



# Skills Needs in Automotive Sector

## Blueprint for Sectoral Cooperation on Skills in Automotive Sector

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# DRIVES Project in General



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- [The Blueprint](#) for Sectoral Cooperation on Skills in Automotive Sector
- Duration – **January 2018 to December 2021**
- Project assures cooperation between **24 full partners from 11 EU countries**
- **Steering Board** has extra 10 associated partners, chaired by ACEA, co-chaired by CLEPA, ETRMA, as full project partners.

# DRIVES Project – Partnership

- Project Coordinator



- Steering Board Leaders



European  
Automobile  
Manufacturers  
Association



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# DRIVES Project – Partnership

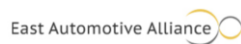
- Work Package Leaders



**UNIVERSITY  
OF TWENTE.**



- Partners



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# DRIVES Project – Partnership

- Associated Partners (Members of Steering Board)



Verband der  
Automobilindustrie



- Associated Partners:



**Linked in** - research partner



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# DRIVES Objectives

- **Analyse key trends** in the automotive, covering the whole value chain
- **Define the skills and job roles** needed in the future and **identify skills gaps** for foreseen changes
- **Analyse offer side** currently available for the trainings/upskilling
- **Provide clear guidance for the education and training providers** on skills needs of the automotive industry



# DRIVES Objectives

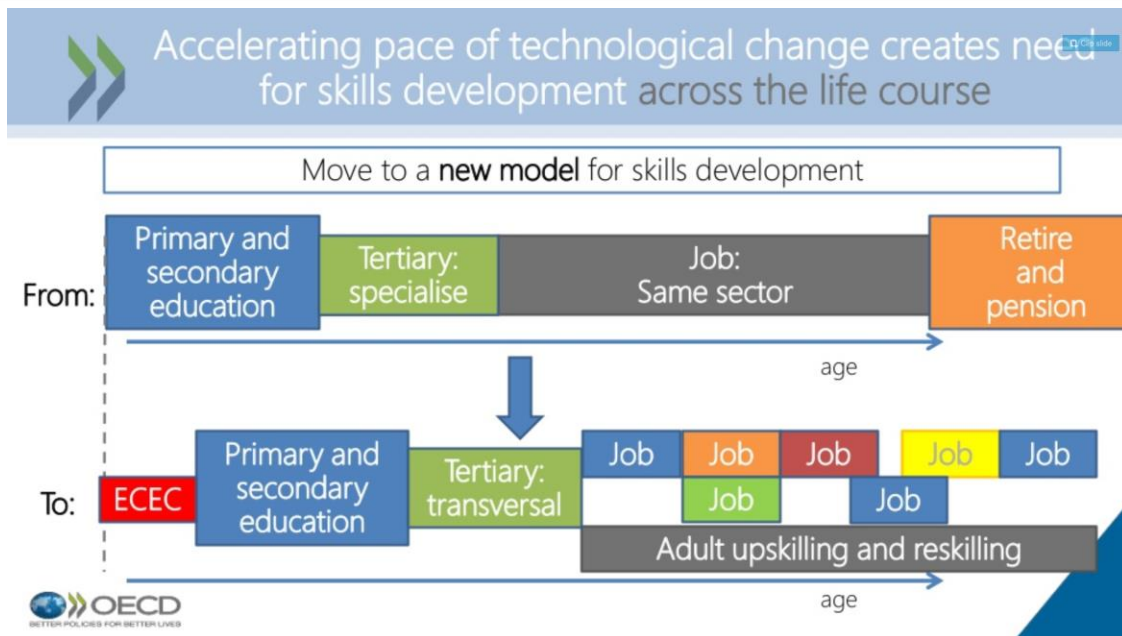
- **Create trainings** for selected skills and job roles in the automotive sector
- **Ensure mutual recognition of the skills and job roles across the EU**
- **Provide as a pilot 1100 trainings across the EU** and across the education and training institutions
- As the Blueprint project – Regularly **deliver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





# DRIVES Education and Training Scope

- DRIVES project focus on whole life course, mainly to Tertiary education and Adult upskilling and reskilling



Source: Montserrat Gomendio, A Coordinated Approach to Skills Issues: The OECD Centre For Skills, Skills Summit 2018, Porto

