



ETUI WORKSHOP

"FACING THE CHALLENGES OF A FAST TRACK
TRANSITION TO ELECTROMOBILITY"

8 JUNE 2021

OUR DATA



- # Syndex is a chartered accounting firm that works exclusively for employee representatives, works councils and trade unions in France and in Europe.
- # French companies are obliged by law to issue social reviews for each site, and to present the results to the works council.
- # Through our work for employee representatives in the automotive sector, we have been able to collect and aggregate these data in a unique database.

Automotive sector

 <p>Powertrain industry OEM OES Subcontractors</p>	<ul style="list-style-type: none">• 136 sites in the powertrain industry• 70 000 employees (2018) in production, R&D and services
 <p>Services Inspection & repair</p>	

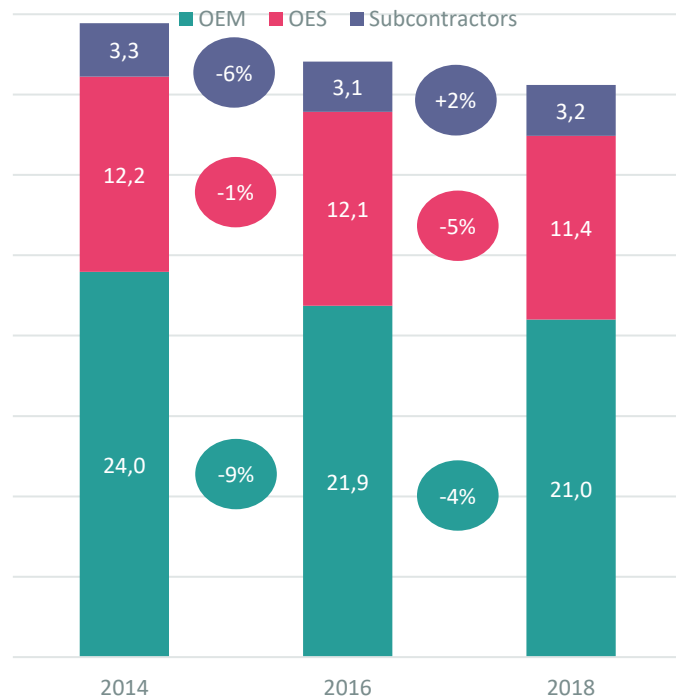
- # In addition, we have conducted a number of expert interviews to estimate the impact of changes in powertrain technologies on employment.



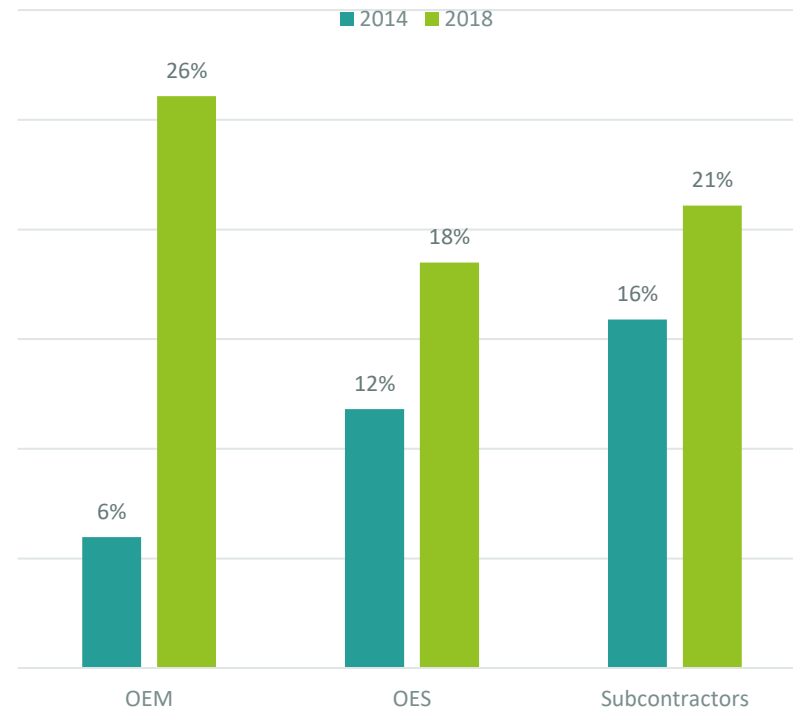
THE DOWNWARD TREND IN AUTOMOTIVE EMPLOYMENT IS AN ONGOING PROCESS...

