







### **CLUSTER**

advanCing youth and women sociaL inclUSion in The mEditerRanean (C\_A.3.1\_0014) - WP3 (O.3.2)

# Market needs analysis form FRANCE

CDE PETRA PATRIMONIA (PP3) 21/06/2022

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#### Introduction

For each Project sector the responsible partner, have to include several information in order to deliver a quantitative and qualitative analysis aimed at providing a sectors needs overview for each partner country.

#### Project target sectors

**Green economy** is a system of economic activities connected with the production, distribution, and consumption of goods and services that results in better human wellbeing in the long term to avoid exposing future generations to significant environmental risks and the ecologic shortage.

Circular economy refers to strategies that limit the environmental impact and waste of resources and increase efficiency at all product economy stages.

Blue economy encompasses all industries and sectors related to oceans, seas and coasts, whether they are based directly in the marine environment (e.g. shipping, seafood, energy generation) or on land (e.g. ports, shipyards, coastal infrastructures).

Sustainable agriculture is a type of agriculture that focuses on producing longterm crops and livestock while having minimal effects on the environment, trying at the same time, to find a good balance between the need for food production and the preservation of the ecological system within the environment.



























### **Market Needs Analysis**

Please provide the following information by using both data you collected during the A 3.2.1 – "Sectors Needs Analysis" (targeting Social Economy Actors) and any publication, report, study you may have, produced at country level, as well as opinions, observations, etc. coming from your local stakeholders:

#### **Blue Economy**

Skills and competencies young people should have to work within the sector

10 years ago, according to INSEE, non tourism related job in the maritime or blue economy were defined as "workers", while the tourism sector was typified by "employees". The picture has since evolved. Currently, in terms of the types of jobs and business development in the blue economy (see below), young people will increasingly need relatively advanced technical skills as the blue economy is at the heart of the digital revolution. In addition, climate change is creating a increasing need for skills in prevention and control measures to protect the environment in connection with the UN SDGs, marine protected areas and rare habitats (corals, seagrass meadows).

More precisely, young people will also have to have significant digital skills (database management and processing, programming and software design and maintenance).

Finally, returning to the climate crisis, according to European Green Deal — Developing a sustainable blue economy in the European union, young people will have to have a contextual knowledge of climate neutrality, zero pollution and preservation, adaptation and resilience as well as sustainable food production. These will provide the broad frameworks in which they conduct more specialised jobs within the blue economy, whether in port services or sailing and tourism.



























## Needs of the SMEs operating within the sector

Businesses broadly operate in three sectors: i) mature sectors like logistics, ship repairs, leisure and tourism that need a new energy, ii) high-potential sectors like smart ports, robotic and embedded systems that are gaining ground and iii) new sectors like biotechnology, offshore windfarms and ship disposal to be developed. SMEs must be <u>aqile</u> to operate in this sector in conjunction with international resources

According to the 2020 Union for the Mediterranean Stakeholder Conference, there is still a big gap between the educational (and therefore training) offer and the job market. Valid for the region SUD in France, one solution is to propose training cooperations between SMEs supported by national training bodies.

By extrapolation from the UfM paper, if the future for SMEs is to be agile, adopt new business models and upscale successful entrepreneurial concepts, young people will also benefit by having the same entrepreneurial mindset.

Potential in terms of business development and job creation

regional investment Rising Sud, and economic development agency, states the blue economy accounts for 124,000 jobs 30% of national jobs and 6% of regional employment. According to the WWF "Medtrends" report, with the exception of commercial fishing, all traditional sectors of the blue economy are predicted to grow over the next 15 years in the French Mediterranean, including enegy, tourism, shipping and aquaculture. Seabed mining and biotechnologies should also develop on a longer timescale. Cluster Maritime Français (CMF) estimates there are already 400,000 jobs in the French blue economy producing €70 bn worth of products annually. This is expected to rise to 1 million and €150 bn respectively by 2030. CMF also states that jobs will be created in pharmaceutics, cosmetics and food processing, and maritime tourism while climate change will create jobs in prevention and control. Pôle Emploi Régional PACA states that there are 60,000 businesses recruiting 90,000 people a year for 900 different occupations supported by 70,000 trainings. The most jobs will be in port and shipping services (56%), fishing and seafood farming (21%) and food processing (6%).



























