and 3d printing also refer to ongoing transformations impacting the production processes and therefore jobs and work organisation. For instance, additive fabrication might lead to the decline of industrial machining. Industrial maintenance is also strongly impacted by the growing use of sensors and big data and this has consequences on jobs and (higher) skills needed, as shown by an ongoing project involving the Alliance Industrie du Futur as well as the employer organisation UIMM [47].

As regards the possible impacts of the platform or collaborative economy on industrial activities, one might say that, for the time being, it's not seen as a significant driver for restructuring according to the actors we met. However, the UIMM assumes it's likely to become a growing phenomenon, fueled, for instance, by the dissemination of 3D printing possibilities.

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[44] A think tank dedicated to the analysis of challenges manufacturing faces : Bidet-Mayer, T. and Toubgal L. (2016), Travail industriel à l'ère du numérique – se former aux competences de demain, Les Notes de la Fabrique, La Fabrique de l'Industrie https://bit.ly/2PZHN3X retrieved 25th september 2018

[45] Even if, according to the UIMM (interview 25th September 2018), AI should also impact the industry, for instance support functions.

[46] Whether the machine is able to create its own production models….

[47] La maintenance : des métiers d'avenir, Osons l'Industrie https://bit.ly/2DoVAja (retrieved 25th september 2018). « Osons l'Industrie" is a collaborative project aiming to provide information about the evolution of jobs and skills in manufacturing to young people, workers and bodies in charge of initial and vocational training

Which social dialogue to cope with digitalisation of metalworking industries?

Branch social dialogue in metalworking

In the metalworking sector, companies are represented by the UIMM (Union des Industries Métallurgiques et Minières). The UIMM organisation covers different levels: national, territorial and « sub sectoral » (the different industries making up the metalworking branch). On unions' side, from December 2017, representative union organisations are the following (ranked according to their weight as measured through the results of elections of employees' representatives in the branch): CGT (30,3%), CFDT (29,1 %), CFE-CGC (22,02%) and CGT-FO (18,58 %)

Collective bargaining in metalworking is both rich (a large number of collective agreements) and complex : 78 collective agreements, including 1 national collective agreement covering engineers and managers, 1 national collective agreement covering the steel industry and 76 territorial collective agreements. In order to simplify the current situation and specifically to provide with a common and national social pillar to all employees in metalworking industries, social partners in the branch have launched in 2016 a significant process aiming to reframe the whole system of branch collective bargaining. The negotiation is to cover a range of different topics and is still ongoing, even if social partners (including all representative unions but the CGT) already came to an agreement on a specific and very significant topic, the reform of job classifications, but which is not in force yet.

Branch social dialogue in metalworking is usually seen as "fruitful" as shown by the number of agreements concluded. In the recent period, since 2009/2010, it's worth underlining that sectoral social dialogue has been very active as regards the social impacts of the financial and economic crisis. Specific agreements were thus concluded in order to mitigate these impacts and therefore to better manage restructuring, let's mention especially a national agreement regarding emergency measures to support employment in the metal sector concluded on 7th May 2009.

In the UIMM's view, the economic crisis clearly unveiled the necessity to go further in order to anticipate restructuring and especially to improve human resources planning and therefore to better know the evolutions affecting jobs and skills. In this respect, a collective agreement is presented as a key one by the UIMM: the agreement on employment in metalworking concluded on 23rd September 2016. The latter covers a large range of topics both related to the anticipation (especially human resources planning- GPEC) and management of restructuring. Beyond, it insists on the need to use social dialogue as a key tool to deal with changes, including technological changes. In this respect, the role of the branch is not, for the UIMM, to directly regulate restructuring processes but rather to support companies and social dialogue at company level by providing incentives and support, especially to SMEs in order they can successfully deal with digital transformation. In that extent, for this employer organisation, the main issue is therefore to foster the quality of social dialogue at company level. This general orientation is put at the forefront in the current context, resulting from the recent reform of the Labour code. While this reform strengthens the role of collective bargaining at company level, including on matters directly linked to restructuring processes, the idea is that companies really seize these legal opportunities to cope with changes they face.

Digitalisation, restructuring and social dialogue

One significant starting point to consider the role of social dialogue facing digitalisation and restructuring is the diagnosis of social partners themselves. For both UIMM and FGMM CFDT , there is no doubt that, even if metalworking industries have always been dealing with technological innovations as a part of their DNA, the ongoing transformation is especially significant, impacts different industries in multiple ways and extents and is deep even if not rough. As a result, the ongoing evolution seems to be uncertain and probably explain the need for a genuine and quality social dialogue.

The evolutions of the sectoral skills and employment observatory are a good example of such concern. Before 2008, according to the UIMM, the latter rather produced generic studies and analysis but the global crisis resulted in a need for more focused perspectives, allowing the Observatory to become a major tool for supporting human resources planning (GPEC) in companies. Social partners at sectoral level, in charge of managing the Observatory, therefore decided to ensure that the Observatory is able to precisely analyse trends about the evolution of skills and jobs, taking into account as much as possible the peculiarities of sub sectors covered as well as of territories. The objective is thus to feed social dialogue and its actors as well as, of course, companies and employees. As a result, it's today possible to identify precise analysis related to specific sectors and also taking into account the impacts of digital changes. In this respect, one might for instance mention studies about electronics[48] and automotive industry[49].

