STRATEGIC ROADMAP – AUTOMOTIVE SECTOR

# Survey's first assessment

In March 2019, DRIVES launched an online survey to support the creation of a strategic roadmap for the sector, which will contain information necessary to all the project's partners to analyse the current Automotive situation in terms of Job Role and Skills needs and the attractiveness of the sector in general. Also, to evaluate the current gap between the VET needs and offer and to develop 30 job role trainings to be offered to the automotive sector, providing 1.100 pilot trainings during project duration.

## 1. The Survey Results – The Respondents Profile

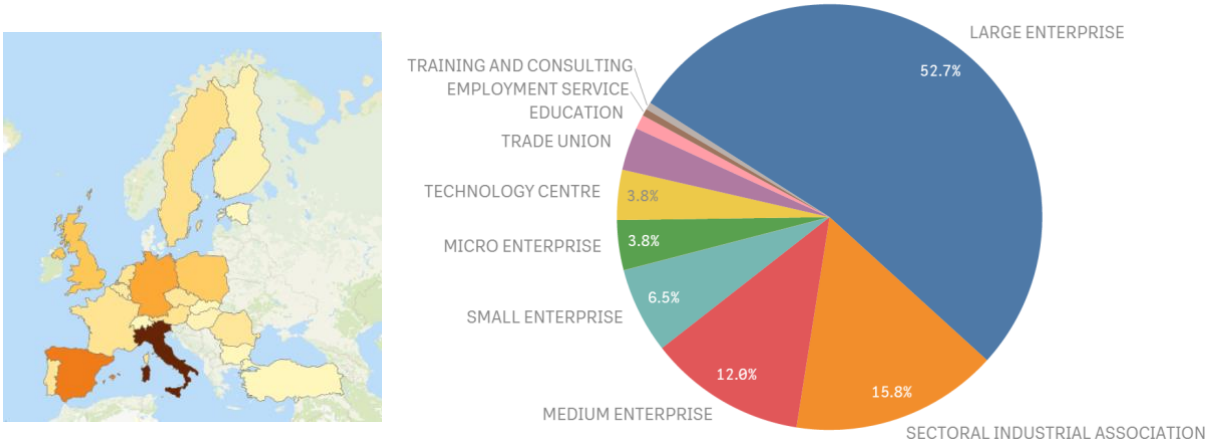


**Figure 1 The Respondents Profile and Geographical Coverage**

Large Enterprises and SMEs compose the predominant group of survey respondents with 75%, while sectoral and industrial associations represent 15% of the sample as per Figure 1.

## 2. The Survey Results - Drives of Change

The identified 'Drivers of Change' were categorised by importance for the business and urgency for implementation. The DRIVES consortium highlights 5 macro groups of Drivers of Change (following the outcome of the GEAR2030[1], the European Automotive Skill Council[2] reports with an analysis on current availability intelligence) related to the Automotive sector - 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; Globalisation and the rise of new players.

[1] GEAR 2030, High Level Group on the Competitiveness and Sustainable Growth of the Automotive Industry in the European Union, 2017
[2] European Sector Skill Council: Report, Eu Skill Council Automotive Industry, 2013

