

European Skills Agenda in the Automotive Ecosystem

Alliance for **B**atteries **T**echnology, **T**raining and **S**kills
2019-2023

Dr. Jakub Stolfa, VSB-TUO, ALBATTTS Project WP Supervisor and DRIVES Project Coordinator

**ALBATTTS Workshops: Electric Vehicle Manufacturing & Battery Integration –
Future Qualifications Needed, 27th January 2021**



Automotive Skills Agenda

The road until now

Automotive Skills Agenda - Background



- ⚡ **Automotive ecosystem** is facing **unprecedented transformation**
- ⚡ Caused by, e.g.
 - ⚡ Long-term shift towards **zero-emission, digital mobility, new mobility concepts, or carbon neutrality** by 2050
 - ⚡ Short-term **COVID impact**
- ⚡ Impact to the workforce – **cca. 15 million people employed** in European automotive value-chain
 - ⚡ **Jobs endangered VS. struggle to attract and recruit qualified people for new and emerging jobs**

Sustainable, massive and pragmatic approach towards education and training (up-/re-skilling) in the ecosystem is needed more than ever before

Automotive Skills Agenda – Initiatives



- ⚡ **High Level Group GEAR 2030 (2015 - 2017) - Final report** on automotive competitiveness and sustainability

- ⚡ New Skills Agenda for Europe (2016) with action **The Blueprint for Sectoral Cooperation on Skills**



Automotive Sector
Ongoing (2018 - 2021)



Batteries Sector
Ongoing (2019 - 2023)

- ⚡ European Skills Agenda (2020) with action **Pact for Skills (launched November 2020)**





Automotive Skills Agenda


DRIVES³ Blueprint Project

Development and Research on Innovative Vocational Education Skills



- ⚡ **24 full project partners from 11 European Countries, including ACEA, CLEPA, ETRMA**

- ⚡ **Main results so far:**
 - ⚡ [Strategy and Roadmap including also Sectoral Analysis of Skills Demand and Offer](#)

 - ⚡  [DRIVES Job Roles](#) and [DRIVES MOOCs](#) to offer directly to companies and also to education and training providers to their courses

 - ⚡ [DRIVES Framework](#) – initial version of EU-wide database of reference job roles and training courses provided across Europe and possibility of digital badges for skills awards

- ⚡ **See more at: www.project-drives.eu**



Automotive Skills Agenda

ASA **AUTOMOTIVE SKILLS ALLIANCE**



- ⚡ ASA is implementation of European Skills Agenda, **Pact for Skills in Automotive Ecosystem**
- ⚡ The ASA mission is to bring together different kind of stakeholders involved in the Automotive ecosystem and to ensure continuous, pragmatic and **sustainable cooperation on the skills** agenda in the ecosystem. Including Massive workforce **upskilling and reskilling across the automotive ecosystem**
- ⚡ It further aims to ensure collaboration on a **European level, as well as on national and regional levels**, between all the involved stakeholders in the Automotive ecosystem
- ⚡ See more at: <https://bit.ly/35TKEVO>
- ⚡ Get involved: info@skills-alliance.eu



Automotive Skills Agenda

albatss Blueprint Project

Alliance for Batteries Technology, Training and Skills

What is **ALBATTTS**?



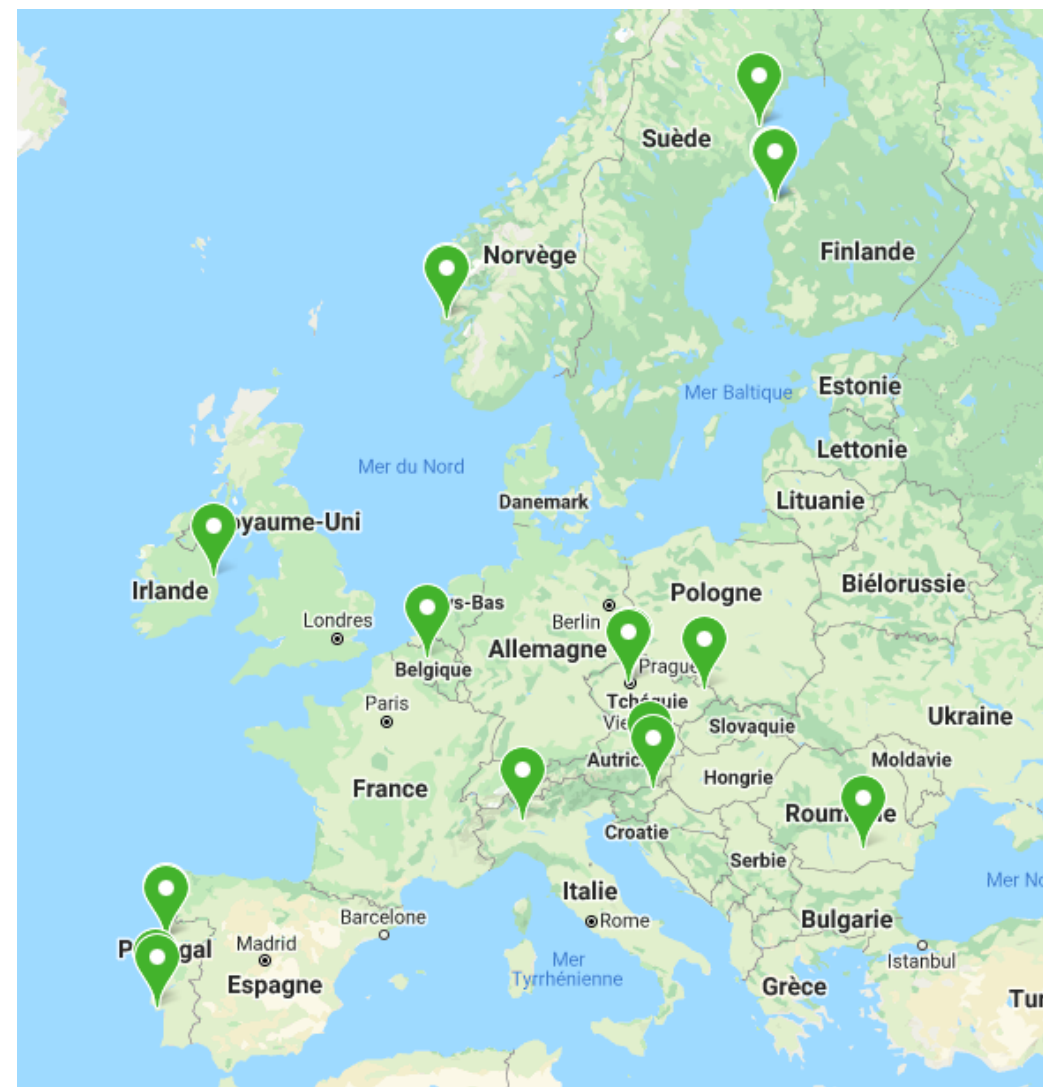
- ⚡ 4-year (2019-2023) Erasmus+ funded project
- ⚡ Blueprint for Sectoral Cooperation on Skills in Battery sector
- ⚡ Contributes to the electrification of transport, green energy and environmental goals in Europe
- ⚡ Gathers demand and supply sides of competences in the battery value chain

