



Guidance and levers for a labour market in rapid change

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an initiative of **AGORIA**

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ABOUT BE THE CHANGE



How is the Belgian labour market evolving and what opportunities should we seize?



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Detailed and scientific approach



Quantitative research into the demand

- ▶ How big is the labour **demand** today?
- ▶ What is the **expected evolution** of this demand up to 2030?



Quantitative research into the supply

Who is **available** to work between now and 2030?



Qualitative research

Which **skills** are **indispensable** in a digitalising world? Now and in the future.

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ICT	2022	2023	2024	2025	2026	2027	2028	2029	2030
L									
FL	78.585	79.470	80.485	81.632	82.730	83.837	84.952	86.075	87.205
WAL	23.524	23.820	24.188	24.542	24.907	25.275	25.645	26.018	26.394
EXL	24.112	23.282	22.405	21.442	20.573	19.737	18.933	18.159	17.415
BE	126.220	126.571	127.638	127.616	128.210	128.849	129.530	130.253	131.015
growth rate	0,18%	0,28%	0,37%	0,45%	0,47%	0,50%	0,53%	0,56%	0,58%
y/L									
FL	121.868	124.124	126.278	128.216	130.316	132.458	134.643	136.873	139.150
WAL	124.042	127.849	131.484	135.030	138.732	142.508	146.357	150.280	154.276
EXL	170.664	178.254	186.794	196.817	206.826	217.355	228.430	240.080	252.333
BE	131.593	134.782	137.937	141.082	144.226	147.434	150.671	153.940	157.242
growth rate	2,56%	2,42%	2,34%	2,26%	2,25%	2,22%	2,20%	2,17%	2,15%
y									
FL	9.577	9.864	10.161	10.466	10.781	11.105	11.438	11.781	12.135
WAL	2.918	3.045	3.177	3.314	3.455	3.602	3.753	3.910	4.072
EXL	4.115	4.150	4.185	4.220	4.255	4.290	4.325	4.360	4.394
BE	16.610	17.059	17.523	18.000	18.492	18.997	19.516	20.051	20.601
growth rate	2,75%	2,71%	2,72%	2,72%	2,73%	2,73%	2,74%	2,74%	2,74%

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DATA DETAIL LEVEL: JOB FAMILY

Sector	Job (Belgium, Flanders, Walloon)	2022	2030	CAGR	
Chemicals and life sciences	IT service manager	1,189	1,260	71	0.7%
Chemicals and life sciences	IT specialist	1,871	2,220	349	2.2%
Construction	IT service manager	8,812	10,595	1,782	2.3%
Construction	IT specialist	1,951	2,869	718	4.0%
Corporate and personal services	IT service manager	2,747	3,880	1,133	3.8%
Corporate and personal services	IT professional	13,074	20,827	7,752	6.1%
Corporate and personal services	IT technician	4,179	6,174	1,994	5.1%
Education	IT service manager	4,209	5,132	924	2.4%
Education	IT professional	2,722	3,356	634	2.6%
Education	IT technician	693	1,207	213	2.4%
Financial services	IT service manager	3,877	5,023	1,145	2.7%
Financial services	IT professional	9,197	10,474	1,277	1.7%
Financial services	IT technician	916	1,049	131	1.7%
Healthcare	IT service manager	4,133	6,279	2,146	4.4%
Healthcare	IT professional	2,406	3,377	971	4.4%
Healthcare	IT technician	1,141	1,601	460	4.4%
ICT	Production & ICT service manager	9,990	10,611	614	0.9%
ICT	Software developer and IT business consultant	47,497	54,209	6,711	1.7%
ICT	Database & network professional	8,553	10,916	1,361	1.7%
ICT	IT technician	10,797	11,463	666	0.9%
Media and digital entertainment	IT service manager	1,980	2,193	174	1.1%
Media and digital entertainment	IT professional	3,094	3,619	524	2.1%
Media and digital entertainment	IT technician	3,396	3,743	347	1.1%
Public sector	IT service manager	1,214	1,383	169	1.3%
Public sector	IT professional	7,095	7,569	504	0.8%
Public sector	IT technician	2,287	2,414	146	0.8%
Technology industry	IT service manager	1,604	1,605	1	0.3%
Technology industry	IT specialist	4,268	5,813	1,544	4.1%
Traditional industry	IT service manager	1,654	1,640	-14	-0.9%
Traditional industry	IT specialist	1,716	2,030	313	2.3%
Transportation and logistics	IT service manager	4,055	4,969	914	2.5%
Transportation and logistics	IT specialist	4,533	7,943	3,409	7.2%
Utilities	IT service manager	587	886	100	2.0%
Utilities	IT specialist	1,648	1,962	314	2.2%
Wholesale and retail	IT service manager	2,625	3,022	397	1.6%
Wholesale and retail	IT professional	7,403	9,820	2,417	3.7%
Wholesale and retail	IT technician	3,697	5,163	1,207	3.8%
		194,210	237,600	43,390	

