POSTED WORKERS FROM FRANCE

FACTS AND FIGURES

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POSTING.STAT

Abstract

This report analyses the evolution of posted work in France between 2021 and 2023, drawing on administrative data from the *Système d'Information Préalable au Détachement de Salariés* (SIPSI), accessed via CASD. It provides a comprehensive empirical overview of the structure and dynamics of posting practices in the aftermath of the COVID-19 crisis and following the implementation of Directive (EU) 2018/957. The study distinguishes between three legal forms of posting (inter-company service provision, intra-group mobility, and cross-border temporary agency work) to capture heterogeneous patterns of use and duration.

Results reveal a return to pre-crisis levels of activity, with inter-company postings (Model M1) regaining dominance, while temporary agency work (Model M3) remains substantial but structurally longer in duration. The median duration of assignments remains short (18–19 days), though marked by strong heterogeneity, with long postings exceeding 500 days in some sectors.

From a geographical perspective, seven EU countries (Poland, Portugal, Germany, Belgium, Spain, Italy, and Romania) account for over 70 % of postings to France, confirming a stable core of sending countries. However, the growing presence of third-country nationals posted via intermediary Member States (e.g. Ukrainians via Poland, Brazilians via Portugal) highlights new migration and intermediation dynamics. By linking legal frameworks, sectoral structures, and national origins, the report documents both the resilience and transformation of transnational labor mobility in France. It contributes to ongoing debates on fair competition, social protection, and the regulation of cross-border employment within the European Union.

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Contents

List of tables

Abbreviations

BTP – Construction industry / *Bâtiment et Travaux Publics*

CASD – *Centre d'Accès Sécurisé aux Données* / Secure Data Access Centre

CEECs / PECO – *Central and Eastern European Countries* / *Pays d'Europe centrale et orientale*

CODAF – *Comité Opérationnel Départemental Anti-Fraude* / Departmental Anti-Fraud Operational Committee

DGFiP – *Direction Générale des Finances Publiques*

DGT – *Direction Générale du Travail* / Directorate-General for Labour

DREETS – *Directions régionales de l'économie, de l'emploi, du travail et des solidarités* / Regional Directorates for Economy, Employment, Labour and Solidarity

EA – *Euro Area* (*Zone euro*)

EC – *European Commission*

EEA – *European Economic Area*

ESF / FSE – *European Social Fund* / *Fonds social européen*

EU – *European Union*

EU-27 / EU-28 – All Member States of the European Union, comprising 27 or 28 countries depending on the period under consideration

FTE / ETP – *Full-Time Equivalent* / *Équivalent temps plein*

GDP / PIB – *Gross Domestic Product* / *Produit intérieur brut*

ICT – *Information and Communication Technologies* / *Technologies de l'information et de la communication*

IMI – *Internal Market Information System* (Système d'information du marché intérieur)

INSEE – *Institut National de la Statistique et des Études Économiques* / National Institute of Statistics and Economic Studies

ISCO – *International Standard Classification of Occupations*

MSA – *Mutualité Sociale Agricole* / Agricultural Social Mutual Fund

NACE – *Nomenclature statistique des Activités économiques dans la Communauté Européenne*

OECD / OCDE – *Organisation for Economic Co-operation and Development* / *Organisation de coopération et de développement économiques*

SIPSI – *Système d'Information Prestation de Services Internationale* / Information system on international provision of services

TWA – *Temporary Work Agency*

URACTI – *Unité Régionale d'Appui et de Contrôle du Travail Illégal* / Regional Unit for Combating Illegal Work

URSSAF – *Unions de Recouvrement des Cotisations de Sécurité Sociale et d'Allocations Familiales* / Agency for the Collection of Social Security Contributions and Family Allowances

Executive summary

This report analyses the evolution and characteristics of posted work to France over the period 2019–2024, drawing on exhaustive administrative data from the SIPSI system (*Système d'Information Prestation de Services Internationale* / Information system on international provision of services), accessed and processed within the secure CASD environment. Produced within the framework of the European Commission–funded POSTING.STAT 2.0 project, the report aims to improve the statistical monitoring and analytical understanding of intra-EU labour mobility. The analysis deliberately focuses on incoming posting to France, excluding posting from France to other Member States, reflecting both data availability and the specific relevance of inward posting for the French labour market.

Posted work constitutes a specific form of cross-border labour mobility within the European Union, allowing firms established in one Member State to temporarily provide services in another while workers remain affiliated to the social security system of their country of origin. France is among the main host countries for posted workers in Europe. Understanding the structure and dynamics of posting is therefore essential to assess the interaction between economic integration, labour market regulation and social protection, particularly in the context of the post-COVID recovery and following the implementation of Directive (EU) 2018/957.

Between 2019 and 2024, posted work in France followed a marked cyclical trajectory. After a sharp contraction in 2020 due to the COVID-19 crisis, all indicators point to a sustained recovery. In 2024, the number of posting declarations reached approximately 652,000, approaching its pre-crisis level, while the number of distinct posted workers exceeded its 2019 level, reaching nearly 256,000 individuals. Average posted employment also continued to rise, reaching around 67,000 workers present on an average day in 2024, although it remains slightly below its pre-crisis peak. This divergence highlights the importance of distinguishing between flows, individuals and average employment when assessing the actual weight of posted work in the labour market.

The analysis confirms the structural dominance of inter-company posting (Model M1). After a strong decline in 2020, average posted employment under Model M1 recovered steadily and, in 2024, exceeded its pre-crisis level for the first time. This reflects the resilience and renewed expansion of cross-border subcontracting, particularly in construction and industry. Intra-group posting (Model M2) remains quantitatively limited but stable, with a gradual recovery since 2022 that nonetheless leaves employment below its 2019 level. Posting through temporary work agencies (Model M3) displays a different pattern: despite its significant contribution to average employment due to long assignment durations, M3 has stabilised at a lower level than before the crisis, suggesting a lasting reconfiguration of this channel of posting.

Posting durations remain short on average but highly heterogeneous. Median durations have declined steadily since 2021 and reached their lowest level in 2024, while mean durations remain substantially higher due to a small number of very long assignments. The reduction in dispersion indicators in 2024 points to a compression of the distribution, suggesting a shift toward shorter and more homogeneous posting assignments. Strong differences persist across legal models and sectors: inter-company postings are typically short and task-oriented; intra-group postings are longer and more dispersed; and temporary agency postings remain the longest and most continuous.

Sectoral analyses highlight persistent structural patterns. Construction continues to account for the largest share of posted labour and total days worked, followed by industry and services. Services are characterised by very short assignments, while agriculture and construction rely more heavily on long-term postings. Between 2023 and 2024, the total number of days worked by posted workers increased further, driven mainly by construction, industry and services, confirming that the recovery of posting also translated into higher overall labour input.

From a geographical perspective, posting to France remains concentrated in a stable core of sending countries, notably Poland, Portugal, Germany, Belgium, Spain, Italy and Romania. However, the declining cumulative share of the main countries of birth points to a gradual diversification of worker origins. This evolution reflects the growing importance of third-country nationals posted via intermediary Member States and the increasing complexity of posting chains at the intersection of intra-EU mobility and global migration.

The report also documents strong territorial heterogeneity within France. Between 2020 and 2024, most regions experienced an increase in the recourse to posted workers, although with markedly different intensities. Construction emerges as the main driver of rising recourse rates in many regions, while employment growth in services often outpaces changes in recourse rates, pointing to sector-specific dynamics in the post-crisis recovery.

Finally, gender patterns remain highly segmented. Between 2020 and 2024, the share of women among posted workers shows little change overall and remains strongly differentiated by sector. Construction continues to be overwhelmingly male-dominated, while agriculture and industry show stable gender compositions. Services exhibit the most visible adjustment, with a partial recovery of the female share after 2021, though levels in 2024 remain below those observed in 2020.

The inclusion of 2024 data confirms that posted work in France has entered a phase of consolidation rather than simple recovery. While posting flows and the number of workers involved have returned to or exceeded pre-crisis levels, the structure of posting has evolved toward more fragmented assignments, persistent sectoral segmentation and differentiated regional trajectories. By providing a detailed, micro-founded analysis of posting practices over an extended period, this report contributes to a better understanding of contemporary transnational labour mobility and offers empirical evidence to support more targeted regulation, enforcement and statistical coordination at both national and European levels.

Résumé exécutif

Ce rapport analyse l'évolution et les caractéristiques du travail détaché vers la France sur la période 2019–2024, à partir de l'exploitation exhaustive des données administratives issues du système SIPSI (*Système d'Information Préalable au Détachement de Salariés*/ Information system on international provision of services), traitées dans un environnement sécurisé via le CASD. Il s'inscrit dans le cadre du projet européen POSTING.STAT 2.0, financé par la Commission européenne, dont l'objectif est d'améliorer le suivi statistique et l'analyse de la mobilité du travail au sein de l'Union européenne. L'analyse se concentre volontairement sur le détachement entrant vers la France, à l'exclusion du détachement depuis la France vers d'autres États membres, en raison à la fois de la disponibilité des données et de la pertinence spécifique de ce phénomène pour le marché du travail français.

Le travail détaché constitue une forme spécifique de mobilité transfrontalière du travail au sein de l'Union européenne, permettant à des entreprises établies dans un État membre de fournir temporairement des services dans un autre État membre, tout en maintenant l'affiliation des travailleurs au régime de sécurité sociale du pays d'origine. La France figure parmi les principaux pays d'accueil de travailleurs détachés en Europe. L'analyse de la structure et de la dynamique du détachement est donc essentielle pour appréhender l'articulation entre intégration économique, régulation des marchés du travail et protection sociale, en particulier dans le contexte de la reprise post-COVID et après la mise en œuvre de la directive (UE) 2018/957.

Entre 2019 et 2024, le travail détaché en France suit une trajectoire fortement cyclique. Après une contraction brutale en 2020 liée à la crise sanitaire, l'ensemble des indicateurs témoigne d'une reprise progressive et soutenue. En 2024, le nombre de déclarations de détachement atteint environ 652 000, se rapprochant de son niveau d'avant-crise, tandis que le nombre de travailleurs détachés distincts dépasse son niveau de 2019, pour atteindre près de 256 000 personnes. L'emploi moyen annuel de travailleurs détachés poursuit également sa progression, pour s'établir autour de 67 000 travailleurs présents en moyenne chaque jour en 2024, tout en restant légèrement inférieur à son pic pré-crise. Cette divergence souligne l'importance de distinguer les flux, les individus et l'emploi moyen pour évaluer le poids réel du travail détaché sur le marché du travail.

L'analyse confirme la domination structurelle du détachement entre entreprises indépendantes (modèle M1). Après une forte baisse en 2020, l'emploi moyen sous ce modèle se redresse régulièrement et dépasse, en 2024, son niveau d'avant-crise pour la première fois. Cette évolution reflète la résilience et la reprise du recours à la sous-traitance transfrontalière, notamment dans la construction et l'industrie. Le détachement intra-groupe (modèle M2) demeure quantitativement limité mais relativement stable, avec une reprise graduelle depuis 2022, sans toutefois retrouver son niveau de 2019. Le détachement via les entreprises de travail temporaire (modèle M3) présente une dynamique distincte : malgré une contribution toujours importante à l'emploi moyen en raison de durées de missions longues, ce modèle s'est stabilisé à un niveau inférieur à celui observé avant la crise, suggérant une reconfiguration durable de ce canal de détachement.

Les durées de détachement restent courtes en moyenne mais fortement hétérogènes. Les durées médianes diminuent régulièrement depuis 2021 et atteignent leur niveau le plus bas en 2024, tandis que les durées moyennes demeurent élevées du fait d'un nombre limité de missions très longues. La baisse des indicateurs de dispersion observée en 2024 traduit une compression de la distribution des durées, suggérant une évolution vers des missions plus courtes et plus homogènes. De fortes différences persistent selon les formes juridiques et les secteurs : les détachements M1 sont majoritairement courts et liés à des tâches ponctuelles ; les détachements M2 sont plus longs et plus dispersés ; les détachements M3 restent les plus longs et assurent une présence plus continue de main-d'œuvre détachée.

Les analyses sectorielles mettent en évidence des structures persistantes. La construction demeure le principal secteur d'accueil des travailleurs détachés et concentre la plus grande part du volume total de jours travaillés, suivie par l'industrie et les services. Les services se caractérisent par des missions très courtes, tandis que l'agriculture et la construction recourent davantage à des détachements de longue durée. Entre 2023 et 2024, le volume total de jours travaillés par les travailleurs détachés augmente de nouveau, principalement sous l'effet de la construction, de l'industrie et des services, confirmant que la reprise du détachement se traduit également par une hausse de l'apport total de travail.

Du point de vue géographique, le détachement vers la France demeure concentré autour d'un noyau stable de pays d'envoi, en particulier la Pologne, le Portugal, l'Allemagne, la Belgique, l'Espagne, l'Italie et la Roumanie. Toutefois, la baisse de la part cumulée des principaux pays de naissance révèle une diversification progressive des origines des travailleurs détachés. Cette évolution reflète l'importance croissante des ressortissants de pays tiers détachés via des États membres intermédiaires et la complexification des chaînes de détachement, à l'interface entre mobilité intra-européenne et migrations internationales.

Le rapport met également en évidence une forte hétérogénéité territoriale en France. Entre 2020 et 2024, la plupart des régions connaissent une hausse du recours au travail détaché, mais avec des intensités très variables. La construction apparaît comme le principal moteur de l'augmentation des taux de recours dans de nombreuses régions, tandis que, dans les services, la croissance des effectifs dépasse souvent celle des taux de recours, traduisant des dynamiques sectorielles spécifiques dans la phase de reprise post-crise.

Enfin, les configurations de genre demeurent fortement segmentées. Entre 2020 et 2024, la part des femmes parmi les travailleurs détachés évolue peu dans l'ensemble et reste très différenciée selon les secteurs. La construction demeure massivement masculine, tandis que l'agriculture et l'industrie présentent des structures de genre stables. Les services connaissent l'évolution la plus visible, avec un redressement partiel de la part des femmes après 2021, sans toutefois retrouver en 2024 le niveau observé en 2020.

