

JOBS IN A CLEAN FUTURE AUTOMOTIVE INDUSTRY

ETUC/ETUI conference:

The World(s) of Work in Transition

28th June 2018

LOW CARBON CARS HAVE NET POSITIVE EFFECTS ON JOBS BUT REDUCE EMPLOYMENT IN SOME SECTORS



Upsides

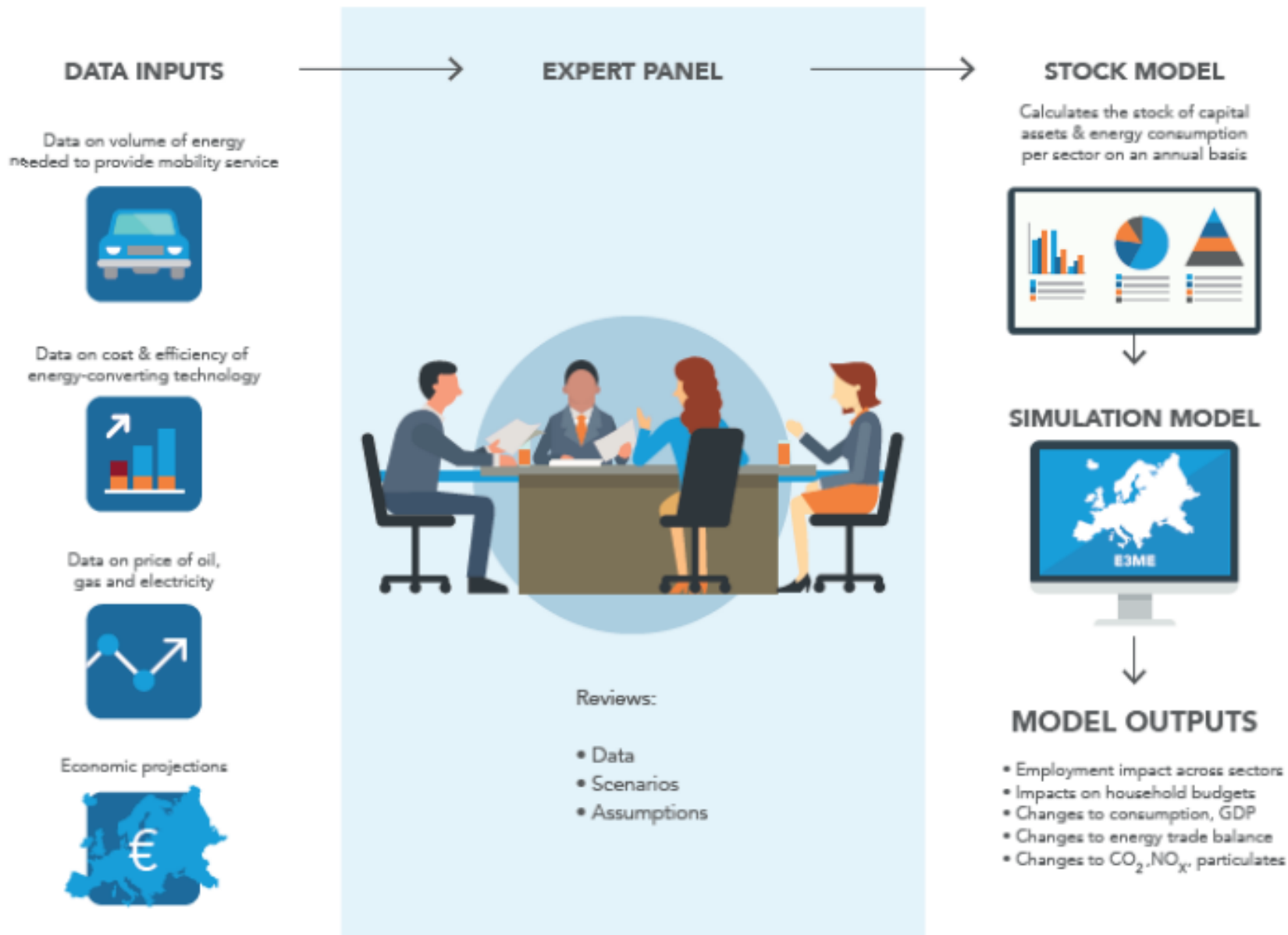
- Lower running costs
- Added value from efficient techs inc PHEV
- More available spending
- Job creation in other sectors
- Less oil imports
- Local energy production & infrastructure
- International competitiveness
- Higher vehicle prices