2022 77854
 2030 87197
 Delta 9344

METHODOLOGY

BE THE CHANGE

Detailed and scientific approach



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- ▶ How big is the labour **demand** today?
- ▶ What is the **expected evolution** of this demand up to 2030?



Quantitative research into the supply

Who is **available** to work between now and 2030?



Qualitative research

Which **skills** are **indispensable** in a digitalising world? Now and in the future.

KEY SKILLS



27 crucial skills in a digitalizing world

	DAILY USE ■ Using digital devices & apps ■ Guarding identity & digital well-being ■ Searching for & assessing information	COLLABORATION ■ Digitaal cooperation ■ Project management ■ Multi-disciplinary work	COMMUNICATION ■ Empathy ■ Multilingualism ■ Goal-oriented communication	CREATIVITY & INNOVATION ■ Creative & innovative thinking ■ User-oriented thinking ■ Creating digital content
	SOLUTIONS ■ Devising efficient solutions ■ Using digital tools ■ Solving technical problems	PERSONAL DEVELOPMENT ■ Active self-development ■ Resilience ■ People management & coaching	SECURITY ■ Protecting digital devices ■ Protecting data & privacy ■ Respecting copyright	DATAMANAGEMENT & AI ■ Collecting & managing data ■ Analyzing & visualizing data ■ Making data-driven decisions

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SKILLSMATRIX



	Dagelijks gebruik						Samenwerking					
	Digitale toestellen en apps gebruiken		Identiteit en digitaal welzijn bewaken		Informatie zoeken en evalueren		Digitaal samenwerken		Project management		Multidisciplinair werken	
	2022	2030	2022	2030	2022	2030	2022	2030	2022	2030	2022	2030
Elektriciens en elektronici	1	2	1	1	1	2	1	1	1	1	1	2
Leden van wetgevende en uitvoerende macht, openbaar bestuur	2	2	2	2	2	2	2	3	2	3	2	3
Managers op administratief en commercieel gebied	2	3	1	2	2	3	2	3	2	3	2	2
Managers op het gebied van informatie- en communicatietechnologie (ICT)	3	3	1	2	2	2	2	3	3	3	2	2
Databank- en netwerkspecialisten	3	3	2	2	2	3	2	3	2	2	1	2
Chef-koks	1	2	1	2	1	1	1	1	1	2	2	2
Bouwvakker	1	1	1	1	1	1	0	0	1	2	1	1
Bibliotheekmedewerkers, ticketverkopers en verwante beroepen	1	2	1	1	2	2	1	1	1	1	1	1
Assembleurs	1	1	1	1	1	1	1	1	2	2	1	1
Artsen	2	2	1	2	2	2	2	3	1	2	2	2
Architecten, planologen, landmeters en designers	2	3	1	1	2	2	2	3	2	3	2	3
Apothekers	2	2	1	1	2	2	1	1	1	2	2	2
Monteurs en reparateurs	1	1	1	1	1	2	1	1	1	1	1	1
Algemeen directeur	2	3	2	3	2	2	2	3	3	3	2	3
Heftruckchauffeurs, reachtruckchauffeurs	1	1	1	1	1	1	0	1	0	0	1	1
Administratief en ondersteunend personeel	1	2	1	1	1	1	2	2	2	3	2	2

