



20-22 JUNE 2023

EUROPEAN SUSTAINABLE ENERGY WEEK

Accelerating the clean energy
transition – towards lower bills
and greater skills



POLICY CONFERENCE

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UPSKILLING THE EU'S INDUSTRIAL WORKFORCE TO CREATE CLEAN ENERGY SYSTEMS FOR ELECTRIC MOBILITY

PLATFORM
FOR
electr
mobility



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#EUSEW

Upskilling the EU's industrial workforce to create clean energy systems for electric mobility

20th June 2023

16:30 – 18:00

Martin EU Brussels Hotel

TZENI FARVI



ERIC FEUNTEUN



PATRIK KRIZANSKY



FEDERICO FUCCI



ALEX KEYNES



PLATFORM
FOR
electromobility

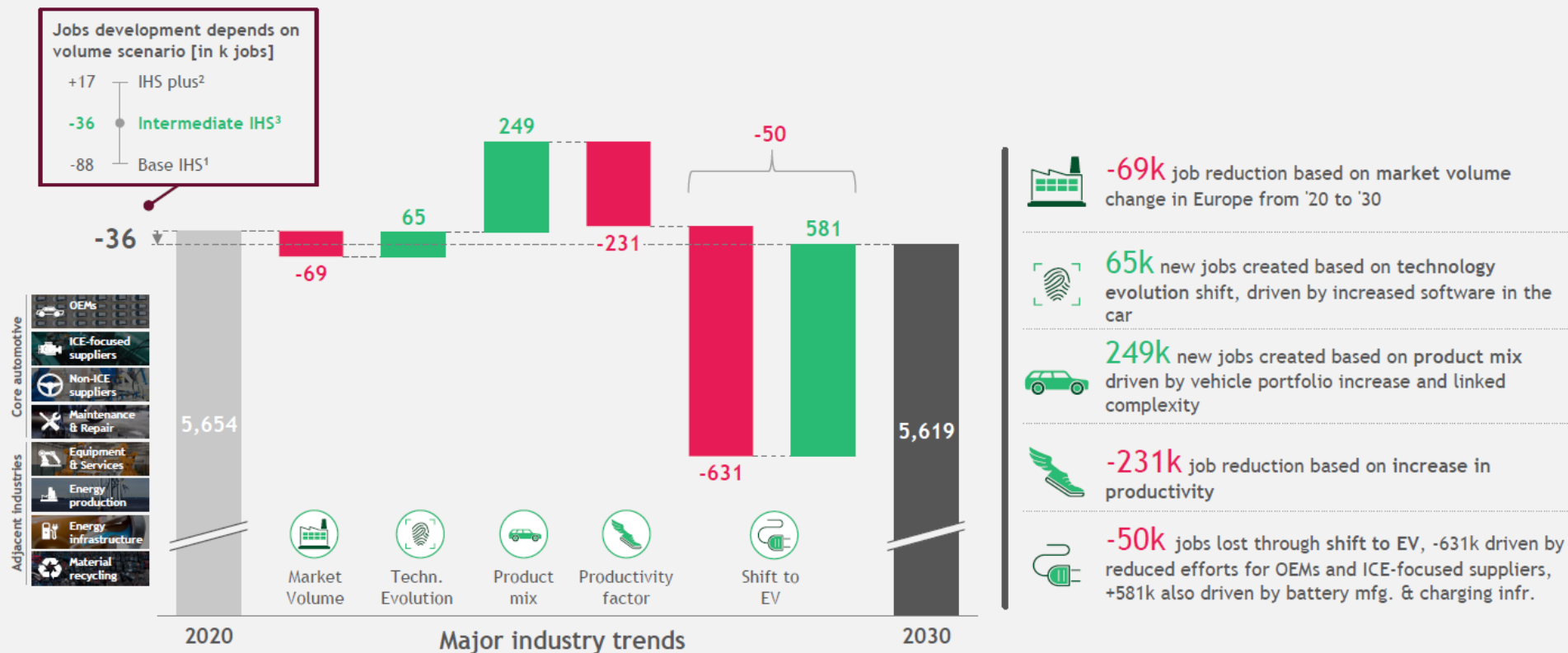


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Nearly flat development of total jobs until 2030