What is **ALBATTTS**?



- ⚡ Identification of skills and job roles needs
- ⚡ Enabling education sector to provide education and training for the future workers and specialists needed by the battery sector
- ⚡ Set up clear sectoral skills strategy
- ⚡ Covers the battery life cycle - batteries developed for and used in both stationary and mobile applications

Partners



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ALBATTIS

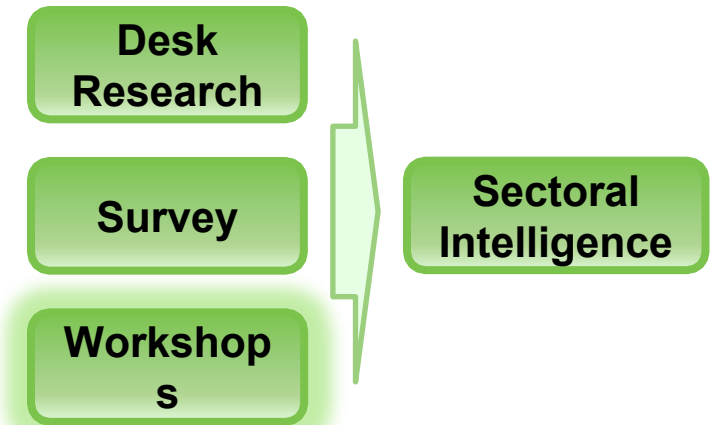
Sectoral Intelligence

Q1: What is going on?



ALBATTIS Workshop Series

- ⚡ Brings stakeholders together to participate on the skills intelligence updates and consult on the latest inputs
- ⚡ Workshop Series starts by 2021 and will be hold till 2023



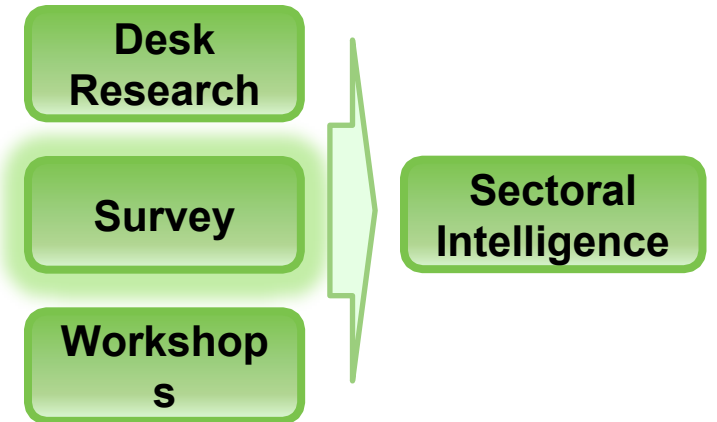


ALBATTIS Online Survey

⚡ Online Survey is focused on detailed analysis of skills and job roles needed in the sector

⚡ Please, participate in online questionnaire:

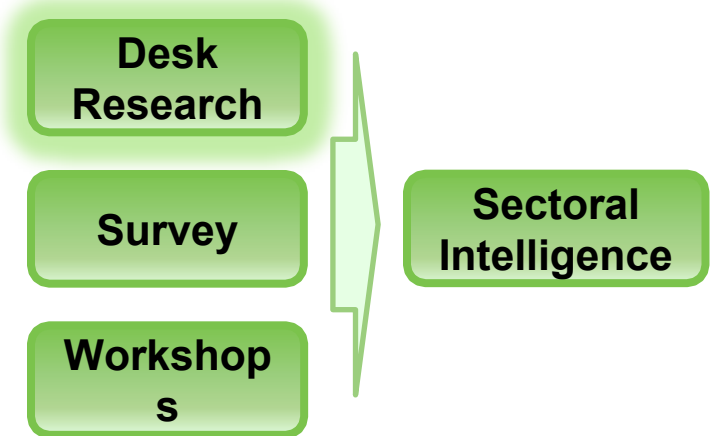
<https://stakeholders.project-albatts.eu/s/survey2020>