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DETAILED SHEETS



Production technician, procestechnician ISCO 312 - 313



Digiskills level of the job		Profile's demand	
Today	48%	Today	47.400
2030	63%	2030	53.700

Upskilling 2022 - 2030: + 11 skill levels

Level 0 to 1

Level 1 to 2

- Activeself-development
- Goal-oriented communication
- Searching for & assessing information
- Protecting digital devices
- Creating digital content

Level 2 to 3

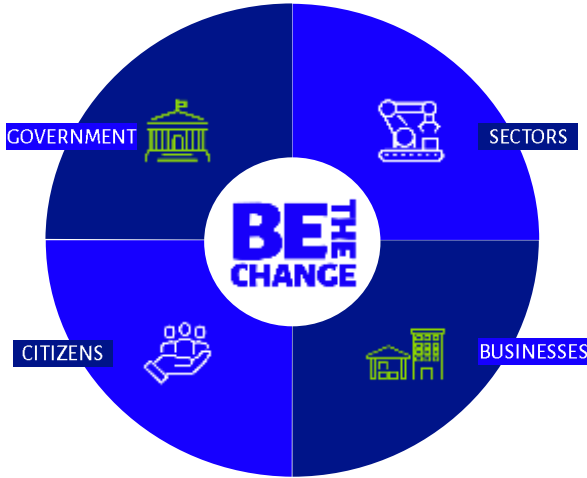
- Analyzing & visualizing data
- Data-driven decision making
- Resilience
- Digital cooperation
- Devising efficient solutions
- Using digital tools

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ABOUT BE THE CHANGE



Four target audiences



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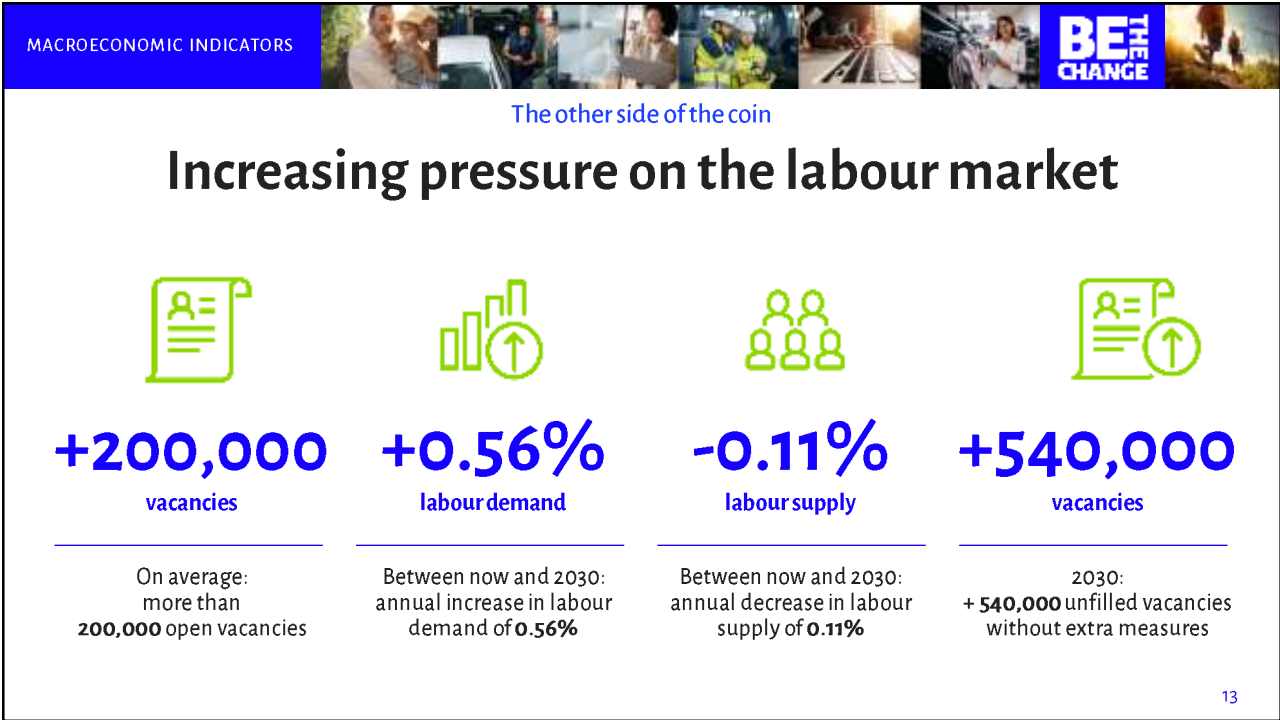
MACROECONOMIC INDICATORS