Clic&Sea states that apart from port and shipping occupations, hundreds of thousands of jobs will be created in related industries requiring profiles such as researchers, engineers, scientists, architects and maritime communication specialists. New occupations will be created in the digital, new technology and lectronics sectors. However, the biggest profession will be renwable energy technicians to install solar/PV panels and wind turbines.

### Impact of the Covid-19 pandemic on the sector

Most notable is the effect on maritime tourism and coastal eco-tourism. This is also backed up by the World Bank. The lack of activity led to many eco-tourism businesses already operating on fine margins and small numbers of clients to stop trading. Despite the government support scheme, many self-owned/run businesses have not resumed and have converted to other professions thereby increasing the vulnerability of young people and women who were employed in this sector.

Interestingly, the government sponsored a number of community conservation, restoration and sustainable management projects in nature sites which provided short-term revenue and helped social resilience in areas that need to revitalise their local economies.

# Policies adopted concerning the development of the sector

The Region SUD has a job campus dedicated to the future maritime economy, called « Campus des Métiers et des Qualifications de la Mer (Campus of Trades and Qualifications of the Sea) », which offers basic training, continuous training, or apprenticeships.

The French government is also committed to making blue economy jobs more attractive (traditionally dominated by male employees to 60%) as a priority of its maritime policy through a policy of training and social support/guidance. This is all underpinned by the drive to decarbonise the sector, thereby creating new technical jobs based on environmental protection and monitoring.

French law No. 2016-816 of 20 June 2016 on the Blue Economy



























Any other observation	[max 2000 characteres]
relating with the sector at	
the country, regional or	
Mediterranean level	



























#### **Green Economy**

Skills and competencies young people should have to work within the sector

A distinction must be made here: Green jobs, i.e. jobs with an environmental purpose, and the "greening jobs" where jobs are adapted to address environmental issues. Compared to the blue economy, jobseekers looking for employment in the green economy are less qualified and have been unemployed for longer than those in greening jobs.

29% of green jobs in France typically require no or few qualifications (level 3 EQF) as opposed to 14% among all jobseekers. Occupations concern waste, urban clean-ups and green space maintenance. Qualification levels strongly depend on the type of occupation. Greening jobs, especially the building trade, typically require skilled (11%) or qualified (31%) workers while green jobs commonly require unskilled (26%) and labourers (11%). The French government Covid economic recovery plan promotes basic digital skills for vulnerable young people, not specifically for digital technology professions but as a means of integrating NEETs into the workforce, not necessarily for green jobs.

Needs of the SMEs operating within the sector

The greening jobs agenda means that SMEs need to take on more staff, particularly in the building and transport sectors which are priorities in the ecological transition process.

The challenges in terms of employment and skills in SMEs fall into 2 groups:

- Greening and evolving traditional trades, for example in the construction and industrial sectors, to take into account the needs of adapting the economy to the challenges of climate change. This challenge involves both the requalification of existing jobs (for older people) and changes in training standards for younger people, for example, taking into account the principles of low-carbon construction in the training of those entering the building trade.
- Inventing tomorrow's production and service occupations in a low-carbon economy (also applies to the circular economy). This involves both qualified jobs, at the engineering level (eco-design, territorial coordination, etc.), and jobs with little or no



























qualifications in the areas of personal services (maintenance of photovoltaic equipment, carpooling, etc.)

# Potential in terms of business development and job creation

There is greater potential for the development of green businesses and job creation than for the blue economy. This is mainly due to lower investment costs and lower demands for technical and digital skills.