Dans l'ensemble, l'intégration des données 2024 confirme que le travail détaché en France est entré dans une phase de consolidation plutôt que de simple rattrapage. Si les flux de détachement et le nombre de travailleurs concernés ont retrouvé, voire dépassé, leurs niveaux d'avant-crise, la structure du détachement a évolué vers des missions plus fragmentées, une segmentation sectorielle persistante et des trajectoires régionales différenciées. En proposant une analyse détaillée et microfondée des pratiques de détachement sur une période étendue, ce rapport contribue à une meilleure compréhension de la mobilité transnationale du travail contemporaine et fournit des éléments empiriques utiles à l'élaboration de politiques publiques plus ciblées en matière de régulation, de contrôle et de coordination statistique, aux niveaux national et européen.

1. Introduction

1.1 Context of Posted Workers in France

Posted work refers to a situation in which an employee is sent, for a limited period, by an employer established in a Member State of the European Union (EU), to carry out an assignment in another Member State, in the context of a contract of services, an intra-group posting or a hiring out through a temporary agency, while remaining affiliated with the social security system of their country of origin. This status is governed by European Directive 96/71/EC on the posting of workers in the framework of the provision of services (PWD), more recently amended by Directive (EU) 2018/957, which strengthens the rules on equal treatment.

The specific nature of posting lies in a threefold compromise: promoting the free provision of services within the European single market, ensuring a minimum level of protection for posted workers, and allowing firms to address skill shortages (De Wispelaere and Pacolet, 2016). However, this mechanism requires fine-tuned regulation, as it can, under certain conditions, generate distortions of competition or risks of social dumping (Bernaciak, 2015).

The development of posting in Europe, and in France in particular, can be explained by several combined factors: the enlargement of the European Union towards the East, the generalization of international subcontracting chains, and the growing demand for flexibility in certain sectors such as construction, agriculture, services, or industry. France is among the main host countries for posted workers, receiving each year several hundred thousand posting declarations through the national platform SIPSI (*Système d'information sur les prestations de services internationals* / Information system on international provision of services).

The study of posted work is essential for several reasons. First, it represents a major socio-economic and political issue at EU level, in terms of working conditions, social rights, and the structuring of labour markets (Michon and Rocca, 2023). Second, it lies at the heart of debates on European social cohesion and the ability of the EU to ensure fair competition among undertakings in the internal market, as stated by the preamble of the Posting of Workers Directive. Finally, posting flows reveal invisible migration dynamics, in which third-country nationals can circulate within the EU through intermediary countries (e.g., Ukrainians posted via Poland, Brazilians via Portugal) (Lens, Mussche, and Marx, 2022). In the specific French debate, posting of workers has a history as a thorny political topic, giving rise to the image of the "polish plumber" as a shorthand expression for social dumping in the context of the debates over the EU referendum of 2005 and the opposition to the first proposal of the Services Directive (Crespy, 2010).

Posting of workers became a national political issue framed through domestic lenses (social justice, protection of local employment and working conditions) and was sometimes instrumentalised in the context of an opposition to the EU as a whole. The activism of the first Macron's presidency (2017-2022) in reforming the Posting of Workers Directive amplified the visibility of the topic in the French political space but did not fundamentally alter its framing (Michon and Weill, 2021).

The present report contributes to the collective analytical effort of the POSTING.STAT 2.0 project, covering data concerning posting of workers to France. To do so, it relies on administrative data from the SIPSI system, extracted and analysed within a secure environment via CASD (*Centre d'Accès Sécurisé aux Données* / Centre for Secure Data Access). This report deliberately focuses exclusively on **posted workers coming to France**, that is, workers employed by companies established in another Member State and temporarily assigned to work on French territory. It does not cover situations in which workers employed by companies established in France are posted to other Member States. This analytical choice reflects both the availability and the quality of administrative data, as well as the specific relevance of incoming posting for the French labour market and public policy debate. While outward posting from France constitutes an important dimension of intra-EU labour mobility, it is not systematically documented in French administrative sources and therefore falls outside the scope of the present analysis. Throughout the report, references to "posted workers" should thus be understood as referring solely to **incoming posting to France**, unless explicitly stated otherwise.

1.2 European and National Regulatory Framework

The legal framework governing posted work in Europe has been progressively built since the mid-1990s, in a context of consolidation of the internal market and the growing importance of cross-border service exchanges. Directive 96/71/EC, adopted on 16 December 1996, constitutes the foundational text. It aims to regulate the posting of workers carried out in the context of a transnational provision of services between Member States of the European Union, while guaranteeing a core set of rights to the posted worker in the host country (European Commission, 1996).

This directive is based on a delicate balance between the freedom to provide services (Article 56 TFEU) and the protection of workers, through minimum standards regarding remuneration, working time, paid leave, and health and safety. It requires employers posting workers to comply with the working conditions of the host country, while maintaining the worker's affiliation with the social security system of the country of origin (Regulation No. 883/2004). The text applies to three situations: posting within the framework of a provision of services, intra-group posting, and posting via a temporary work agency.

With the enlargement of the Union to Central and Eastern European countries from 2004 onward, the number of posted workers increased sharply, generating growing tensions in several Member States, notably France, Belgium, and Germany. The initial framework was considered insufficient to prevent abuses (under-declaration, bogus self-employment, non-compliance with minimum wages), and several legal disputes revealed its limitations, most notably the *Laval* (C-341/05) and *Rüffert* (C-346/06) decisions by the Court of Justice of the European Union (CJEU), which reinforced the primacy of the freedom to provide services over social rights (Rocca, 2015).

In response to these criticisms, the European Commission undertook a major reform of the system. The 2014/67/EU Enforcement Directive introduced concrete measures to improve the application of the existing framework: mandatory declarations, joint liability within subcontracting chains, and enhanced administrative cooperation between Member States.

A major step of this reform process came in 2018, with the adoption of Directive (EU) 2018/957, which entered into force in July 2020. This text introduced the principle of "equal pay for equal work in the same place," expanded the range of applicable rights (beyond the core provisions) and limited the posting period to 12 months (renewable for 6 months), after which all working conditions of the host country must apply (European Commission, 2018). This revision aimed to better protect posted workers while restoring fairer competition between national companies and cross-border service providers.

Several studies have highlighted the effects of this reform. Cremers (2014) emphasizes that formal harmonization alone is not sufficient to prevent circumvention strategies, particularly those put in place using complex subcontracting chains and letterbox companies. The POSTING.STAT project has documented concrete posting practices, the diversity of national profiles, and the effects of the reform in various countries, combining statistical data and field interviews (KU Leuven, n.d.).

Finally, posting of workers remains under close scrutiny by European institutions, in a context marked by rising demands for social justice, the ecological transition, and the increasing mobility associated with geopolitical conflicts, notably the war in Ukraine. The Mobility Package, covering a set of legislative instruments concerning the road transport sector, and ongoing discussions on the revision of the regulation on the coordination of social security systems (Regulation 883/2004; Morsa, 2019), illustrate a political willingness to consolidate a common European social foundation while preserving the fluidity of the internal market.

1.3 Assessing Structural and Dynamic Changes in Posting between 2021 and 2023

The primary objective of this report is to examine recent developments in posted work in France during the period 2021–2023, relying on administrative data extracted via CASD from SIPSI declarations. The aim is both to provide a structured empirical overview of current posting practices and to capture the underlying dynamics, legal, economic, sectoral, and geographical, that shape them.

The study seeks to document observed trends along three complementary dimensions:

- **Structural evolutions of the posting system:** legal forms of posting, profiles of workers, sectors involved, and geographical distribution of assignments;
- **Dynamic transformations:** changes in countries of origin, types of assignments, the changes in the use of certain contractual forms (such as transnational temporary agency work), and the increasing posting of third country nationals;
- **Regional and sectoral differences**, which help to understand the specific role of certain territories and industries in hosting or strategically using posted labour.

Beyond a three-year analysis, this report also adopts a comparative temporal perspective. In some instances, we refer to previous studies, particularly those by Mathilde Muñoz (Posted Workers from and to France: Facts and Figures, 2020), which have reconstructed the long-term trajectory of posting in France since the 2010s. These earlier analyses, also based on SIPSI data, allow us to assess the persistence of certain patterns (for instance, the concentration of postings in the construction sector) as well as to identify recent breaking points linked to the 2018 European reform or the COVID-19 crisis.

The relevance of this exercise lies in the fact that posted work, often treated as an exception or a marginal phenomenon within the labour market, provides an important lens through which broader transformations in employment and mobility patterns within the European Union can be observed. Understanding its dynamics provides valuable insight into the tensions between competitiveness and social protection and contributes to ongoing debates on the regulation of transnational labour, particularly in low-skilled, seasonal, or fragmented sectors.

Accordingly, the ambition of this report is also to provide robust evidence to inform public debate, policy evaluation, and future academic research on labour mobility in Europe.

1.4 Presentation of the Data Source

All results presented in this report are based on the exploitation of data from the *Système d'information sur les prestations de services internationals* / Information system on international provision of services (SIPSI) for the years 2021, 2022, and 2023. These data were made available in a secure environment via the *Centre d'Accès Sécurisé aux Données* (CASD). Only declarations with the status "TRANSMIS", that is, those actually submitted by companies and recorded in the system, were retained for analysis. This restriction ensures greater statistical reliability by excluding drafts, duplicates, test entries, or incomplete declarations.

1.4.1 The SIPSI Database

Created to transpose Directive 2014/67/EU, Article 9(a), SIPSI serves as the single-entry platform through which any service-providing company posting employees to France must submit a prior declaration. This system collects detailed information on each posting assignment (dates, duration, location, sector, user company), on the employer established abroad, as well as on the posted workers concerned (age, gender, country of residence, country of birth, social security affiliation, etc.).

This database constitutes the most comprehensive administrative source available on posted workers in France, in the absence of any nominative dataset tracking such mobility. It also enables detailed microeconomic analysis of posting by combining variables relating to individuals, firms, assignments, and territories.

1.4.2 Relevance of the 2021–2023 Period

The period 2021–2023 is particularly relevant for several reasons. It covers the post-COVID phase, marked by an uneven recovery in labour mobility, and immediately follows the entry into force of the 2018 European reform on posting (implemented in July 2020). These three years thus make it possible to observe the stabilization or adjustment effects in the use of posting after a period of crisis, as well as the resulting sectoral and geographical reorientations.

1.4.3 Limitations of the SIPSI Database

Despite its richness, the SIPSI database presents several methodological limitations, which translate into limitations of the present report. Notably, the SIPSI Database:

- Is based on declarative data, the completeness of which depends on the diligence of the declaring employers. Some assignments may not be reported, particularly in informal sectors or among poorly monitored foreign subcontractors.
- Does not allow for nominative tracking of workers over time, nor for linkage with other administrative databases such as those of URSSAF or DGFIP. It is therefore difficult to precisely estimate full-time equivalent volumes, income levels, or fraud rates.
- It includes a "status" variable which does not necessarily reflect the actual implementation of the work: a "TRANSMIS" declaration does not automatically mean that the assignment took place, nor that it occurred as planned.
- Only concerns posting of workers to France. Cases of posting from France to other countries, or intra-company mobility without a service provision, are not covered.

Finally, the strictly administrative nature of the database limits the understanding of the concrete working, housing, or social protection conditions of the workers concerned. For this reason, SIPSI data are best complemented, whenever possible, by qualitative surveys or other sources (such as data from social security institutions, or labour inspectorates).

2. Overall Evolution of Posted Work in France (2021–2024)

2.1 Measuring Posted work: Distinct workers, Postings and Average Posted employment

DARES distinguishes three complementary indicators to measure posted work in France: the cumulative number of postings declared over the year, the number of distinct posted workers, and average annual posted employment. These indicators respectively capture the intensity of administrative flows, the number of individuals concerned by posting, and the effective presence of posted labour on the French labour market.

Between 2019 and 2024, all three indicators display a common trajectory marked by a sharp decline in 2020 due to the COVID-19 crisis, followed by a gradual and sustained recovery. By 2023, the number of postings had almost returned to its pre-crisis level, and in 2024 it further increased, reaching 652,000 declarations, thereby approaching closely the 2019 level. Over the same period, the number of distinct posted workers recovered more rapidly: after remaining below its pre-crisis level until 2023, it exceeded it in 2024, reaching 255,900 workers.

Average posted employment, measured as the mean daily number of posted workers over the year, also increased steadily after 2020, from 56,200 in 2021 to 65,300 in 2023 and 67,100 in 2024. However, despite this continued growth, average posted employment in 2024 remains slightly below its 2019 level. This indicates that the post-crisis rebound of posting flows and of the population concerned by posting has not been fully translated into an equivalent increase in the sustained presence of posted labour on the French labour market.

The persistent gap between the number of postings and the number of distinct posted workers highlights the recurrent nature of posting, with many posted workers carrying out several assignments within the same year. At the same time, the fact that distinct workers recover faster than average posted employment suggests a continued prevalence of relatively short or fragmented posting assignments. This distinction between flows, individuals, and average employment remains essential to properly assess both the dynamics of posting and its actual weight in the French labour market.

Table 1 Different measures of Posted/Posting

	2019	2020	2021	2022	2023	2024
Postings	667 300	560 300	564 200	591 000	623 100	652 000
Distinct workers	246 300	188 00	193 800	217 100	237 100	255 900
Average posted	72 200	56 600	56 200	58 600	65 300	67100

Source: DGT – 2025 SIPSI. Dares calculus

2.2 Posted workers by Year and by Posting Model

The SIPSI system distinguishes three legal types of posting, referred to as "models," which reflect different organizational logics in the use of foreign labour in France. These models stem from Article 1(3) of the Posting of Workers Directive. This typology helps to better understand the various channels of recourse to posted work and their evolution over time.
The breakdown of average annual posted employment by type of posting reveals a highly asymmetric distribution, reflecting the differentiated role of legal posting arrangements in the French labour market.

Table 2 **Average Number of Posted workers by Model (2019 - 2024)**

Model	2019	2020	2021	2022	2023	2024
M1	41 285	34 734	34 855	37 052	43 087	45 143
M2	12 348	8 887	8 254	9103	9 665	9 903
M3	18 609	12 942	13 124	12 411	12 537	12 064
Total	72 243	56 562	56 233	58 566	65 289	67 111

Source: DGT – 2025 SIPSI. Dares calculus

According to Dares (Auvray, Le Toullec & Moquay, 2024), 2022 marked a sharp rebound in posted employment in France, with about 218,000 posted workers recorded outside the transport sector, a 30 percent increase over 2021, bringing the posting rate back to 0.36 percent of private-sector employment. These results confirm that the post-COVID recovery of posting flows observed in SIPSI data was already visible in employment-based measures.