Even during the recent years with booming sales figures and sufficient workload for production sites, employment in the French automotive industry has decreased. In addition to automatization and delocalisation, companies increasingly use flexible forms of employment (agency workers) and subcontracting.

Workforce development from 2014 - 2018
(71 sites)



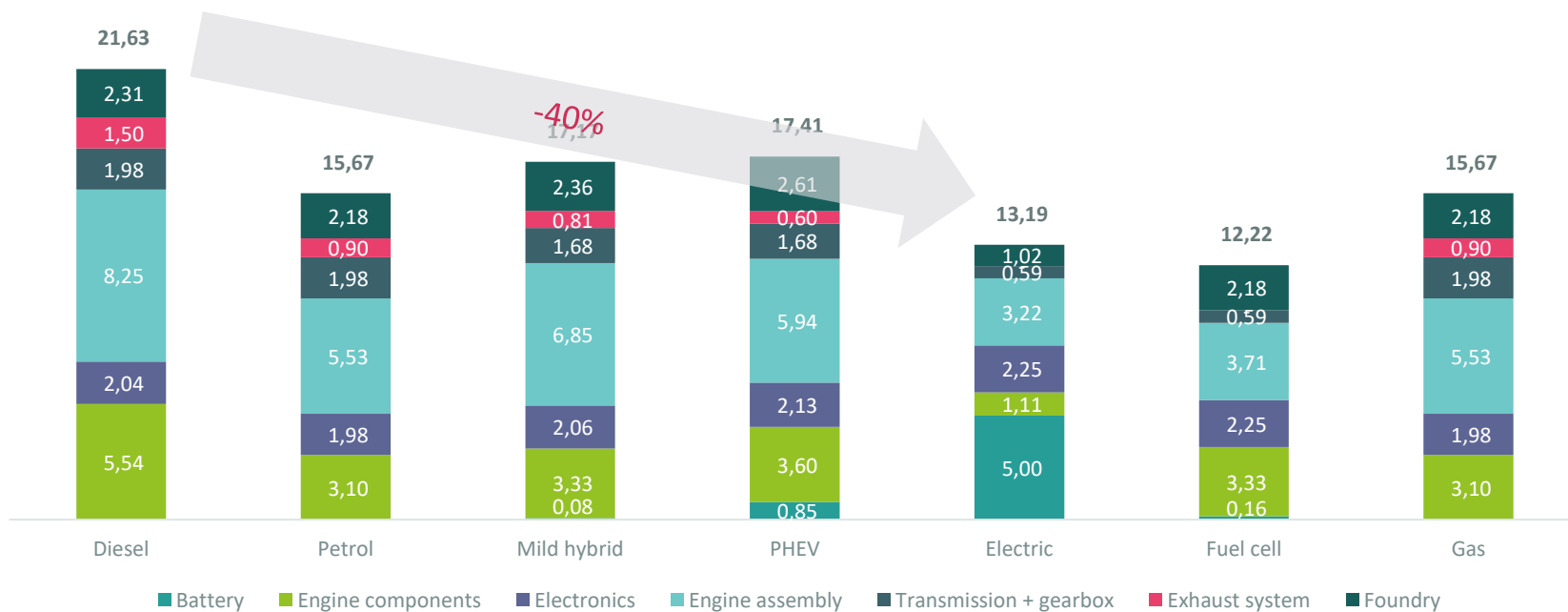
Proportion of agency workers 2014 - 2018
(71 sites)



... THAT WILL BE ACCELERATED BY ELECTRIFICATION.

We estimated that the need for manual labour for electric cars will be ~40% lower than for current diesel engines. New employment opportunities in batteries and electronics, all other activities will decrease

Employment indices by propulsion technology (FTE needs for 1,000 vehicles)