In 2020, 14.1% of job applications in France and 17.5% of job offers submitted by employers to the French national employment agency, Pôle Emploi, concerned green or greening jobs. 53% of green jobs were fixed-term contracts while 46% of greening jobs were permanent.

A new report related to green skills in the global job market predicts a shortage of skilled "talent." Employee demands are growing faster than the profiles for these positions which are hampered by conventional training offers.

According to a global green jobs report published by LinkedIn, demand for employees with environmental skills will soon outstrip market supply. After analysing thousands of profiles on the social network, the report's authors say that not enough people are being hired for green jobs.

In fact, the share of green jobs on the market has been growing annually by 8% for the past five years while the curve of employees with "green" skills is barely following. Over the same period, "talent" has increased by just 6%.

The report suggests that faced with this problem, more traditional sectors will be impacted by the lack of suitable profiles. Examples include sales, engineering and public affairs. According to the study, the potential for upskilling, by promoting green or greening job opportunities represents 40% of existing jobs.



























### Impact of the Covid-19 pandemic on the sector

The green economy has not directly affected by the pandemic, apart from the slowdowns in activity that affected most economic sectors. Conversely, this sector is fully benefiting from the economic recovery plans that have been designed in response to the COVID pandemic.

The French Government "1 youth, 1 solution" plan has been designed to address the crisis, which was also unprecedented, constituting a double-whammy when the Covid 19 epidemic hit just as 750,000 young people entered the job market at the beginning of the school year. The plan is promotes three priorities:

- facilitating entry into working life,
- guiding and training 200,000 young people in the sectors and occupations of the future,
- supporting young people who are far from employment by building 300,000 personalised employability programmes.

The plan is funded by the post COVID recovery plan, with the activation of the national and European funding for the recovery plan, and in particular additional ESF grant allocations.

Several measures that existed in previous school dropout prevention plans and national training plans have been reinforced under the "1 young person - 1 solution" scheme, while new ones have been added. To help young people find their way through the myriad of measures deployed, an online tool has been created by the French Ministry of Labour:

#### https://www.1jeune1solution.gouv.fr/

To help young people enter the workforce, a series of measures aim to strengthen youth employment, such as financial aid for employers who hire young people under the age of 25, or one-off bonuses for companies that recruit a student on an apprenticeship or professionalisation contract, particularly for companies with less than 250 employees.

Digital skills and Green skills



























- 100,000 new training courses leading to qualifications or pre-qualifications will be created in strategic sectors of the future (jobs in the ecological transition, digital technology, personal care and health) but also in priority sectors identified as being heavily impacted by the crisis (tourism, industry, agriculture, food processing, etc.).

Policies adopted concerning the development of the sector

The French law of 17 August 2015 on energy transition for green growth provides for an employment and skills programming plan (PPEC). Developed with local authorities and social partners, this PPEC must "indicate the development needs in terms of employment and skills in the territories and in the professional sectors." Continuing education activities relating to sustainable development and energy transition are then added to the list of continuing professional education activities. "These aim to provide the skills necessary for knowledge of techniques to implement and maintain renewable energy systems, as well as energy efficiency and recycling systems". Higher education policies must contribute to the assessment of new skills needs in the field of energy.

The climate plan published on July 6, 2017 deals with employment in its section "Decarbonising energy production and ensuring a controlled transition".

Launched in May 2018 by Muriel Pénicaud, Minister of Labour, and Estelle Sauvat, the former High Commissioner for Skills Transformation, a national training programme for green jobs aims to train 10,000 people in these jobs.

Among the 30 economic sectors impacted by adaptation to climate change, the following sectors are of relevance to Cluster:

farming, agri-food, management, waste recycling,



























renewable energies, smart grids, vehicles.

In addition, the sectors currently under pressure that are likely to lack employees "trained" in climate changerelated challenges have been listed by the national *programme.* These include:

- measures of energy performance of buildings,
- welders,
- boilermakers,
- revegetation of the building,
- recycling, sorting ambassador,
- agri-food,
- chemicals and plastics.