2.2.1 Model M1 – Posting between Independent Companies

Posting between independent companies (Model M1) constitutes the dominant channel of posted work in France in terms of average annual posted employment. Throughout the period considered, Model M1 accounts for the largest share of posted workers present on French territory on an average day, reflecting the central role of cross-border subcontracting and service provision in sectors such as construction, industry and services.

In 2019, average posted employment under Model M1 amounted to 41,285 workers. This figure declined sharply in 2020, falling to 34,734, as a direct consequence of the COVID-19 crisis and the interruption of many cross-border service activities. The contraction continued, though at a slower pace, in 2021, when average M1 employment remained close to its 2020 level (34,855). From 2022 onwards, a clear recovery can be observed, with average posted employment rising to 37,052 in 2022 and increasing more markedly in 2023 to 43,087 workers.

2024 data confirms and reinforces this recovery trend. The average posted employment under Model M1 reached 45,143 workers in 2024, exceeding its pre-crisis level for the first time over the period considered. This development indicates a strong rebound of inter-company posting, suggesting that traditional forms of cross-border subcontracting have not only recovered from the pandemic shock but have also expanded beyond their 2019 intensity.

This renewed growth of Model M1 contrasts with the more moderate dynamics observed for other posting models and underscores the structural importance of inter-company service provision within the French posting system. It also suggests that the post-crisis reconfiguration of posting has favoured arrangements based on direct contractual relations between firms, possibly reflecting both regulatory adjustments and firms' strategies to secure flexibility through established subcontracting networks.

2.2.2 Model M2 – Intra-group Posting

Intra-group posting (Model M2) represents a quantitatively limited but structurally stable component of posted work in France. In terms of average annual posted employment, Model M2 consistently accounts for a much smaller share than inter-company posting, reflecting the selective nature of this form of mobility, which is typically associated with specific project-based assignments and higher-skilled profiles within multinational firms.

In 2019, average posted employment under Model M2 amounted to 12,348 workers. This figure declined sharply in 2020, falling to 8,887, in line with the widespread suspension of international mobility and corporate projects during the COVID-19 crisis. The contraction continued in 2021, when average M2 employment reached its lowest level over the period (8,254 workers), reflecting the slower recovery of internal corporate mobility compared to subcontracting-based posting.

From 2022 onwards, a gradual recovery can be observed. Average posted employment under Model M2 increased to 9,103 workers in 2022 and to 9,665 in 2023, indicating a progressive resumption of intra-group assignments as international projects and managerial mobility resumed. The inclusion of 2024 data confirms this upward trend, with average M2 employment reaching 9,903 workers. Despite this increase, Model M2 employment in 2024 remains clearly below its pre-crisis level.

The relatively smooth trajectory of Model M2, compared to the sharper fluctuations observed for other posting models, suggests a lower sensitivity to short-term economic cycles. Intra-group posting appears to be more closely tied to long-term corporate strategies and organizational needs than to short-term demand fluctuations. Its slower and incomplete recovery may also reflect persistent changes in firms' internal mobility practices, including increased reliance on remote work or alternative forms of international coordination.

Overall, while intra-group posting plays a limited role in quantitative terms, its stability over time underlines its specific function within the posting system. Model M2 contributes modestly to the average presence of posted workers in France but remains an essential channel for the cross-border mobility of skilled workers within multinational enterprises.

2.2.3 Model M3 – Posting through a Temporary Work Agency

Posting through temporary work agencies (Model M3) represents a distinct and structurally important component of posted work in France. Although it accounts for a smaller share of total postings in flow terms, Model M3 contributes disproportionately to average posted employment, reflecting the longer duration and greater continuity of assignments typically associated with cross-border temporary agency work, particularly in labour-intensive sectors such as agriculture, logistics and certain service activities.

In 2019, average posted employment under Model M3 amounted to 18,609 workers, making it the second largest posting model in terms of average presence on the French labour market. This figure declined sharply in 2020, falling to 12,942 workers, as a result of the COVID-19 crisis and the disruption of seasonal and agency-mediated labour mobility. Unlike inter-company posting, the recovery of Model M3 employment in the post-crisis period has remained limited.

Between 2021 and 2023, average posted employment under Model M3 stabilised at a relatively low level, fluctuating between 12,411 and 13,124 workers. This plateau suggests a structural adjustment rather than a temporary slowdown, possibly reflecting the combined effects of increased regulatory scrutiny of temporary work agencies, legal clarifications regarding equal treatment, and changes in labour demand in sectors traditionally reliant on cross-border temporary agency work.

Average posted employment under Model M3 reached 12,064 workers in 2024, slightly below its 2023 level. This marginal decline indicates that, despite the overall recovery of posted work in France, temporary agency posting has not followed the same expansionary trajectory as inter-company posting. By contrast with Model M1, Model M3 remains clearly below its pre-crisis level, with no evidence of a sustained rebound in average employment.

One can speculate as to the causes of the significant decline of the recourse to posting via temporary agency. The 2018 reform of the PWD has reinforced the application of the principle of equal treatment of workers posted by temporary work agencies vis-à-vis other workers employed by the user undertakings. However, this change should not be overstated since it merely clarified the application of a pre-existing Directive (Directive 2008/104/EC on temporary agency workers). On the other hand, a mediatised legal case leading to sanctions against one such temporary work agency, *Terra Fecundis*, (Robin-Olivier, 2022) providing workers in the agricultural sector, might also have had an impact on the use of this mode of posting. In the same vein, the French Supreme Court (*Cour de Cassation*) confirmed in 2020 the joint liability of the large French group Bouygues with the Maltese temporary employment agency Atlanco, for the payment of compensation for undeclared work on the construction site of the new-generation nuclear reactor at the Flamanville site.[1]

Overall, the distribution of average posted employment by type of posting highlights a clear hierarchy between legal models, with inter-company posting playing a structurally dominant role, temporary agency work ensuring a significant and durable labour presence, and intra-group mobility remaining quantitatively secondary. This composition illustrates that the effective presence of posted workers on the French labour market is shaped not only by the number of postings, but also by the duration and continuity associated with each legal form of posting.

2.3 Duration of Assignments by Legal Model of Posting (M1, M2, M3) – 2021 to 2023

Table 3 Distribution of Posting Durations by Year (2021–2024)

Year	Number of days	Average	Median	1st quartile	3rd quartile
2019	25 649 039	102	57	13	158
2020	19 963 902	102	67	18	160
2021	19 993 298	100	58	15	154
2022	20 984 410	94	47	12	145
2023	24 236 343	97	51	12	153
2024	23 483 340	92	41	12	139

Source: DGT – 2025 SIPSI. DARES calculus
Note: The data correspond to the median, mean, and dispersion indicators for the duration of posting missions in France. Values are expressed in days.

The duration of posting assignments is a key indicator for understanding how posted labour is used in France. It provides insight into the nature of assignments (short-term versus long-term), the organisation of production and subcontracting, and the degree of continuity of cross-border labour mobility. SIPSI data allow for a detailed analysis of both central tendencies and dispersion in posting durations.

Table 3 presents the evolution of posting durations between 2019 and 2024. Over the entire period, posting durations display a strongly skewed distribution, characterised by a large number of short assignments alongside a smaller share of very long postings. This structural feature remains stable over time, despite significant cyclical fluctuations linked to the COVID-19 crisis and the subsequent recovery.

In 2019, before the pandemic, the average duration of posting missions was 102 days, while the median stood at 57 days. This gap already indicated the presence of long-duration postings pulling the mean upward. In 2020, the average duration remained unchanged at 102 days, but the median increased markedly to 67 days, reflecting the interruption of many short-term assignments and the relative persistence of longer postings during the period of mobility restrictions.

1 Cour de cassation, 22 december 2017, n° 13-25.467.

From 2021 onwards, a clear downward adjustment in posting durations can be observed. In 2021, the average duration declined slightly to 100 days, and the median fell back to 58 days, signalling the gradual return of shorter assignments. This trend intensified in 2022, with the average duration decreasing to 94 days and the median dropping sharply to 47 days. The contraction of the median suggests a renewed prevalence of short-term postings as cross-border service provision normalised.

In 2023, posting durations increased moderately, with the average rising to 97 days and the median to 51 days. This partial rebound likely reflects a combination of longer industrial or technical assignments and the recovery of posting volumes in sectors characterised by project-based activity. However, the distribution remained highly dispersed, with a third quartile of 153 days, confirming the continued coexistence of short and long postings.

2024 data points to a renewed decline in posting durations. The average duration fell to 92 days, the lowest level observed over the period, while the median decreased further to 41 days. The first quartile remained stable at 12 days, whereas the third quartile declined to 139 days. These developments indicate a strengthening of the trend toward shorter assignments and a compression of the upper part of the duration distribution.

Beyond central tendencies, the evolution of dispersion indicators points to a gradual compression of posting durations. In particular, the interquartile range reached its lowest level in 2024, at 127 days, compared with 133 days in 2023 and 147 days in 2019. This reduction reflects a narrowing of the distribution of posting durations, driven both by a decline in the upper quartile and by the continued stability of the first quartile. The shrinking interquartile range suggests a relative convergence of posting practices toward shorter and more homogeneous assignments, reinforcing the evidence of a structural shift away from very long postings.

The distribution of posting durations over the period 2019–2023 highlights both the persistence of short assignments and a high degree of dispersion in posting practices. Throughout the period, the median duration of posting missions remains relatively low, fluctuating between 47 and 67 days, which indicates that at least half of postings are of limited length. After a temporary increase in 2020, when the median reached 67 days, the median duration declined markedly in 2024 (47 days) after partially increasing again in 2023 (51 days). This pattern suggests that the post-COVID recovery of posting has been accompanied by a renewed prevalence of shorter assignments.

The first quartile remains very stable over time, at around 12–18 days, confirming that a substantial share of posting missions is very short-term. At the opposite end of the distribution, the third quartile consistently exceeds 145 days, reaching up to 160 days in 2020, which points to the coexistence of a minority of long-lasting postings alongside most short ones. This wide interquartile range illustrates the strong heterogeneity of posting durations.

Average durations are systematically higher than medians, ranging from 94 to 102 days, reflecting the influence of a limited number of very long assignments that pull the mean upward. Taken together, these indicators reveal a structurally skewed distribution of posting durations, characterised by a concentration of short missions and a tail of long-term postings. This configuration remains remarkably stable over time, despite cyclical fluctuations linked to the COVID-19 crisis and underlines the importance of distinguishing between typical posting durations and extreme cases when analysing the effective use of posted labour in France.

Posting durations vary strongly across legal models, reflecting distinct organisational uses of posted labour. Posting between independent companies (Model M1) is predominantly characterised by short assignments, indicating intensive use for time-limited tasks, particularly in construction and industrial subcontracting. While a small number of long postings persist and raise average durations, the typical M1 assignment remains brief and stable over time.

Intra-group posting (Model M2) is associated with longer and more heterogeneous assignments. This pattern is consistent with its function as a channel for project-based, managerial or expert mobility within multinational firms. Although median durations have tended to decline slightly, dispersion remains high, reflecting the diversity of internal mobility arrangements across firms and sectors.

Cross-border temporary agency work (Model M3) stands out as the model involving the longest and most continuous postings. Assignments under this model frequently extend over long periods and are often renewed, corresponding to sustained or seasonal labour needs rather than punctual tasks. As a result, M3 postings contribute disproportionately to the average presence of posted workers in the host labour market.

This configuration demonstrates that the legal form of posting strongly shapes the conditions and temporalities of employment for posted workers, with potential implications for regulation, administrative monitoring, and social protection. These differences call for a differentiated analysis of posting practices and underline that the legal status of posting has a strong impact on work organization, workers' local integration, and the monitoring or control of working conditions.

The longer duration for assignments by temporary work agencies in the French context seems to justify the different treatment increasingly received by this form of posting under the case law of the Court of Justice. Indeed, in the *Vicoplus* decision (Joined Cases C-307/09 to C-309/09) the Court has concluded that posting by temporary work agencies is "specifically intended to enable workers to gain access to the labour market of the host Member State", something which is at least reinforced by the longer duration of these assignments in the French context. Indeed, the Preamble of the PWD itself makes an explicit connection between the length of a posting assignment and its connection with the labour market (Recital n° 9).

The analysis of the correlation between assignment duration and the number of assignments per worker over the entire period reveals an almost zero and slightly negative linear relationship, with a coefficient of −0.025. This result indicates no significant link between performing many assignments and the average duration of those assignments.

In other words, posted workers who complete numerous assignments do not necessarily do so within shorter stays, and vice versa. This finding reflects a strong heterogeneity in posting practices, corresponding to distinct organizational logics: single long-term assignments in some sectors (e.g., industry, engineering) versus highly fragmented assignments in others (agricultural temporary work, multi-site service provision, logistics).

This result underscores the importance of treating frequency and duration indicators separately in the analysis and calls for further study of posted worker profiles by combining these two dimensions.

3. Origin of Posted Workers

Table 4 Country of birth (2019-2024)

Countries	2019	2020	2021	2022	2023	2024
Portugal	13.2%	14.4%	14.1%	11.9%	10.9%	9.1%
Romania	10.4%	10.2%	10.2%	9.6%	9.2%	8.8%
Poland	8.9%	8.8%	9.9%	8.8%	8.3%	7.8%
Italy	7.5%	7.7%	7.3%	7.3%	6.7%	6.7%
Spain	6.8%	7.5%	8.1%	6.9%	6.5%	6.4%
Belgium	3.9%	4.3%	4.0%	4.1%	4.3%	4.7%
Germany	5.0%	4.9%	4.1%	4.1%	3.9%	4.0%
United-Kingdom	5.8%	4.6%	2.5%	2.6%	2.9%	2.8%
Total	61.4%	62.3%	60.2%	55.4%	52.7%	50.3%

Source: DGT - SIPSI (2025).
Note: Data refer to the share of the eight main country of birth in total posting declarations to France. The total corresponds to the cumulative share of these countries in each year.

The distribution of posted workers by country of birth shows a gradual but clear diversification over the period considered. While the same set of countries continues to dominate, their cumulative share in total posting declarations has steadily declined, falling from over 60% before the pandemic to just above 50% in 2024. This downward trend indicates a progressive broadening of the countries of birth represented among posted workers in France.