ALBATTIS Desk Research

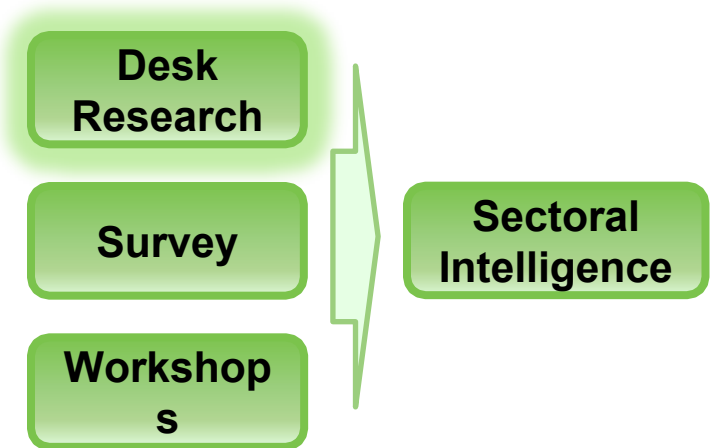
- ⚡ Desk research provide screening of the latest information relevant for skills agenda in Battery Sector
- ⚡ Desk Research starts by 2020 and will be hold till 2023





ALBATTIS Desk Research

- ! ⚡ [D3.3 Desk Research and Data Analysis](#) (Nov 20) - Overview of the Battery Sector
- ! ⚡ [D4.1 Intelligence in Stationary and Industrial Battery Applications – Desk Research Report](#) (Aug 20) – Details related to battery application sub-sector
- ! ⚡ [D5.1 Intelligence in Mobile Battery Applications – Desk Research Report](#) (Aug 20) – Details related to battery application sub-sector





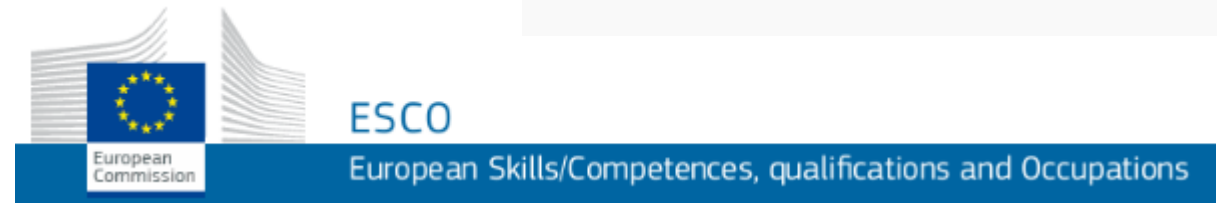
ALBATTTS

Education and Training

Q2: How can we address the education and training needs?

ALBATTIS will...

- Analyse new job roles/skills
- Suggest learning objectives
- Develop course plans
- Develop learning material
- Try out adaptive learning
- Pilot-test innovative courses
- Train-the-trainer guidelines
- Network!
- Use European instruments
- Implement results





ALBATTTS

Desk Research Initial Findings

EV Manufacturing & Battery Integration

Job Roles & Skills – Desk Research I.



Basic **skills/knowledge** for EV battery production and integration:

- ⚡ Battery packs and modules production and design
- ⚡ Battery testing and analysis, embedded systems and battery management systems knowledge
- ⚡ Software development
- ⚡ Specific battery integration techniques
- ⚡ Data Science

Job Roles & Skills – Desk Research I.



Most frequent **job roles** for EV battery production and integration:

- ⚡ BMS and embedded system engineers, battery systems engineers
- ⚡ Software developers
- ⚡ Data Scientists
- ⚡ Module and pack design engineers (electrical, mechanical, simulations, test engineers)

To get involved with the **albatts** stakeholders group:

Stakeholder registration [here](#)

LinkedIn Group - European Battery Skills Agenda [here](#)



Follow us on:

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LinkedIn: [LinkedIn](#)

Facebook: [Facebook](#)

Twitter: [Twitter \(@ALBATTTS1\)](#)

Mail: info@project-albatts.eu

Thank you

Presenter

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DAIMLER

ALBATTIS Automotive Webinar

Dr. Oliver Fischer, Head of Daimler Culture, Talent & Learning

Jan 27, 2021



Daimler consists of three legally independent companies



Daimler facts & figures for 2019

Overview (in m €)	2019	2018
Revenues	172,745	167,362
EBIT	4,329	11,132
Net Profit	2,709	7,582
R&D expenditure	9,662	9,107
Free cash flow industrial business	1,368	2,898