1. Base IHS = Volume according to IHS 2. IHS plus = Volume according to IHS with constant volume for 2028+ 3. Intermediate IHS = average of "base IHS" and "IHS plus"
Note: Impact on Jobs in k Source: EuroStat; BCG

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2



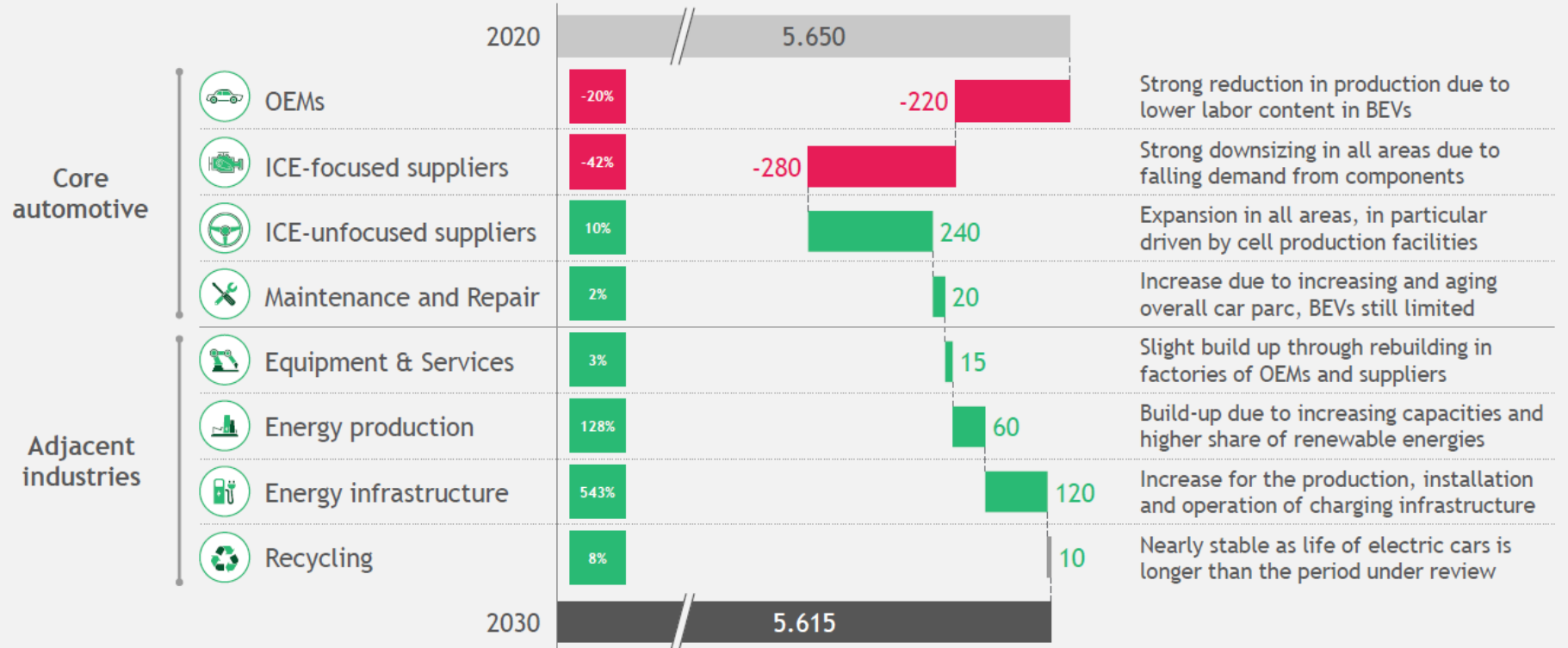
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... but leads to significant shifts between industries

Job losses and job gains (in thousands) across different industries



Source: BCG

5

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1.6M trainings, plus 0.8M transitions with varying effort