Portugal remains the most frequent country of birth throughout the period, but its relative weight has decreased markedly since 2021. A similar, though more moderate, decline can be observed for Romania and Poland, which nonetheless continue to rank among the main countries of birth. Southern European countries such as Italy and Spain also show a gradual reduction in their shares, while Belgium and Germany display relatively stable proportions over time. The United Kingdom, by contrast, has experienced a sharp decline since 2020, consistent with the effects of Brexit on labour mobility.

Overall, the cumulative share of the eight main countries of birth declines markedly, from 61.4% in 2019 to 50.3% in 2024. This decrease points to a progressive diversification of the countries of birth of posted workers, suggesting a growing presence of workers born outside the traditional core sending countries, and potentially outside the European Union. This trend is indicative of increasingly complex posting configurations, where posting acts as a channel for broader international labour mobility rather than solely intra-EU workforce circulation.

Table 5 Country of Establishment of the Employer (2019–2024)

Countries	2019	2020	2021	2022	2023	2024
Portugal	13%	15%	17%	16%	17%	16%
Spain	13%	15%	16%	15%	14%	13%
Poland	8%	9%	10%	9%	9%	9%
Italy	9%	9%	9%	9%	8%	9%
Romania	7%	7%	7%	7%	7%	6%
Belgium	5%	6%	5%	5%	6%	6%
Germany	7%	7%	6%	6%	6%	6%
Lithuania	3%	3%	3%	4%	5%	5%
Total	67%	71%	74%	72%	70%	70%

Source: DGT - SIPSI (2025).
Note: Data refer to the share of the eight main country of Establishment of the Employer in total posting declarations to France. The total corresponds to the cumulative share of these countries in each year.

The distribution of posting declarations by country of establishment of the employer shows a high and persistent concentration around a limited number of Member States, while also revealing some rebalancing over time. Throughout the 2019–2024 period, Portugal and Spain emerge as the two leading countries of establishment of posting undertakings to France. Portugal strengthens its position over time, increasing its share from 13% in 2019 to 16% in 2024 (17% in 2023), thereby confirming its central role in cross-border service provision and labour intermediation towards the French market. Spain also remains a major country of establishment, although its share slightly declines after peaking in 2021, suggesting a stabilisation rather than a structural withdrawal (13% in 2024, back to the 2019 level).

Poland and Italy form a second group of important sending countries in terms of employer establishment, with relatively stable shares over the period. Poland's share increases between 2019 and 2021 before levelling off, while Italy maintains a steady contribution close to 8–9%, indicating a consistent but moderate involvement in posting activities. Romania displays remarkable stability, with its share remaining constant at around 7%, reflecting a sustained and structurally embedded role in posting to France.

Belgium and Germany account for smaller yet stable proportions of posting employers, pointing to more limited but persistent engagement, often associated with geographical proximity and established business links. A noteworthy development concerns Lithuania, whose share rises from 3% in 2019 to 5% in 2024. This increase suggests the growing importance of smaller Member States as bases for posting undertakings, potentially reflecting the expansion of intermediation activities or strategic employer relocation within the EU.

The cumulative share of the eight main countries of establishment remains high, fluctuating between 67% and 74% over the period, and standing at 70% in 2024. This sustained concentration indicates that posting to France continues to rely on a relatively stable core of sending Member States, even as incremental diversification emerges through the growing role of certain smaller countries of establishment.

Table 6 Including workers of the same nationality

Countries	2019	2020	2021	2022	2023	2024
Portugal	85%	80%	72%	62%	53%	45%
Spain	47%	47%	48%	43%	44%	44%
Poland	87%	84%	82%	80%	77%	74%
Italy	70%	73%	73%	74%	72%	68%
Romania	100%	99%	99%	98%	99%	98%
Belgium	67%	70%	70%	72%	69%	68%
Germany	64%	62%	60%	62%	63%	61%
Lithuania	59%	52%	44%	44%	36%	33%

Source: DGT - SIPSI (2025).
Note: Data refer to the share of the eight main country of Establishment of the Employer in total posting declarations to France. The total corresponds to the cumulative share of these countries in each year.

The share of posted workers holding the same nationality as the country of establishment of the employer varies markedly across Member States and over time, revealing increasing heterogeneity in posting configurations. Some countries display a high degree of national alignment between employers and workers. This is particularly the case for Romania, where almost all posted workers are Romanian born throughout the period, reflecting a predominantly "national" posting model. Poland also shows a consistently high share of same-nationality workers, although this proportion gradually declines from 87% in 2019 to 74% in 2024, indicating a slow diversification of worker profiles.

By contrast, other countries exhibit a pronounced and growing reliance on foreign-born workers. Portugal stands out in this respect: the share of Portuguese nationals among workers posted by Portuguese-established firms falls sharply from 85% in 2019 to 45% in 2024. In 2023, 27% of workers posted from Portugal are Brazilian, while Ukrainian nationals account for 4.7%, illustrating the increasing use of third-country nationals within Portuguese-based posting chains. A similar pattern is observed for Spain, where only 44% of workers posted in 2023 are Spanish nationals; in the same year, 23% originate from Senegal and 9% from Morocco, highlighting the role of posting as an indirect channel of labour mobility from third countries.

Intermediate configurations can be observed for Italy, Belgium and Germany, where the share of same-nationality workers remains relatively stable over time, at around two-thirds to three-quarters. These cases suggest mixed posting models combining national workers and foreign-born labour. In Italy, for instance, 7% of workers posted by Italian-established firms in 2024 are Romanian nationals, pointing to selective cross-national recruitment within the EU.

Finally, Lithuania displays the lowest and most rapidly declining share of same-nationality workers, decreasing from 59% in 2019 to 34% in 2024. This evolution suggests a strong role of Lithuanian-established firms as intermediaries posting workers of diverse national origins.

Over recent years, the share of posted workers originating from the EU-27 has gradually declined, falling from 74% of all postings in 2019 to 63% in 2024. This steady decrease is largely driven by the contraction in postings from some of the main traditional sending countries. In particular, the number of Portuguese posted workers declined markedly over the period, from 9 513 in 2019 to 6 112 in 2024, reducing their share from 13.2% to around 9% of total postings. Similar, though more moderate, declines are observed for Romania and Poland, whose respective shares decreased by 1.1 and 1.6 percentage points. Postings from the United Kingdom have also fallen sharply, with the number of workers nearly halved since 2019, leading to a reduction of almost three percentage points in their overall share, despite their relatively modest initial weight.

By contrast, the relative importance of several major non-EU partner countries has increased significantly. Brazilian nationals now account for 4.7% of all postings to France, with their numbers multiplying more than fourfold over the period. An even stronger relative increase is observed for Chinese nationals, whose numbers have grown sixfold, raising their share from 0.3% in 2019 to 1.7% in 2024. These developments illustrate the growing diversification of origins in posted work and the increasing role of third-country nationals.

At the same time, the relationship between the nationality of posted workers and the country of establishment of posting firms does not always display a direct correspondence. For example, while Chinese nationals represent 1.7% of posted workers, Chinese-established companies account for a comparable 1.5% share of posting firms. By contrast, Brazilian nationals represent a much larger share of posted workers than Brazilian-established firms, whose presence in posting remains below 0.15%. This asymmetry reflects the complexity of posting chains and the role of intermediary Member States in organising cross-border labour mobility.

These patterns indicate that posting to France increasingly relies on multi-layered configurations, where the country of establishment of the employer and the nationality of workers are no longer closely aligned. This trend reflects the growing complexity of posting chains and underlines the role of posting as a mechanism connecting intra-EU mobility with broader international migration dynamics.

These configurations reflect a combination of sectoral specializations, historical or linguistic ties (e.g., Portugal–Brazil), and institutional opportunities. They help explain why certain EU Member States now stand at the heart of posting networks to France.

4. Sectoral Distribution of Posting Assignments

4.1 Distribution by Major Sector (Agriculture, Construction, Industry, Services)

Over the period 2021–2024, the sectoral distribution of posted work in France shows both strong structural constants and marginal yet meaningful evolutions that shed light on ongoing economic dynamics. The analysis relies on two types of tables: the distribution of assignments across the main sectors of activity (agriculture, construction, industry, and services) and the breakdown of this distribution by posting model (M1, M2, M3). These data are essential to understanding how firms use posting within their organizational and production strategies. Consistent with Muñoz (2022), Auvray et al. (2024), and Bermany and Lemoine (2025), construction remains the main driver of posting, but our data reveal a gradual diversification since 2021, with services accounting for an increasing share of assignments and temporary agency work remaining dominant in agriculture.

Table 7 Sectoral Distribution of Posting Missions by Legal Model (in \%)

	M1	M2	M3
Agriculture	17.96	0.61	81.42
Construction	64.42	9.95	25.63
Industrie	75.31	13.28	11.4
Services	80.79	9.31	9.91

Source: DGT – SIPSI (2025).
Note: The table presents the percentage distribution of posting missions by sector and legal model (M1–M3). Each value represents the share of a given model within the total missions of that sector.

At the aggregated level, construction clearly dominates, accounting for 40% of total posted employment (26942 workers), followed by industry (31%, 20 612 workers), services (22%, 14 601 workers), and agriculture (7%, 4 956 workers). This distribution confirms the central role of construction as the main sector of effective posted employment in France, while also highlighting the significant contribution of industry and services.

A more detailed breakdown reveals strong intra-sectoral concentration patterns. In agriculture, posted employment is overwhelmingly concentrated in crop and animal production and related activities, which represent 93% of agricultural posted workers, while forestry, fishing and aquaculture account for only a marginal share. In services, posting is primarily concentrated in scientific, technical, administrative and support activities (36%) and in a residual category of other services (40%), pointing to a strong presence of subcontracted and support functions. More traditional service activities such as trade, hospitality, transport, or information and communication each account for relatively limited shares.

Within industry, posted employment is heavily concentrated in manufacturing activities, particularly in the fabrication of other industrial products (48%), followed by transport equipment manufacturing and energy and extractive industries, each representing around one fifth of industrial posted employment. This profile reflects the use of posted labour in capital-intensive and project-based industrial activities, often linked to maintenance, assembly, or specialised production tasks.

Finally, the construction sector displays the most pronounced internal concentration. Specialised construction activities alone account for 62% of posted employment in construction, far ahead of building construction (32%) and civil engineering (7%). This configuration underlines the structural importance of posting in highly fragmented subcontracting chains, where specialised firms provide short-term or project-specific labour on construction sites.

4.2 Average duration of posting assignments by sector (2019–2024)

Table 8 Average duration of posting assignments by sector (2019–2024)

	2019	2020	2021	2022	2023	2024
Services	72	75	68	60	61	60
Industry	100	88	84	83	87	84
Agriculture	104	108	105	113	108	107
Construction	127	119	124	121	124	125
Multiactivity	143	153	141	150	159	155
Total	**102**	**100**	**98**	**92**	**94**	**92**

Source: DGT-Dares, Sipsi ; Dares Calculus.

Posting durations vary substantially across sectors, reflecting differences in production processes, labour needs and organisational arrangements. Over the 2019–2024 period, sectoral patterns remain highly structured, with a clear hierarchy in assignment length that persists despite cyclical fluctuations linked to the COVID-19 crisis and the subsequent recovery.

In the services sector, posting assignments are consistently short. Median durations remain low throughout the period and declined further after 2021, reaching 18 days in 2024. The first quartile is particularly low, indicating a high concentration of very short missions. This pattern reflects the prevalence of task-based or punctual service provision, such as maintenance, cleaning, logistics or business services, where posting is primarily used to meet short-term operational needs.

Industrial postings exhibit intermediate durations. Median assignment lengths are systematically higher than in services but lower than in construction or agriculture. Over time, both average and median durations have gradually declined, with the median falling to 33 days in 2024. This evolution suggests a progressive fragmentation of industrial postings, possibly linked to changes in subcontracting practices and project organisation.

The agricultural sector is characterised by longer posting assignments and strong seasonal effects. Median durations remain high across all years and, despite some fluctuation, continue to exceed those observed in services and industry. In 2024, the median duration stood at 88 days. This reflects the use of posted labour to cover sustained seasonal labour needs, often over several consecutive months.

Construction displays some of the longest posting durations among single-activity sectors. Median durations remain close to three months throughout the period, and the upper quartiles are particularly high, indicating the presence of long assignments associated with large-scale projects and extended subcontracting chains. In 2024, the median duration remained close to 90 days, with a third quartile approaching 200 days, confirming the structural reliance on longer postings in this sector.

Finally, multi-activity postings consistently show the longest and most dispersed durations. Median and upper-quartile values are markedly higher than in all other sectors, reflecting complex posting trajectories that span several activities or contracts. In 2024, the median duration exceeded 120 days, while the third quartile reached 255 days. This sector thus contributes disproportionately to the upper tail of the duration distribution.

4.3 Number of days per sector

The evolution of the total number of posting days provides a complementary perspective on the intensity of posting across sectors, combining both volumes of workers and assignment durations. At the aggregate level, the total number of days falls sharply from 25.6 million in 2019 to 18.7 million in 2020, reflecting the immediate impact of the COVID-19 crisis on cross-border mobility. This is followed by a gradual recovery to 23.5 million in 2024.

Table 9 Number of days per sector (2019 - 2024)

	2019	2020	2021	2022	2023	2024
Services	4.6	3.4	3.0	3.7	4.3	4.8
Industry	7.9	4.9	5.1	5.4	6.5	6.7
Agriculture	1.9	1.4	1.3	1.5	1.5	1.5
Construction	7.8	7.8	8.4	8.1	8.8	8.8
Multiactivity	2.4	1.0	1.1	1.1	1.4	1.5
Total	**25.2**	**18.7**	**18.9**	**20.0**	**22.4**	**23.4**

Source: DGT-Dares, Sipsi ; Dares Calculus.

The 2023–2024 period nonetheless differs from the pre-crisis configuration in its sectoral composition. In construction, which consistently accounts for the largest share of total days, the volume of days continued to increase in 2024, consolidating its central role despite broadly stable average durations. Industry also contributed significantly to the rise in total days between 2023 and 2024, reflecting both higher employment levels and sustained, though moderate, assignment lengths. By contrast, agriculture shows a slight decline in total days in 2024 after peaking in earlier years, suggesting a stabilisation or partial reallocation of seasonal posting patterns. Services stand out for their strong contribution to the increase in total days over the last two years, driven primarily by the sharp rise in the number of posted workers rather than by longer assignments.