Sectors such as construction, agriculture, renewable energies and waste recovery will also experience skills shortages

*In March 2022, the State set up the national observatory* of jobs and occupations in the green economy (Onemev) to identify and better define the jobs in the green economy as part of efforts to overhaul the French economic model. This observatory centralises and produces methods, reference figures and analyses useful for disseminating knowledge on jobs and occupations in the green economy at national level.

Any other observation relating with the sector at the country, regional or Mediterranean level



























#### **Circular Economy**

Skills and competencies young people should have to work within the sector

The circular economy is often accredited with the potential to create 200,000 to 400,000 jobs in France (ADEME, 2013). This estimate is actually a extrapolation of the value calculated at European Union level by the GWS7 Group as part of a study for the European Commission (GWS, 2012). The job creation interval for France is obtained by comparing the ratio of French GDP with that of Europe. It provides an interesting indicative figure but remains highly unsatisfactory since it does not take into account the differences in dynamics between national labour markets. No specific data exists on the potential for employment growth in the sector, either for young people or for other segments of the French population. The main data used by the State within the framework of support plans and programmes confuse the green economy with the circular economy.

Following the circular economy roadmap (FREC) published in April 2018, a "circular economy skillstraining" working group was set up to work on the assessment of jobs, trades and skills and training needs. Training underpins the growth and spread of the circular economy. The report outlines employment and training potential for the coming years, for all sectors of the public combined, while identifying a few emerging occupations. Among the those identified requiring lower qualification levels are: Methanisation maintenance technicians in the agricultural sector, all trades in mechanical repair and reuse (from parts maintenance to reassembling components), trades in design and retail linked to recycling (sustainable fashion, reconditioning of recycled devices, etc.)

Today, the main challenge is the emergence of new training programmes for these specific professions, but also that of the expansion of existing training provision to account for these professional developments, for example in the mechanical repair sector, maintenance, etc.

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#### Needs of the SMEs operating within the sector

The integration of circular economy principles into the real economy is only just getting started and will represent an immense challenge for SMEs, in a period of widespread economic and social tensions (post COVID, international economic pressures, war in Ukraine, etc.) In this difficult context, French SMEs are unable to anticipate the major changes to be implemented that integrate the 7 pillars of the circular economy into their operating methods:

- Sustainable supply
- Ecodesign
- Industrial and territorial ecology
- The functional economy
- Responsible consumption
- Extending the duration of use
- Recycling

#### Potential in terms of business development and job creation

The challenges for economic development and in particular for SMEs highlight the extent of the task to develop professions and develop new services.

The study of job sources specific to the circular economy sector is still difficult to establish at the French level. Despite this, France Strategy has estimated that the workforce in the circular economy comprises nearly 800,000 full-time equivalent jobs (FTE), i.e. more than 3% of overall employment. More than half may be employed in eco-activities, the rest by repair, rental and the second-hand market.

The repair sector represents the largest number of jobs in the circular economy, with more than 200,000 FTEs, i.e. a quarter of the workforce. Finally, extending the life of goods involves reselling equipment that has already been used. The second-hand market sector is dominated by online trading and by professional dealers.



























## Impact of the Covid-19 pandemic on the sector

[max 2000 characteres]

No sectoral study in France has been undertaken on this subject.

Policies adopted concerning the development of the sector [max 2000 characteres]

The anti-waste law for a circular economy was introduced on February 10, 2020. It follows the work carried out during the Roadmap for a Circular Economy, the result of a long process of consultation and exchange with stakeholders. The law features 5 main priorities:

- A comprehensive switch from the use of all disposable (single-use) items;
- better informed consumers;
- combatting waste and support for solidarity reuse:
- combatting planned obsolescence;
- produce better.