# DRIVES Provides Strategic Guidance



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# Survey - Overview

- Aim is to **analyze the automotive sector and its skills needs and gaps**
- **Represents stakeholders perspective on:**
  - Key drives of change
  - Timing of those drives of change
  - Associated skills needs and jobs roles in the future
  - VET mechanisms
  - Attractiveness of the sector
  - Training offer



# Survey – Target Groups

- SME
- Large enterprise
- Technology centre
- Sectoral/Industrial association
- Trade union
- Labour market intelligence entity
- Public employment service
- Private employment service
- Public authority
- Chambers of Commerce
- Labour ministry
- National statistics office
- Professional School (secondary education, EQF 3-4)
- Higher Education (master & bachelors, EQF 5-8)
- Training and education provider
- Independent trainer

## Survey - DEMAND

- To analyze the demand of the automotive sector and its skills needs

## DEMAND

(completed  
March – June 2019)

Online questionnaire –  
around 300 respondents

## Survey – OFFER

- Based on the demand, analyze the offer
- What skills are offering, what is in plan, what are the capacities of offered courses



# Survey – Target Groups

Participate to Survey OFFER, online  
questionnaire:

[drives-survey.vsb.cz](https://drives-survey.vsb.cz)

- Private employment service
- Public authority
- Chambers of Commerce
- Labour ministry
- National statistics office
- Professional School (secondary education, EQF 3-4)
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## Survey - DEMAND

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## Survey – OFFER

- Based on the demand, analyze the offer
- What skills are offering, what is in plan, what are the capacities of offered courses

**OFFER** (open  
September –  
October 2019)

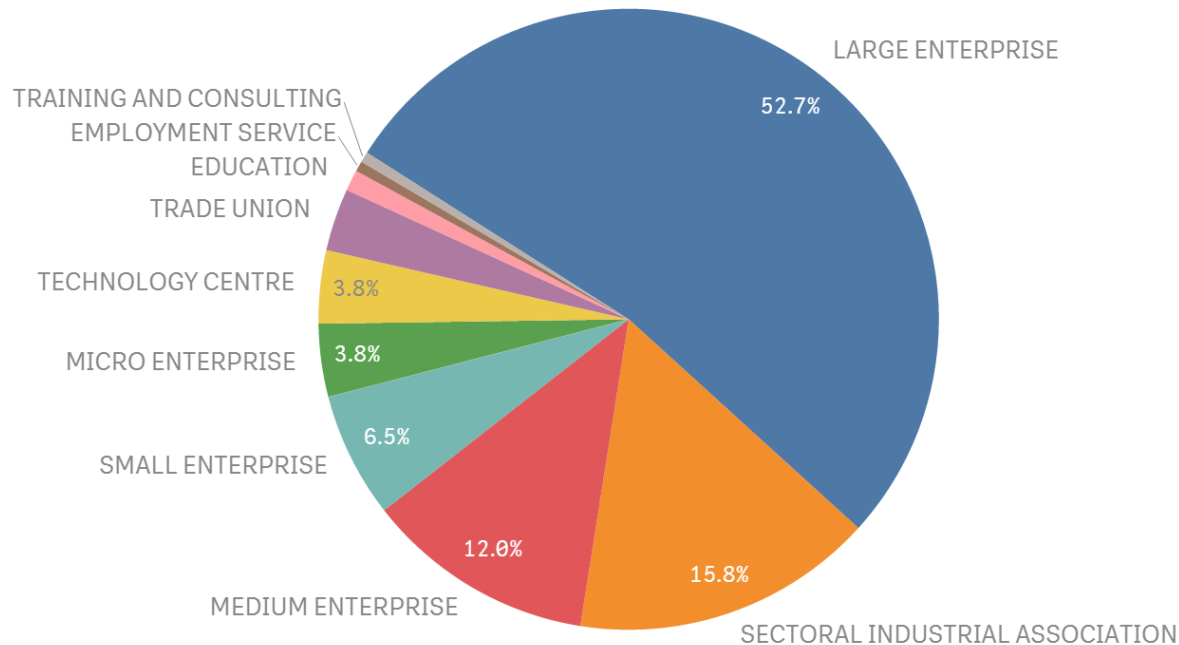
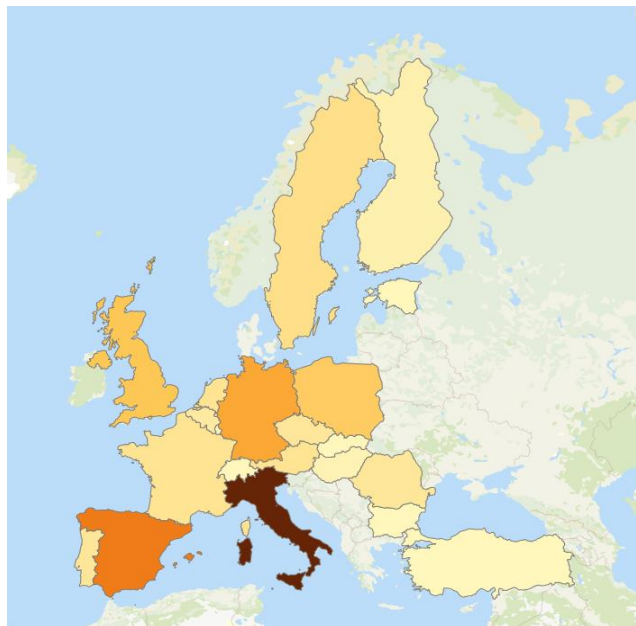
Online questionnaire