Comparing sectoral headcounts with the total number of posting days reveals important contrasts in the way posted labour is actually used across sectors. In some sectors, relatively large numbers of posted workers generate a limited volume of posting days, resulting in shorter average durations, while in others smaller workforces account for a disproportionate share of total days, reflecting longer or more continuous assignments.

This contrast is particularly visible in services, which combine high headcounts with comparatively lower total posting days. In 2024, services account for 81,195 posted workers, almost as many as industry, but only 4.8 million posting days, substantially fewer than construction (8.8 million). As a result, average durations in services remain low (60 days) compared to the COVID period (75 days in 2020). This pattern indicates that posting in services is primarily used for short, task-specific assignments, with frequent turnover and limited continuity.

With 70,815 workers and 8.1 million posting days in 2024, construction combines large volumes with long durations, resulting in consistently high average lengths (around 120–125 days) over the last three years. This reflects the project-based nature of construction activity and the prevalence of extended worksites requiring sustained labour input.

This comparison shows that headcounts alone are insufficient to assess the effective presence of posted workers on the labour market. Sectors with many posted workers may exert limited pressure on local labour markets if assignments are short, while sectors with fewer workers but longer durations may have a stronger structural impact. By jointly analysing effectives, total posting days, and average durations, it becomes possible to distinguish between sectors characterised by intensive turnover (services), sustained labour presence (construction), fragmented specialised interventions (industry), and long-term atypical postings (multiactivity). This distinction is essential for understanding sectoral exposure to posting, assessing labour market impacts, and designing targeted enforcement and policy responses.

4.4 Impact on sectoral labour market

Table 10 Recourse rate per sector

	2019	2020	2021	2022	2023	2024
Services	0.1	0.1	0.1	0.1	0.1	0.1
Industry	0.7	0.6	0.5	0.5	0.6	0.6
Agriculture	2.2	1.4	1.5	1.4	1.5	1.5
Construction	1.5	1.5	1.5	1.4	1.6	1.7
Total	**0,4**	**0,3**	**0,3**	**0,3**	**0,4**	**0,4**

Source: DGT-Dares, Sipsi ; Dares Calculus.

Although the recourse to posted work remains limited in relative terms—around 0.4% of total employment—it has increased steadily since 2020 and is gradually returning to its pre-crisis level observed in 2019. Nevertheless, it remains highly differentiated across sectors. Construction records the highest rate of recourse, with posted workers representing 1.7% of total employment, confirming the structural role of posting in a sector characterised by subcontracting, project-based activity and short-term labour needs. Agriculture follows closely, with a rate of 1.5%, reflecting strong seasonal labour demand and recurrent use of cross-border temporary and posted labour. In industry, the rate of recourse is more moderate (0.6%), indicating a selective but non-negligible use of posting, often associated with specialised skills or maintenance activities. By contrast, services display a very low rate (0.1%), highlighting that posted labour remains marginal in this sector at the national level. Overall, these figures show that the impact of posted work on the French labour market is concentrated in a limited number of sectors, with construction and agriculture accounting for the bulk of its effective presence.

These results demonstrate that posting is not a homogeneous phenomenon but one that adapts closely to sectoral constraints. Agriculture (seasonal and "low-skilled") relies primarily on temporary agency work, while services and industry use more structured inter-firm posting arrangements, often of a more durable nature. The growth of posting in services, particularly between 2022 and 2024, may signal the rise of high value-added activities or new organizational forms (European freelancers, cross-border umbrella employment, etc.). The use of posting of workers in agriculture, albeit relatively limited when compared with other sectors such as construction, remains a French specificity. Hovering just below 10% of incoming posting, it marks an important deviation when compared to data at EU level, which indicate that only around 1% of postings happen in this sector (De Wispelaere, De Smedt, and Pacolet, 2022).

The persistence of temporary agency work in socially vulnerable sectors (such as agriculture) suggests the need for stronger oversight, notably following recent legal decisions concerning cases of exploitation of posted workers in the sector (Hellio and Mésini, 2022). Finally, the variation by model and sector suggests that public policies should be differentiated according to productive configurations rather than based on a uniform approach to posting.

4.5 Cross-analysis: Sector × Country of Residence

The cross-analysis between country of residence and sector of activity provides insight into the sectoral allocation of posting assignments by sending country. The analysis is based on the number of posting missions declared in SIPSI. It therefore reflects the structure of posting flows to France rather than average posted employment or the number of distinct posted workers.

A differentiated pattern of sectoral orientation emerges among the main sending Member States. Spain displays a particularly strong concentration in agricultural assignments. In 2021, 46.3% of all posting missions originating from Spain were recorded in agriculture. Conversely, Spain accounted for nearly four out of five agricultural posting missions declared in France that year. This share increased further in 2023, reaching more than 79% of agricultural missions.

Among the principal sending countries to France (Poland, Portugal, Germany, Belgium, Spain, Italy and Romania), Spain therefore represents by far the largest origin country in terms of the number of agricultural posting assignments. In other words, within the core group of major EU sending Member States, Spain constitutes the primary source of agricultural posting flows to France when measured by declared missions. Portugal exhibits a similarly marked sectoral orientation, though in construction. In 2021, 69.8% of Portuguese posting missions were directed toward construction activities, and Portugal accounted for 31.6% of all construction-related missions declared in France. This pattern remained broadly stable through 2023, reflecting the persistence of well-established subcontracting linkages between Portuguese firms and the French construction sector.

Other countries display more diversified profiles. Germany combines a strong presence in services and industry, with services representing around half of its posting missions in recent years. Italy remains consistently anchored in industrial assignments. Romania and Poland primarily direct their posting missions toward construction, although Romania shows signs of gradual diversification toward industry over time.
Overall, this cross-sector perspective highlights differentiated configurations of posting flows across Member States. As the analysis relies on the number of declared missions, the results should be interpreted as describing the sectoral structure of posting assignments rather than the distribution of posted employment stocks.

Table 11 Cross-Distribution of Posting Missions by Country of Residence and Sector (2023, in \%)

	By Country (share within each country)					By Sector (share within each country)				
Country	Agriculture	Construction	Industry	Services	Total	Agriculture	Construction	Industry	Services	Total
BE	3.75	37.24	19.22	39.79	100.00	3.84	10.31	8.13	19.05	11.06
DE	0.60	12.37	37.11	49.92	100.00	0.71	3.95	18.11	27.59	12.77
ES	50.73	17.85	16.90	14.51	100.00	79.57	7.56	10.94	10.63	16.93
FR	1.05	40.36	27.02	31.57	100.00	1.01	10.51	10.75	14.21	10.40
IT	0.50	29.46	44.63	25.41	100.00	0.45	7.15	16.55	10.67	9.70
PL	5.95	55.18	24.50	14.38	100.00	7.05	17.64	11.96	7.95	12.78
PT	1.06	70.55	21.61	6.77	100.00	1.94	34.74	16.25	5.77	19.67
RO	8.75	48.44	28.53	14.28	100.00	5.43	8.12	7.31	4.14	6.70
Total	10.79	39.95	26.16	23.10	100.00	100.00	100.00	100.00	100.00	100.00

Source: DGT – SIPSI (2025).
Note: The left panel shows the distribution of posting missions by sector within each country of residence (row percentages). The right panel presents the contribution of each country to the total number of postings by sector (column percentages).

5. Territorialization of Posting in France: A Differentiated Geography

5.1 Regional Distribution of Posted workers: levels and sectoral composition

In 2024, the geographical distribution of posted workers in France reveals a strong concentration in a limited number of regions, combined with marked sectoral specialisation at the regional level. At the aggregate level, five regions concentrate a substantial share of total posted employment: Île-de-France (11,180), Provence–Alpes–Côte d'Azur (9,349), Auvergne–Rhône-Alpes (7,209), Pays de la Loire (8,571) and Grand Est (6,765). Together, these regions account for a large proportion of the 67,111 posted workers recorded nationwide, reflecting their economic weight, the intensity of construction activity, and, in some cases, strong seasonal agricultural demand. By contrast, regions such as Corsica, Centre–Val de Loire, Brittany and Bourgogne–Franche-Comté display much lower absolute numbers, despite sometimes high sectoral rates of recourse.

A closer look at the sectoral composition of posted employment by region highlights pronounced territorial specialisation. Construction dominates posted employment in most regions, particularly in Corsica, where it accounts for the vast majority of posted workers (392 out of 531), and in Provence–Alpes–Côte d'Azur and Île-de-France, each recording more than 4,000 posted workers in construction alone. This reflects the concentration of large infrastructure projects, housing construction, and specialised construction activities in these territories. Industry plays a major role in regions with a strong manufacturing base, notably Pays de la Loire, Grand Est, Hauts-de-France and Normandie, where industrial posted employment reaches levels comparable to or exceeding those observed in services.

Agriculture, while representing a relatively small share of posted employment at the national level, is highly concentrated geographically. It plays a central role in Provence–Alpes–Côte d'Azur (1,722 workers), Occitanie (650), Nouvelle-Aquitaine (613) and Auvergne–Rhône-Alpes (520), confirming the importance of seasonal agricultural posting in southern regions. In these areas, agriculture accounts for a sizeable fraction of total posted employment, even when overall regional volumes are moderate. By contrast, agricultural posting remains marginal in regions such as Île-de-France, Normandie and Brittany.

Finally, services contribute more evenly across regions but rarely dominate the regional structure of posted employment. They play a secondary role in most territories, with higher absolute levels in economically dense regions such as Île-de-France, Auvergne–Rhône-Alpes and Pays de la Loire, reflecting demand for support, logistics and specialised service activities linked to construction and industrial projects.

5.2 Regional and sectoral patterns in the recourse to posted workers in 2024

In 2024, the overall rate of recourse to posted workers in France remains low, at 0.4% of total employment, confirming that posting represents a marginal form of employment at the national level. However, this aggregate figure conceals substantial regional and sectoral heterogeneity, with marked differences in both the intensity and the structure of posting across territories.

At the regional level, the overall rate of recourse ranges from 0.2% in Île-de-France, Brittany and Centre–Val de Loire to 0.7% in Corsica, with several regions displaying rates above the national average, such as Provence–Alpes–Côte d'Azur (0.7%), Pays de la Loire (0.8%) and Grand Est (0.5%). These disparities indicate that the intensity of posting is not primarily driven by the size of regional labour markets, but rather by sectoral composition and local productive structures.

Across all regions, construction emerges as the main driver of high rates of recourse. In 2023, construction-specific rates reach particularly elevated levels in Corsica (3.3% in 2024 – 4.3% in 2023), Provence–Alpes–Côte d'Azur (3.6%), Pays de la Loire (3.2%), Grand Est and Hauts-de-France (2.2%). These figures are consistently and significantly higher than those observed in other sectors, reflecting the central role of posting in construction activities characterised by subcontracting chains, project-based production and specialised tasks.

Agriculture displays the strongest territorial contrasts. While the national rate stands at 1.5%, several regions record exceptionally high values, notably Provence–Alpes–Côte d'Azur (7.2%), Occitanie (2.0%), Auvergne–Rhône-Alpes (1.9%). In these regions, the high rate of recourse reflects the combination of seasonal labour demand and structural reliance on posted and temporary workers. By contrast, agricultural posting is almost non-existent in regions such as Île-de-France or Normandie, highlighting the strong link between posting intensity and regional specialisation.

In industry, rates of recourse remain more moderate, generally ranging between 0.3% and 1.2%, with higher values observed in regions with a strong industrial base, such as Pays de la Loire, Provence–Alpes–Côte d'Azur and Grand Est. Services, by contrast, display uniformly low rates of recourse across all regions (around 0.1–0.2%), including in economically dense regions such as Île-de-France, confirming that posting plays only a marginal role in the adjustment of labour demand in this sector.

A key insight from these data is the structural mismatch between rates of recourse and absolute numbers of posted workers. Regions with very high volumes of posted employment, such as Île-de-France, may exhibit low rates of recourse due to the size and diversification of their labour markets, while regions with relatively small numbers of posted workers, such as Corsica, can display very high rates due to strong sectoral dependence. This distinction highlights that rates of recourse measure the relative intensity of posting, rather than its quantitative impact in terms of headcounts.

Overall, the 2024 data underline that the use of posted workers in France is highly concentrated in specific regions and sectors, primarily construction and agriculture, and closely linked to local production structures. These patterns suggest that the labour market impact of posting, as well as the relevance of enforcement and monitoring policies, must be assessed through a territorially and sectoral differentiated approach, rather than on the basis of national averages alone.

5.3 Evolution in the post-Covid period – 2020 to 2024

Table 12 Evolution in recourse and posted workers by regions and sectors (2020-2024)

	Recourse - Δ 2020-2024 (in pp)					**Posted workers - %Δ 2020-2024**				
	Total	**Agriculture**	**Construction**	**Industry**	**Services**	**Total**	**Agriculture**	**Construction**	**Industry**	**Services**
Overseas territories	0.01	0.01	0.18	-0.09	0.01	20%		55%		37%
Île-de-France	0.03	1.19	-0.09	0.08	0.04	19%	191%	-6%	14%	73%
Centre - Val de Loire	0.03	-0.22	0.23	0.05	0.01	17%	-37%	31%	14%	18%
Bourgogne - Franche-Comté	0.21	1.51	0.74	0.15	0.09	118%	270%	115%	49%	224%
Normandie	0.05	0.00	0.61	-0.04	0.01	20%	6%	65%	-11%	30%
Hauts-de-France	0.13	0.15	0.48	0.39	0.02	35%	27%	26%	54%	20%
Grand Est	0.07	0.37	0.22	0.17	0.02	16%	151%	6%	19%	19%
Pays de la Loire	0.21	0.42	1.05	0.09	0.18	41%	72%	46%	5%	192%
Bretagne	0.09	0.02	0.15	0.28	0.03	66%	16%	27%	101%	78%
Nouvelle-Aquitaine	0.07	0.33	0.11	0.20	0.03	35%	43%	7%	66%	66%
Occitanie	0.00	-0.24	0.16	0.03	0.00	8%	-4%	12%	12%	9%
Auvergne - Rhône-Alpes	-0.08	0.40	-0.12	0.01	-0.10	-17%	40%	-11%	3%	-44%
Provence - Alpes - Côte d'Azur	0.03	-1.85	0.28	0.42	0.02	10%	-18%	4%	66%	27%
Corse	-0.10	0.25	-0.73	-0.16	0.08	-6%		-18%		117%
Total	0.05	0.11	0.19	0.13	0.02	19%	15%	10%	24%	31%

Source: DGT-Dares, Sipsi (2025), Dares Calculus

The table highlights an overall increase in the recourse to posted work between 2020 and 2024, accompanied by pronounced regional and sectoral disparities. At the national level, the recourse rate increased by 0.047 percentage points, alongside a 19% rise in the number of posted workers, confirming a gradual but uneven recovery following the COVID-19 crisis.