Despite successive crises, a positive message and a paradigm shift

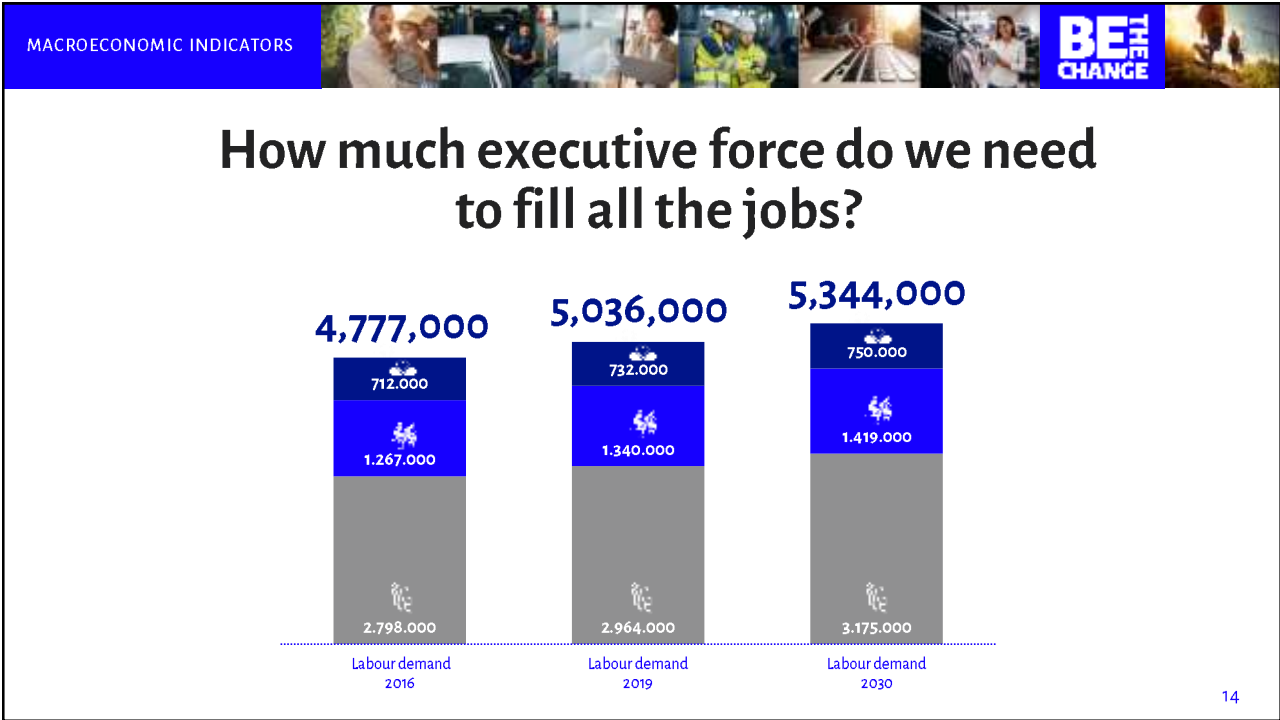
**Between now and 2030 – for every job that disappears –
2.8 new job offers will appear in its place**