EMPLOYMENT IMPACTS VARY SIGNIFICANTLY IN THE DIFFERENT SCENARIOS

Employment developments according to the different scenarios



-26%
-70%

NOM DE LA SOCIÉTÉ – NATURE DE LA MISSION – DATE
CE RAPPORT EST DESTINÉ AUX MEMBRES DU COMITÉ D'ENTREPRISE EUROPÉEN



TECHNOLOGICAL CHANGE, DEINDUSTRIALISATION AND DELOCALISATION

- ▶ Electrification will drive employment trends in the car industry in the years to come, **but...**
 - ... the expected employment effects **overlap** with other trends that precedes and are somehow independent from electrification (delocalisation, automatization, use of flexible employment...)
 - ... the expected employment effects are not carved in stone, but there is significant **room to manoeuvre** for both political actors and companies.
- ▶ We have shown that an **ambitious policy to foster e-mobility** combined with a strong focus on **local value chains** has a less negative impact on employment than a laissez-faire approach of continuous deindustrialisation.
- ▶ All ambitious scenarios would require a **strong shift** in industrial policy at national and European level.
- ▶ At **national level**, public support mechanisms would combine stricter emission standards and other legal requirements with tax incentives and other public support instruments to foster investment in new green technologies.
- ▶ **European policy** would increasingly focus on strengthening the industry's competitiveness through stronger regulation of carbon emissions and more ambitious emission targets.
- ▶ **Companies** would have to invest massively in new technologies and develop a network of local value chains, notably through the introduction of environmental criteria in choosing suppliers.



Contact

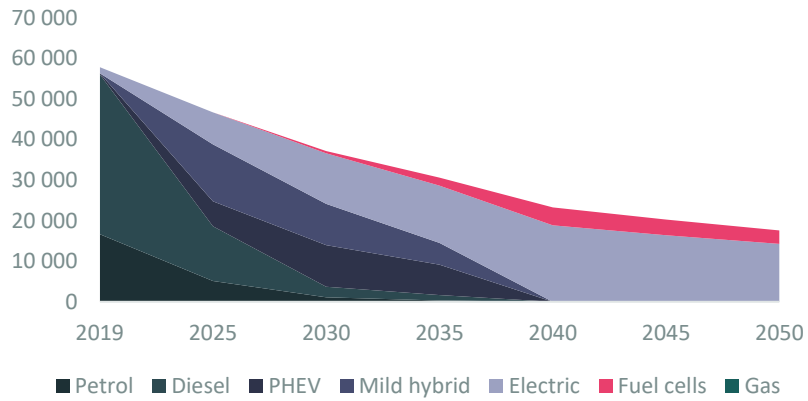
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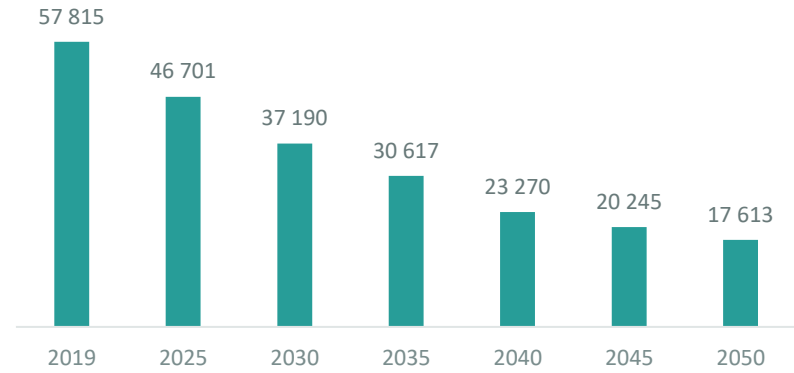
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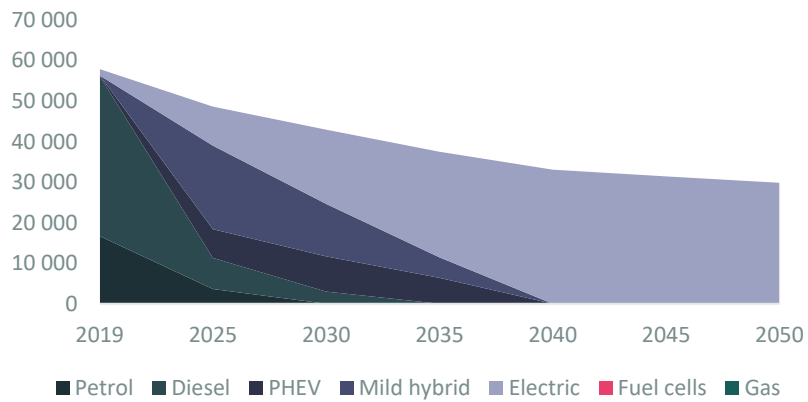
Employment trends - S1