Daimler facts & figures

Q1-3 2020

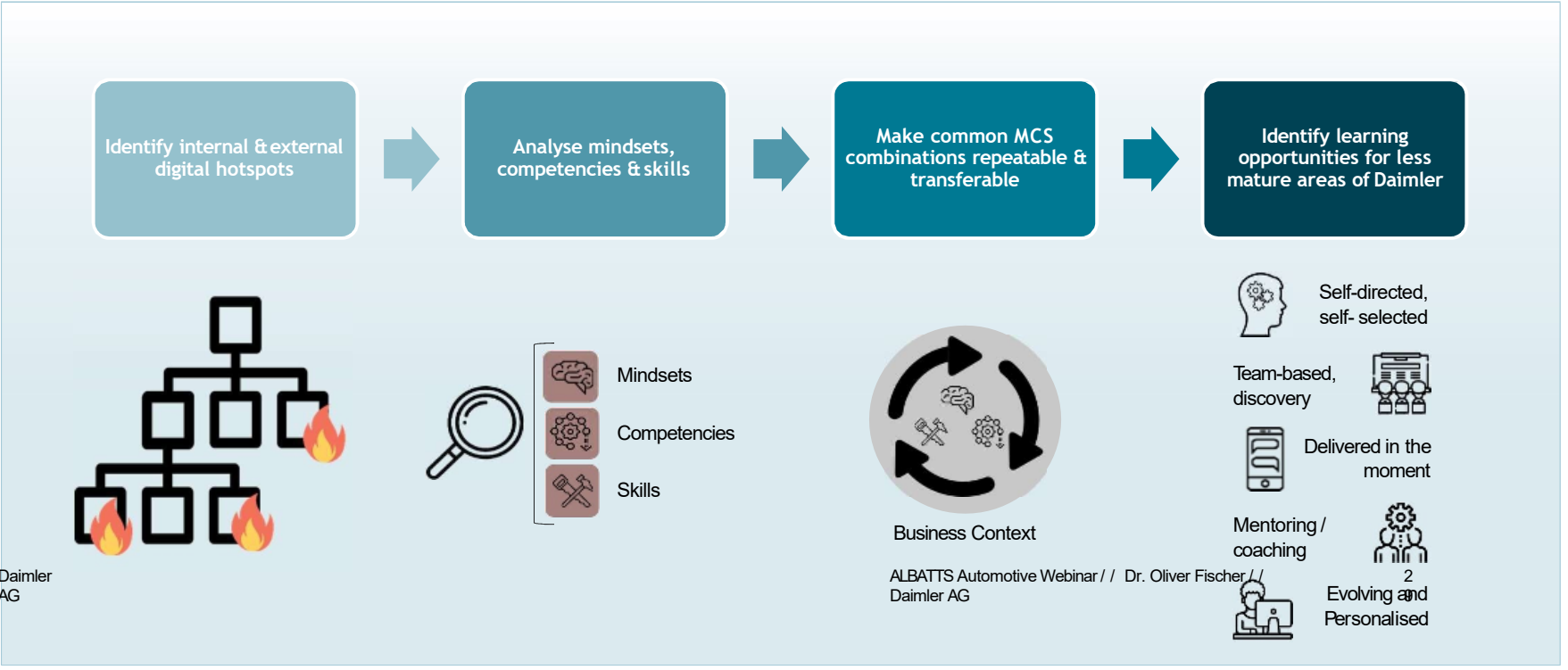
Overview (in m €)	Q1-3 2020	Q1-3 2019
Revenues	107,688	125,618
EBIT	2,005	3,930
Net Profit	420	2,720
R&D expenditure	6,735	7,236
Free cash flow industrial business	3,508	-522



Key Elements of the Daimler Strategy

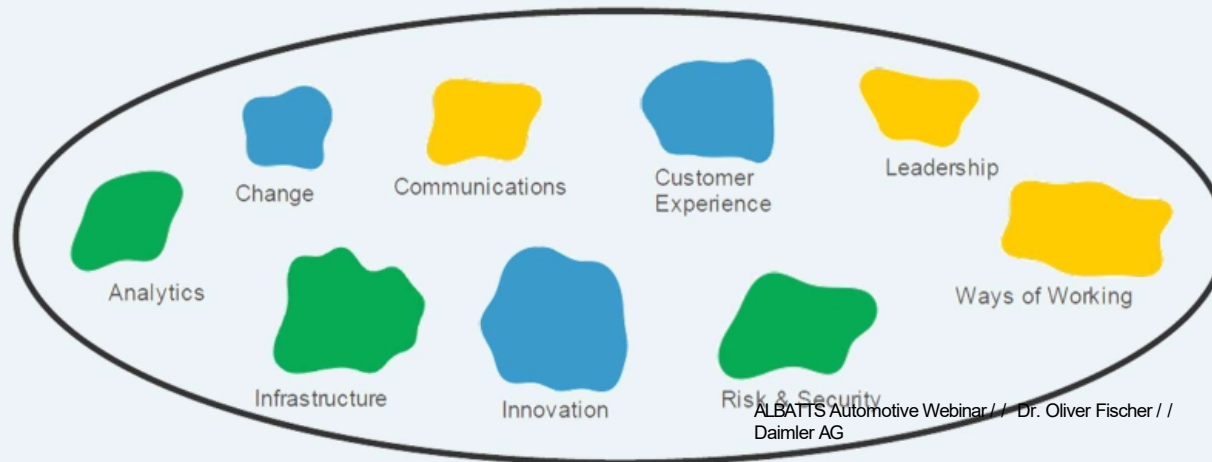


We advise on future qualification needs: Taking mindsets, competencies, and skills into account.



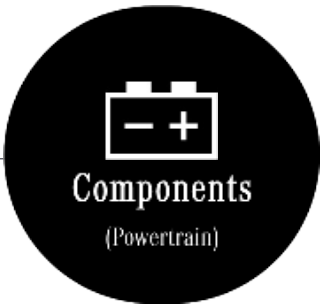
Competencies required for the Digital Transformation: Redrawn from a broad set of disciplines & cover a wide array of domains of knowledge.

- ♣ Internal and external digital hotspots combine expertise from different domains, and have high numbers of employees that are hybrids.
- ♣ These hybrids have strengths in a combination three types of competencies: **technical** competency, **enabling** competency or a **transformational** competency.

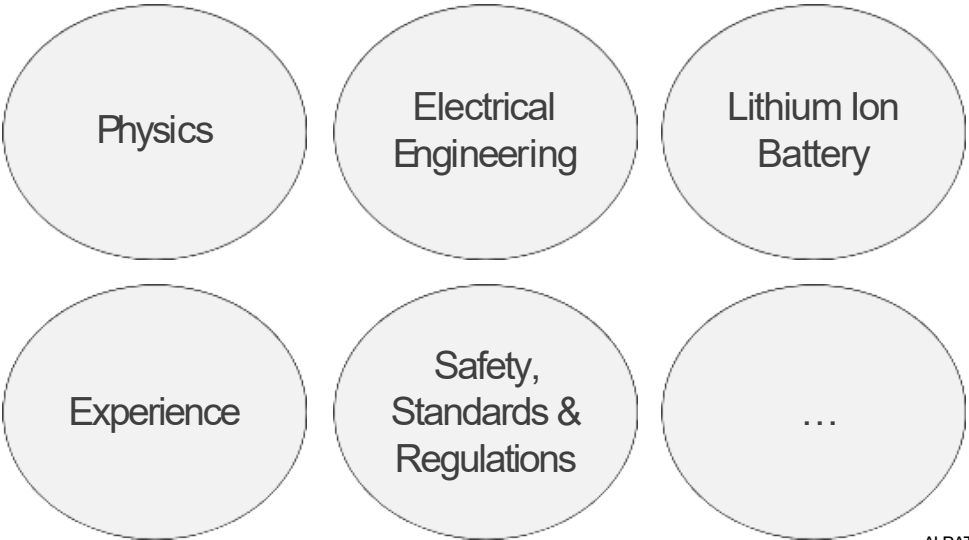


Example: Mercedes-Benz “Upskilling in the Transformation”