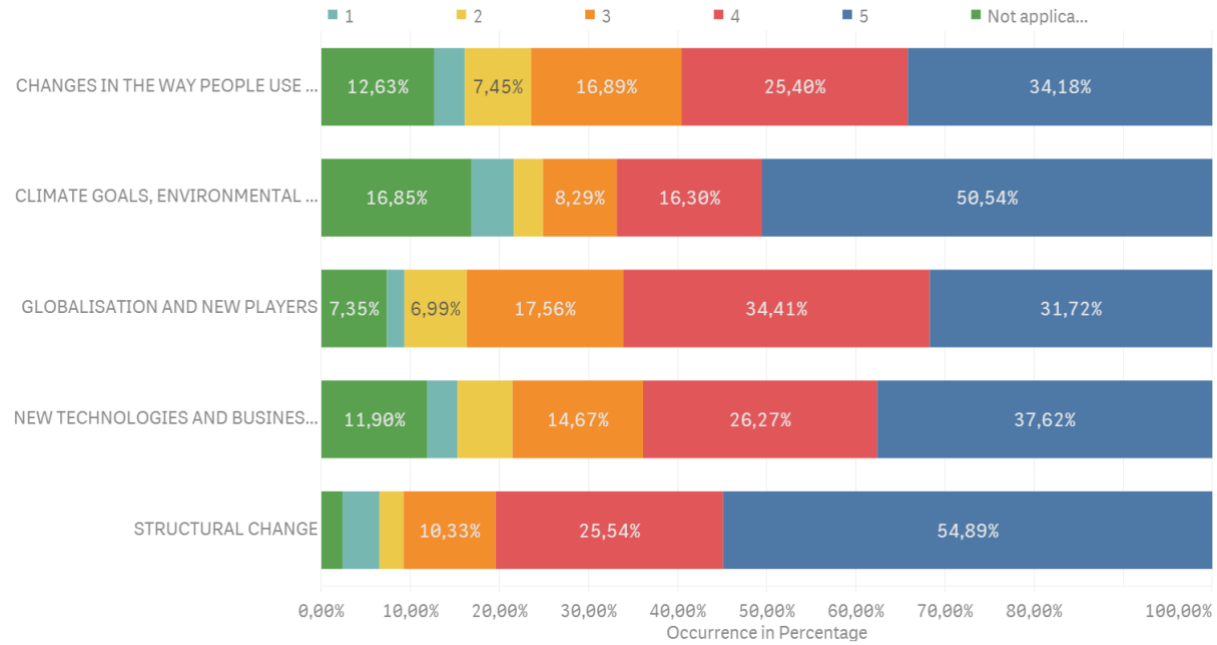


**Figure 2 Drivers of Change – Importance per group**

It is visible that 'Structural change' was acknowledged as the most important, followed by 'Globalisation and the rise of new players' (Figure 2). A high level of importance is also given to 'Climate goals, Environmental and health challenges' and 'New technologies and business models'. Least relevant are 'Changes in the way people use cars'.

All the presented Drivers of Change groups have been recognised as urgent (the flag by 2020 is always predominant – Figure 3). However, it is evident that 'Structural Change' group is be the most impacting driver. The remaining Drivers of Change groups are set with similar weight, well behind the former.

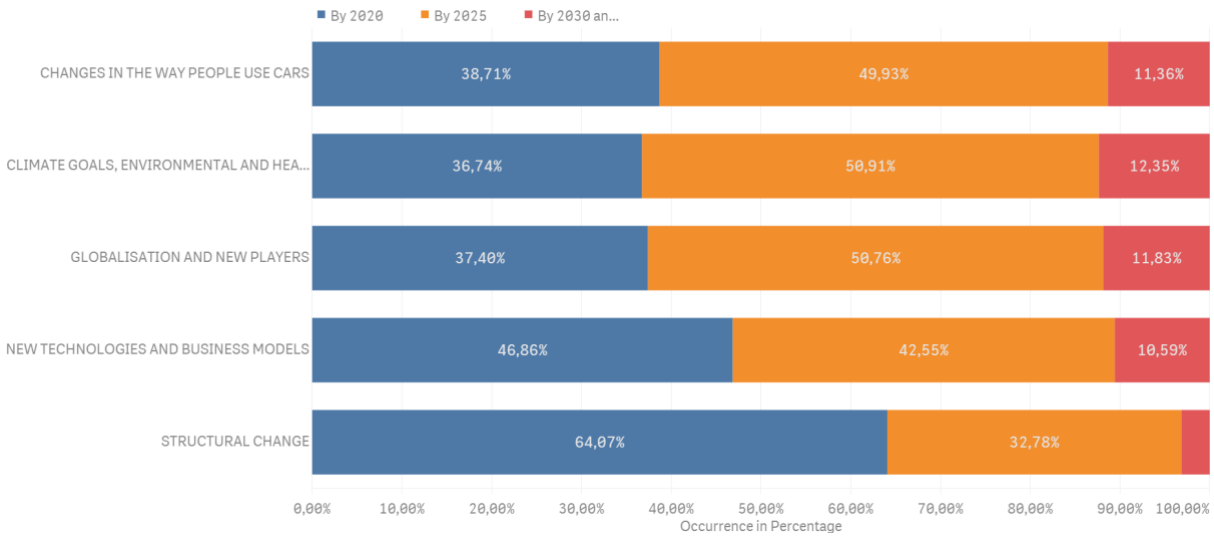


**Figure 3 Urgency (timeframe) of Drivers of Change Groups**

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# 3. DRIVERS OF CHANGE INDEX