# DRIVES – Survey Demand Findings



# Geographical Scope and Stakeholder Category



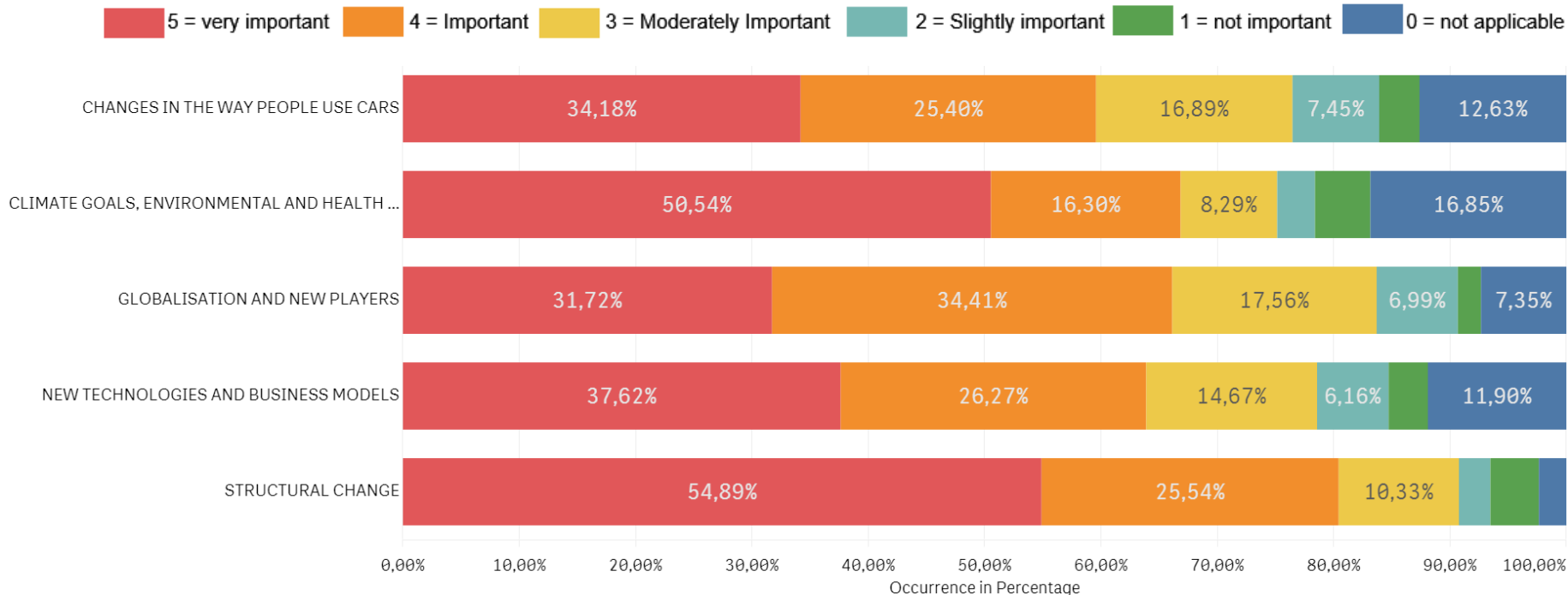
# Drives of Change – Definitions

- Five macro drives of change groups analysed:
  - **Change in way how people use car** (4 drivers of change)
  - **Climate change, environment and health** (4 drivers of change)
  - **Globalization and new players** (3 drivers of change)
  - **New technologies and new players** (9 drivers of change)
  - **Structural change** (3 drivers of change)



