DRIVES

Development and Research on Innovative Vocational Education Skills

D5.2 Understanding the Marketplace UPDATE

Report - Practical Implications and Next Steps

Report on the European Automotive Apprenticeship Marketplace

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D5.2 UNDERSTANDING THE MARKETPLACE UPDATE REPORT

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1 INTRODUCTION

A key aim of the DRIVES project[1] is to identify ways of supporting the creation of an effective apprenticeship market serving the automotive sector.

The changes taking place within the automotive sector have huge implications for the apprenticeship marketplace serving the sector. These issues together with a number of practical actions to address them were set out in a major report published as part of the DRIVES project in 2020[2].

Since the publication of the DRIVES 'Understanding the Marketplace' Report in 2020 the global and EU automotive sector have experienced a period of major upheaval and restructuring. While changes driven by technology development have continued, a number of other factors have also helped to reshape the sector including the impact of COVID 19, the associated recession across Europe and the different policy responses to this, together with other factors including BREXIT.

These factors have impacted on working practices and helped drive changes in skill requirements, which in turn have major implications for apprenticeships supporting the sector.

The purpose of the UPDATED Report is to document these more recent patterns of change, identify the implications for the EU automotive apprenticeship marketplace, highlight a number of innovative ways in which the challenges facing the apprenticeship marketplace have been tackled and set out practical suggestions moving forward. This section of the Report focusses on the changing economic context of the European automotive industry and recent developments across the European apprenticeship marketplace.

The Full UPDATED Report can be found at: INSERT LINK
The Executive Summary can be found at: INSERT LINK
Changing economic context and recent developments can be found at: INSERT LINK
Innovative practice in relation to automotive apprenticeships can be found at: INSERT LINK

[1] https://www.project-drives.eu/en/home
[2] The report summarising key issues from this research can be found at: Key Issues Report
The Full Report can be found at: LINK (https://www.project-drives.eu/Media/Publications/157/Publications_157_20200825_104825.pdf)

2 PRACTICAL IMPLICATIONS AND NEXT STEPS

This Report has been developed in order to underpin practical action and intervention within the European automotive apprenticeship marketplace.

This section summarises a number of practical suggestions for improving the current European apprenticeship marketplace serving the automotive sector and next steps in relation to the DRIVES Project to help achieve these actions.

These recommendations have been developed taking into account funding for the DRIVES Project will cease at the end of December 2021 and in the light of recent major developments across the automotive ecosystem including the recently announced Automotive Pact for Skills and associated Automotive Skills Alliance (ASA).

The recommendations below start with those relating to potential actions to sustain the DRIVES Good Practice Resource in the future before setting out recommendations relating to each of the Report 'themes'.

Recommendations relating to the potential future role of the Automotive Skills Alliance (ASA) in taking forward these recommendations are set out at the end of this section.

Sustaining and enhancing the Good Practice Resource

Considerable work has been undertaken as part of the DRIVES project to identify and document examples of innovative practice relating to different aspects of apprenticeship development and delivery supporting the European automotive sector.

It will be important to implement further measures to improve dissemination of these and other examples moving forward.

It is through practical examples that employers, providers and other stakeholders can learn about and adopt improved practices.

The critical question therefore, is how can the work already be undertaken through the development of the DRIVES Good Practice Resource https://drives-compass.eu/good-practice-resource be enhanced and sustained after the end of the Drives Project?