Different requirements towards qualification



Example: Daimler Trucks “Qualification Electric Specialist” Modular Design for Basic Qualification



Thank you!





ACEA

European
Automobile
Manufacturers
Association

ACEA PERSPECTIVE ON THE EU POLICY FOR E-MOBILITY AND SKILLS

ALBATTS WORKSHOP

PETR DOLEJŠÍ

Director Mobility and Sustainable Transport

27 January 2021

MEMBERS

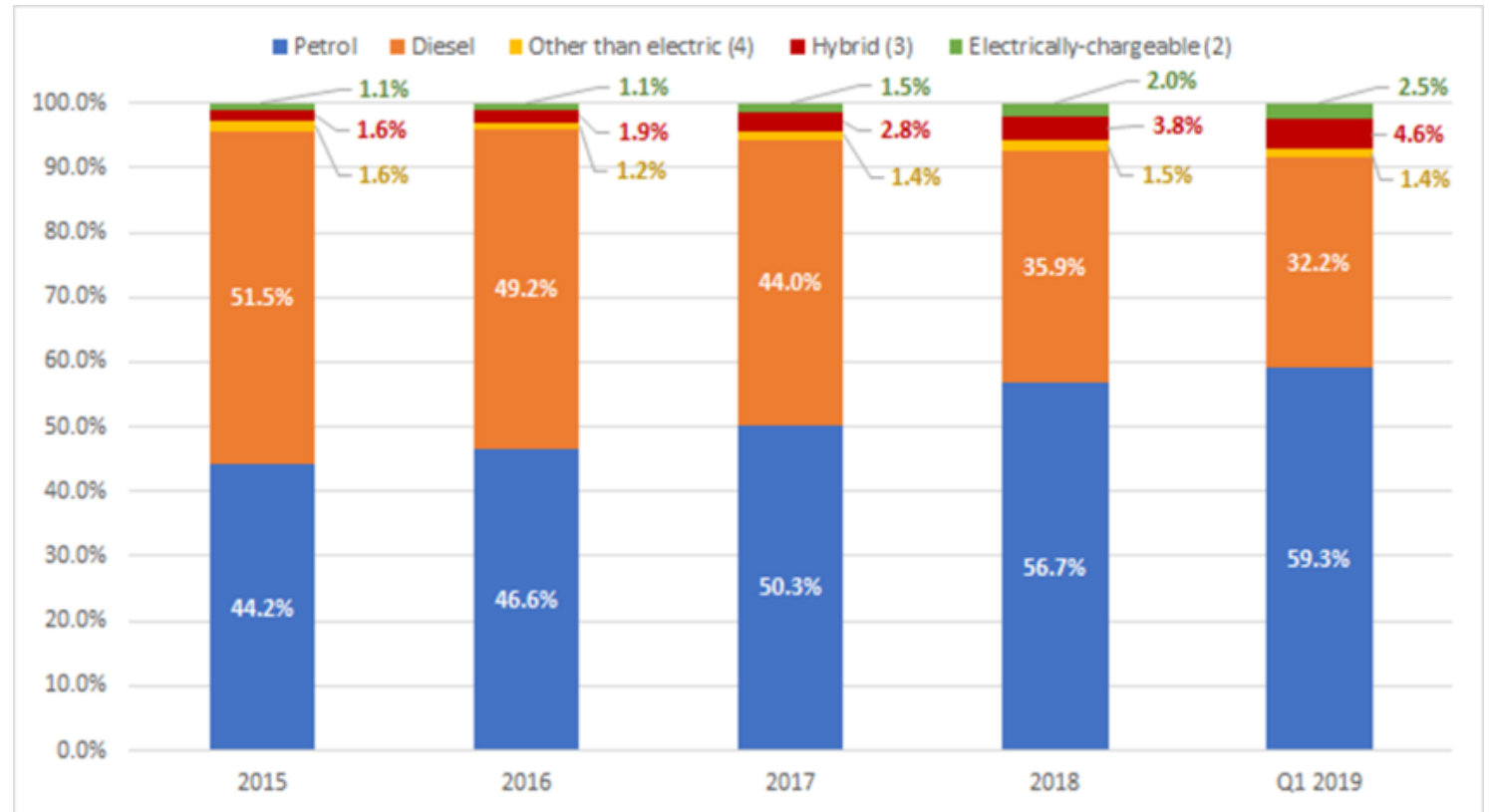
			
	 FIAT CHRYSLER AUTOMOBILES		 The Power of Dreams
	 		
	 AKTIENGESELLSCHAFT		

COMMERCIAL VEHICLE MEMBERS



BACKGROUND – KEY STATISTICS

- Role of alternatively powered vehicles is still low in the EU



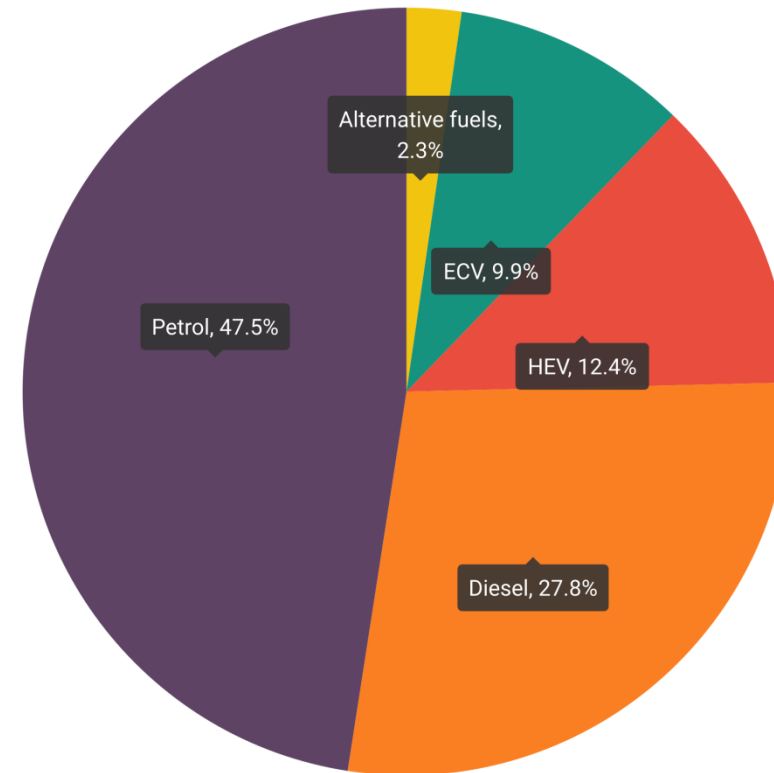
BACKGROUND – KEY STATISTICS

- **The share of ECVs is growing fast and accelerates (figures Q3 2019)**

New passenger cars by fuel type in the EU

Market shares (%)

■ Petrol ■ Diesel ■ ECV ■ HEV ■ Alternative fuels



Created with LocalFocus

Source: ACEA

BACKGROUND – KEY STATISTICS

- **With CO₂ targets fixed, more to expected...**

Projected number of newly registered ZLEV in 2030 (thousands of cars)				
Scenario	Plug-in hybrid vehicles (PHEV)	Battery Electric Vehicles (BEV)	Fuel Cell vehicles (FCEV)	Total ZLEV)
30%	2,162	1,420	380	3,962
40%	3,157	1,962	514	5,633
45%_40%ZLEV	4,266	4,468	1,166	9,900
50%	4,440	2,607	671	7,718
50%_30%ZLEV	2,703	3,567	1,066	7,336