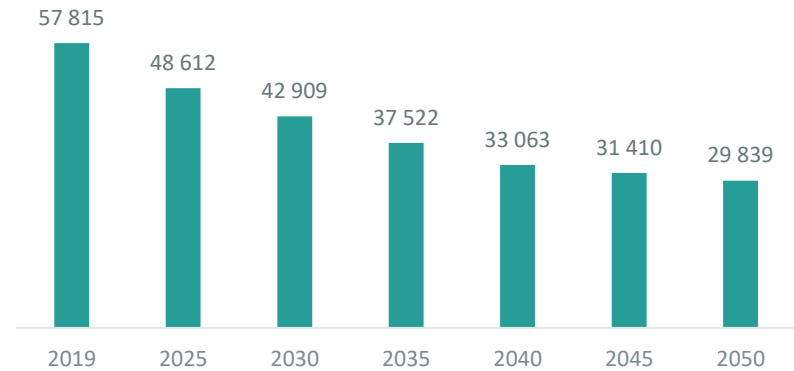
Employment trends - S1



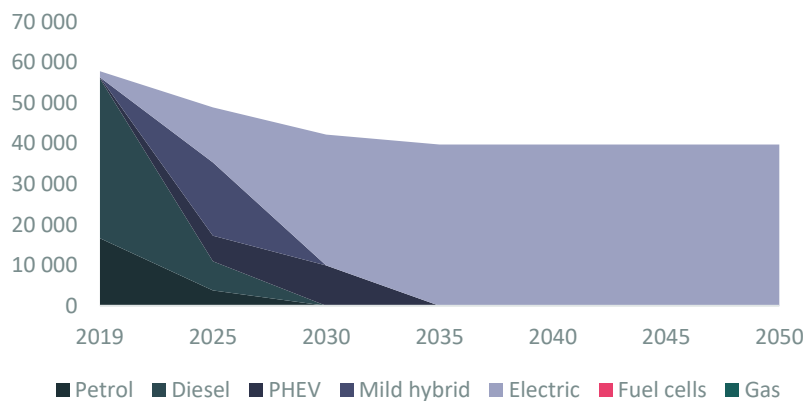
Employment trends - S2



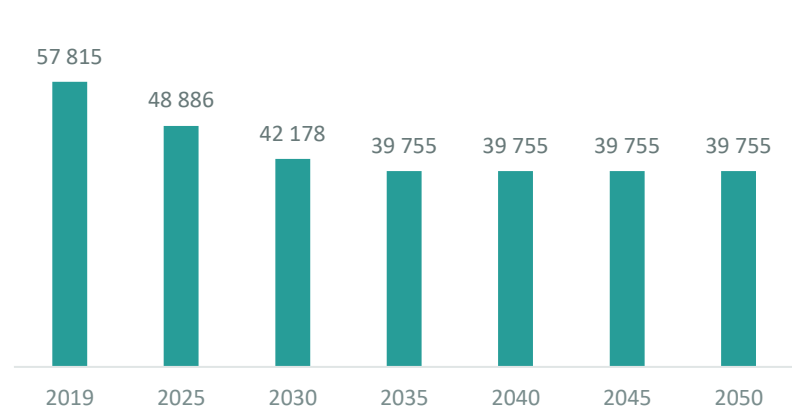
Employment trends - S2



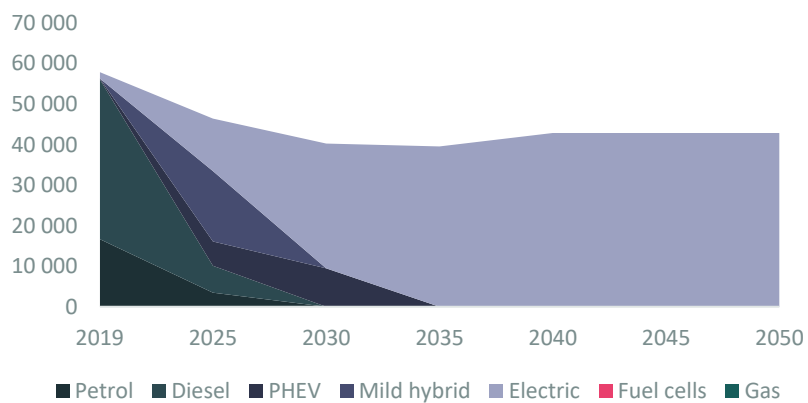
Employment trends - S3a



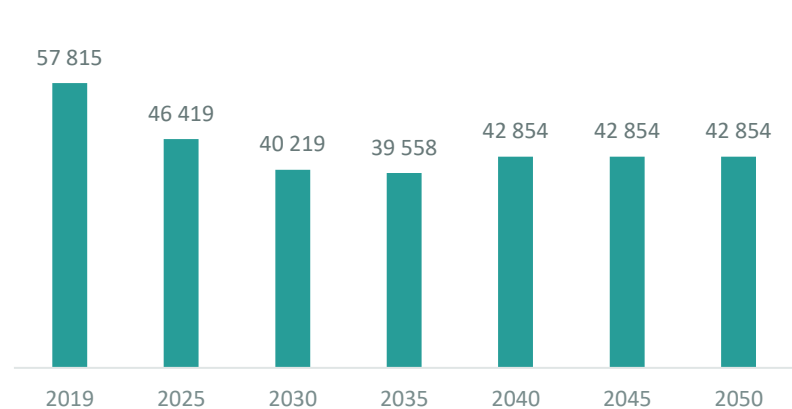