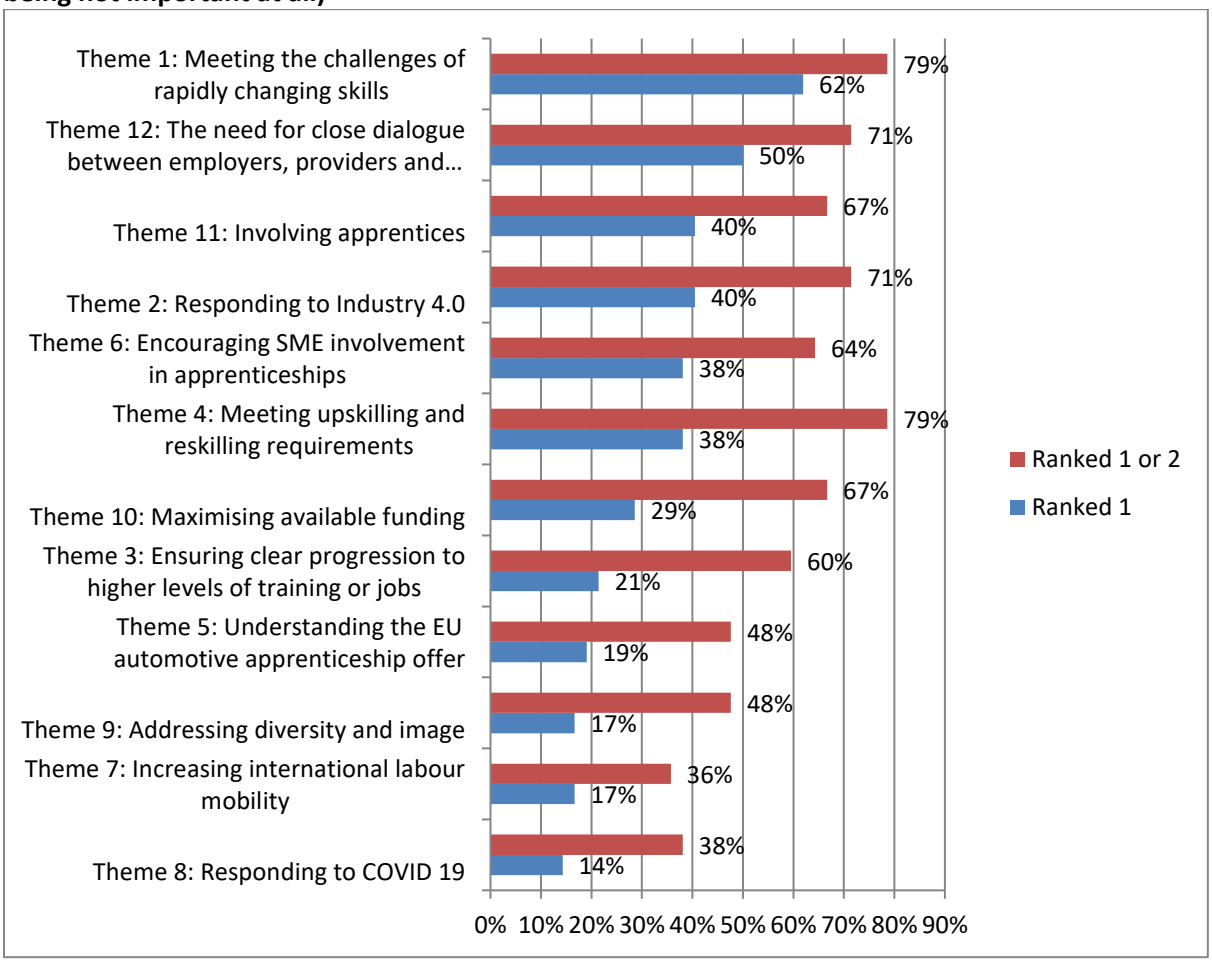
Evidence from a recent survey of apprenticeship stakeholders conducted as part of DRIVES Project points to widespread support (amongst respondents) for identification of further examples of innovative practice. When asked to indicate how useful it would be to identify further examples of innovative practice in relation to each of the themes used within the Good Practice Resource, based on a scale of 1-5 (with 1 being 'very useful'), the highest priorities were attached to:

- Theme 1: Meeting the challenges of rapidly changing skills;
- Theme 12: The need for close dialogue between employers, providers and other stakeholders;
- Theme 11: Involving apprentices;
- Theme 2: Responding to Industry 4.0;
- Theme 6: Encouraging SME involvement in apprenticeships; and
- Theme 4: Meeting upskilling and reskilling requirements.

More details of these results are set out in the chart below:

Respondents also made a number of more specific suggestions about improving the Good Practice Resource moving forward and specific suggestions of potential good practice case studies which can be followed up.

Can you indicate how useful you think it is to identify further examples of innovative practice in relation to each of the following themes (Rank 1-5 in each case with 1 being very important and 5 being not important at all)



Source: DRIVES Apprenticeshipp Survey 2021

It is proposed that the scope of the Good Practice Resource is widened beyond a focus on apprenticeships to include all training and skills development issues impacting on the automotive sector and a clear plan for sustaining and enhancing this initiative over time is developed and agreed prior to the end of the DRIVES Project.