	Staying	Small transition	Large transition	Industry exit
Industry	No transition	same industry cluster	similar industry cluster	other industries
Job family		same job family	same / similar job family	same / similar job family
Transition effort	●●● No effort ✓	●●● Low effort, minor re-qualification needed ✓	●●● Medium effort, re-qualification & incentives needed ✓	●●● High effort, intense re-qualification & support needed ✓
Priority	0 Prepare employees for future job demands through training	1 1 st choice transition - as many jobs shifted within industry as possible	2 2 nd choice transition - only if shift within industry not possible	3 3 rd choice transition - only if shift in Auto/adj. Industry not possible
Affected Positions	~4,800K ~1,600K with major retraining ~3,200K with no/minor retraining	~264K	~346K	~225K

Focus of this chapter

Source: BCG

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7



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European
Commission



ERIC FEUNTEUN

VICE-PRESIDENT

SOFTWARE RÉPUBLIQUE OPERATIONS, RENAULT GROUP



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TALENT ACADEMY

3 key moments along a professional life

ECOSYSTEM

SOFTWARE

+Educate

**Talent
Factory**

15-20y

Increase the pool of young talents in the fields of cybersecurity, data and software

+Recruit

**Talent
Incubator**

20-25y

Retain our young talents by offering them attractive activities in many fields

+Train

**Talent
Accelerator**

30-65y

Contribute to the need to train approximately 40,000 employees of the founding partners by 2025



software
république

Atos

DS DASSAULT
SYSTEMES



Renault
Group



THALES
Building a future we can all trust



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TZENI VARFI

PRINCIPAL E.DSO



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E.DSO Survey: Skill needs, coverage and gaps



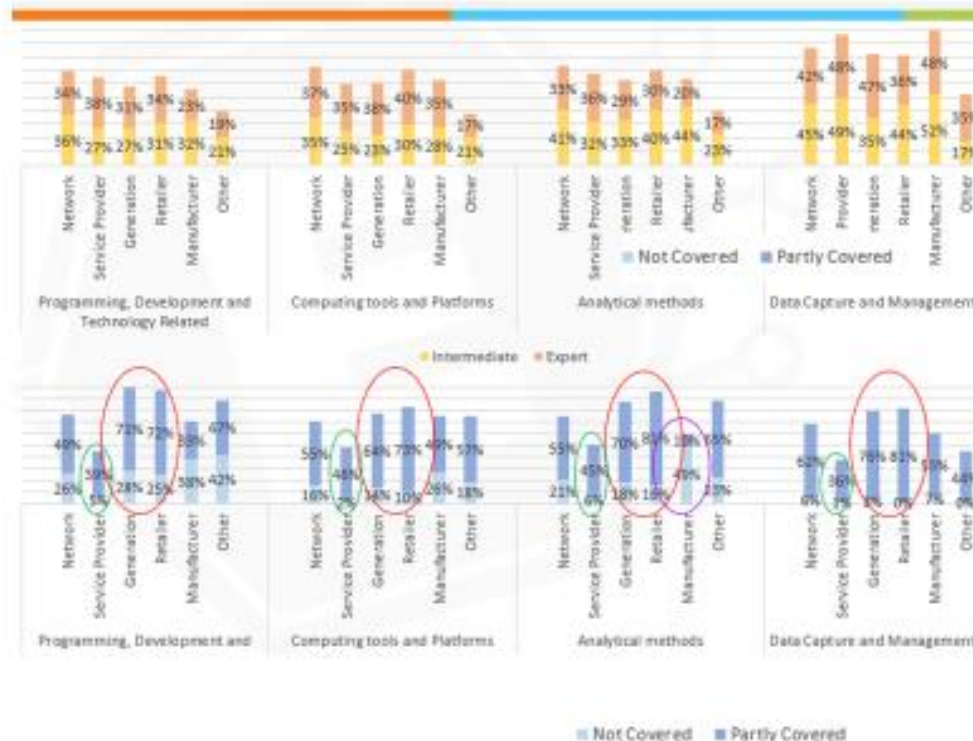
- The **“Heating and Cooling”** sector showcases the highest coverage level on every skillset.
- The **“Power”** sector showcases the lowest coverage level on every skillset.
- Analyzing the expertise demand diagram and the coverage diagram by sector we conclude that **the “Power” sector showcases the biggest skill gap**, possibly related to increased penetration of DERs and the adoption of smart grid technologies.



