

Insights of the Automotive Sector

Strategic Blueprint* project for the
automotive sector
**Forming sectoral intelligence and VET offer
development**

Car usage behavior, electrification, sharing, autonomy and connectivity are leading the transformations of the automotive industry. The Blueprint for Sectoral Cooperation on Skills in the Automotive sector, *Development and Research on Innovative Vocational Educational Skills - DRIVES*, has been working avidly to obtain a snapshot of the current situation of skills needs and offer in the automotive sector, throughout the industry value chain. A survey among industry and related stakeholders provided information on the main drivers of change influencing future skills needs.

This leaflet summarises main assessment of inputs and data collected. The full report is available at https://www.project-drives.eu/Media/Publications/10/Publications_10_20190918_195654.pdf

DRIVES Objectives

- ◆ **Analyse key trends**, covering whole value-chain
- ◆ **Define futures skills and job**
- ◆ Identify skills gaps for foreseen changes
- ◆ **Analyse current offer** for trainings/upskilling
- ◆ Provide **clear guidance for education and training providers** to cover the needs

DRIVES Proposed Outcomes

- ◆ **Create trainings** for selected skills and job roles
- ◆ Ensure **mutual recognition** of the skills and job roles across the EU
- ◆ **Provide**, as a pilot, 1100 trainings across the EU and training institutions
- ◆ Regularly deliver to EC policy messages representing the automotive sector needs

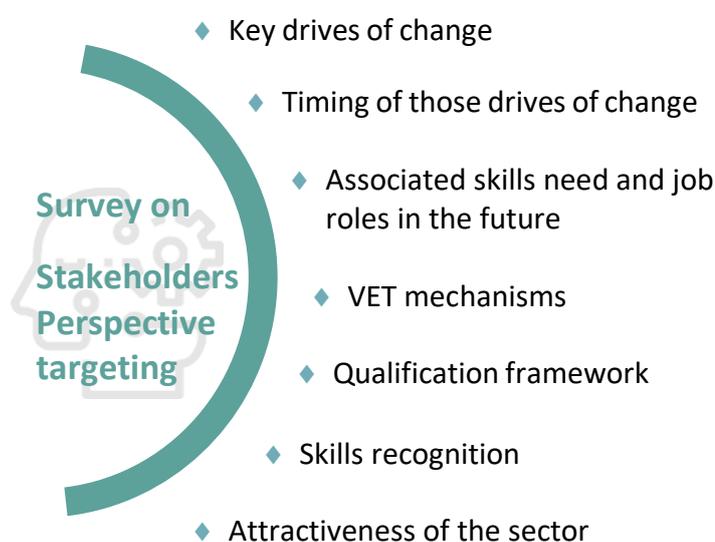
*A strategic sectoral cooperation on skills to address one of the key actions of the [New Skills Agenda for Europe](#)

Insights of the automotive sector Results of the DRIVES Survey

The vehicle of the future no longer functions solely as a mode of transportation; thus, the overall vision of the sector is moving from the vehicle to the integration of services around the product itself.

Adaptation to this transition and set of uncertainties will require sizeable investments in innovation, upskilling and reskilling. A gathering of highlights from key stakeholders' perspective is shown.

Future trends, needs and gaps



Survey – Stakeholders involved

SME
Large enterprise
Technology centre
Sectoral/industrial association
Trade union
Labour market intelligence service
Public employment service
Private employment service
Public authority
Chambers of commerce
Labour ministry
National statistics office

Sectoral associations and trade unions represent their entire membership, which in many cases comprises hundreds of members from the automotive sector. Large enterprises are companies employing more than 250 people.

Geographical scope and Stakeholder Category

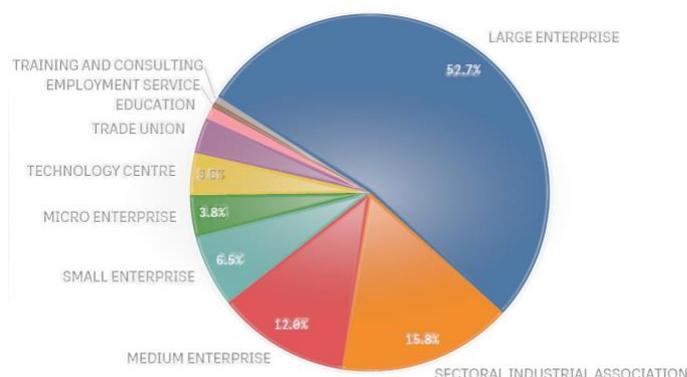


The geographical coverage is set to countries where companies are located.

Sectoral associations and trade unions (19.1%) had a key role as they widen the coverage of stakeholders' responses.

The profile of the respondents comprises 74% automotive companies and 26% automotive sector organisations, mainly from Italy (25%), Spain (14%) and Germany (10%).

SMEs cover a relevant share of 22.3% of total responses from micro to medium enterprises, while large enterprises represent 52,7%.



Drivers of Change

Drivers of Change are those factors which are key to transforming an industry.