The rapid pace of skill change

Apprenticeships need to be designed so they are flexible enough to respond to the increasingly rapid pace of skills change.

However, the challenge is to achieve this greater flexibility at the same time as ensuring the fundamental goal of apprenticeships as a way of equipping learners with a comprehensive set of skills, knowledge and behaviours to enable entry and progression in a particular occupation is not compromised. It is also recognised that a fundamantal principle of an Apprenticeship is its use for an employee, irrespective of their age, starting a new role (or job) in acquiring the full range of skills and knowledge they need for that role or job. In other words apprenticeships need to be more than just a way of meeting the specific skill gaps employers' face.

One way of doing this is to adopt a more modular approach, with each module assessed and certified independently, in addition to accreditation linked to completion of the whole apprenticeship for those undertaking the complete programme.

This would allow updated modules that reflect recent changes in skill requirements to be 'bolted on' to existing apprenticeships without the need to change the entire apprenticeship.

It will therefore be important to identify and document examples of particular relevance to the automotive sector of where a modular approach has been successfully implemented.

Those stakeholders that design and develop apprenticeships, as well as potential apprentices themselves, need to have access to the latest information on changing skill requirements.

This has been recognised in relation to recent work relating to the role of apprenticeships in the transition to greener economies across the EU, presented at a joint CEDEFOP/OECD symposium.[3]

It was pointed out that in order to design apprenticeships to meet the skills needs of for a green transition three aspects of skills intelligence are required:

[3] https://www.cedefop.europa.eu/files/2021-10/cedefop-oecd_symposium_2021_agenda.pdf
Apprenticeships for Greener Economies and Societies; 21/22 October 2021; Reskilling for a green transition Dr Florian Egli (ETH Zurich) and Simon Schmid (skilllab)

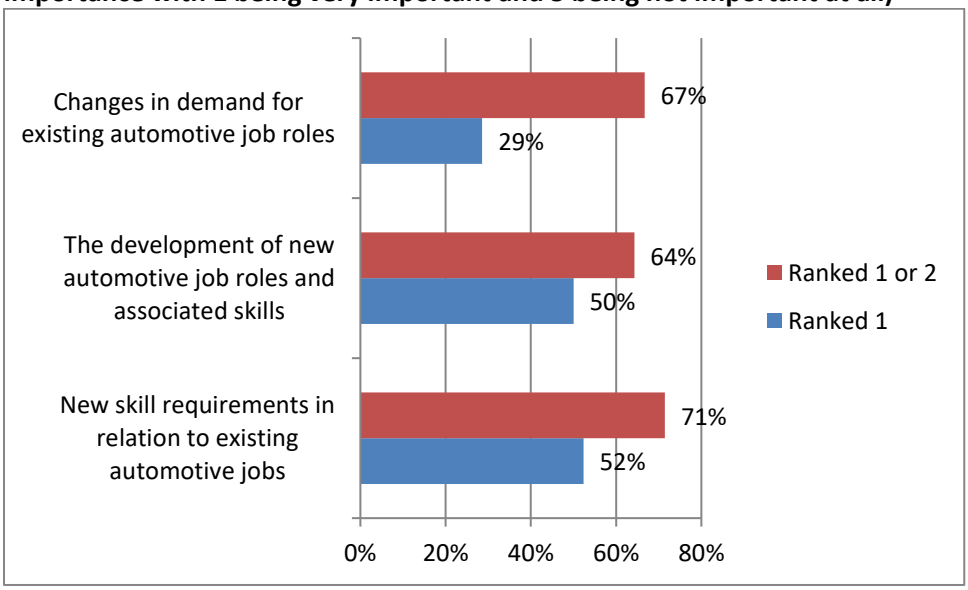
- In-depth knowledge about the expected growth and decline of different occupations in a green transition;
- An understanding of the skills that are associated with these occupations; and
- Knowledge about the likely unequal geographical distribution of affected jobs across the EU in order to identify problem zones and potential (re-)training bottlenecks.

The same is true in relation to the development and/or adaption of all automotive related apprenticeships.