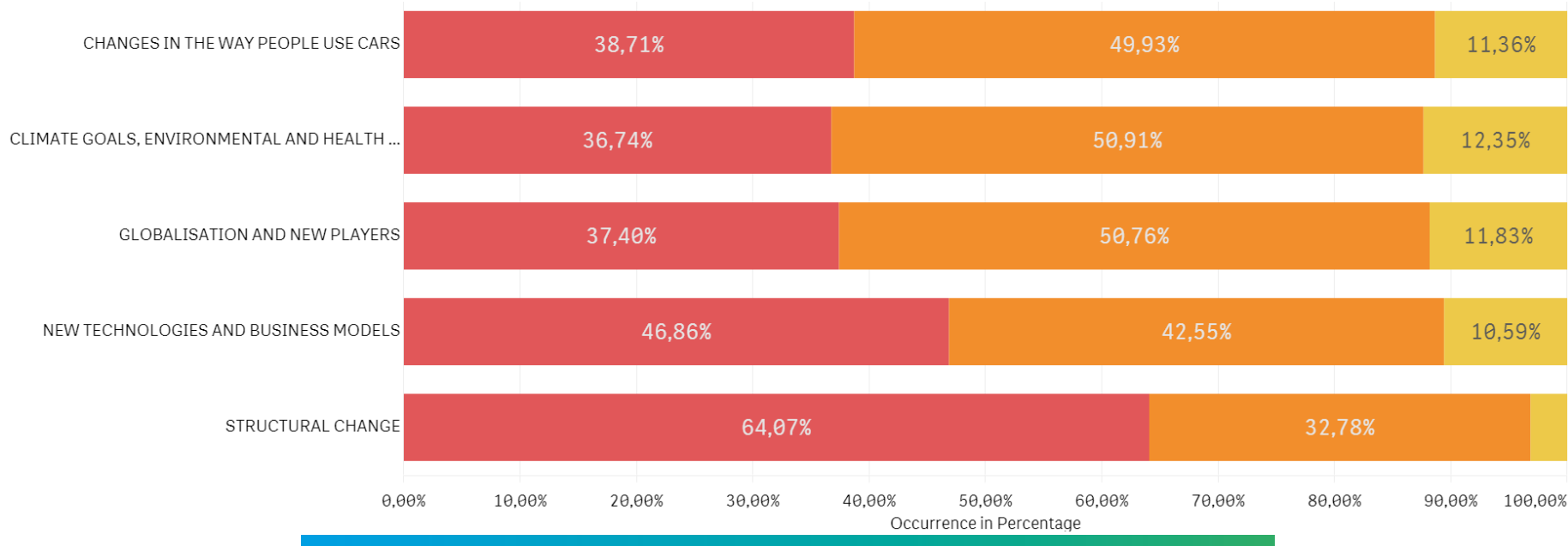


# Drives of Change – Priorities



# Drives of Change – Timing

by 2020: 5 = very urgent    by 2025, 3 = urgent    by 2030 and later, 1 = not urgent



# Drivers of Change – Priorities and Timing

- The results are relatively **similarly shared by large enterprise and SMEs.**
- National associations focus more on the climate change (clearly subjected to political pressure on national level)
- **Structural change - Full consensus on timing “by 2020”** – 64% of the stakeholders, other 32% “by 2025”