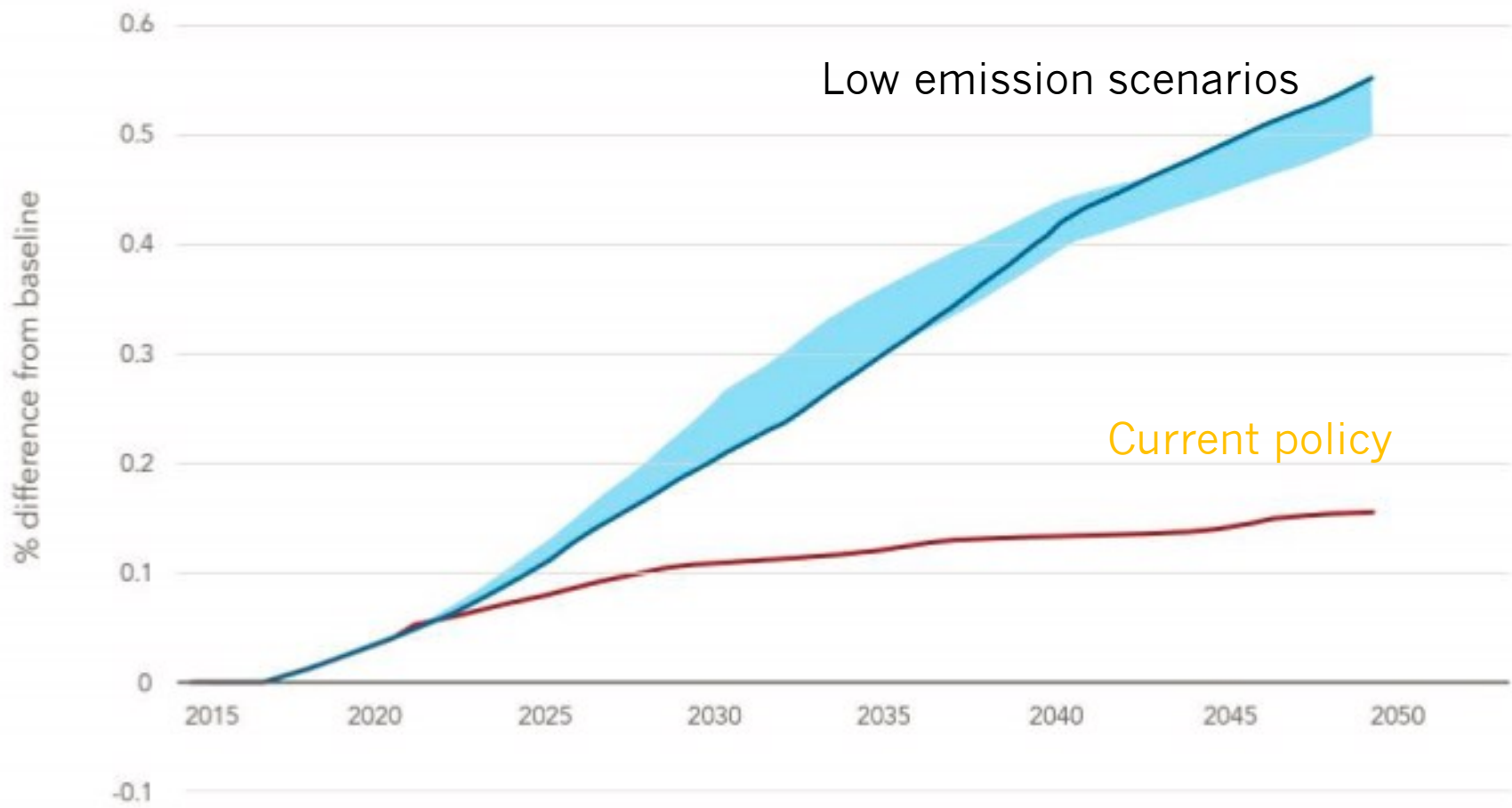
Downsides

- Fewer refining jobs
- Fewer jobs in BEV