Evidence from a recent survey of apprenticeship stakeholders conducted as part of the DRIVES Project indicates that amongst respondents to the survey there is recognition of the need to improve current skills intelligence to support apprenticeship development/updating. When asked to indicate how useful it would be for up to date information on different aspects of skills intelligence, based on a scale of 1-5 (with 1 being 'very useful'), more than 60% of all respondents ranked all three aspects of skills intelligence included in the survey as either 1 or 2 in terms of levels of importance (See chart below) , and for half or more of respondents, two aspects of skills intelligence were ranked 1 (very useful), these being up to date information on:

- New skill requirements in relation to existing automotive jobs; and
- The development of new automotive job roles and associated skills.

How useful do you think it would be for up to date information on the following in relation to apprenticeships supporting the European Automotive sector: (Rank 1-5 in terms of level of importance with 1 being very important and 5 being not important at all)



Source: DRIVES Apprenticeshipp Survey 2021

This presents a major challenge, particularly in relation to trying to assess future skill requirements.

One practical step forward would be to develop and publicise a simple guidance system (as is already in place in certain countries) to indicate likely relative levels of demand for different occupational areas (high, medium, low) rather than attempt a detailed quantification of demand.

It would also be useful to document and disseminate innovative approaches to skills foresighting/intelligence gathering.

One example already highlighted in the Good Practice Resource is the High Value Manufacturing Catapult. This is a structured process in the UK of engaging with research organisations and employers to understand new organisational capabilities needed in the automotive sector in the next 3 to 5 years and then engaging with employers and educators to identify the competencies (knowledge and skills) needed to implement these capabilities.

Some progress has been made as part of the work of DRIVES to make use of available vacancy data (relating to the UK) in order to track changes in demand for different occupations/job roles.

This approach could be expanded to encompass the use of vacancy data across the EU, not only to track changes in demand by occupation/job role, but also provide valuable insights into changing demand for skills within particular job roles across the sector.

Cedefop have established a new system to collect and analyse vacancy data across different EU countries[4] and have released information based on the collection and analysis of online job vacancies in seven EU Member States.

At present the information released is not very detailed at a sector level but the Automotive sector might provide an interesting pilot case study to refine the analysis at a detailed sector level.

Apprenticeships are designed and developed nationally, with each country having its own structures for involving different stakeholders in this process. It is important therefore that if measures are put

[4] https://www.cedefop.europa.eu/en/publications-and-resources/publications/4172

in place to improve the skills intelligence that is collected, that this is readily available to the different Apprenticeship bodies across different countries involved in Apprenticeship design.

Practical measures therefore need to be put in place to ensure enhanced skills intelligence on the automotive sector is disseminated to those bodies involved in Apprenticeship design in different countries.

Industry 4.0

The rapid transformation of the automotive industry towards Industry 4.0 (i4.0) is linked with massive advancements in technology development and processes. These developments are associated with significant productivity increases. This highlights not only the need to ensure the content of relevant apprenticeships reflects changing skill requirements, but also, the need to maximise the innovative use of digital technology to deliver at least some aspects of apprenticeships.

In particular, advances in digital technology increases possibilities for the innovative use of such technology through delivery methods such as e-learning, mobile apps, and virtual and augmented reality.

In recognition of the scope for the use of digital technology for work-based learning a new tool #SELFIE_EU has been developed that helps VET schools and companies improve their use of digital technologies in their training programs.

The Good Practice Resource has highlighted one example of the successful application of digital technology in relation to welding training.

More relevant examples need to be documented to encourage greater adoption of apprenticeship delivery techniques involving digital technology across the sector. The recently launched DAMAS[5] project established to test virtual training and mobility in the automotive sector may provide a useful source of such examples.

[5] https://www.earlall.eu/fostering-digital-mobility-in-vet-damas-project-kicked-off/

Ensuring progression to all levels

The Report has highlighted the need for apprenticeships supporting the automotive sector at all levels including higher levels, but also how the apprenticeship offer in many countries focusses on lower and intermediate levels.

There is a need to use examples from countries such as Germany, France and the UK where higher level apprenticeships are common-place to promote the more widespread development of this level of apprenticeships serving the automotive sector across Europe as a whole.

There is also a need to highlight and disseminate further good practice examples of initiatives successfully providing clear progression pathways from lower and intermediate level to higher level training/employment.

Upskilling and reskilling

The Report highlights the scale of upskilling and reskilling challenges faced across the European Automotive sector.