5.3.1 Contrasted regional dynamics in recourse rates

Most regions experienced an increase in the recourse rate, in some cases substantial. The strongest rises are observed in Bourgogne–Franche-Comté and Pays de la Loire, where the increase is largely driven by the construction sector, and to a lesser extent by agriculture and services. Hauts-de-France, Grand Est and Brittany also show significant increases, with relatively balanced sectoral contributions, pointing to a broader diffusion of posted work across regional economies.

By contrast, a small number of regions display stagnation or even a decline in the overall recourse rate. This is notably the case in Auvergne–Rhône-Alpes and Corsica, where the decrease reflects a contraction in construction and services, despite heterogeneous sectoral developments.

5.3.2 The central role of construction and sectoral heterogeneity

Construction emerges as the main driver of the increase in recourse rates in many regions (Normandy, Hauts-de-France, Pays de la Loire, Bourgogne–Franche-Comté), with gains well above those observed in industry or services. Industry contributes more moderately but relatively consistently to the rise in recourse rates in several regions (Brittany, Provence–Alpes–Côte d'Azur, Hauts-de-France).

Agriculture displays more contrasted dynamics. Some regions record strong increases in both recourse rates and employment levels (Île-de-France, Grand Est, Bourgogne–Franche-Comté), while others experience declines, reflecting differentiated adjustments in seasonal labour needs and recruitment practices.

5.3.3 Employment growth sometimes outpacing recourse rates

In several regions, growth in the number of posted workers exceeds the increase in recourse rates, suggesting that the expansion of posted work has been driven more by rising volumes of posted workers than by a broad-based transformation of regional employment structures. This pattern is particularly visible in Bourgogne–Franche-Comté, Pays de la Loire and Brittany, where employment growth is strong across multiple sectors.

Conversely, some regions show only moderate increases in recourse rates but substantial growth in posted employment in services (Île-de-France, Nouvelle-Aquitaine), pointing to an expansion of posted work in labour-intensive sectors characterised by shorter assignments.

The analysis allows for a clear mapping of the geographical distribution of posting declarations in France for the year 2021. The resulting frequency table, ranking regions by number of declarations, highlights a strong concentration of the phenomenon in a few major industrial and border regions. The territorial pattern described by Muñoz (2022), highlighting a strong concentration of postings in border and industrial regions, persists in 2021–2023, though our data suggest a modest westward diffusion towards Atlantic regions such as Nouvelle-Aquitaine and Pays de la Loire.

In 2021, the Grand Est region led with 112,743 declarations, representing 17.25% of the national total. Several factors explain this: its border location with Germany, Belgium, and Luxembourg; its dense industrial fabric; and a longstanding tradition of cross-border and posted labour. The Grand Est region was followed by Provence-Alpes-Côte d'Azur with 88,915 declarations (13.61%) and Auvergne-Rhône-Alpes with 86,956 (13.31%). Both regions also benefit from strong productive structures, particularly in construction and agri-food industries, and serve as major hubs for hosting foreign posted workers.

Île-de-France, with 73,583 declarations (11.26%), confirmed its central role as a service hub, notably linked to corporate headquarters, security, temporary work, and cleaning companies. It was followed by Hauts-de-France (11.17%), Nouvelle-Aquitaine, and Pays de la Loire, each accounting for around 7.4% of declarations.

This ranking illustrates a high regional concentration of posting, with the top five regions accounting for more than 65% of total missions. Such concentration largely reflects regional economic specializations but also geographical proximity to the main countries of origin of posted workers (Belgium, Germany, Luxembourg, Spain, Italy, etc.).

In contrast, regions such as Corsica (0.95%) or the Overseas Territories (0.23%) show marginal activity. This can be explained by both economic factors (low industrial or construction activity) and logistical constraints (insularity, remoteness from transnational labour markets).

The significance of this analysis is twofold. First, it helps identify priority monitoring zones for labour inspection authorities. Areas with a high density of postings may face greater risks of rule circumvention or degraded working conditions. Second, this distribution sheds light on the territorial embeddedness of the phenomenon: far from being uniform, posted work is embedded in local dynamics linked to sectoral needs and specific economic circuits.

Overall, this regional frequency analysis provides insight into the territories most affected by posting and calls for differentiated public policies that combine business support, worker protection, and cross-border coordination. It also highlights the importance of combining this geographical perspective with sectoral and temporal data to fully understand the dynamics of posted work in France.

5.4 Regional Distribution of Posted Workers by Origin

Cross-analysis between the administrative host region and the country of residence of posted workers reveals a complex geography of posting, shaped both by regional specializations and by highly differentiated transnational patterns depending on the sending countries.

Several regions showed strong specialization in hosting workers from particular countries. In Auvergne-Rhône-Alpes, over 36% of posted workers came from Poland, 23% from Portugal, and nearly 11% from Italy. This concentration of Polish workers likely reflects the importance of subcontracting in construction and manufacturing, as well as specialized intermediary networks. In Bourgogne-Franche-Comté, 32% of posted workers came from Spain, 20% from Portugal, and 11% from Germany, suggesting a more fragmented configuration, possibly tied to industrial and agricultural activities involving Iberian and German firms.

In Bretagne, the profile was similar but more balanced: 23% of posted workers were Polish, 19% Portuguese, 17% Spanish, and 11% German, illustrating the coexistence of several posting circuits even in a relatively peripheral region. In Corsica, concentration was extreme: 37% of posted workers were Portuguese, 9% Italian, and the remainder highly dispersed, likely reflecting seasonal needs in agriculture and construction, often managed by a handful of temporary work agencies.

Table 13 Regional distribution of Posted Workers by origin (in %)

Region (host)	Poland	Portugal	Spain	Germany	Italy	Belgium	Oth.EU
Auvergne–Rhône–Alpes	36.2	23.0	6.8	5.4	10.7	3.1	14.8
Bourgogne–Franche–Comté	9.4	20.1	32.4	11.2	5.3	4.7	17.0
Bretagne	23.1	19.2	17.0	10.8	7.4	3.2	19.3
Grand Est	15.7	8.9	4.3	32.1	7.1	18.9	13.0
Hauts-de-France	6.5	9.3	4.1	10.4	3.8	50.3	15.6
Île-de-France	8.4	14.2	11.3	9.6	8.9	10.7	36.9
Normandie	11.2	15.7	10.6	12.3	6.5	9.4	34.3
Nouvelle–Aquitaine	7.8	28.6	36.2	6.4	4.3	3.1	13.6
Occitanie	5.9	24.1	38.1	5.7	3.9	2.8	19.5
Prov.–Alpes–Côte d'Azur	3.2	22.6	14.3	5.8	36.4	3.1	14.6
Pays de la Loire	14.9	31.2	11.4	8.7	6.0	4.5	23.3
Centre–Val de Loire	12.3	26.7	9.2	7.1	5.3	6.9	32.5
France (Total)	13.8	18.6	15.3	12.4	8.1	8.8	23.0

Source: DGT – SIPSI, CASD (2025).
Note: The table shows the distribution of posted workers by country of residence for each host region in France (2023). Percentages represent the share of declarations with status "TRANSMIS". Figures are rounded to one decimal and reconstructed from administrative log data; "Other EU" includes postings from smaller sending countries (e.g., Romania, Hungary, Czech Republic, Slovakia, Bulgaria).

The Grand Est region stands out as a particularly distinctive case. It hosts 39% of German posted workers, 25% of posted workers of French nationality, and a significant number of Belgians and Poles. This border region exemplifies the regionalization of the posting market, where labour markets extend across national borders. Conversely, Hauts-de-France hosts a majority of Belgian posted workers (over 50%), illustrating long-standing traditions of cross-border commuting.

Other regions, such as Nouvelle-Aquitaine (36% Spanish, 29% Portuguese), Occitanie (38% Spanish, 24% Portuguese), and Île-de-France (balanced distribution among Italy, Portugal, Germany, and France), reflect configurations linked to local demand for labour in construction, services, and temporary work.

The insights provided by this approach are twofold. First, it helps identify region-specific professional migration circuits, directly linked to local economic structures. Second, it highlights intermediary networks and transnational agency practices, often operating between a small number of origin countries. These findings suggest that posted work functions not as a single unified market but as an archipelago of regional transnational labour markets, each structured by its own combination of supply (labour reservoirs) and demand (local production needs).

This also underscores the need for territorially grounded governance of posted work, built on detailed knowledge of regional practices. It also calls for enhanced cross-border cooperation, particularly in regions with dense bilateral flows (France–Belgium, France–Germany, France–Spain), to safeguard workers' rights and improve transparency within subcontracting chains.

6. Gender and Posted Work

Table 14 Gender Distribution of Posted Workers by Sector (in 2023)

Gender	Agriculture	Construction	Industry	Services	Total
Men	4 138	26 518	19 369	12 512	62 536
Women	818	424	1 244	2 088	4 575
Total	4 956	26 942	20 612	14 601	67 111

Source: DGT-Dares, SIPSI ; Dares calculus

The analysis of 2024 data reveal a strong gender asymmetry among posted workers in France. Across all declared assignments, more than 93% concern men, compared with less than 8% for women. This underrepresentation is evident across all cross-tabulated datasets, whether by sector or by country of residence, and reflects a gendered segmentation of the posted labour market, rooted in occupational specialization and likely reinforced by targeted recruitment practices. Recent Dares statistics (2025) confirm that posted work remains highly male-dominated (93 % men) and increasingly diversified in terms of origin, with EU nationals accounting for 66 % of posted employees in 2023, four percentage points less than in 2022.

By sector, disparities are particularly pronounced. Breaking down postings by gender and sector, women represent only 2% of posted workers in construction, 6% in industry, 14% in services, and 17% in agriculture. These figures confirm that posting remains a heavily male-dominated practice, especially in traditionally masculine sectors such as construction and manufacturing. The relatively higher share of women in services and agriculture can be explained by the types of jobs offered (cleaning, care, domestic assistance, harvesting), yet women still account for less than 20% of postings in these sectors.

Between 2020 and 2024, the share of women among posted workers remains largely stable and strongly differentiated across sectors. Agriculture and industry show little change over the period, with female shares fluctuating only marginally around their initial levels. Construction continues to be overwhelmingly male dominated, with only a very slight increase in the share of women by 2024. By contrast, services display the most visible adjustment, with a sharp decline in the female share after 2020 followed by a partial recovery, although the 2024 level remains below that observed at the start of the period. Overall, these developments point to persistent sectoral segmentation in the gender composition of posted work, with no evidence of a broad-based feminisation between 2020 and 2024.

Table 15 Gender Distribution of Posted Workers by Country of Residence (in %)

Gender	BE	DE	ES	FR	IT	PL	PT	RO
Men	87.35	93.42	90.28	92.91	94.33	97.17	98.85	94.92
Women	12.65	6.58	9.72	7.09	5.67	2.83	1.15	5.08
Total	100%	100%	100%	100%	100%	100%	100%	100%

Source: DGT – SIPSI (2025).
Note: The table shows the gender composition of posted workers by country of residence (2023). Percentages are based on declarations with status "TRANSMIS" and are rounded to two decimals.

Cross-tabulating gender with country of residence, reinforces this finding. In all countries, men constitute the overwhelming majority of posted workers to France. The highest women shares are observed among workers posted from Belgium (12%) and Romania (5%) but remain below 10% among those posted from Spain (9%), Italy (5%), Portugal (1%), and Poland (2%). These differences reflect both sectoral structures in the countries of origin and the nature of posting firms: in industrial configurations (Germany, Poland, Portugal), postings concern almost exclusively men.

These results can also be interpreted in light of task segmentation: women are largely absent from long, physically demanding, or technical postings (construction, heavy industry) and are confined to more precarious or invisible segments of posting, particularly in personal services or seasonal agricultural work. This highlights a possible double vulnerability for women posted workers: first, their very limited numbers make them statistically invisible in aggregate analyses; second, their concentration in specific roles increases exposure to isolation, precariousness, and under-protection.

These findings call for several important considerations for statistical monitoring and policymaking. It is crucial to develop more detailed gender-disaggregated indicators to identify the specific configurations of women posting, better understand women's trajectories, and detect potential situations of vulnerability or exploitation. Labour inspection services and information systems should also integrate a gender perspective in the analysis of posting practices, ensuring equal access to information, occupational health, and social protection.

In summary, posted work in France remains overwhelmingly male-dominated across all sectors and countries of origin. While women presence is slightly higher in services and agriculture, it remains marginal. This reality justifies a differentiated and inclusive approach, both analytically and regulatory, to ensure that the few women affected by posting are neither invisible nor forgotten

The distribution of women posted workers across sectors and countries of residence reveals that women remain a small minority within the overall posting system, at least when it comes to posting to France, yet their presence is far from uniform. In most cases, their participation reflects the structure of national labour markets and the gendered segmentation of industrial sectors.

Table 16 Sectoral Distribution of Female Posted Workers by Country of Residence (2023, in %)

Sector	BE	DE	ES	FR	IT	PL	PT	RO	Total
Agriculture	0.2	0.1	5.9	0.1	0.0	1.2	0.1	0.6	8.21
Construction	3.0	1.9	3.4	3.5	3.9	5.1	9.4	3.1	33.40
Industry	2.2	7.7	4.0	1.9	7.1	3.5	4.2	2.2	32.90
Services	4.4	7.5	2.4	2.2	3.9	2.6	1.2	1.3	25.49
Weight (share)	9.8	17.2	15.7	7.7	15.0	12.5	15.0	7.2	100.0

Source: DGT – SIPSI, CASD (2025).

Note: The table shows the distribution of female posted workers by sector and country of residence in 2023. Percentages represent the share of each sector within the country's total postings. The last row indicates the relative contribution of each country to the total number of postings in France.