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E.DSO Survey: Skill needs, coverage and gaps



- Analysis by **type of operation** (Network, Service Provider, Generation, Retailer, Manufacturer, Other)
- A **similar distribution of answers** between types of operation is observed in every skillset in both diagrams.
- The types **"Generation"** and **"Retailer"** showcase the lowest coverage level.
- The type **"Service Provider"** showcases the smallest skill gaps, as we observe the lowest percentages of "Partly Covered" and "Not Covered" combined.
- The activity **"Manufacturer"** showcases a particularly significant skill gap in the **"Analytical Methods"** skillset as we observe a **high expertise demand** paired with a **high (49%) percentage of "Not Covered"**. Developments in Industry 4.0 might be related to the increased needs and low coverage.



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#EUSEW23 - Electrical Contractors

- EuropeOn represents electrical contractors and installers
 - Shifting towards electrical integrators
 - EQF ELEC project shows EV charging installations and system integration are among most in-demand skills
- New jobs to be created with (installation of) charging infrastructure
 - 2018 estimate: 113k jobs
- Priority should be to increase workforce
 - Increase pipeline of workers: get youth interested, re-skill brown sector workers
 - Upskilling still needed for existing and qualified workers
- Strive for fully qualified workers, beware of short trainings
 - Safety of installation
 - Efficiency of integration
 - Consumer demand for integration

EuropeOn
ELECTRICAL CONTRACTORS ASSOCIATION



**POWERING A NEW VALUE CHAIN
IN THE AUTOMOTIVE SECTOR**
The job potential of transport electrification

EuropeOn
ELECTRICAL CONTRACTORS ASSOCIATION



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#EUSEW23 - Policy Recommendation(s)

- Always consider workforce & skills availability in energy/climate policy
- 1st step: gap assessment

EPBD

- National Building Renovation Plans: assess the gap between available & needed workforce (with KPIs)

NZIA

- Net-Zero Platform to assist Commission in “assessing, continuously monitoring and forecasting the demand and supply of a workforce with the skill sets needed in net-zero technologies availability and uptake of corresponding education and training opportunities”
 - Green Workforce & Skills Observatory?

EED

- Member States to assess the gap between available and in demand professionals



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PATRIK KRIZANSKY

CHAIR

SLOVAK ELECTRIC VEHICLES ASSOCIATION
(SEVA)