The 'Automotive Pact for Skills' has set out ambitious targets for the upskilling and reskilling of the workforce within the European automotive ecosystem.

A key objective of the Automotive Skills Alliance (ASA) is to pave the way to member states/regions/industry for the massive up-/re-skilling agenda.

We would argue that Apprenticeships need to support upskilling of existing employees as well as provide training for new entrants and that Apprenticeships can play a significant role in fulfilling the these re-skilling and upskilling ambitions.

We are not suggesting apprenticeships should replace other existing training to support upskilling and re-skilling of the workforce but that this provision should sit alongside other forms of training and be flexible enough to offer an alternative upskilling/reskilling route where this is appropriate.

At the same time, if a more modular approach is adopted towards apprenticeships it will be important not to lose sight of a key objective of providing a basis for new entrants to develop a career in their chosen occupations rather than a focus on simply acquiring a set of specific skills.

In order to achieve this increased flexibility and broaden the upskilling/reskilling potential of apprenticeships serving the automotive sector we would suggest:

- **An audit of existing apprenticeship provision serving the automotive sector in order to identify specific barriers in place in particular countries restricting use of apprenticeships for upskilling/reskilling the existing workforce, including age restrictions and funding limitations. Where these are in place steps need to be taken to address these issues;**
- **Promote the potential and practical benefits of apprenticeships as a mechanism for upskilling/reskilling the workforce more widely. This includes development of marketing material to address current misconceptions relating to apprentices (**They are only for young people, for new entrants or for those in specific occupations);
- **Promote the increased adoption of a 'modular' approach to apprenticeships in order to improve flexibility and use for upskilling/reskilling. This could be done by:**
  - *Promoting practical examples of where this has been achieved (Such as Austria);*
  - *Ensuring mechanisms for Accrediting Prior Learning of existing employees is in place in order that existing employees can opt in to the specific components of an apprenticeship and 'top up' only those skills they require, where this is the most appropriate vehicle for achieving this; and*
  - *Ensuring each module is accredited and assessed separately (rather than having to take the whole apprenticeship before accreditation). This could be linked to the development and adotion of micro-credentials, learning from the experiences of the DRIVES development of digital badges for bespoke VET courses.*

Understanding the Apprenticeship Offer

This Report has already set out the current difficulties in:

- Accessing information on the current apprenticeship offer supporting the automotive sector in different nations
- Comparing this offer across different nations

In order to try and address this, a key recommendation in the first DRIVES Apprenticeship Marketplace Report was to establish an Automotive Apprenticeship Comparison Tool (ACT) to enable comparison of relevant automotive related apprenticeships in different European countries in one place for use by both employers and individuals https://drives-compass.eu/home
The tool will be launched later in 2021.

Moving forward we suggest:

Use of the ACT should be monitored.

If it is found to be useful by employers and other stakeholders it should be maintained beyond the lifetime of DRIVES and expanded to include other key automotive EU nations not so far represented.

Assessing the adequacy of current provision

We would argue that if the future design of apprenticeships is really going to adequately meet the fast changing requirements of the automotive sector then, as a minimum, those stakeholders involved in apprenticeship development need access to information on:

- What the current demand for different job roles is and some idea of what the future demand is likely to be?
- What the current profile of skills is in relation to different job roles and some idea of likely future changes?
- How does current provision match demand?

- What are the gaps and weaknesses in current provision and how can these gaps and weaknesses be rectified?

Recommendations in relation to the development of enhanced 'demand' related intelligence have been addressed already under 'The rapid pace of skills change'.

The ACT provides a tool for comparing current provision based on a defined set of criteria. What it does not enable is an assessment of the adequacy of current provision. For this to happen, in addition to up to date information on changes in demand for particular occupations, job roles and associated skills, up to date information on current provision, including numbers of apprentices undertaking training in relation to different occupations, job roles and associated skills would be required.

While the ACT provides information on the nature of provision by occupation, job role and skills for specified countries, it does not include information on numbers of learners. This is a critical omission and was not included because of the difficulties encountered in accessing this information.

Results of a recent survey of apprenticeship stakeholders conducted as part of the DRIVES Project indicates that amongst respondents to the survey, nearly half would find this useful. When asked to indicate how useful it would be for up to date information on numbers of automotive apprentices by country and specific apprenticeship, 45% ranked this aspects of skills intelligence either 1 or 2 in terms of levels of importance (based on a scale of 1-5, with 1 being 'very useful')

For any assessment of the adequacy of current provision, mechanisms need to be put in place for intelligence on numbers of automotive related apprentices to be collected systematically over time.