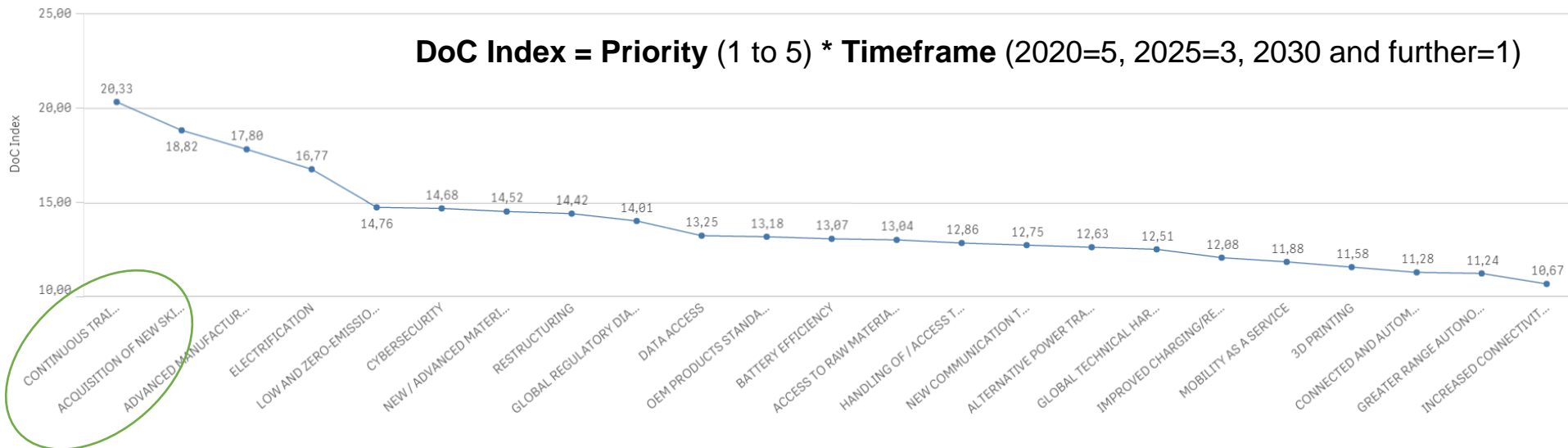
# Drivers of Change – Structural Change

- **Structural change is the biggest challenge, including:**
  - Restructuring
  - Acquisition of new skills
  - Continuous training



# Drivers of Change Index

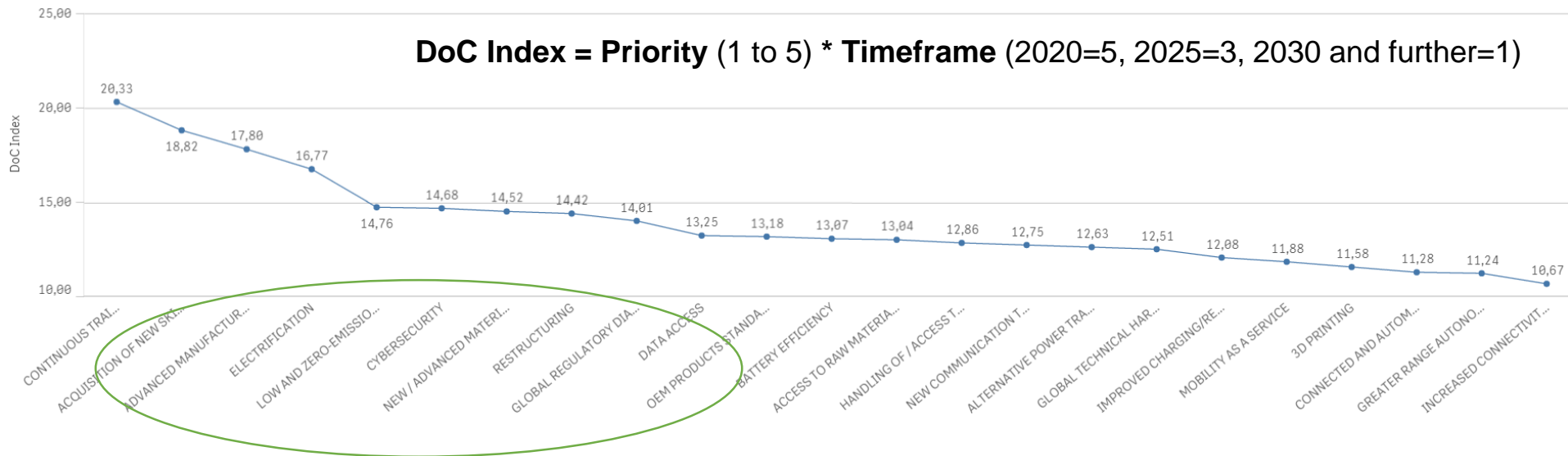
**DoC Index = Priority (1 to 5) \* Timeframe (2020=5, 2025=3, 2030 and further=1)**