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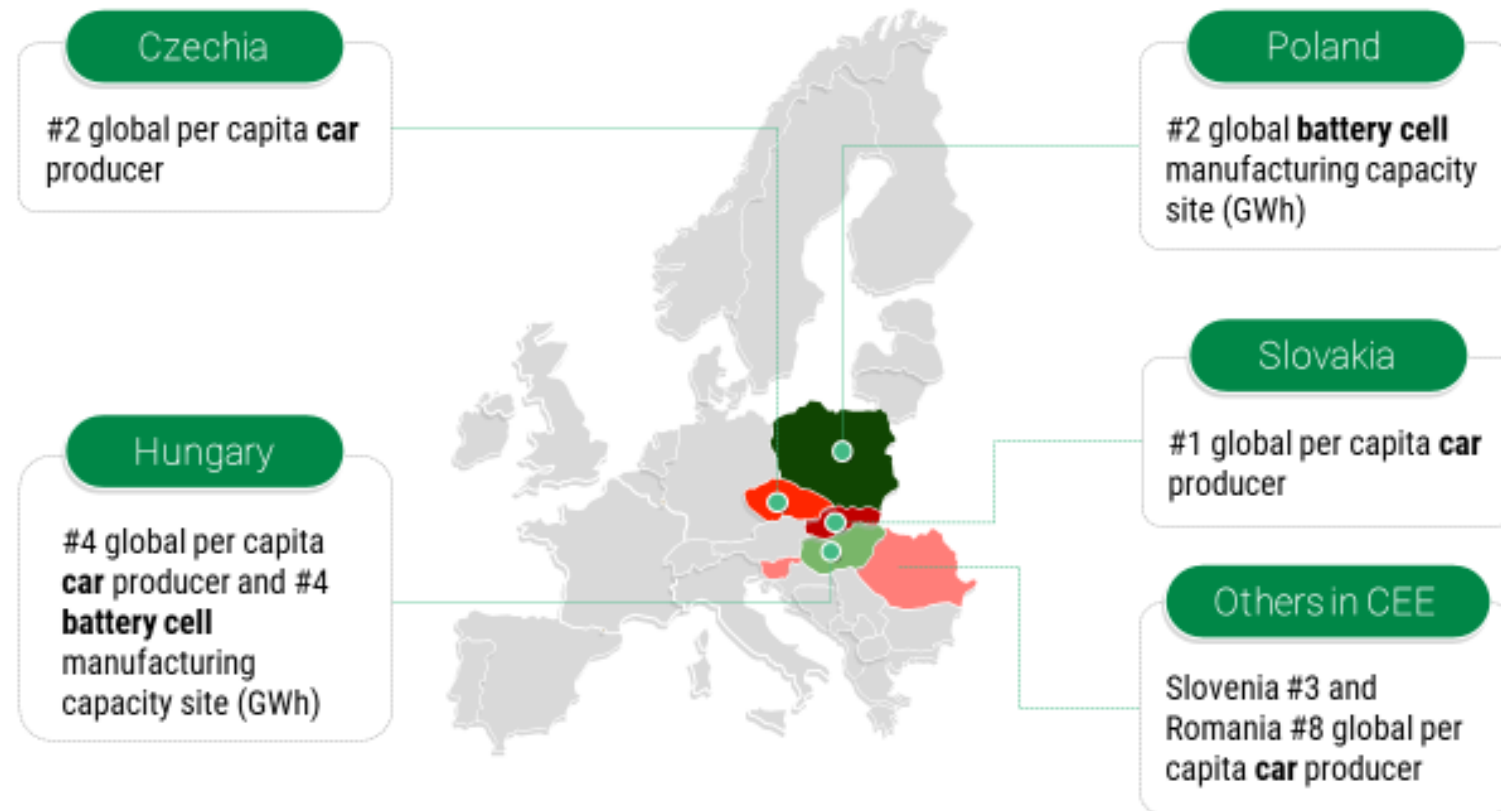
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CEE region is manufacturing hub for cars and batteries