manufacture & maintenance

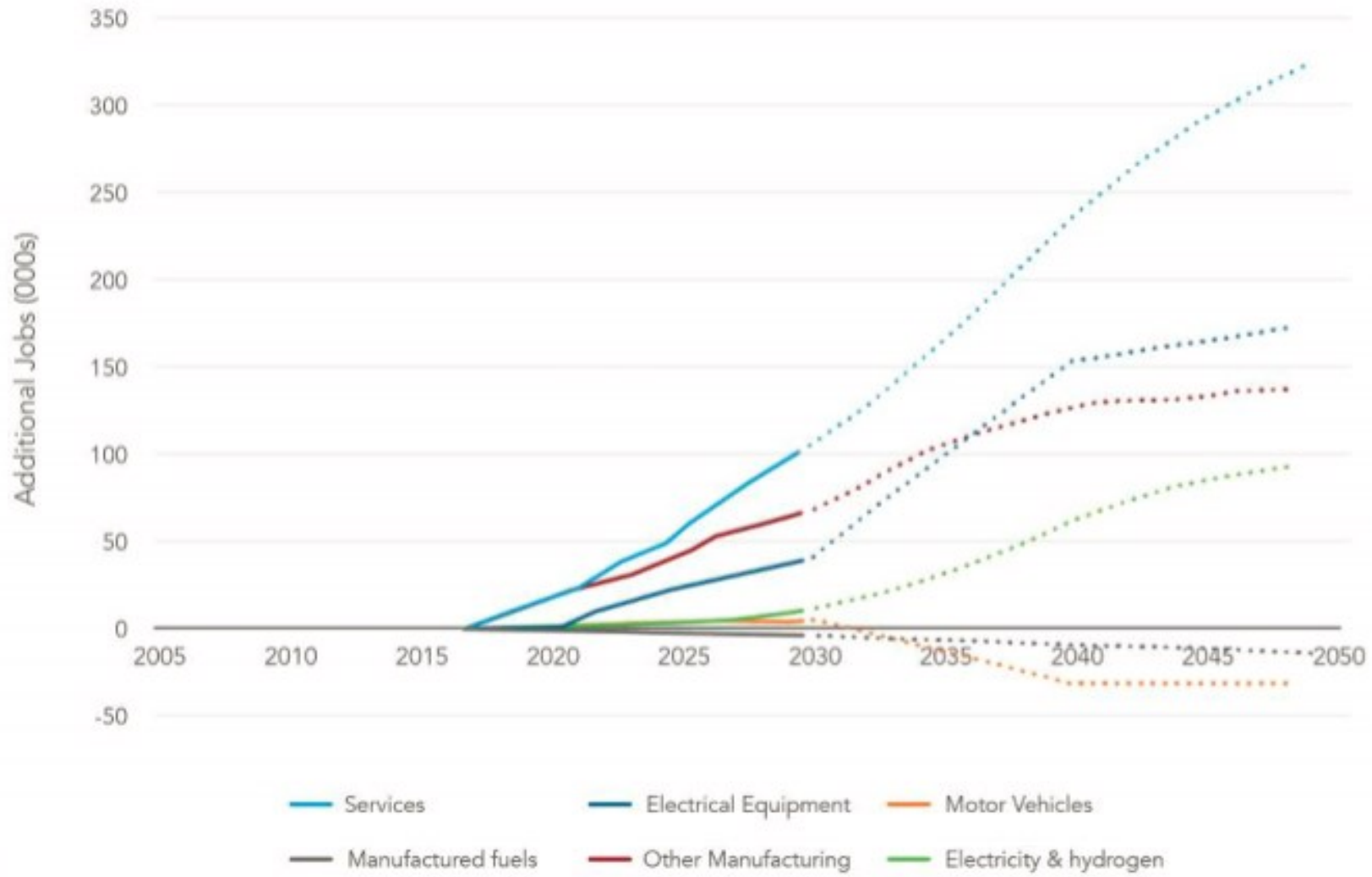
FUELLING EUROPE'S FUTURE