Employment trends - S3a



Employment trends - S3b

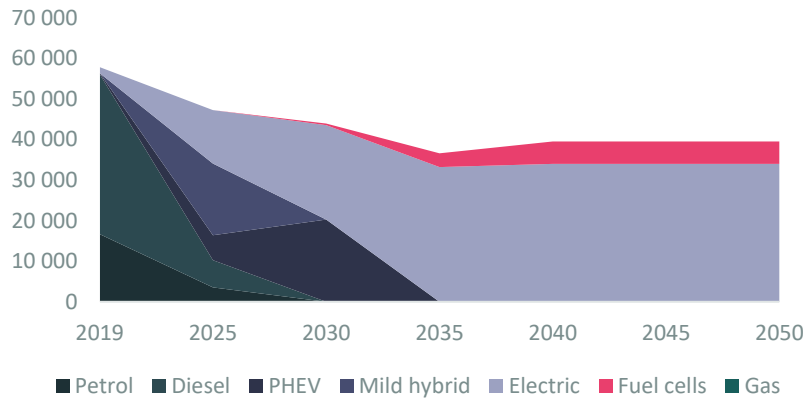


Employment trends - S3b

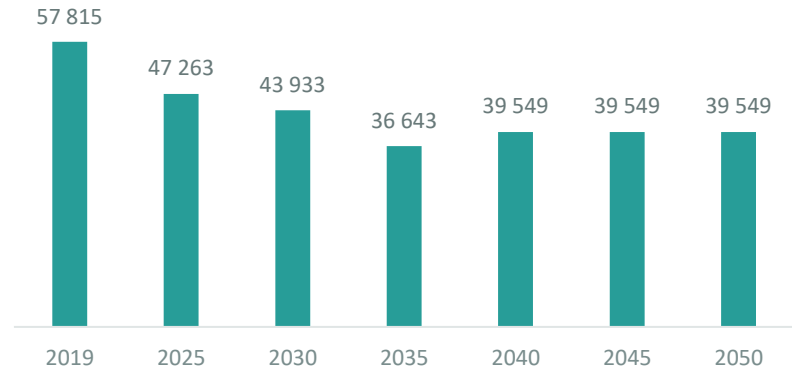




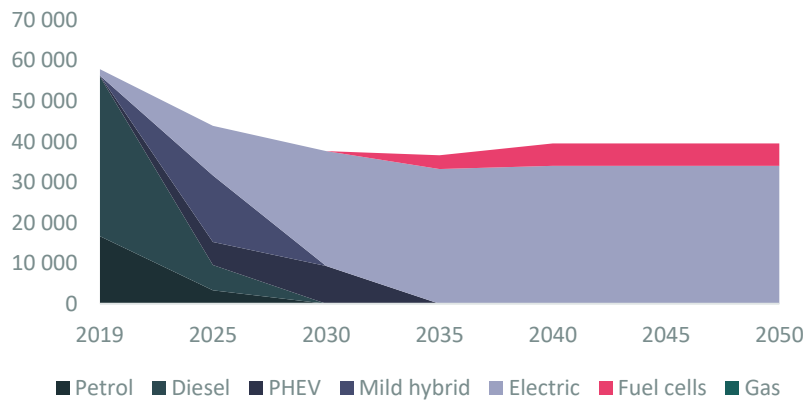
Employment trends - S4a



Employment trends - S4a



Employment trends - S4b



Employment trends - S4b