The law sets new targets, such as the end of disposable plastic by 2040. To achieve this, it introduces progressive bans to reduce single-use plastics. Several measures also aim to better inform consumers, such as the standardised refuse bin colours, the introduction of a single logo (Triman) to facilitate sorting or the expansion of environmental labeling. The law also prohibits the disposal of unsold non-food items and strengthens the fight against food waste. A repairability index has also been established to combat planned obsolescence. Finally, a large part of the law is devoted overhauling those sectors subject to extended producer responsibility by creating new sectors, greater transparency and new targets or goals, etc.

As part of the 2015 energy transition law for green growth, France has set itself ambitious targets to initiate the transition to a circular economy. Published on April 23, 2018, the circular economy roadmap



























proposes concrete measures to achieve these goals. The roadmap was the working basis of the anti-waste law for a circular economy.

The objectives of the circular economy roadmap are to:

- Reduce resource consumption linked to French consumption: Reduce resource consumption by 30% in relation to GDP by 2030 compared to 2010.
- Reduce the quantities of non-hazardous waste sent to landfill by 50% in 2025 compared to 2010.
- Strive for 100% recycled plastics by 2025.

Reduce greenhouse gas emissions: save an additional 8 million tonnes of additional CO2 emissions each year by recycling plastic

- Create 500,000 additional jobs, including in new occupations.
- The circular economy will also contribute to achieving some of the Sustainable Development Goals (SDGs) contained in the 2030 Agenda for France.

Any other observation relating with the sector at the country, regional Mediterranean level

[max 2000 characteres]



























#### Sustainable Agriculture

Skills and competencies young people should have to work within the sector

#### [max 2000 characteres]

Sustainable agriculture includes all forms of agriculture that limit the impact of production on the environment, the ideal being to apply the principles of circular economy to the definition, and therefore to take into account agricultural production while throughout its life cycle, from the supply of raw materials to the marketing and possibly the reuse/recycling of products. The best-known and most-studied model of sustainable agriculture is undoubtedly that of organic farming, which now corresponds to a standardised model at European and even global level.

The skills involved are primarily all "classic" agricultural skills but with a range of technical operations and interventions adapted to environmental challenges. Organic sustainable agriculture does not revolutionise agricultural training courses but makes them evolve towards greater consideration of the environmental impact of technical operations and the products used. The professional skills related to sustainable agriculture focus on using fewer/less resources, having a more holistic vision of agro-ecosystems and preventive management. More precisely, this includes:

- Preventive soil management
- Choice of varieties and self-production of seeds
- Reasonable crop dressings
- Consideration of the relationship between the components of the ecosystem: crops/weeds, crops/insects,
- Controlled and preventive management of water resources
- New approach to product marketing: short supply chains and direct sales
- Diversified vision of the agricultural economy: product processing, agri-tourism and services in rural areas, etc.



























Two more recent models of sustainable agriculture are likely to promote a more pronounced transformation in practices and therefore in skills:

- Permaculture, which refers to a form of agriculture inspired by the harmonious and long-term functioning of natural ecosystems. It considers ecosystem biodiversity through the use of many complementary plants and animals that make up a healthy and almost self-sufficient ecosystem on a human scale. Permaculture will require a more global approach than organic farming by requiring skills in ecology, as well as the development and management of ecosystems, to optimise the relationship between cultivated plants and their environment.
- ecological urban agriculture, which aims to develop cropping systems in urban areas, commonly offground, or using high-intensity cropping methods. The model is based on mastering the techniques of hydroponics, aquaponics and adequate technical training.

### Needs of the SMEs operating within the sector

The shift from conventional farming to sustainable agricultural models requires both:

- Adequate technical support based on consulting companies, training organisations and specialised technical agricultural operators. These various operators, mostly SMEs, are themselves looking for technical skills in sustainable agriculture, combined with skills in consulting or training.
- An evolution of skills within the teams towards more knowledge and practices in agro-ecology, knowledge of the regulations associated with sustainable agriculture (organic certification in particular), a switch of marketing practices to shorter supply chains and direct sales and better knowledge of agri-ecosystems, etc.



