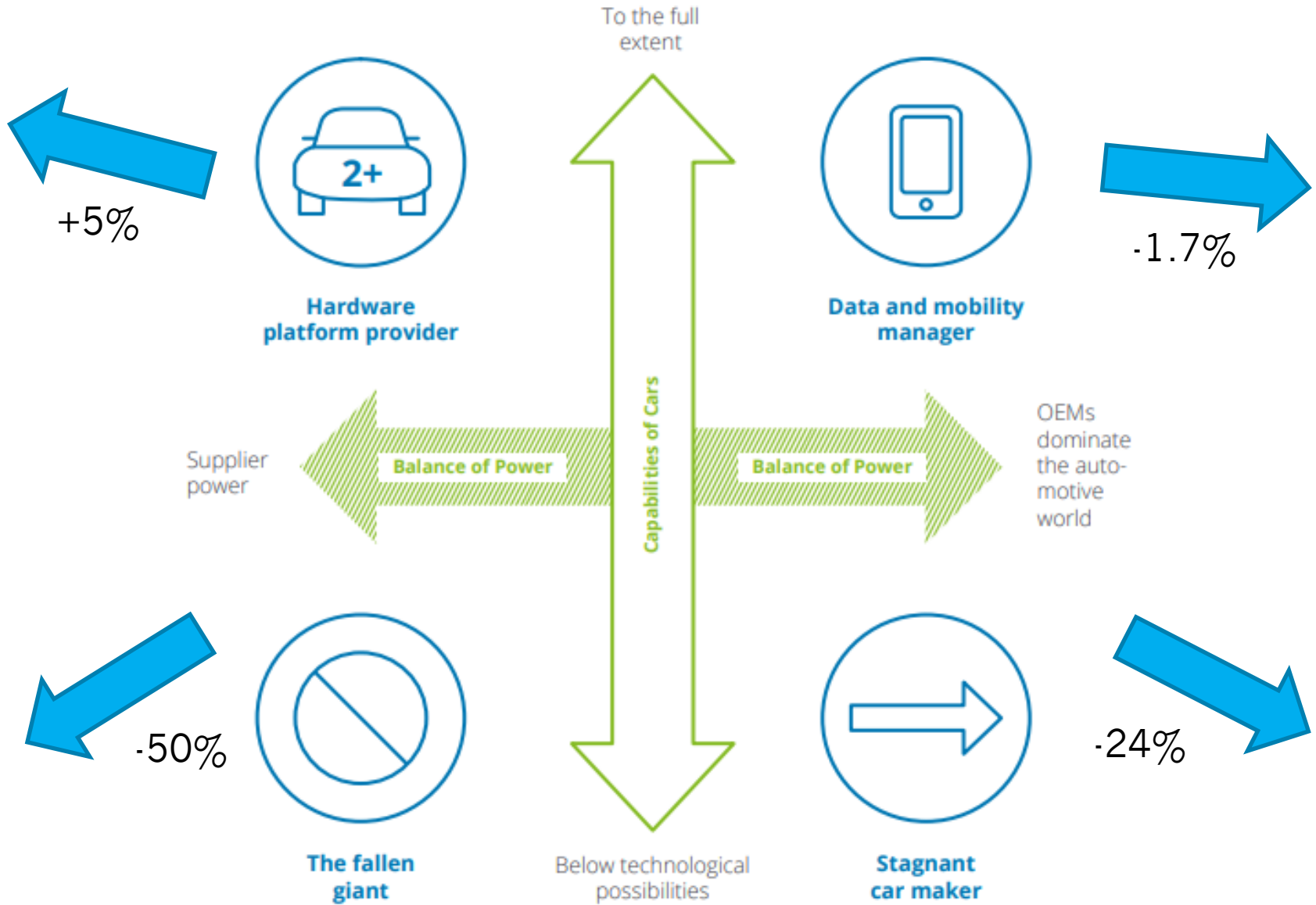
LOW CARBON CARS DELIVER GDP GROWTH



LOW CARBON CARS ARE GOOD FOR JOBS