Several CEE countries are in the global top 10



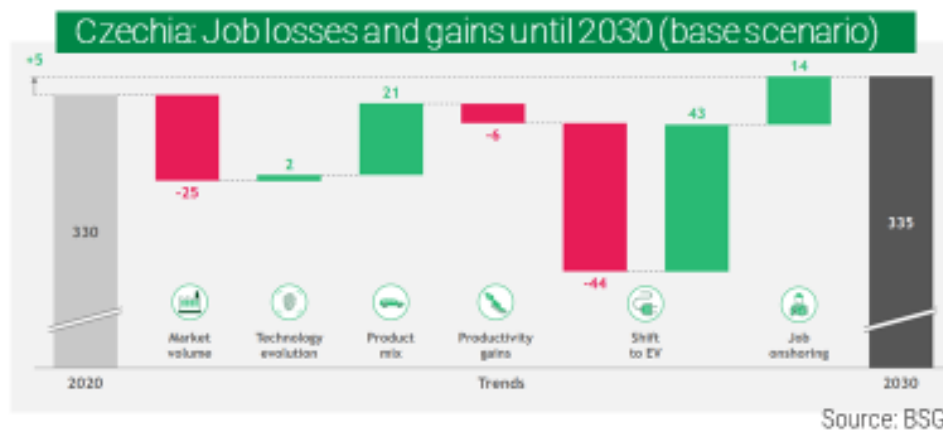
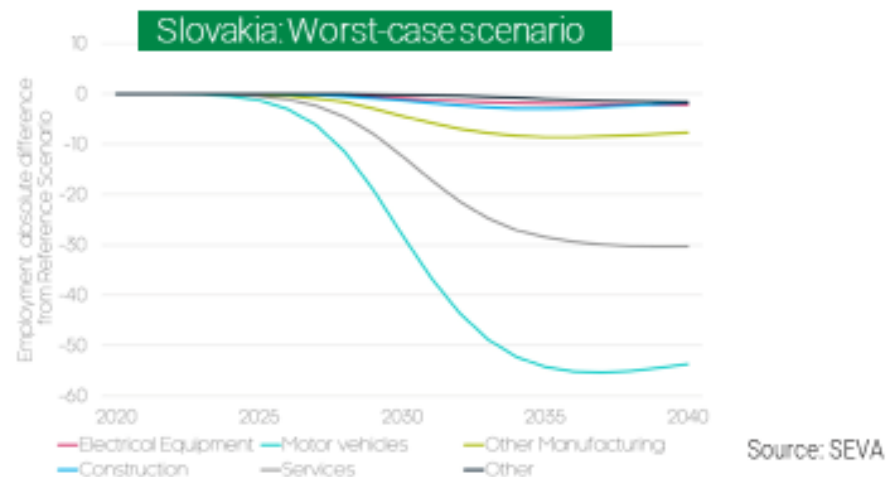
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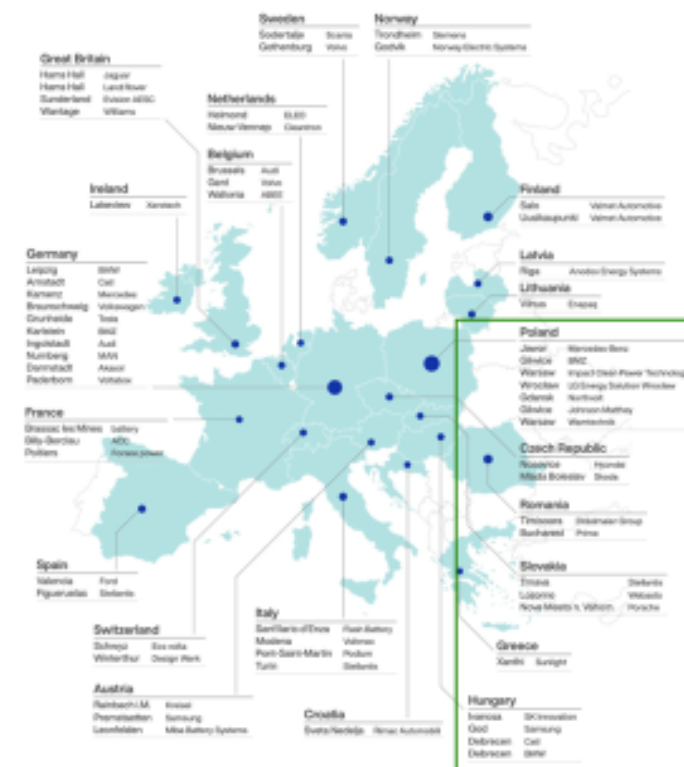
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Job transition in the CEE automotive



Battery pack assembly as part of solution



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SEVA Slovak Electric
Vehicle Association

Member of
AVERE
The European Association
for Electromobility

Since 2012 jointly
for zero-emission electric mobility

Slovak Electric Vehicle Association
Aupark Tower, Einsteinova 24, 851 01 Bratislava, Slovakia