As for branch collective bargaining, we already mentioned some relevant outputs (GPEC agreement 2016) and the ongoing and huge negotiation which already led to a first "possible[50]" agreement related to the reform of job classifications. Is this new classification also to deal with changes in jobs and skills made necessary by technological innovations? Opinions from people interviewed varied in this respect. This reform is for sure not directly linked to digitalisation but has a wider scope. It first aims at ensuring that all employees in metalworking occupying the same job are treated in the same way. As it aims to take into account jobs as they really exist and the recognition of skills acquired through training and work experience, this "instrument" might also be a tool to consider evolution of jobs and skills due, among others, to new work organisations and competencies resulting from the introduction of new technologies (UIMM). However, the FGMM underlined that it has no direct and necessary links with such changes.

[48] L'électronique et le numérique en France –Mutations et évolution des besoins en emplois et en compétences, Observatoire paritaire, prospectif et analytique des métiers et qualifications de la métallurgie, February 2017, https://bit.ly/2y2VurK (retrieved 1st october 2018)

[49] Etude prospective des mutations de la construction automobile et de ses effets sur l'emploi et les besoins de compétences, Observatoire paritaire, prospectif et analytique des métiers et qualifications de la métallurgie, May 2017, https://bit.ly/2DMSWUz (retrieved 1st october 2018)

[50] This agreement is not in force for the time being and will possibly be signed at the end of the overall negotiation process

Going further? Are existing tools to anticipate and manage restructuring enough?

As it is the case in other sectors and in France globally, tools to anticipate and manage restructuring through social dialogue exist as showed, among others, by the MOLIERE project above mentioned. According to the UIMM, it's even more the case while considering the increasing role of collective bargaining linked to the recent reform of the labour code. In this framework, the opportunities to better anticipate and address changes through social dialogue resulting from digitalisation are underlined by both organisations we met. However, some differences exist. For the UIMM, the first issue is to develop « GPEC » approaches in all companies, something which makes necessary to foster a genuine social dialogue based on trust and transparency between social partners at company level. In a slightly different perspective, for the FGMM CFDT, GPEC, as it often exists in practice, does not allow for a genuine anticipation, either such approaches do not exist at all (especially in SMEs) or they occur too lately or in a too formal , and thus not efficient/fruitful, way.

However, for both organisations, whether GPEC is to really contribute to anticipation of restructuring, it supposes a quality social dialogue based on mutual trust between parties and allowing to share companies' strategy soon enough to then build support measures accessible to workers. This joint belief probably constitutes the basis of an experimental project involving both FGMM CFDT and UIMM.

In 2017, the FGMM indeed seized the opportunity to get financing from the ESF at national level[51] in order to develop, at branch level, an experimentation/pilot project. This application was accepted last June 2018 and the project has just started to be implemented. As the FGMM is the initiator and project leader, UIMM and Alliance Industrie du Futur are partners in it. It is to last about 2 years. What is this project about?

Its title first: "The road to the future of work – managing changes with workers and their representatives"[52]. The aim of the project is to build up, at branch level, an optional framework/method to manage changes through social dialogue. The drivers are of course the ongoing changes especially generated by "digitalisation" of industries. The rationale of it is, for the FGMM, that existing tools for the anticipation and management of restructuring do not really allow for an involvement of workers and their reps in the management of changes. In the view of the FGMM project leader, the digital revolution, even before *"being a matter of technologies, is a revolution of work under its different dimensions*" (quantity of available work, quality of work and work organisation). In this regard, the role social dialogue has to play is fully justified. On its side, UIMM accepted to join the project as it is in line with its general objective to foster a quality social dialogue at company level, i.e. to build up optional tools to support its development. In this respect, the digital transformation is seen as a good "incentive lever". In addition, such a project is consistent with the UIMM general mission, ie. to set up frameworks flexible enough to meet companies' needs.

[51] The application was submitted under one of the ESF priority axis "anticiper les mutations et sécuriser les parcours et les transitions professionnels"

[52] In French : « La route vers le travail du futur –conduire les changements avec les salariés et leurs représentants »

The project will be implemented according to different steps, in order to set up a toolbox available to companies in order to facilitate/promote:

- Joint learning : a joint diagnosis about changes company is to cope with
- Joint scenario exercise : imagining scenarios of changes by involving employee reps but also workers themselves
- Setting up / negotiation of action plans in light of the scenario chosen
- Testing the action plan in companies

These different steps/phases should be planned in an early "method" company collective agreement", to be concluded as soon as a company plans changes, in order to design and agree on the overall working process.