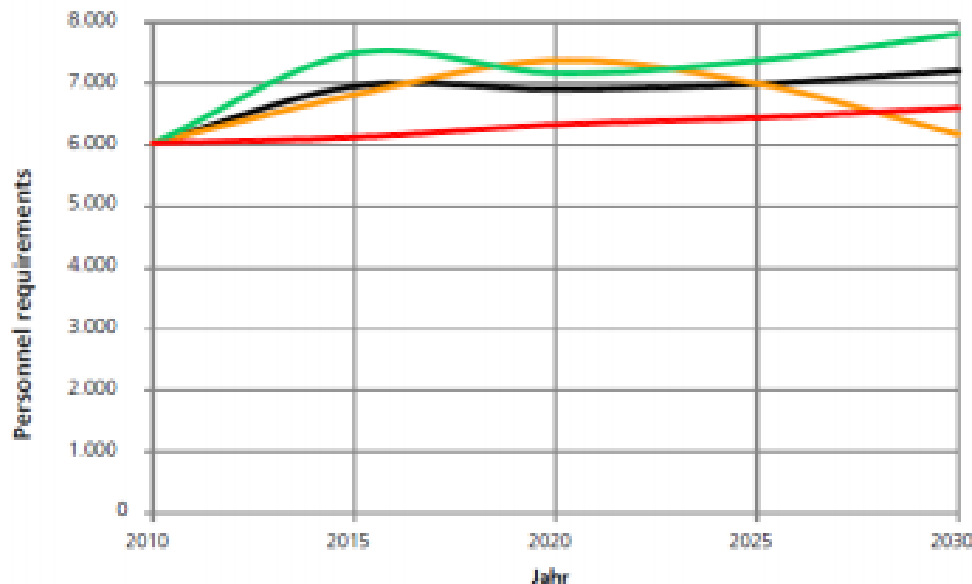
DELOITTE SCENARIOS SHOW MIXED IMPACTS ON JOBS