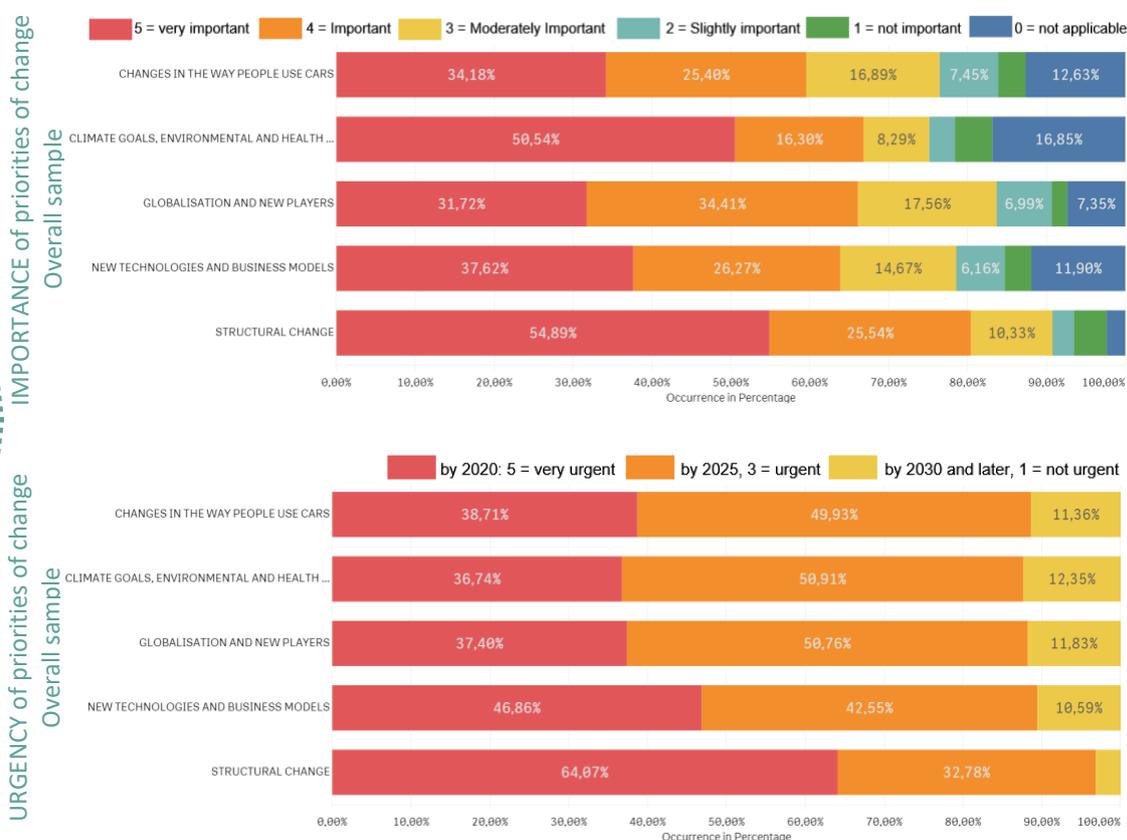
Wider literature review, the European Automotive Skill Council and GEAR 2030 reports, supported identification of the selected five main ‘macro’ Drivers of Change, reporting to the relative *importance* and *urgency* (by 2020, 2025, 2030 or later):

- ◆ New technologies and business models; ◆ Climate goals, environmental and health challenges
- ◆ Societal changes and changes in the way that consumers access, purchase and use cars
- ◆ Structural change (restructuring, acquisition of new skills, continuous training) ◆ Globalisation and the rise of new players

The results are relatively **similarly shared by large enterprise and SMEs**

National associations focus more on the climate change

Structural change - Full consensus on timing “by 2020” – 64% of the stakeholders, other 32% “by 2025”



Societal Changes Assessed

The way that consumers access, purchase and use cars and other modes of transport is changing due to increasing connectivity and the greater use of e-commerce. New technologies and the massive use of the internet will have a huge impact on the use and concept of mobility. There is also growing public expectation that greater automation will lead to even higher standards of road safety and higher connectivity of vehicles, opening a wide range of new services. Thus, these changes will influence issues around Bigdata and Cybersecurity will demand for horizontal skills and occupations coming from other sectors.

Skills Needs

The survey identified the key skills needed in the future.

A skills index was created to allow a harmonised assessment of 'open' replies to related questions within the survey. It ranks the skills correlated to drivers of change.

Difference between the needs of large enterprises, SMEs and industrial associations are obvious.

So, additional research is needed to investigate the reasons of those differences.

Nonetheless, the general output shows a clear demand for **technical skills** and some specific **soft skills**.

Stakeholders also provided important guidance on the relevance of upskilling/upgrading skills by **work-based trainings**.



Main Conclusions

- ◆ The whole industry is expecting major structural changes in a near future;
- ◆ Continuous trainings will be fundamental for the sector;
- ◆ It is unavoidable a close cooperation between education providers and industry to establish a skills agenda;
- ◆ Reskilling/upskilling/work-based trainings may succeed overcoming structural changes in the automotive sector

If you wish to provide comments or further inputs for insights of the automotive sector, contact DRIVES partnership at: <https://www.project-drives.eu/en/contact>

DRIVES Consortium and Coordinator



DRIVES Steering Board and Associated