The most significant concentrations of women occur in specific country–sector combinations. The clearest outlier is Portugal in construction, where women represent 9.4% of all women posted workers in this sector, an exceptionally high figure given the traditionally male dominance of construction activities. Germany also stands out with a markedly diversified pattern. In industry, 7.7% of German posted workers are women, and in services, 7.5%. These figures are substantially higher than the European average and suggest that German postings to France mobilize a broader range of professional profiles, often in qualified or technical occupations such as logistics, maintenance, or engineering support. This dual concentration confirms Germany's tendency to export skilled labour within both manufacturing and service-oriented activities.

A similar, though less pronounced, trend can be observed for Italy, where women account for 7.1% of postings in industry. This reflects the involvement of Italian women in industrial value chains requiring intermediate skills, particularly in manufacturing and precision work.

By contrast, Spain shows a more traditional pattern: the only sector where women reach notable levels is agriculture (5.9%), consistent with the strong seasonal and rural component of Spanish postings to France. Other countries, such as Belgium, Poland, and Romania, display very limited women participation, generally below 4% in all sectors.

Overall, these data confirm that the presence of women in posted work is highly concentrated in a few national and sectoral niches. Postings of women workers remain most visible in Germany's industrial and service activities, in Portugal's construction sector, and in Spain's agricultural work. These configurations illustrate the persistence of gendered divisions of labour within European mobility systems, where women's access to transnational employment remains circumscribed to specific and often secondary segments of the posting economy.

These figures provide additional insight into the gender distribution of posted work, offering a more nuanced understanding of the sectoral and geographical segments where women's participation, although still limited, is most visible.

This highlights significant gender differences depending on the country–sector configuration. Several cases merit particular attention.
Construction remains the most male-dominated sector: women represent less than 0.3% of posted workers across all countries, and 0.0% for Romania, Poland, and Spain. This confirms that the construction sector remains structurally closed to posted women workers regardless of origin.

By contrast, Spanish agriculture stands out with 5.91% of women posted workers, a notably high rate. French agriculture also records a relatively elevated share of 3.66%, significantly above most other countries. This suggests that certain agricultural sub-sectors (harvesting of delicate produce, packing, or food preparation) rely more frequently on women's labour.

The most notable case (highlighted in the table) is Germany, which presents an atypical and instructive profile. In industry, 3.47% of German posted workers are women, a figure much higher than for other countries in this sector. In services, Germany again shows a high rate (5.96%), well above the average. This indicates that German postings to France mobilize a more diversified labour force, likely in qualified or technical roles (logistics, maintenance, engineering) where women are better represented.

Belgium also shows a relatively high share of women posted workers in services (5.98%), which may reflect a more balanced cross-border posting structure involving administrative, care, or cleaning roles, occupations more often held by women.

7. Temporary work agencies

7.1 Definitions and economic activity of TWAs

According to French legislation, a temporary work company is any natural or legal person whose sole activity is to make employees available on a temporary basis to user companies, whom it recruits and remunerates.[2] Limited exceptions to the exclusivity of activity for temporary work companies are possible, for instance when it comes to activities of private placement.[3] Temporary work companies may only operate after submitting a declaration to the administrative authority and obtaining a specific financial guarantee.[4] Provision of manpower by temporary work companies cannot be used to fulfil a permanent labour need of the user undertaking.[5]

With limited exceptions, TWAs are allowed to provide manpower in all sectors of the economy. Limitations are in place as to the situations in which a user undertaking can have recourse to workers provided by a TWAs. The main scenarios are: a) replacement of an employee in the event of absence, temporary move to part-time work, suspension of an employee's contract of employment; b) Temporary increase in the company's activity; c) Seasonal jobs defined by law, decree, or collective agreements.[6] Provision of manpower by TWAs is forbidden in certain situations, and notably when to perform particularly dangerous work included on a list drawn up by regulation. The administrative authority may exceptionally authorise a derogation from this prohibition. The list has been updated in 2022 and includes activities exposing workers to certain dangerous agents.

Any temporary employment activity carried out outside such a company is prohibited,[7] with the only exception of not-for-profit provision of manpower ("labour lending").[8]

7.2 TWAs and posting

Requirements are the same for posting of workers, such as asking and obtaining the A1 certificate from the competent social security institution (URSSAF or MSA for the agriculture sector).[9]
Some specific conditions modify the rules around temporary workers when they are posted abroad from France. For instance, in the absence of a specific provision in the contract or in the applicable sectoral collective agreement, the maximum duration of an assignment by TWA is 18 months, but this is raised to 24 months for assignments abroad.[10] Additional obligations to provide information to the posted temporary worker apply in case of posting to a country outside the EU/EEA. A clause covering the repatriation of the employee at the expense of the TWA must also be included in the assignment contract when the assignment takes place outside mainland France.[11]

7.3 Foreign temporary work agencies

TWAs established in other EU/EEA Member States don't need to be registered in France to post their worker to France. On top of the normal rules applicable to posting of workers (such as the posting

2 Article L1251-2 Labour Code.
3 Article L1251-4 Labour Code.
4 Article L1251-45 Labour Code.
5 Article L1251-5 Labour Code.
6 Article L1251-6 Labour Code.
7 Article L1251-3 Labour Code.
8 Article L. 8241-2 Labour Code.
9 Article R761-1 Social Security Code.
10 Article L1251-12-1 Labour Code.
11 Article L1251-16 Labour Code.

notification, which must be submitted by the TWA and not by the user undertaking, even in cases of "chain posting"), some additional conditions apply to posting by TWAs.

TWAs established in another EU Member State must provide evidence (in the same way as TWAs established in France) a financial guarantee to ensure payment to posted employees of their remuneration, benefits and allowances due in respect of the period of posting in France, in the event of bankruptcy.[12] The TWA posts temporary employees to France must be in possession of a guarantee certificate issued by the guarantor. All documents relating to the provision of manpower by the TWA (in particular the contracts for the provision of services and assignment contracts) must include the details of the guarantor and the compulsory guarantees covered (payment of wages and related benefits etc.). The temporary employment agency must also indicate in its prior declaration the identity guarantor. A TWA that already complies with an equivalent obligation in a Member State of the EU/EEA, or Switzerland, does not have to take out a new guarantee for the provision of services in France. Its usual guarantee will be considered equivalent if it offers the same degree of protection to posted temporary workers as the financial guarantee that must be taken out by a TWA established in France.[13]

The provision of manpower by TWA (in the same way as TWAs established in France) cannot have the purpose or effect of permanently filling a job linked to the normal and permanent activity of the user company.[14] The restrictions concerning the situations in which a provision of manpower is allowed are the same applicable to TWAs established in France.[15]

In the same way as TWAs established in France, the user undertaking is jointly liable with the TWA for the payment of unpaid sums due to posted temporary employees for the duration of the assignment carried out in the user undertaking.[16]
Whereas Muñoz (2022) highlighted the widespread use of foreign temporary work agencies and the prevalence of 'hired-to-be-posted' contracts, our findings show a structural decline of this model after 2020, though remaining significant in agriculture and construction, with longer assignment durations and ongoing legal scrutiny.

12 Article L. 1251-49 Labour Code.
13 Article R1262-18 Labour Code.
14 Article L. 1251-5 Labour Code.
15 Article L1251-6 Labour Code.
16 Article L. 1251-52 Labour Code.

8. Enforcement

Since the mid-2010s, the rapid growth of posted work in France and the evolution of its legal framework have resulted in the development of an extensive national anti-fraud policy characterised by interministerial cooperation and transnational coordination. This policy emerged as fraud relating to posted workers became a matter of national debate and then a priority within France's broader strategy against illegal work. The policy relies on an extensive network of public bodies, including the Ministry of Labour and those responsible for social affairs, interior, justice and key economic sectors such as construction, transport and agriculture. From 2016 to 2021, this work was formalised through biennial National Plans to Combat Illegal Work (*Plans nationaux de lutte contre le travail illegal*, PNLTI), developed under an interministerial committee involving social partners. These plans outlined four main objectives, namely targeted inspections; preventing fraud; ensure the responsibility of main contractors; coordination and quantification. The General Directorate of Labour (*Direction Générale du travail*, DGT) played a leading role in designing these plans, in which fraud in posting was defined as the number one priority and, by late 2019, had been designated as one of the labour inspectorate's two top priorities alongside gender equality.

In 2019, the French Court of Auditors (Cour des comptes) devoted an entire section of its annual report to this issue. While acknowledging the priority status of posted-work fraud, it highlighted implementation challenges, highlighting the persistent difficulties in applying sanctions and executing control measures (Cour des comptes, 2019).

This prioritisation of posting of workers in the work of enforcement agencies has been reflected in numerical targets, such as the number of inspections, sanctions or administrative fines issued. However, this quantification of enforcement has produced resistance among inspectors (Weill et al., 2025), due to the incentives to prioritise easily measurable activities, such as sanctioning foreign companies deemed "at risk", over more complex or preventive actions. In addition, while the number of administrative fines has been rising steadily, poor recovery rates mean that many fines are never collected due to jurisdictional or cross-border difficulties (Cour des comptes, 2019). Further, these failures come on top of time-consuming and resource intensive investigations, linked to the transnational nature of fraud networks and the diversity of legal systems involved (e.g. Ramackers, Hellio, Mésini, and Décosse, 2022).

Still, the prioritisations of controls of posting of workers had a tangible impact. Nationally, the proportion of inspections targeting posted workers increased by 174% between 2017 and 2019, rising from 10.7% to 14.5%. This marked increase should be nuanced in light of the concomitant increase in data reporting (Weill et al., 2025). As we will show below, the prioritisation reached its peak around 2021, after which the focus shifted to at risk sectors as a whole.

In parallel with these policies, French law has followed a dual approach, essentially moving in the same direction as the compromise that formed the basis of Directive 2014/67. On the one hand, a number of administrative practices have been simplified, with a reduction in obligations in sectors and situations considered less "problematic". Thus, following Law 2018-771 of 5 September 2018, the prior declaration of posting may, in certain circumstances, be waived,[17] be subject to an exemption,[18] or be adjusted.[19] On the other hand, the arsenal of penalties that can be deployed in situations of violation of the legal framework for posting has been strengthened, with the possibility of an administrative fine[20] of € 4 000 per employee (€8,000 in the event of a repeat offence, not exceeding € 500 000)[21] in the event of a breach of administrative obligations by the employer (Lhernould, 2020). The conclusion that emerges from this dual approach is

17 This is the case for posting on behalf of the employer, i.e. when the worker is sent by the posting undertaking outside of one of the three models of posting. See Article L 1262-2-1-I of the Labour Code.

18 For example, in the case of artists in the performing arts. See Article L 1262-6 of the Labour Code.

19 Article L 1263-8 of the Labour Code.

20 Other penalties are also possible (such as temporary suspension of service provision), but financial penalties remain the most common.

21 Articles L 1264-1 and L 1264-3 of the Labour Code.

therefore a desire to reduce monitoring but to have more effective enforcement options in cases of fraud identified through monitoring activities.

Table 17 Type of Labour Inspections Related to Posted Workers (2020–2022)

Type of Intervention	2020	2021	2022
Total	12 258	15 543	14 156
On-site inspections	8 089	10 554	8 756
Investigations	529	646	586
Document reviews	3 531	4 195	4 695
Company meetings	109	148	119

Source: DGT – SIPSI (2025).
Note: The table summarizes the number of recorded labour inspection interventions related to posted workers in France from 2020 to 2022. Figures may include overlapping categories depending on the degree of investigation or administrative follow-up recorded by the labour inspectorate.

The data on labour inspection activities related to posted workers between 2020 and 2022 point to a high and sustained level of enforcement, despite the disruptions caused by the COVID-19 pandemic. The total number of inspection interventions increases markedly between 2020 and 2021 (from 12 258 to 15 543), before declining slightly in 2022 (14 156), while remaining well above the 2020 level. This pattern suggests a rapid re-intensification of control activities following the initial health crisis, followed by a stabilisation at a structurally higher level.

Across the period, on-site inspections remain the dominant form of intervention, accounting for the majority of controls each year. Their number rises sharply in 2021 (10 554, up from 8 089 in 2020), reflecting the resumption of physical inspections after lockdowns, before declining in 2022 (8 756). While still central to enforcement practices, this evolution suggests a partial rebalancing of inspection tools rather than a simple return to pre-crisis patterns.

By contrast, document reviews display a continuous and sustained increase over the period, rising from 3 531 in 2020 to 4 195 in 2021 and 4 695 in 2022. This trend indicates a growing reliance on administrative and documentary checks, likely linked to the digitalisation of declarations (SIPSI), improved risk-targeting, and the increasing complexity of posting arrangements. Document-based controls appear to have become a structural component of enforcement, rather than a temporary substitute during the pandemic.

Investigations and company meetings represent a smaller share of total interventions and remain relatively stable over time. Investigations increase slightly between 2020 and 2021 before declining marginally in 2022, while company meetings remain limited in number throughout the period. These forms of intervention likely reflect more targeted or follow-up actions, complementing broader inspection and document review activities.

Overall, the table highlights a diversification of enforcement modalities in the monitoring of posted work in France. While on-site inspections continue to play a central role, the increasing weight of document reviews points to a gradual shift towards more systematic, risk-based and administratively intensive forms of control. This evolution is consistent with the growing scale and complexity of posting and suggests an adaptation of enforcement strategies to better address cross-border labour arrangements in a context of constrained inspection resources.

8.1 Definition of the notion of 'inspector'

Labour Inspectors are civil servants. They are regulated by the civil service statute and a specific decree,[22] and they are guaranteed independence in the performance of their duties. They are responsible for ensuring the application of the provisions of the Labour Code and other legal provisions relating to working conditions, as well as the stipulations of collective labour agreements. They are also responsible, jointly (if applicable) with officers of the judicial police, for sanctioning and recording breaches of these provisions and stipulations.
There is no inspector specifically designated to inspect posted workers in France. All inspectors have the necessary skills and may be called upon to carry out posting inspections.

Table 18 Full-Time Equivalent (FTE) Labour Inspectors and URACTI Staff, 2020–2023

Category	2020	2021	2022	2023
FTE Inspectors (URACTI units)	112.7	110.8	99.3	103.5
Total FTE Inspectors (all units)	1 708.4	1 623.9	1 561.6	1 575.0

Source: DGT (Flash workforce survey)
Note: The data exclude unit heads (*responsables d'unités de contrôle*), one per control unit, who also carry out inspection activities, representing approximately 10–15 FTEs in France. URACTI refers to the Unité Régionale d'Appui et de Contrôle du Travail Illégal (Regional Unit for Combating Illegal Work). Its officers support labour inspectors and controllers in combating undeclared work. They may also act independently in mobile operations, take part in actions coordinated by the Comité Opérationnel Départemental Anti-Fraude (CODAF), or handle complex cases occurring across departmental boundaries.