The necessity to create an index to combine importance and urgency (timeframe) per Drivers of Change was fundamental to prioritise all the decisions and to rank the vision of the sector by stakeholders interviewed.

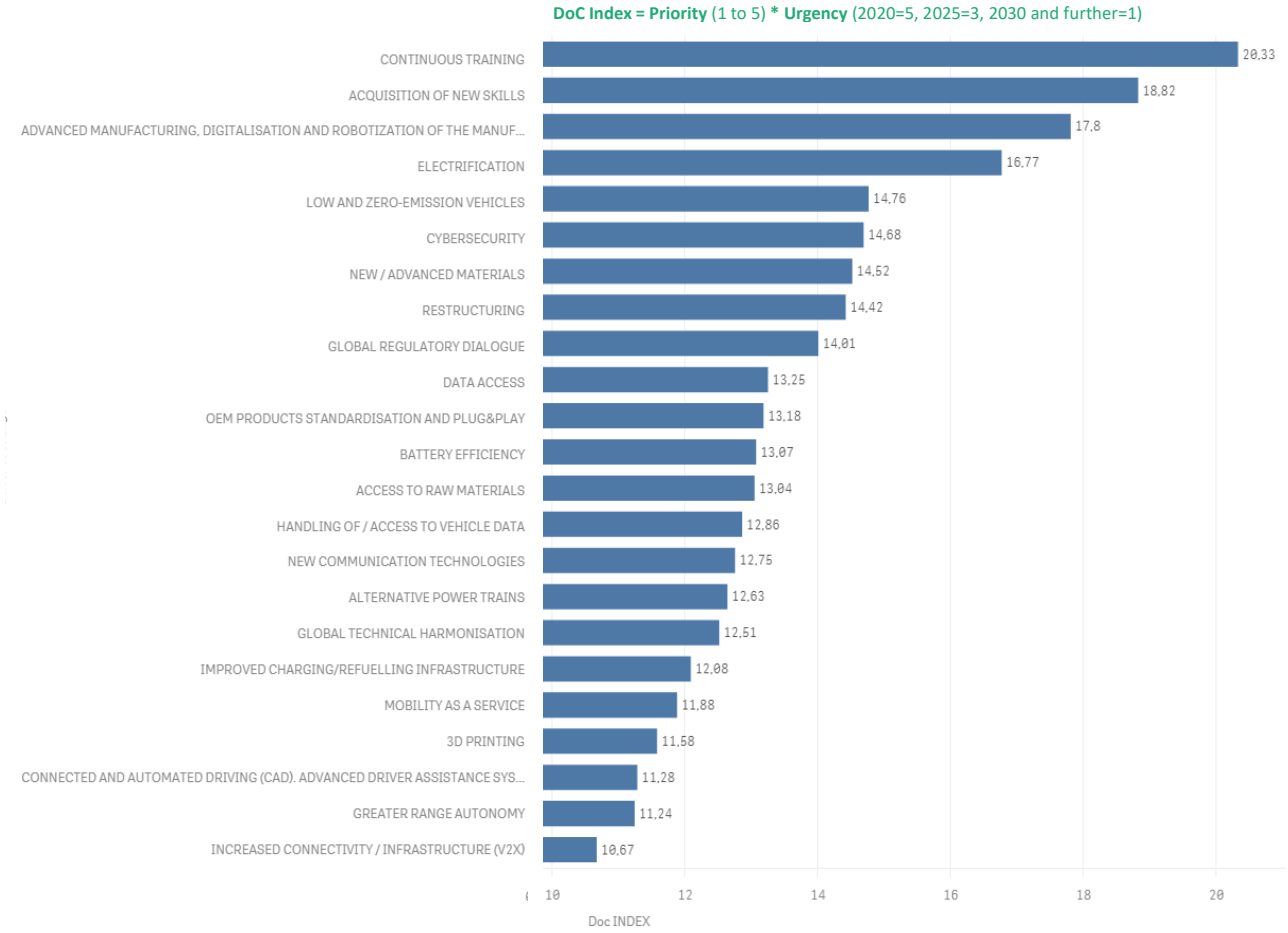


**Figure 4 Drivers of Change Index**

Figure 4 shows Drivers of Change Index ranking. It identifies that 'Continuous training' and 'Acquisition of new skills' are the first two Drivers of Change with the most priority. These results confirm the need for upskilling and reskilling a priority for the sector, matching one of the most important objectives of the DRIVES project itself. 'Advanced manufacturing, Digitalisation and robotization of manufacturing process' trailed by 'Electrification' are next in line, being a consequence of the specific need/vision of the stakeholders over a technological and transversal sector such as the Automotive.