Any assessment undertaken could be enhanced further through use of the recently adopted European Framework for Quality and Effective Apprenticeships (EFQEA) recommendations.

These recommendations provide a more detailed accepted framework against which the current automotive Apprenticeship market place within selected countries can be benchmarked. The feasibility of adopting this criterion as part of a structured mechanism for assessment of current provision supporting the automotive sector has been piloted as part of the DRIVES Project in relation

to 6 key EU automotive countries, selected to highlight divergences in approach to apprenticeships, these being Sweden, Spain, Portugal, Czech Republic, Germany and the UK.

We recommend that adoption of the EFQEA criterion more widely would further enhance the quality of apprenticeship assessment mechanisms in the future.

Encouraging SME engagement with apprenticeships

The challenges faced by SME's in relation to engagement with apprenticeships have been well documented in this Report.

The Good Practice Resource has already highlighted two particular innovative approaches to supporting SME's in this process.

More practical examples of initiatives supporting SME engagement with apprentices, together with tips on implementation need to be added to the Good Practice Resource over time.

A further practical initiative to be launched shortly as part of the work undertaken through DRIVES is an SME Apprenticeship Toolkit. This is being developed to support SME's through each stage of the process of apprenticeship engagement, right through from initial workforce analysis, recruitment and selection to on-boarding of apprentices.

A viable plan for sustaining the Apprenticeship Toolkit after funding through DRIVES has ceased needs to be developed.

Centres of Vocational Excellence (CoVEs) are designed to act as catalysts for local business investment, and ensure supply of high-quality skilled workers, but also support entrepreneurial initiatives of their learners (incubators), and act as knowledge and innovation hubs for companies (in particular SMEs).

A further practical step that would enhance the support available to SME's within the automotive sector would be to explore the potential for the establishment of an Automotive Centre of Vocational Excellence (CoVE).[6]

Increasing labour mobility

The factors restricting labour mobility of those undertaking automotive related apprenticeships has already been set out in this Report.

It is clear that in practice the development of a 'single market' across Europe for automotive apprentices is not going to be achievable in the foreseeable future. A more pragmatic approach is therefore required.

One successful example that is proven in practice is the approach of 'dual certification'. One automotive related example of this is documented on the Good Practice Resource.

Practical steps to publicise the benefits of the dual certification approach more widely need to be put in place, together with steps to support wider adoption by other companies and across other countries.

Other practical initiatives that have proven to be successful in increasing labour mobility through apprenticeships also need to be identified and documented on the Good Practice Resource.

Responding to COVID 19

COVID 19 has led to a major shift in approaches towards the delivery of apprenticeships, in particular, a significant increase in digital delivery.

Available evidence indicates that some of these changes in delivery approaches may be permanent.

The Good Practice Resource documents one example of the successful assessment of apprentices via mobile phones.

[6] https://ec.europa.eu/social/main.jsp?catId=1501

Documentation of other examples of innovative practice highlighting both the benefits and potential pitfalls of different approaches to respond to COVID 19 would help providers and employers determine the most appropriate balance of delivery methods moving forward.

Diversity and Image

While steps have been taken to try and address the continued under-representation of women and minority groups within the European Automotive sector these issues still remain, with significant improvements in the image and perceptions of the sector needed if it is to become fully inclusive and maximise the available talent pool.

We would argue that it will be important to put in place additional measures to further improve the diversity balance within the sector.

There are numerous examples of automotive employers taking steps to address diversity issues, a number of which have been documented on the Good Practice Resource.

As part of the steps taken to improve the intelligence available on automotive related apprenticeships it would be useful to build up a much clearer picture of the diversity profile (Gender, ethnicity, disability) of automotive related apprentices and put in place procedures to monitor how this profile changes over time.

Maximising available funding

The widely varying ways in which apprenticeships are funded across Europe has been set out already in this Report, as have the difficulties in accessing detailed information allowing comparison of funding available to support automotive related apprenticeships.

