

DISCUS  
EUROPEAN AND NATIONAL  
PRELIMINARY REPORTS  
FRANCE  
2019

THE CONSTRUCTION SECTOR IN FRANCE  
MAIN CHARACTERISATION

According to the French Building Federation (FFB) In 2017, the construction sector was represented by:



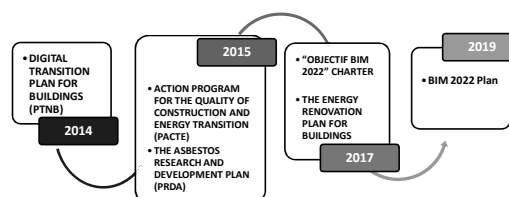
RELEVANT POLICY AND LEGAL  
FRAMEWORK OF THE CONSTRUCTION  
SECTOR

All the legislative and regulatory provisions relating to construction, real estate development, social housing and other real estate issues are grouped in the "Building and Housing Code" (*Code de la Construction et de l'Habitat*).

The code establishes two main institutions leading digital innovation in the construction sector :

- ❖ Scientific and Technical Centre of Construction" (*Le Centre Scientifique Et Technique Du Bâtiment*)
- ❖ High Council for Construction and Energy Efficiency (*Le Conseil Supérieur de la Construction et de l'Efficacité Energétique*)

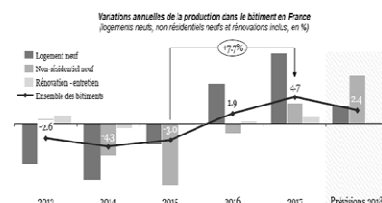
RELEVANT INSTITUTIONAL INITIATIVES AND  
POLICIES



ECONOMIC TRENDS IN THE  
CONSTRUCTION SECTOR

- ❖ The construction sector provides 135 billion euros every year excluding construction taxes. It is equivalent to half the industry or twice the banking and insurance activities.
- ❖ The construction sector represents the 8,6% of the total institutions of main sectors of activity.
- ❖ After being strongly affected by the economic crisis of 2007-2009, the construction sector returned to growth in 2016. It even exceeds forecasts in 2017 (estimated growth of 3.4%), reaching 4.7% in volume for overall activity, or 7.7% of growth since 2015
- ❖ 2018 ended with a good level of activity, despite strong constraints. Therefore, as it still grew by 2.3% in volume, after 4.9% in 2017 and 2.0% in 2016. In addition, order books are at a high level at the end of the year, at around 6 months of production, all trades and all sizes of companies combined.

ANNUAL VARIATIONS IN CONSTRUCTION PRODUCTION IN  
PERCENTAGE



## EMPLOYMENT TRENDS IN THE CONSTRUCTION SECTOR

IN 2017, THE CONSTRUCTION SECTOR COUNTED WITH...

- ❖ A total of 1,145,887 employees
- ❖ 78% of whom worked in the construction sector and 22% in the public works sector
- ❖ 88% are men.
- ❖ 28% of workers are between 25 and 34 years old

## MAIN PROFESSIONS AND OCCUPATIONS

COMMERCIAL AND ADMINISTRATIVE 18,09%	PRODUCTION 66,97 %	TECHNICAL AND SITE SUPERVISION 14,94 %
<ul style="list-style-type: none"> <li>• Sales</li> <li>• Human resources</li> <li>• Office Manager</li> </ul>	<ul style="list-style-type: none"> <li>• Mason</li> <li>• Painter</li> <li>• Carpenter</li> <li>• Electrician</li> <li>• Roofer</li> <li>• Machine operator</li> <li>• Metal worker</li> <li>• [...]</li> </ul>	<ul style="list-style-type: none"> <li>• technician</li> <li>• Site manager</li> <li>• Engineer</li> <li>• Draughtsman quantity surveyor</li> <li>• Topographer</li> <li>• [...]</li> </ul>

## CHANGES AND INNOVATIONS IN THE CONSTRUCTION SECTOR

BUILDING INFORMATION MODELING (BIM)