It is of course too early to forecast what will be the concrete impacts of this project. The project implementation includes the setting up of working groups (bringing together the project leader and partners as well as external stakeholders) and an experimentation phase in 4 different companies, selected with the UIMM, in order to feed the making of the toolbox. Knowledge collected by the Alliance Industrie du Futur, especially about technologies developed in companies, will be used to feed the project implementation. At the end, the project should lead to the implementation of the toolbox in 10 companies. Again, the project has just begun and work is thus emerging. A this stage, it's worth highlighting that it only involves one representative union, the project leader, and it's clear for the FGMM CDFT that the final outcomes of the project, within companies, will make necessary the involvement of other unions, let's say on the field. This issue is still unclear. A kick off conference of the project will be organised in the coming weeks and other representative unions in the branch will be invited.

Which lessons learnt at this stage?

Metalworking sector has already developed a significant work regarding the impacts of digitalisation on jobs and skills, a process already in place in various industries and which covers or combines different technologies. Social dialogue at sectoral level has, for long, proved to be well developed and this is also the case regarding the ongoing technological revolution. In this respect, the metalworking branch and social partners at this level[53] try to support companies facing digital challenges especially as regards the anticipation of restructuring through social dialogue. Development of a quality dialogue at company level seems to be key for actors interviewed, in light of the ongoing and huge challenges related to digitalisation. This explains a lot of the initiatives taken at this level (Observatory, GPEC) as well as the commitment of some social partners' organisations in a new experimental project aiming to develop change management in a concerted way. To be continued. .

[53] Even if there is a diversity /pluralism of unions orientations in the branch

4. Provisional conclusions

Following lines might only be seen as very first and general conclusions based on the exploratory work carried out in the frame of the DIRESOC work package 1.

As already mentioned in section 2, this overview suffers from limitations. Some of them are directly linked to the timeframe of the DIRESOC project, which led us to strictly select key informants interviewed in order to be efficient. It's especially the case considering the different representative unions at the different levels this report is focused on, in a context of sometimes high union pluralism. Other limitations simply result from the practical impossibility to get answers from, or to arrange an interview with, some of the actors we got in touch with. This especially relates to employers' organisations in the banking and tourism sector. These limitations naturally lead to consider this report as a working paper and a starting point to feed the next steps of the DIRESOC project.

Globally, it's worth mentioning, in our view, some main lessons learnt:

- First of all, it's clear that the general debate about the impacts of digitalisation on employment and work has become prominent in France.
- It's also obvious, while considering restructuring in the DIRESOC meaning, that digitalisation appears to be, in the different sectors covered, not the only driver for ongoing or future restructuring but for sure one of them
- Obviously as well, digitalisation does not concretely refer to the same things/technologies in all the sectors covered. Digitalisation is also more or less developed / spread depending on the sectors, and even on specific businesses within the sectors considered. In this respect, banking and metalworking probably reflect the most what people ordinary think about when the word "digitalisation" is used (robots, data and AI). This also allows for pointing out that, depending on each sector's features as regards the kind of companies it covers (rather large, midcaps, small or very small ones), the need for triggering/fostering digitalisation of companies (very especially the smallest ones) and therefore changes in business models and skills : this is clearly the case in the tourism sector.
- However, it's also clear that some technologies already have or will have the potential to impact all the sectors, even in a different extent, especially big data, IOT and AI
- It seems to go the same with other phenomena usually mentioned under the heading "digitalisation", especially the development of the platform economy and the restructuring of the value chain it might trigger. This aspect of "digitalisation" is of course present in the national debate and raises a lot of debates, discussions, thinking and proposals (especially regarding its incidence on the labour market and the new forms of job precariousness it triggers). At the moment however, and considering the limited number of interviews made, the "platform economy" does not impact in the same way or extent the different sectors we considered
- Coming to restructuring, it's worth repeating that, overall, the actors of social dialogue do not only focus on the impacts of digitalisation on employment level but also and perhaps more, on the changes affecting working tasks, work organisation, work identities, ie. "work" as such ! In this respect, stakeholders interviewed seems to all

share the idea that "digitalisation" already changes jobs and will follow on this way in the future

- Social partners thus seem to share a starting point : digitalisation refers to a progressive but deep, lasting and also partly unpredictable transition of our economy
- This explains that the objective to anticipate restructuring is prominent in the discourses and therefore that many of the different outputs of social dialogue mentioned in this report refer to a search for better anticipation.
- In that respect, it seems to be clear , and not surprising, that the capacity of sectoral social partners to concretely engage in a dialogue and to deliver outputs, will strongly depend on the history, features and experience of each sector regarding social dialogue in general and the introduction of new technologies, ie. on the maturity of each sector in this respect. In light of this, metalworking or banking are probably more equipped than tourism.
- Are the "usual" tools and practices to anticipate and manage restructuring through social dialogue impacted by digitalisation? No, for sure, in a certain extent: if you need to cut jobs, you'll have to discuss a social plan or whatever, digitalisation or not... However, as shown in this report, digitalisation, and the uncertainties in its implementation and future developments, triggers the need for more shared diagnosis between social partners, as a basis to enable them to develop a permanent dialogue. This might justify the setting up of new areas, tools and processes, ie. to "enrich social dialogue". Some ideas and initiatives mentioned in our report illustrate this point.

To be continued……

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