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ALEX KEYNES

CLEAN VEHICLES MANAGER T&E

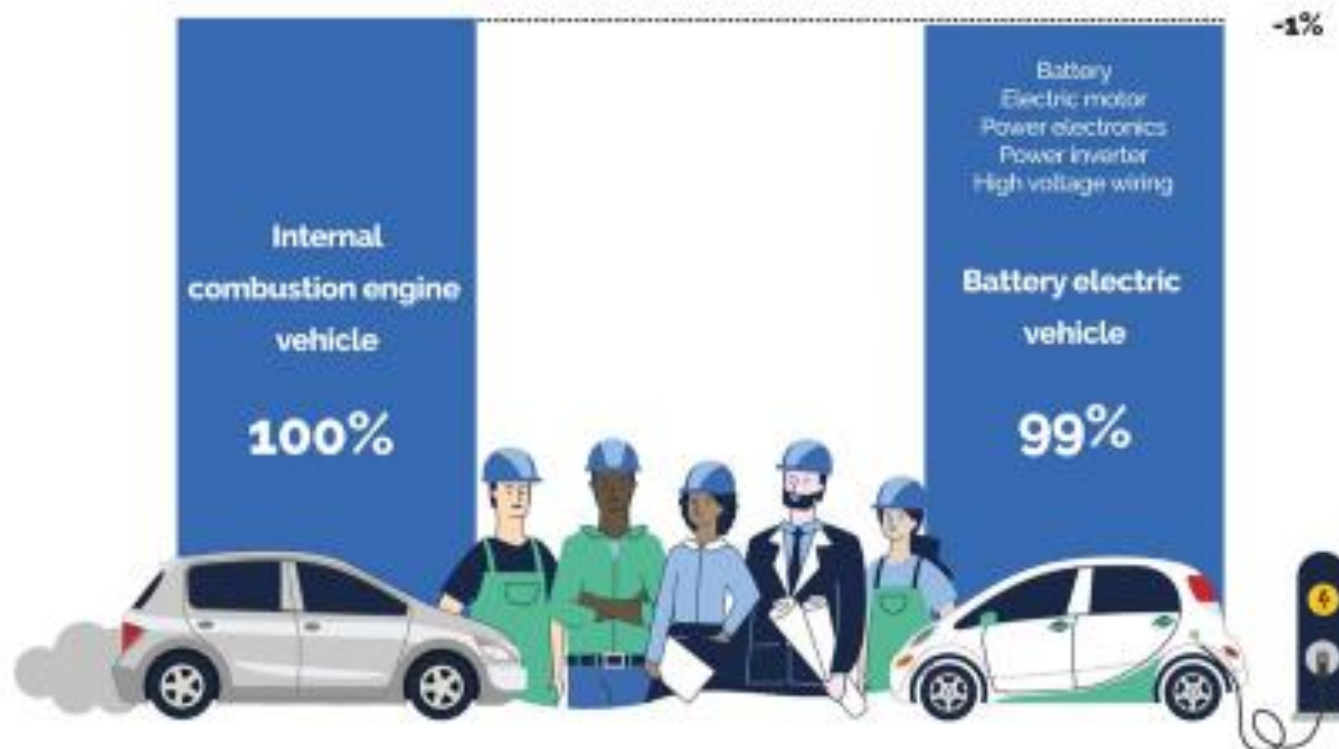


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Labour required to build a BEV vs ICE vehicle



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The new EV supply chain will create hundreds of thousands of European jobs, almost entirely replacing potential losses in the ICE vehicle sector

New jobs

581 000 jobs in the EV ecosystem by 2030, including:



237 000 jobs

Non-ICE automotive suppliers
(includes 60 000 jobs in the battery cell manufacturing)



113 000 jobs

**Installation, operation
and maintenance of charging points**



63 000 jobs

**New renewable
energy production**



40 000 jobs

**Short term in civil works
and construction**



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Just Transition - key asks

A Just Transition framework for the mobility eco-system must be built on:

1. **Mapping of employment impacts:** a clear, granular mapping at company, regional and national levels to ensure effective skills intelligence and anticipation of change.
2. **Policy support and exchanges of best practices:** the extension of the Just Transition Platform to the scope of the European Green Deal.
3. **Transition planning and social dialogue:** mapping of employment effects, negotiated transition plans at company, regional and sectoral levels, and strengthening of social dialogue, notably through binding social conditionality on access to EU funds.
4. **Adequate resources:** pooling resources for active labour market policies, including retraining and upskilling, as well as economic diversification, in a dedicated fund for the mobility ecosystem.



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