## 3.1. SKILLS RANKING

Figure 5 shows the TOP15 Skills/Skills Groups ranked by the Skill Index, which is calculated by multiplication of occurrence of the skills in the results of the survey and the average of linked Drivers of Change to that particular skill. The results show that most of the skills in TOP15 are technical skills, with a connection to Big Data and Software Development as main needs. Few soft skills in the TOP15: Learnability and Adaptability/Flexibility.

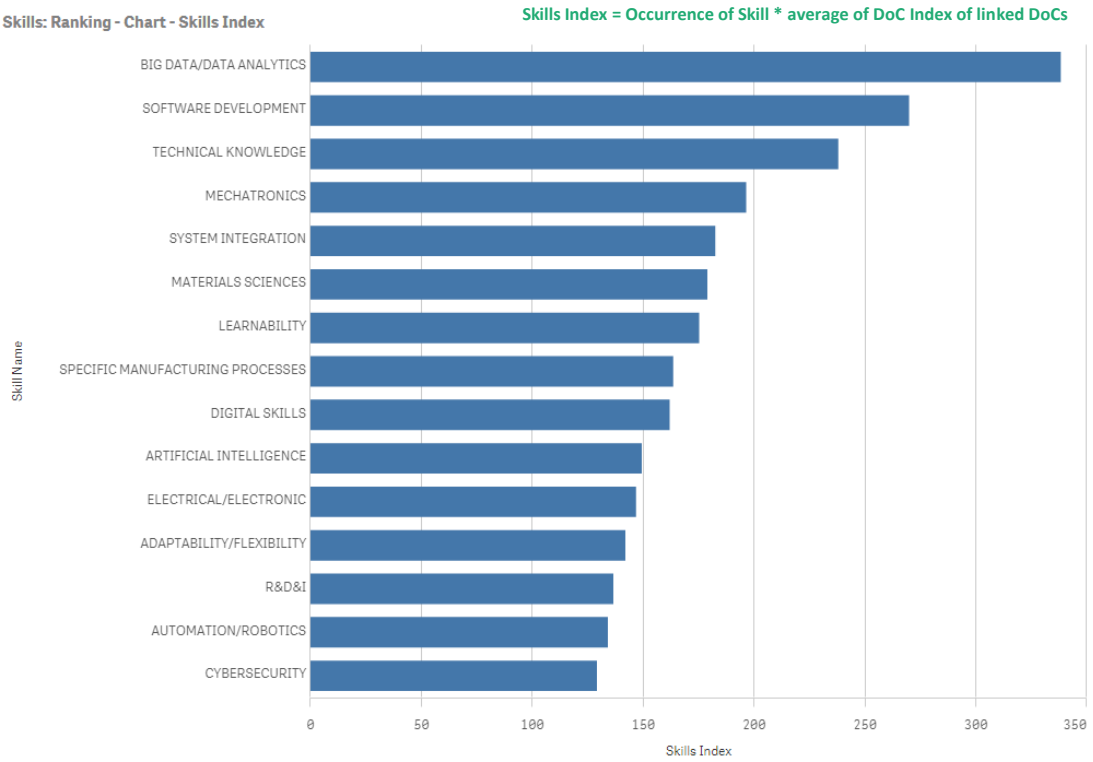


**Figure 5 Top 15 Skills – Skills Index**

## 3.2. VET APPROACH

Figure 6 depictures importance of VET approaches – Blended learning, Classroom based training, Dual systems/apprenticeships, Mentoring, Online training and Training on the job. It shows that there is a clear predominant importance (need for) given to 'Training on the job', followed by Dual systems/apprenticeships and Mentoring, which could be summarised as a need for Work based learning/training.