ELAB STUDY SHOWS A LOSS OF JOBS IN A BEV SCENARIO BUT PRODUCTIVITY IMPROVEMENTS ARE A BIGGER DRIVER

Employment impacts of different ELAB scenarios

Total staffing requirements for all ELAB scenarios



- FCV scenario
- Reference scenario
- BEV scenario
- ICE scenario

Ranking of total personnel requirements 2030

1.	FCV scenario	7.816 Emp
2.	Reference scenario	7.213 Emp
3.	ICE scenario	6.607 Emp
4.	BEV scenario	6.173 Emp

EU CARMAKERS ARE INVESTING IN CHINA NOT HERE

EU carmakers invested 7 times more in China than EU

China is leading the race for electric car investments

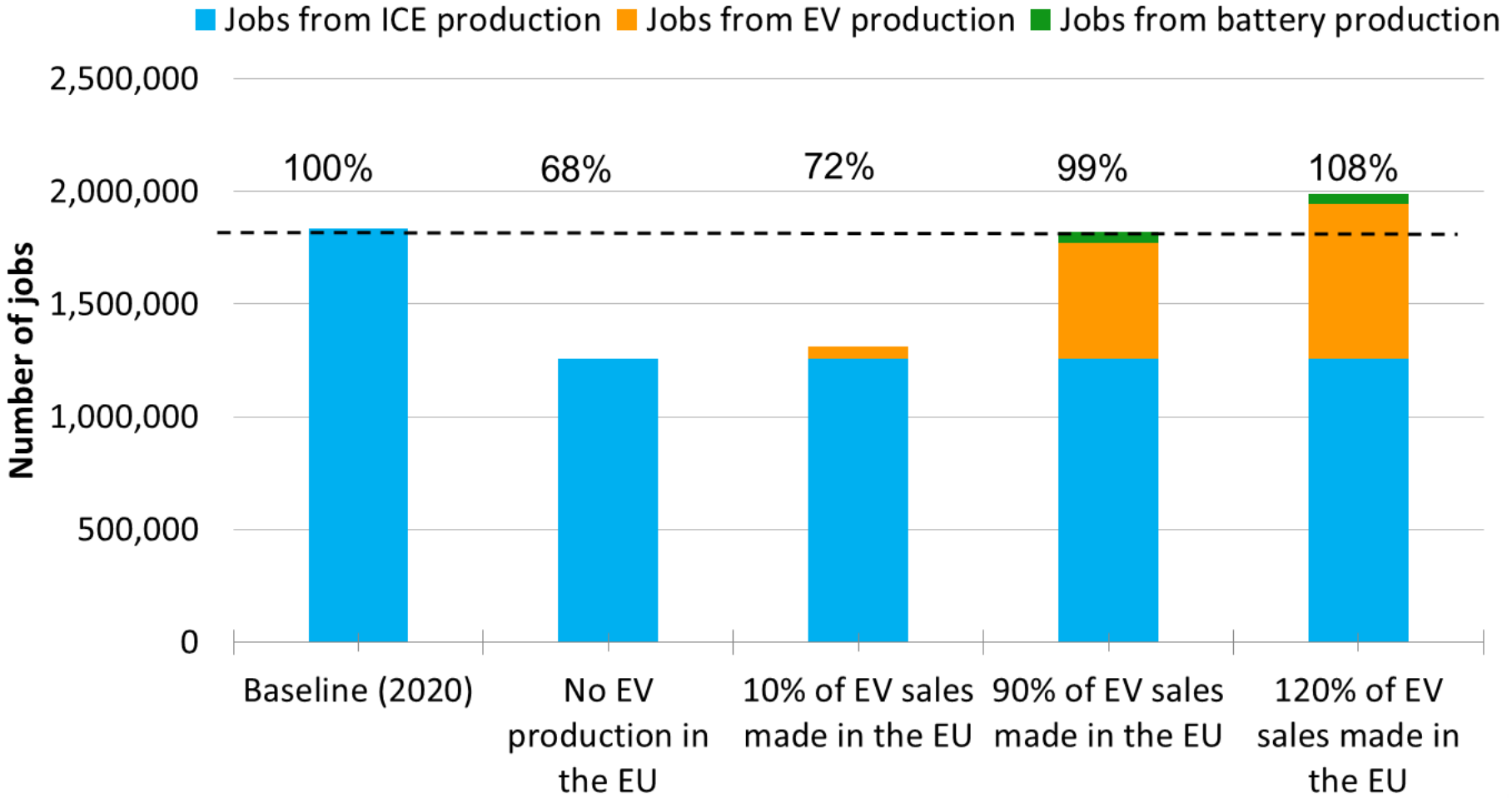
Investments in the EU
€3.2 billion



Investments in China
€21.7 billion

THE JOBS RISK IS FROM EVS NOT BEING MADE IN THE EU

Car manufacturing job projections for 2030



ZEV MANDATE WILL DRIVE INVESTMENT AND IS WIN-WIN FOR EU ECONOMY



KEY REQUIREMENTS

Ambitious targets

- 2025 target -25% from 2020
- 2030 goal 50-60%

A target for low and zero emission vehicles

- 20% 2025
- 40-60% 2030

Real world saving to match test results