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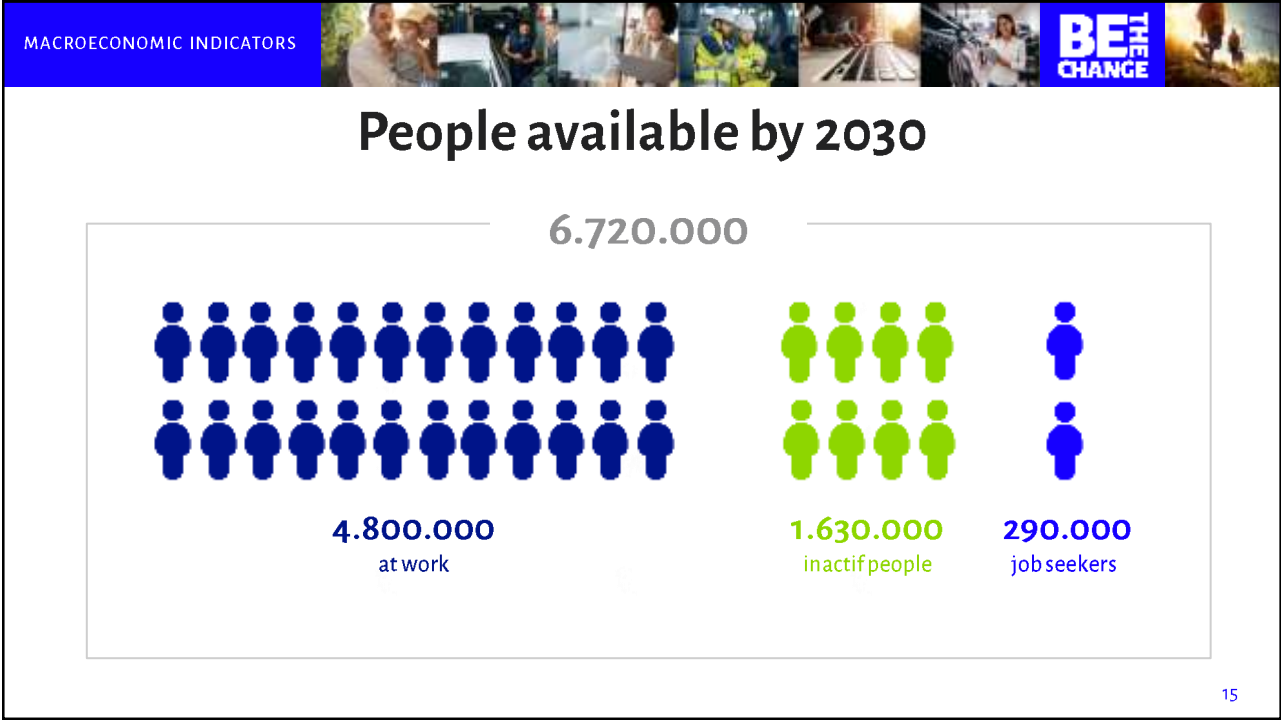
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STAGNATING PRODUCTIVITY