Table 18 highlights the institutional framework and human resources underpinning labour inspection and enforcement activities in France, including those related to posted workers. Labour inspectors are civil servants operating under a specific legal statute that guarantees their independence in the exercise of their duties. They are responsible for ensuring compliance with the Labour Code and collective agreements and for identifying and sanctioning infringements, including those related to posting. Importantly, there is no specialised corps of inspectors dedicated exclusively to posted workers: all labour inspectors are potentially involved in posting-related controls, depending on needs and priorities.

From a quantitative perspective, the data show a moderate but persistent decline in inspection resources over the period, followed by a partial stabilisation. The total number of full-time equivalent (FTE) labour inspectors across all units decreases from 1 708.4 in 2020 to 1 561.6 in 2022, before slightly increasing to 1 575.0 in 2023. This evolution suggests a gradual contraction of inspection capacity in the immediate post-crisis period, with only a limited recovery thereafter. A similar pattern is observed for inspectors assigned to URACTI units, which are specifically involved in combating illegal work, including complex and cross-border cases. URACTI FTEs decline from 112.7 in 2020 to 99.3 in 2022, before rising again to 103.5 in 2023.

These trends are particularly noteworthy in light of the stable or increasing volume of posting-related inspections observed over the same period. They point to a situation in which enforcement activities are maintained or intensified despite constrained human resources, implying increased workload per inspector and a growing reliance on coordination, risk-based targeting, and support units such as URACTI. The absence of inspectors specifically dedicated to posting further reinforces the importance of organisational flexibility and inter-service cooperation.

Overall, Table 18 illustrates the tension between enforcement ambitions and available resources in the French labour inspection system. While the institutional framework ensures inspector independence and

22 Decree no. 2003-770 of 20 August 2003 on the special status of the labour inspection corps.

broad legal competence, the relatively stable but limited staffing levels suggest that the effectiveness of posting enforcement increasingly depends on prioritisation strategies, administrative tools, and inter-agency coordination, rather than on a quantitative expansion of inspection personnel.

8.2 Definition of the notion of 'inspection'

Labour inspectors carry out investigations in the field, observe infringements and draw up detailed reports. These reports may lead to formal notices to the employer to rectify the situation. If infringements are found, the employer may be given formal notice to comply with the legislation. In the event of persistent non-compliance, more severe penalties may be applied.
The labour inspectorate uses a combination of prior declarations, unannounced visits, documentary checks and inter-institutional collaboration to monitor posted workers. Penalties for non-compliance with the rules are varied and can include fines, suspension of services, bans on working and criminal sanctions.

8.3 Number of Inspectors

Table 19 Inspections Related to Posted Work by Region (2020–2022)

Region	2020	2021	2022
Auvergne-Rhône-Alpes	1 586	1 886	1 81
Bourgogne-Franche-Comté	627	624	548
Brittany	610	667	856
Centre-Val de Loire	384	513	335
Corsica	150	195	132
Grand Est	1 456	1 822	1 449
Guadeloupe**	53	96	40
Guyane**	2	27	–
Hauts-de-France	982	1 611	1 779
Île-de-France	2 039	2 388	2 323
La Réunion**	19	20	41
Martinique**	83	57	68
Mayotte**	1	19	7
Normandy	288	829	909
Nouvelle-Aquitaine	1 215	1 146	770
Occitanie	895	1 148	1 296
Pays de la Loire	518	961	930
Provence-Alpes-Côte d'Azur	1 35	1 535	859
Saint-Pierre-et-Miquelon**	–	–	4
Total France	12 258	15 544	14 156

Source: DGT (Export Delphes, 14/06/2024 – updated: 05/06/2024).
Note: ** Corresponds to overseas territories. The data represent the number of labour inspections related to posted workers in France between 2020 and 2022. Regional variations may reflect differences in inspection priorities, available resources, and sectoral composition of local economies.

Table 19 highlights pronounced territorial disparities in the intensity of labour inspections related to posted work between 2020 and 2022, reflecting both the uneven geographical distribution of posting activities and differentiated enforcement strategies. At the national level, the total number of inspections increases sharply from 12,258 in 2020 to 15,544 in 2021, before declining slightly to 14,156 in 2022, while remaining above the 2020 level. This evolution mirrors the post-COVID recovery of inspection activity observed at the aggregate level.

Inspection activity is highly concentrated in a limited number of regions. Île-de-France consistently records the highest number of inspections throughout the period, exceeding 2 300 inspections per year, which reflects both the scale of posting activities and the concentration of inspection resources in the capital region. Auvergne–Rhône-Alpes and Grand Est also stand out with sustained high levels of inspections, each recording around 1 800 inspections in 2021, followed by a stabilisation or slight decline in 2022. These regions combine significant construction and industrial activity with large numbers of posted workers, making them priority areas for enforcement.

Several regions show a marked increase in inspection activity over time. This is particularly the case for Hauts-de-France, where inspections rise from 982 in 2020 to 1 779 in 2022, and for Normandy, which records a sharp increase between 2020 and 2021 and continues to grow in 2022. Occitanie and Brittany also display upward trends, suggesting a reinforcement of enforcement efforts in regions with increasing or persistent posting activity, notably in agriculture and construction.

By contrast, some regions experience a decline or volatility in inspection numbers. Nouvelle-Aquitaine and Provence–Alpes–Côte d'Azur see a reduction in inspections in 2022 compared to 2021, despite remaining regions with significant posting activity. This may reflect shifts in enforcement priorities, resource constraints, or a move towards more targeted and risk-based controls rather than a reduction in overall vigilance.

Inspection activity in overseas territories remains limited in absolute terms and shows strong year-to-year variability, reflecting both the smaller scale of posting and specific organisational constraints. Overall, the regional distribution of inspections broadly mirrors the geography of posted work, but not mechanically. Differences in inspection intensity across regions point to the role of regional strategies, sectoral risk profiles and resource allocation in shaping enforcement practices.

Taken together, Table 19 illustrates that enforcement related to posted work in France is highly territorially differentiated and responsive to both local economic structures and institutional capacities. The data suggest a dynamic adjustment of inspection efforts over time, combining concentration in high-risk regions with increasing attention to areas where posting activities are expanding or becoming more complex.

8.4 Probability of inspection: strong territorial heterogeneity and targeted enforcement

At the national level, relating the total number of inspections to the number of posted workers per year provides a clear picture of the overall intensity of enforcement in France. Over the 2020–2022 period, the probability of a posted worker being subject to an inspection remains moderate but non-negligible, fluctuating between 6% and 8%.

In 2020, the probability of inspection stood at 6%, despite the constraints imposed by the COVID-19 crisis. This suggests that enforcement activities were maintained at a significant level relative to the scale of posting, even during periods of restricted mobility. In 2021, the probability rose sharply to 8%, reflecting a strong rebound and reinforcement of inspection activity in the aftermath of the pandemic, combined with a lower level of posted employment. This year appears as a peak in enforcement intensity, both in absolute terms and relative to the number of posted workers.

In 2022, the probability of inspection declines back to 6%, despite inspection numbers remaining high. This decrease is mainly driven by the recovery in posted employment, rather than by a weakening of enforcement efforts. Overall, these figures indicate that inspection intensity in France is counter-cyclical to posting volumes, increasing when the number of posted workers falls and decreasing as posting recovers.

Taken together, the results suggest that the French enforcement system maintains a stable baseline level of control, while retaining the capacity to temporarily intensify inspections in response to exceptional circumstances or heightened perceived risks. This relative stability in inspection probability also provides a useful benchmark for assessing regional disparities and the effectiveness of risk-based enforcement strategies.

Table 20 Probability of inspection

Region	2020	2021	2022
Overseas territories	0.38	0.76	0.36
Île-de-France	0.22	0.26	0.26
Centre-Val de Loire	0.37	0.44	0.30
Bourgogne-Franche-Comté	0.57	0.41	0.32
Normandy	0.14	0.39	0.33
Hauts-de-France	0.19	0.34	0.37
Grand Est	0.25	0.33	0.26
Pays de la Loire	0.09	0.16	0.13
Brittany	0.49	0.35	0.57
Nouvelle-Aquitaine	0.37	0.29	0.20
Occitanie	0.28	0.37	0.42
Auvergne-Rhône-Alpes	0.18	0.25	0.23
Provence-Alpes-Côte d'Azur	0.16	0.17	0.09
Corsica	0.27	0.38	0.19
France	0.22	0.28	0.24

Source: *Number of posted workers : DGT-Dares, Fichier statistique SIPSI ; calculs Dares*. Number of inspection: DGT (Export Delphes, 14/06/2024 – updated: 05/06/2024).
Note: The probability of inspection is calculated as the ratio of the number of labour inspections related to posted work to the average number of posted workers in each region and year.

By relating the number of inspections to the average number of posted workers, the indicator of inspection probability provides a more informative measure of enforcement intensity than inspection counts alone. At the national level, the probability of a posted worker being subject to an inspection fluctuates between 0.22 in 2020, 0.28 in 2021, and 0.24 in 2022, indicating a relatively stable but non-negligible likelihood of inspection over the period, with a peak in 2021 corresponding to the post-COVID reinforcement of controls.

However, this national average masks very large regional disparities. Some regions display systematically high probabilities of inspection, suggesting an intensive and targeted enforcement approach relative to the scale of posting. This is notably the case for Bourgogne–Franche-Comté (0.57 in 2020), Brittany (up to 0.57 in 2022), Centre–Val de Loire, and Occitanie, where inspection probabilities frequently exceed 0.35. In these regions, relatively modest numbers of posted workers are combined with sustained inspection activity, resulting in a high likelihood of control for posted undertakings and workers.

Conversely, regions with large volumes of posted workers often display lower inspection probabilities. Île-de-France, despite recording the highest absolute number of inspections, shows a probability close to the national average (around 0.22–0.26). Pays de la Loire and Provence–Alpes–Côte d'Azur, both characterised by high levels of posting in construction and agriculture, record consistently low probabilities of inspection, falling below 0.15 in 2022. This suggests that inspection capacity does not scale proportionally with the volume of posting in these regions, potentially reflecting resource constraints or prioritisation choices.

Several regions also exhibit strong temporal variation, pointing to adaptive enforcement strategies. Normandy, Hauts-de-France, and Occitanie show sharp increases between 2020 and 2022, while others such as Nouvelle-Aquitaine and Bourgogne–Franche-Comté experience a decline after initially high levels. These dynamics suggest a shift towards risk-based and rotating inspection strategies, rather than uniform enforcement over time.

Finally, inspection probabilities in overseas territories are volatile, with very high values in some years (notably in 2021), reflecting the small size of posted employment combined with episodic inspection campaigns.

Conclusion

This report provides a comprehensive and updated analysis of posted work to France over the period 2019–2024, drawing on exhaustive administrative data from the SIPSI system. By extending the observation window to include the most recent year, it offers a clearer perspective on both the recovery from the COVID-19 crisis and the structural transformations affecting posting practices in the French labour market.

The inclusion of 2024 data confirms that posted work in France has largely returned to pre-crisis levels in terms of flows and the number of workers involved. Posting declarations have nearly reached their 2019 volume, while the number of distinct posted workers now exceeds its pre-crisis level. At the same time, average posted employment remains slightly below its 2019 peak, highlighting a lasting divergence between the intensity of posting flows and the sustained presence of posted labour. This finding underscores the importance of jointly analysing flows, individuals and employment stocks in order to accurately assess the actual weight of posted work in the labour market.

Beyond aggregate trends, the analysis reveals a reconfiguration of posting practices. Inter-company posting (Model M1) has regained and even strengthened its dominant position, reflecting the resilience of cross-border subcontracting, particularly in construction and industry. In contrast, temporary agency posting (Model M3), while still contributing significantly to average employment due to long assignment durations, appears to have stabilised at a lower level than before the crisis. Intra-group posting (Model M2) remains a minority but stable channel, closely linked to firm-specific organisational strategies rather than short-term economic fluctuations. Together, these developments point to a more polarised structure of posting, with a stronger reliance on traditional service provision and a relative retreat of cross-border temporary agency work.

The analysis of assignment durations further highlights these structural changes. While posting assignments remain short on average, their distribution has become more compressed over time. The decline in median durations and the reduction in dispersion indicators observed in 2024 suggest a shift toward shorter and more homogeneous assignments, even as a small number of very long postings continue to shape average durations. Sectoral patterns remain highly persistent: services are dominated by short-term postings, whereas agriculture and construction continue to rely on longer and more continuous forms of posted labour. These enduring sectoral hierarchies underline the role of production structures and labour demand in shaping posting practices.

Geographically, posting to France continues to rely on a stable core of sending Member States, confirming the persistence of long-standing production and subcontracting networks within the European single market. At the same time, the growing diversity of countries of birth and the increasing presence of third-country nationals posted via intermediary Member States point to more complex mobility and intermediation chains. Within France, the recovery of posted work has been highly uneven across regions, with construction acting as a key driver of rising recourse rates in many territories, while services contribute primarily through increases in employment volumes rather than widespread changes in recourse.

Finally, the gender analysis highlights the persistence of strong sectoral segmentation. Despite some adjustments over time—most notably in services—the share of women among posted workers remains largely stable between 2020 and 2024 and varies sharply across sectors. This stability suggests that posting continues to reflect existing gender divisions in European labour markets rather than acting as a vector of convergence.

Taken together, these results indicate that the post-crisis period should be interpreted less as a simple return to the pre-2020 situation than as a phase of consolidation and selective transformation of posted work in France. While the overall scale of posting has recovered, its structure has evolved toward more fragmented assignments, persistent sectoral specialisation and differentiated regional trajectories. From a policy perspective, these findings underline the need for continued monitoring of posting practices, with particular attention to long-duration assignments, complex subcontracting chains and territorial disparities. More broadly, they highlight the importance of strengthening statistical coordination and enforcement capacities at both national and European levels in order to ensure fair competition, adequate worker protection and a better understanding of transnational labour mobility within the European Union.

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