**Need of upskilling and reskilling**

# Drivers of Change Index

**DoC Index = Priority (1 to 5) \* Timeframe (2020=5, 2025=3, 2030 and further=1)**



**Major trends in the automotive sector**

# Skills Needs

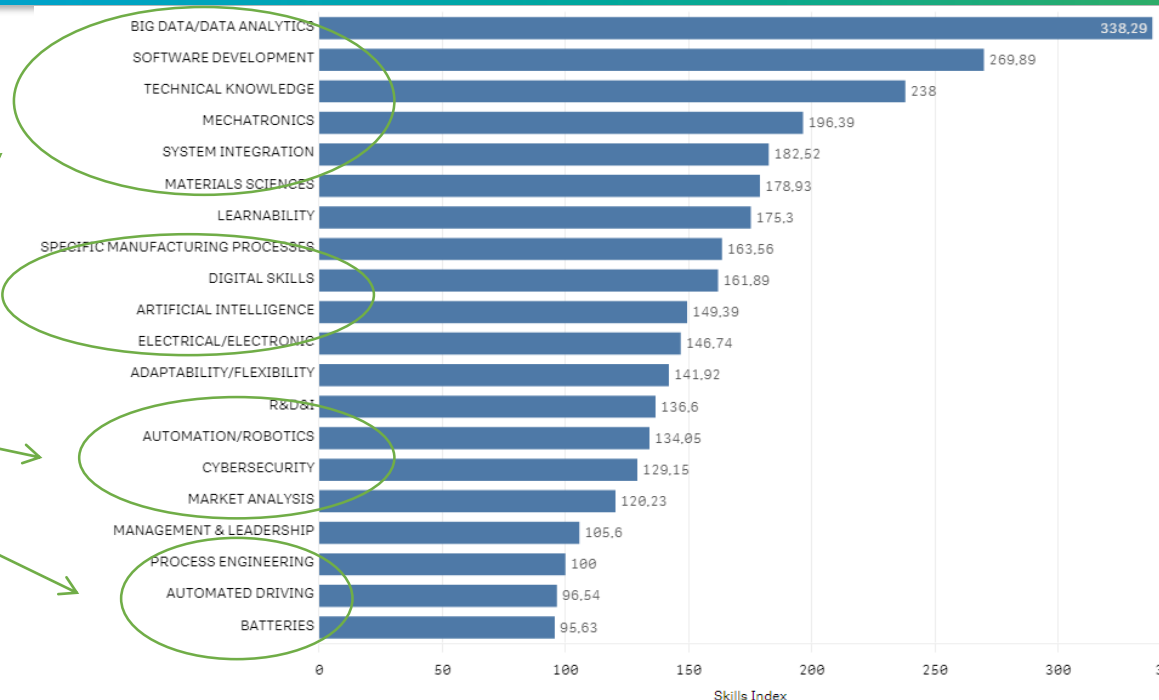
- Survey identified also the key skills needed in future
- There are **differences between large enterprises and SMEs**
- Further analysis is needed to investigate the reasons
- Clear demand for **technical skills** in the future