# Potential in terms of business development and job creation

While overall agricultural employment is steadily decreasing in France, sustainable agricultural models are tending to develop, leading to both changes to existing jobs and the creation of new employment opportunities.

The development of sustainable agricultural models is a fundamental trend in the development of agriculture in France and in Europe. Even if conventional models remain mainstream, the growth of "alternative" models is accelerating, with new momentum during the COVID 19 pandemic (see below).

In 2019, there were 47,196 certified organic farms (13% increase compared to 2018). This figure equates to 10% of French farms, 2.3 million hectares (organically-farmed areas have doubled in 5 years), and 70,322 operators engaged in organic farming (14% increase compared to 2018).

if we extrapolate these trends to all the models of sustainable agriculture for the coming years, there is significant potential for the growth of farming and employment in the sector, both in terms of reorganising existing skills, in addition to new jobs and trades.

### Impact of the Covid-19 pandemic on the sector

From the first weeks of lockdown, the COVID 19 crisis revealed the fragility and vulnerability of the conventional French agricultural and food system. This resulted in considerable, even serious economic difficulties for many farmers, companies and numerous agricultural sectors. These challenges included difficulties in the supply of inputs and raw materials, difficulties in delivery and marketing produce and breakdowns in intermediate markets. In addition, export-oriented producers (e.g. the pork sector) have been strongly impacted by restrictions on international trade and travel.

The most resilient agricultural models have proven to be sustainable models, less dependent on external factors (fewer inputs in particular) and more focused on local markets.



























For example, during the COVID 19 crisis, the 21 organic agricultural small businesses hosted by CDE Petra Patrimonia saw their average turnover increase by 10%.

Local markets, direct deliveries and advertising local products have characterised the various COVID 19 crises, accelerating the shift of some farm businesses in the sector.

Prior to COVID, many opinion polls showed the desire of a section of the French population to change their consumption habits (source France Agrimer). The prospective study on the eating habits of tomorrow, carried out in 2016 for FranceAgriMer and the French Ministry of Agriculture and Food identified several areas of development linked to the intentions or actual consumer behaviour of the French people. This included, in particular:

- the shift to greater concern for health, well-being and natural considerations in food;
- the shift to changing diets, with the main reason being greater meaning to one's diet (greater transparency, sustainability, less waste or animal protein, etc.);

This pattern has been accelerated by the COVID-19 crisis.

Policies adopted concerning the development of the sector

To date, despite recent uncertainties linked to the war in Ukraine and international tensions over the prices of agricultural raw materials, the priorities of French and European policies related to agriculture focus on the ecological transition process and support for more sustainable agricultural models.

The orientations of the new common agricultural policy, currently in the process of being approved, propose a major reorientation of loans to support sustainable farming models: reinforcement of the ecoconditionality of agricultural aid, obligation made to States to direct at least 35% of European agricultural development funds towards activities that improve the environment, etc.



























In this context, France has stepped up its support for sustainable agricultural models between 2023 and 2027, with the following guidelines: - the target of doubling organically farmed surface areas by 2027, i.e. 18% of the agricultural land, - incentives, in particular for the maintenance and planting of hedges and agro-ecological elements to increase biodiversity and carbon storage, etc.

- support for crop diversification (increasing natural biodiversity, strengthening agroecosystem capacity to respond to extreme climatic events and uncertainties and also providing producers with additional means of generating income);

- Preservation of permanent grasslands
- Soil preservation (erosion, water purification), and maintenance of landscapes)

Any other observation relating with the sector at the country, regional Mediterranean level

[max 2000 characteres]



























## Results and data of the A 3.2.1 – Sectors Needs Analysis – SEAs profiling

Please provide a general overview of the results and data you collected during the Social Economy Actors profiling, including the most relevant statistics and data charts.

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