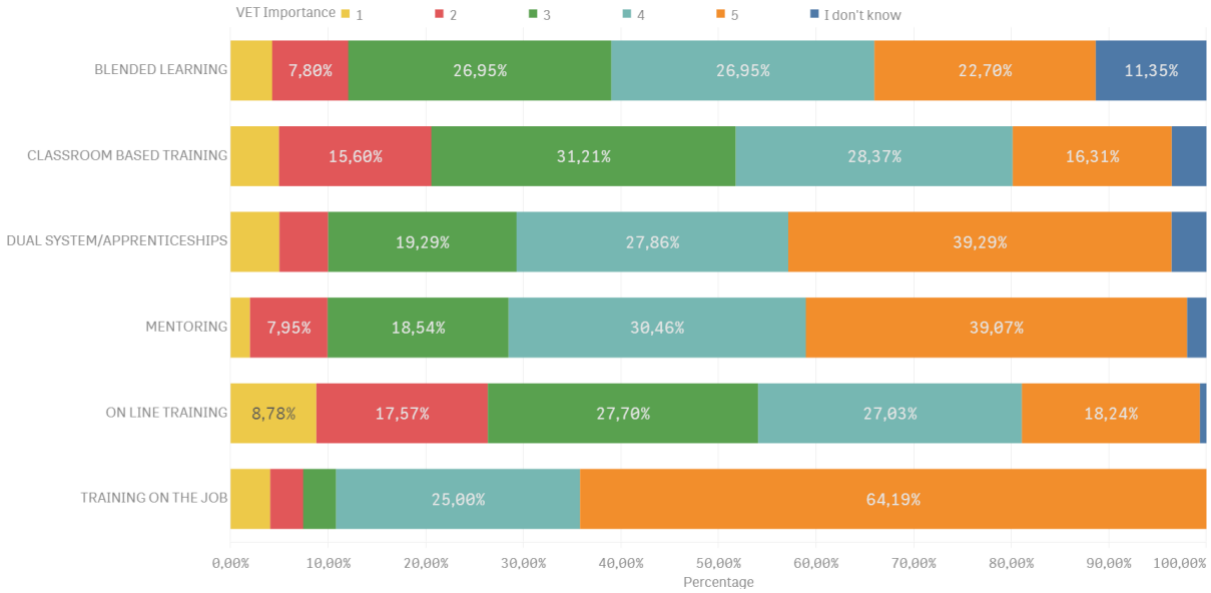


**Figure 6 VET Approach - Importance**

## 4. THE DRIVES' PROJECT TIMELINE AND THE NEXT STEPS

This document presents a first short overview of the survey results. Overall results of the sectoral survey will be released later this year. The dedicated report t will include detailed elaboration of results in topics such as - individual Drivers of Change, VET strategies, Skills needs, Job roles needs, Attractiveness of the sector, Recruitment strategies and so on.

DRIVES project is running from January 2018 to December 2021:

- ✓ **March 2019 to June 2019** - Key stakeholders survey (Demand) - Drivers of Change, Skills and Job Roles needs
- ✓ **July 2019** – First outcomes of the Demand survey
- ➡ **September 2019 to October 2019** – Offer Survey (VET providers, education) - Skills offer and trainings provided in EU to Automotive sector
- ➡ **January 2020** - First Strategic Automotive Roadmap release (skills needs & gaps); Policy recommendations
- ➡ **Years 2020 and 2021** – Implementation of the skills analysis in the education area (preparing and providing trainings, transferability of trainings); continuous Strategic Automotive Roadmap update

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