50%_50%ZLEV	677	8,287	1,046	10,010
75%	5,836	8,930	1,762	16,528

Table 3: Projected number of newly registered ZLEV in 2030

- **Key drivers of future growth**
 - Regulatory requirements
 - COVID-19 recovery plan
 - Changing patterns of the consumers

- **Regulatory requirements**

- Industry has to meet 95g target in 2021
- Additional -37,5% CO₂ reduction target for 2030
- Associated with 35% benchmark level for passenger cars for 2030
- To be further tightened by the Green Deal revision
- Strong push for Euro 7 legislation

- **COVID-19 recovery plans**

- Many member states introduced incentives for fleet renewal
- Supported by the EU funding through nation programmes
- Some will definitely continue in 2021 (but not sustainable forever)
- The Commission is pushing to Green Deal objectives in transport sector

- **Changing consumer patterns**

- OEMs deliver significantly more models on the market
- Price parity is approaching (also supported by fleet renewal schemes)
- Societal “push” on regional or municipal level
- Economics always is essential for final consumers (even more for vans and HDV sector)

- **Key challenges**

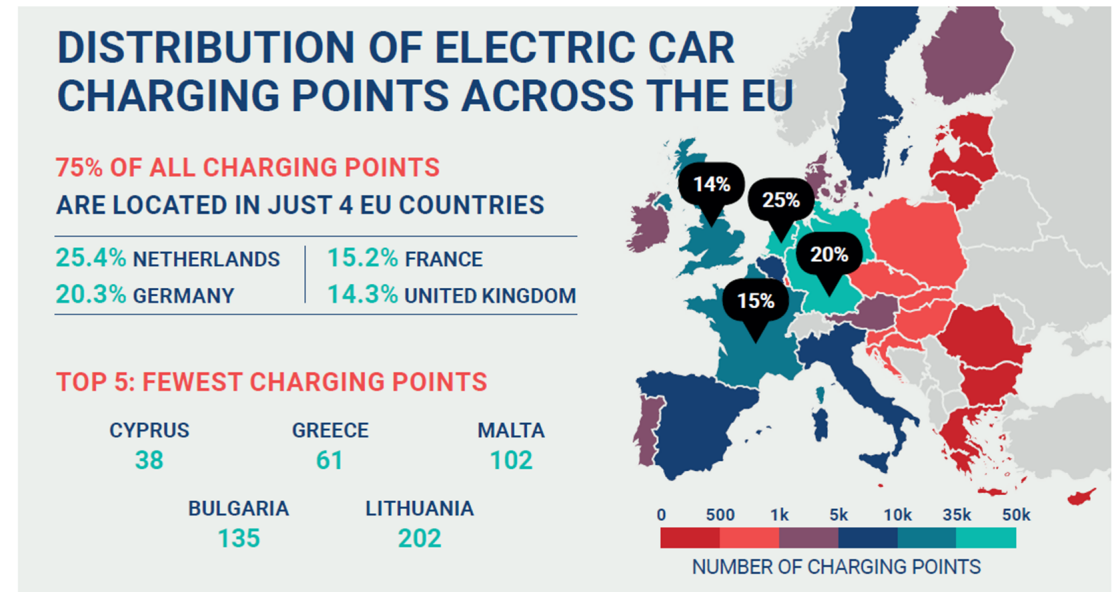
- Lack of recharging infrastructure
- Sustainability of the supportive measures
- Transformation of the industry – skills gaps