While some information is available through the CEDEFOP apprenticeship funding related database https://www.cedefop.europa.eu/en/tools/financing-apprenticeships and also through the DRIVES

Apprenticeship Comparison Tool (ACT), both lack the level of detail required for detailed analysis of funding within the automotive sector.

To support employers' access and maximise the use of available funding relating to automotive related apprenticeships it would be useful to:

- **Document relevant available funding in detail on an ongoing basis and outline how this can be accessed;**
- **Identify and document further examples of how the funding that is available has been utilised in innovative ways; and**
- **Identify what apprenticeship funding is available for use by employers to upskill/reskill existing employers and how this can be accessed.**

Involving apprentices

This Report has highlighted the benefits of involving apprentices in the development, updating and improvement of apprenticeships.

A number of innovative examples of how apprentices have been successfully involved in this process are also highlighted in the Good Practice Resource including:

- The Azubi Car initiative which is an example of a programme at the Skoda Vocational School in the Czech Republic that gives learners the opportunity to design and manufacture their own concept car;

- Zukunft.lehre.österreich in Austria which is an example of how apprenticeship involvement is encouraged through the establishment of an Apprenticeship Alumni-Club; and

- The JA3B initiative in Spain which is an example of an innovative approach to capturing the views of automotive apprentices and feeding these back to key stakeholders.

It would be useful to add further examples to to the Good Practice Resource of how apprentices have been successfully involved in the development, updating and improvement of apprenticeships that others can learn from.

Closer dialogue between stakeholders

Apprenticeships need to balance the need for equipping apprentices with the skills required for successful careers in the automotive industry with the need to meet employers' specific changing skill requirements.

As changing skill requirements within the automotive industry become more complex and the rate at which these skill changes take place increases, the role played by different social partners in ensuring the appropriate balance between these two aims will also become more challenging.

It will be useful to identify and document further examples of successful models that fully involve different social partners at the same time as being flexible enough to respond to fast changing skill requirements of employers.

The role of the Automotive Skills Alliance (ASA)

The work of the Automotive Skills Alliance and associated Working Groups provides an obvious framework in which to implement a number of the above recommendations.

The mission of the Automotive Skills Alliance (ASA) https://automotive-skills-alliance.eu/ is to bring together different kind of stakeholders involved in the Automotive ecosystem and to ensure continuous, pragmatic and sustainable cooperation on the skills agenda in the ecosystem.

Recommendations relating directly to the Automotive Skills Alliance (ASA) are summarised below:

Good Practice Resource (GPR): ***It is proposed that responsibility for sustaining and enhancing the Good Practice Resource over time is transferred to the ASA. It is also recommended that the scope of the Good Practice Resource is widened beyond a focus on apprenticeships to include all training and skills development issues and that the protocols for the collection and documentation of innovative practice are streamlined with those being developed through the ASA.***

Apprenticeship Comparison Tool (ACT): ***The Automotive Skills Alliance could potentially provide an umbrella structure for taking forward and sustaining the ACT over time.***

Skills intelligence: ***The Automotive Skills Alliance (ASA) could play a central role:***

- ***As a repository of information on changing skill requirements within the automotive sector;***
- ***By providing a mechanism to disseminate skills intelligence to appropriate Apprenticeship bodies and others involved in apprenticeship and other training development across the sector. (This potentially could be coordinated through Working Group 4 of the Automotive Skills Alliance (ASA));***
- ***By coordinating the documentation of innovative practice in relation to both skills intelligence gathering and modular/other flexible approaches to apprenticeship design that enable 'just in time' adaption to changing skill requirements;***
- ***The ASA should involve and mobilise CEDEFOP to use the automotive sector as a pilot to test more detailed analysis of vacancy data relating to job roles and associated skills; and***
- ***Each region represented through the ASA WG4 should commit to accessing and providing an agreed minimum set of data on numbers of apprentices undertaking training in relation to the automotive sector. This would enhance the ability to assess the adequacy of current provision serving the sector.***

Strengthening links with key Apprenticeship networks and stakeholders: ***As part of the work undertaken through DRIVES on Apprenticeships links have been established with a number of Apprenticeship stakeholders, in particular the European Alliance for Apprentices (EafA). It is recommended that the ASA continue to build on these links moving forward.***

Explore available funding to continue work relating to Apprenticeships: ***The ASA should identify potential sources of funding to continue to take forward the above work relating to Apprenticeships.***