# Skills Needs – Skills Index – TOP 20

**Skills Index =**  
**Occurrence of Skill \* average DoC Index of linked DoCs**

**Technical skills**





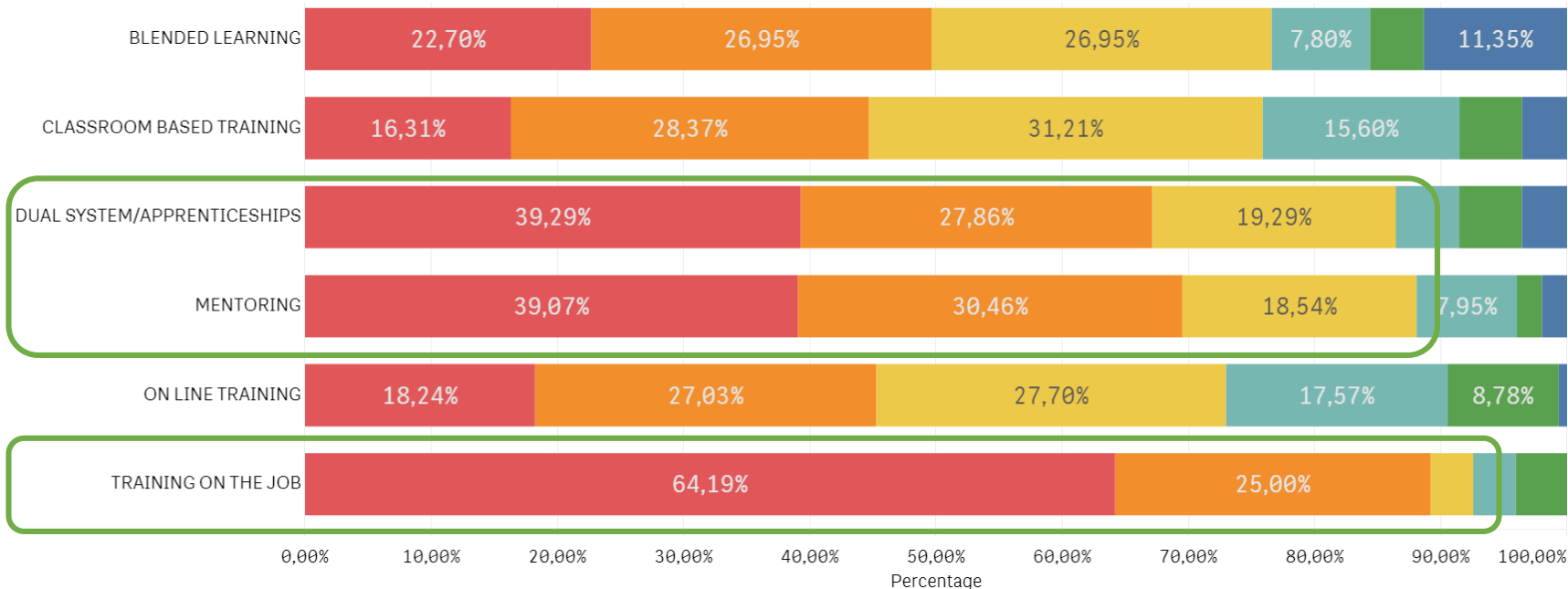
# How to Educate

- The survey also indicated clear guidance “how to educate”
- Clear focus on the **work based trainings/upskilling/upgrading skills**
- Further work on the trends is on-going and will be basis for the second part of the DRIVES project

# VET Approach

Work based learning

5 = very important   4 = Important   3 = Moderately Important   2 = Slightly important   1 = not important   0 = not applicable



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# Conclusions

- The whole industry is **expecting major structural changes** soon
- **Continuous training is playing key role**
- Close **cooperation between education providers/industry on skill agenda** is the must
- **Work based trainings/upskilling will manage OR NOT the structural change**

# DRIVES Project Timeline



# DRIVES (January 2018 – December 2021) Timeline

- ✓ • **2018** - Project begins
- ✓ • **March 2019 to June 2019** - Key stakeholders survey (Demand survey)
  - 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, trainings provided in EU



# DRIVES (January 2018 – December 2021) Timeline

- ➔ • **January 2020** - First Strategic Automotive Roadmap presentation (skills needs and gaps) and Policy recommendations
  - DRIVES Conference in Brussels, January 2019 – Final date to be confirmed and shared
  
- ➔ • **2020 + 2021**
  - Implementation of the skills analysis in the education area
    - Preparing/Harnessing and Upgrading trainings/curricula
    - Transferability of trainings – certification by DRIVES Framework
    - Providing trainings
    - EU-wide platform for apprenticeship in automotive
  - Continuous Strategic Automotive Roadmap update





# Thank you for your attention

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