- Lack of charging infrastructure across the EU**

Projected number of EV and number of public electric charging points in 2030 (thousands)				
Scenario	Plug-in hybrid vehicles (PHEV)	Battery Electric Vehicles (BEV)	Total PHEV + BEV	Number of public charging points (thousands)
30%	16,494	9,780	26,274	2,627
40%	21,331	12,256	33,587	3,359
45%_40%ZLEV	35,906	27,086	62,992	6,299
50%	27,584	15,394	42,978	4,298
50%_30%ZLEV	29,008	23,481	52,489	5,249
50%_50%ZLEV	10,768	49,499	60,267	6,027
75%	61,035	27,158	88,193	8,819

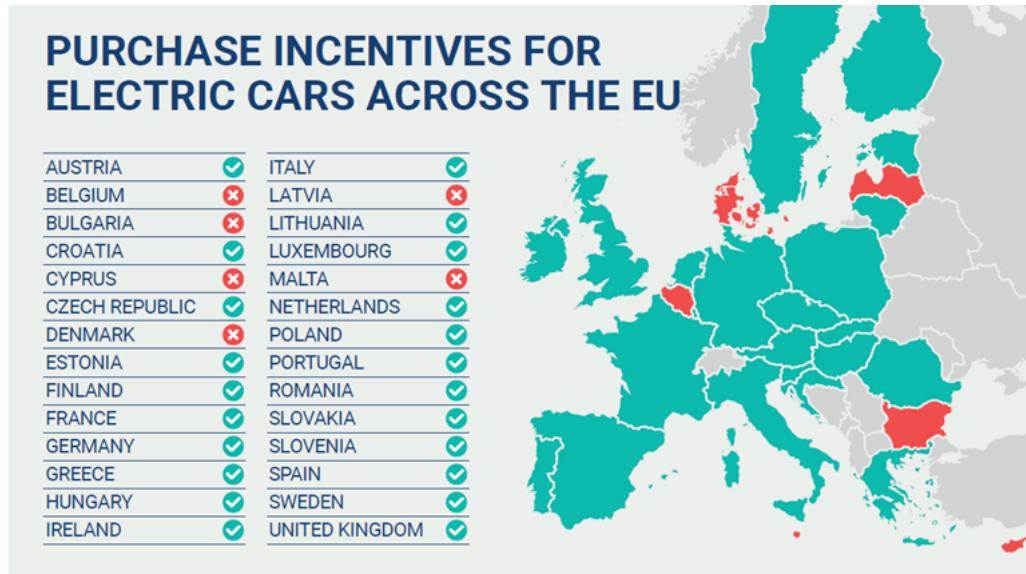
Table 5: 2030 Projected number of EV and number of public electric charging points

Distribution of ECV charging points across the EU (2019)

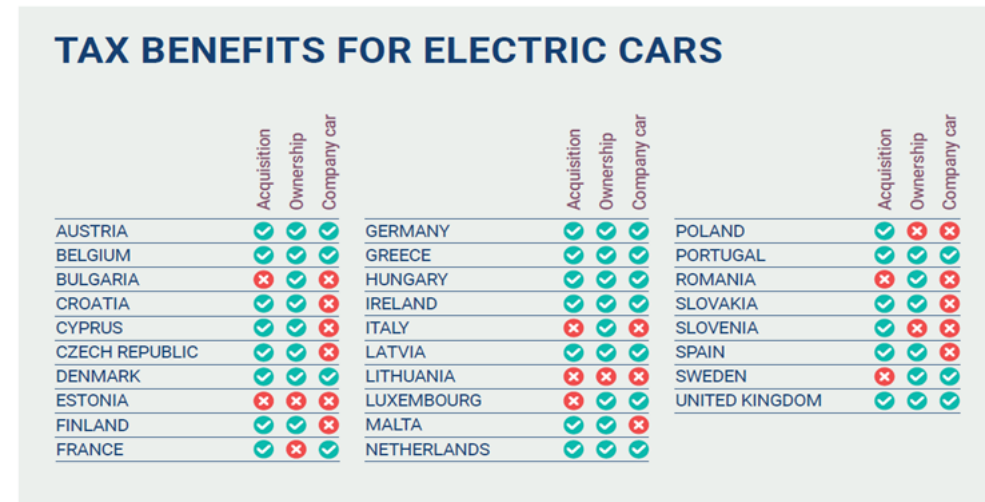


'Electric car' = electrically-chargeable vehicles (battery electric vehicles + plug-in hybrid electric vehicles)
Source: ACEA, EAFO

- Sustainability of the supportive measures**



'Electric car' = electrically-chargeable vehicles (battery electric vehicles + plug-in hybrid electric vehicles)
Source: ACEA Tax Guide 2020



'Electric car' = electrically-chargeable vehicles (battery electric vehicles + plug-in hybrid electric vehicles)
Source: ACEA Tax Guide 2020

- **Transformation of labour force and restructuring**
 - Massive electrification will tackle the whole value chain
 - New skills would be needed in massive way
 - Most of the automotive regions will undergo massive restructuring
 - Upskilling and reskilling projects are needed (e.g. ALBATTIS, DRIVES)
 - Newly established Pact for Skills and Automotive Skills Alliance (<https://bit.ly/35TKEVO>)



European
Automobile
Manufacturers
Association

ACEA represents the 16 major Europe-based
car, van, truck and bus manufacturers

www.acea.be

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ELECTRIC VEHICLE MANUFACTURING & BATTERY INTEGRATION - FUTURE

QUALIFICATIONS NEEDED



ŠKODA
SIMPLY CLEVER



Ing. Stanislav Hackl

ŠKODA Academy (ŠKODA AUTO a. s.)