WORKING PLATFORMS

- ❖ PEER TO PEER
- ❖ PRO TO PEER
- ❖ PRO TO PRO

PUBLIC PLATFORM FOR THE BENEFIT OF SMALL AND MEDIUM-SIZED CONSTRUCTION COMPANIES – KROQI



## OTHER TYPE OF INNOVATIONS



SITE MANAGEMENT SOFTWARE



COMPUTER-AIDED DESIGN/DRAWING



DRONES OR UAVS



3D PRINTERS

## SKILL NEEDS AND TRAINING IN RELATION TO DIGITALIZATION AND INNOVATION

- ❖ Most of construction training is developed in the CONSTRUCTION AND PUBLIC WORKS APPRENTICES TRAINING CENTERS (CFA)
- ❖ CFAs train at levels 1 and 2 (Bac+2) and in particular engineering schools have integrated digital technology into their curricula such as computer development for example.
- ❖ The use of digital tools in the pedagogical model of higher education institutions has therefore gradually become established over the past few years.
- ❖ Concerning the use of digital training, engineers and managers are the biggest consumers with 18% of training, in proportion to their presence in the branches, while they represent only 10% of the branches' workforce.
- ❖ In construction companies the most popular digital training courses are in accounting and ERP management software (24%), design software (15%) and office automation (10%). The objectives are the dematerialization of documents, the systematization and industrialization of data processing, the centralization and sharing of information to gain in processing speed and free up time for core business activities.

## DIGITALISATION : SOME CHALLENGES

### LIMITS FOR THE DEVELOPMENT OF DIGITALIZATION AND INNOVATION IN THE CONSTRUCTION SECTOR

- ❖ Regional disparities: Lack of computer equipment and high speed broadband.
- ❖ The needs range from training in specific tools to training in the basics of digital technology.
- ❖ Companies point to a lack of readability and accessibility of the training offer, which demonstrates a need for support in choosing the right training courses.
- ❖ The need to have easy and personalized access to training and information
- ❖ The lack of visibility on the gains to be expected from the different solutions leads to many postponements of investment decisions.
- ❖ The need to have support systems tailored to the profile of companies and employees.
- ❖ The branches have a large proportion of workers whose digital skills are professional skills remain to be developed. This population would then require mechanisms to specific and personalized support.

## INDUSTRIAL RELATIONS SYSTEMS AT COUNTRY LEVEL

REPRESENTATIVE UNION ORGANISATIONS IN THE BUILDING SECTOR:

- ✧ *La Confédération générale du travail* (The General Confederation of Labour - CGT)
- ✧ *La Confédération générale du travail- Force ouvrière* (The General Confederation of Labour *Force Ouvrière* - CGT-FO)
- ✧ *La Confédération française démocratique du travail* (The French Democratic Confederation of Labour - CFDT)
- ✧ *La Confédération française des travailleurs chrétiens* (The French Confederation of Christian Workers CFTC)
- ✧ *La Confédération française de l'encadrement-Confédération générale des cadres* (The French Confederation of the General Confederation of Managers - CFE-CGC)

## WEIGHT OF UNION ORGANISATIONS

WEIGHT OF THE REPRESENTATIVE TRADE UNION ORGANIZATIONS

- ✧ The General Confederation of Labour (CGT): 29.18%
- ✧ The General Confederation of Labour *Force Ouvrière* (CGT-FO): 26.70%
- ✧ The French Democratic Confederation of Labour (CFDT): 23.06%
- ✧ The French Confederation of Christian Workers (CFTC): 13.97%
- ✧ The French Confederation of the General Confederation of Managers (CFE-CGC): 7.08%

## SOCIAL PARTNERS' INITIATIVES

SOCIAL PARTNERS' INITIATIVES IN THE CONSTRUCTION SECTOR MAINLY REFER TO DIGITAL PLATFORMS.

THREE MAIN INITIATIVES:

1. Creation of the *ADN Construction* association which represents the French construction industry in the digital field, also defines and contributes to the implementation of a collective policy of general interest.
2. Creation of the charter of good practices in the use of digital platforms (FFB)
3. The signature of the Voluntary Commitment Charter for the Building Industry for Digital Construction "BIM 2022"

AND.....

THANK YOU !!!!!