Productivity growth in Belgium compared to Europa

	Added value per employee 2019	Average 1995-2019	1995-2000	2000-2010	2010-2019	2016-2019
Belgium	€ 96,649	0.68	1.64	0.82	0.47	0.07
EU-28	€ 68,197	1.06	1.86	0.94	0.74	0.73
Three main trading partners	€ 80,228	0.79	1.35	0.70	0.59	0.40
▪ Germany	€ 76,189	0.69	0.88	0.65	0.63	0.33
▪ France	€ 85,183	0.84	1.32	0.76	0.67	0.80
▪ Netherlands	€ 84,586	0.85	1.84	0.69	0.47	0.08
Northern Europe	€ 95,176	1.27	2.50	1.15	0.61	0.48
▪ Denmark	€ 104,229	1.12	1.94	0.66	1.00	0.87
▪ Finland	€ 90,262	1.58	2.80	0.97	0.26	0.23
▪ Sweden	€ 92,434	1.11	2.76	1.82	0.58	0.33

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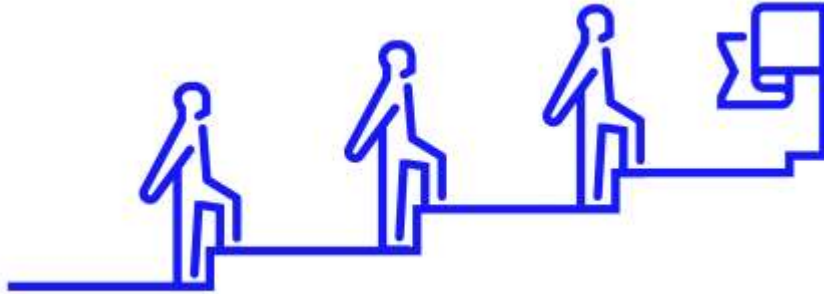
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**A future oriented
skills policy**

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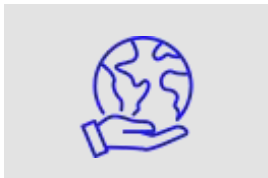
Break the status quo: the collective importance of individual's upskilling



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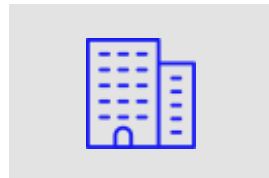
Proactive skills demand prognosis



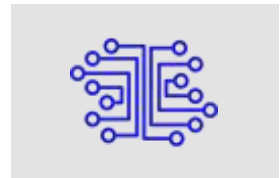
Knowing what the **actual skills demand** looks like all over the world at any moment in time



Present the general skills demand in an **accessible and understandable** way



Specify your specific skills need and translate the general skills language into **more operational terms**



Dare to invest in a **premature analysis** of the skills impact of promising technologies at **sectoral or governmental level**

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SKILLS IN HIGH DEMAND

Which skills are most in demand today across all functions?



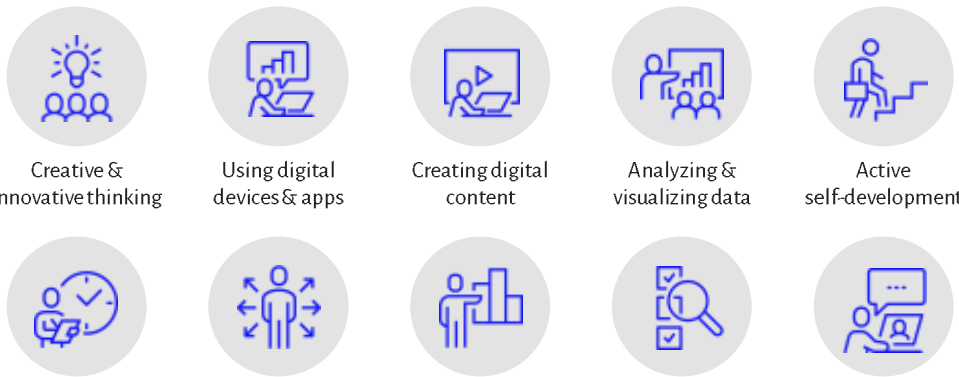
- Goal-oriented communication
- Protecting data & privacy
- Empathy
- Resilience
- Using digital devices & apps

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SKILLS GAINING IN IMPORTANCE

Which skills will gain the most importance in the next 10 years?



- Creative & innovative thinking
- Using digital devices & apps
- Creating digital content
- Analyzing & visualizing data
- Active self-development
- Project management
- Multi-disciplinary work
- Data-driven decision making
- Searching for & assessing information
- Digital cooperation

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DIGITAL TRAINING TRACKS

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Which profiles should excell digitally?



Teachers of higher education



Educational experts



Managers of companies
& public organizations

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DIGITAL TRAINING TRACKS

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Which profiles need to go through an intensive digital trajectory?



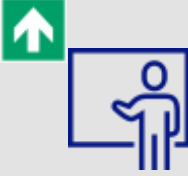
Business, administrative
& commercial service
managers



Sales staff & marketeers



R&D professionals



Teachers at
secondary school level

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DIGITAL TRAINING TRACKS



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Who must go through digital immersion?

 General managers	  Scientists & engineers	  Teachers at elementary school level	 Finance experts
 Journalists	  Process technicians	  Personal service providers	 Travel agents
 Law enforcement officers & security staff	  Doctors & nursing management	 Farmers	 Legal experts

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DIGITAL TRAINING TRACKS



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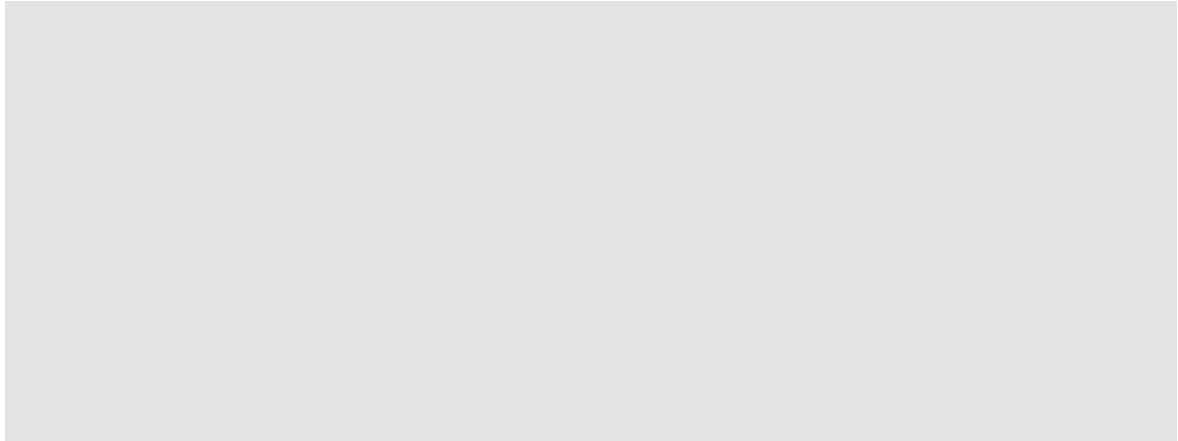
Who needs a digital base?

  Caregivers	 Chefs, waiters & bartenders	 Administrative staff	  Postmen & parcel delivery staff
 Domestic helpers	 Waste collectors	  Transport & storage workers	

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Who escapes digitization?



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The Belgian cyber security landscape - Opportunities



- For SMEs and other entities (private and public sector) to **benefit** from a **vibrant ecosystem** of security providers to improve their posture.
- For providers to **grow** in Belgium and beyond
- For students and IT professionals to consider a **career in cyber security**
- For universities and schools to **train** people

“Overall, Belgium has all the assets to become a top cyber resilient nation”

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FREELANCERS' OPPORTUNITIES

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A playground with plenty of opportunities

Activation

Productivity growth

Upskilling

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