January, 27th 2021

INTERNATIONAL PRODUCTION NETWORK WITH GROUP RESPONSIBILITY

AN EFFICIENT PRODUCTION NETWORK FORMS THE BACKBONE FOR THE FURTHER DEVELOPMENT OF THE COMPANY

Figures from 2019

907,900 cars
Czech Republic
Mladá Boleslav, Kvasiny

ŠKODA AUTO	
OCTAVIA	262,500
FABIA	166,200
KODIAQ	101,600
KAROQ	94,700
SUPERB	77,000
SUPERB iV	2,000
SCALA	54,800
KAMIQ	29,300
RAPID	19,900
SEAT	
SEAT TOLEDO	1,500
SEAT ATECA	98,400

27,300 cars
Slovakia
Bratislava

ŠKODA AUTO	
CITIGO	25,700
CITIGO [®] iV	1,600

108,100 cars
India
Aurangabad, Pune

ŠKODA AUTO		AUDI		VOLKSWAGEN	
RAPID	9,500	AUDI A3	900	TIGUAN	1,200
OCTAVIA	2,700	AUDI A4	300	POLO	27,000
KODIAQ	1,900	AUDI A6	300	POLO (VENTO)	56,900
SUPERB	1,400	AUDI Q3	300	AMEO	4,800
		AUDI Q5	500		
		AUDI Q7	400		

104,900 cars
Russia
Kaluga, Nizhny Novgorod

ŠKODA AUTO	
RAPID	40,600
KODIAQ	36,000
OCTAVIA	28,100
KAROQ	200

266,400 cars
China
Yizheng, Ningbo, Nanjing, Changsha

ŠKODA AUTO	
OCTAVIA	65,100
RAPID	53,600
KAMIQ	46,600
KAROQ	37,100
KODIAQ	25,200
SUPERB	22,200
KODIAQ GT	12,600
KAMIQ GT	4,000

In 2020, ŠKODA AUTO delivered 1,004,800 cars to customers worldwide despite the coronavirus pandemic



ŠKODA IN THE CZECH REPUBLIC

Facts:

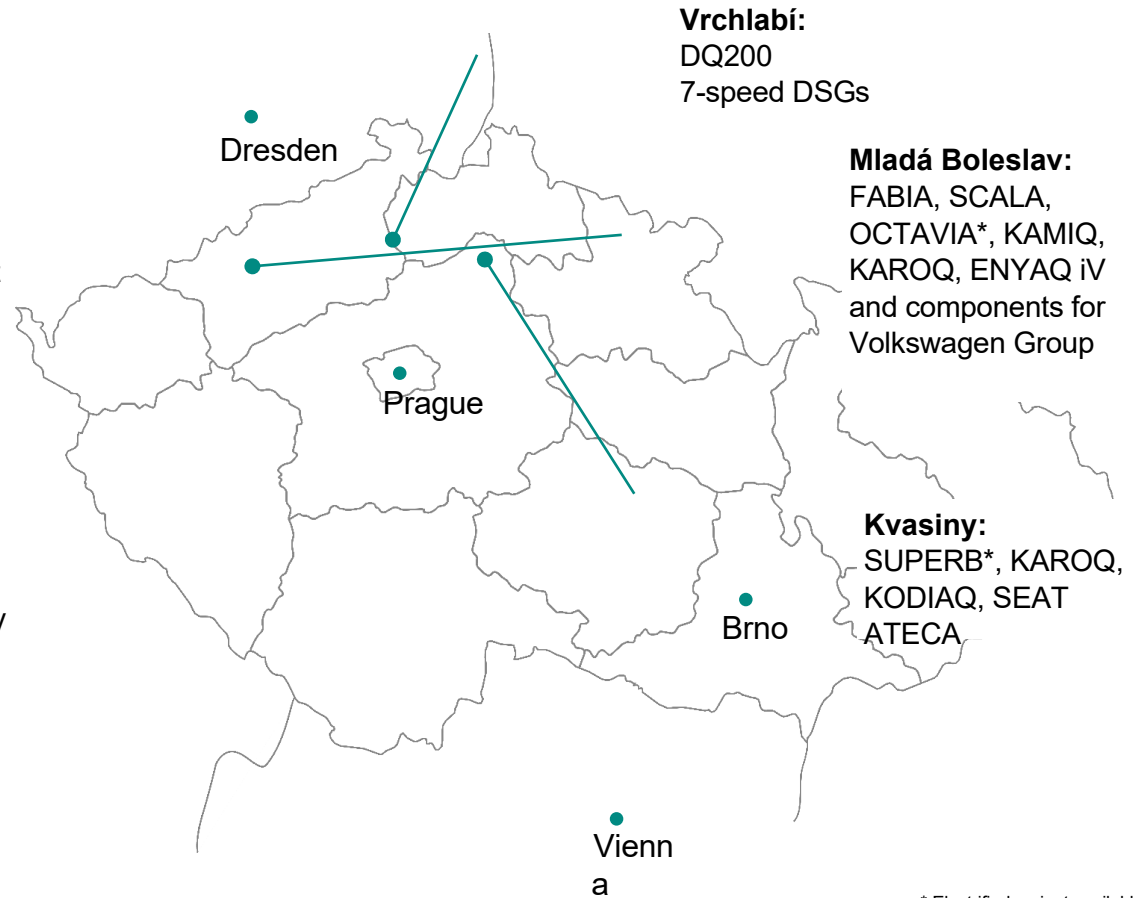
- The brand's home country and second-largest European market
- 907,900 cars produced at the Czech ŠKODA plants in 2019
- 180 dealership sites

Three production sites:

- Mladá Boleslav, Kvasiny, Vrchlabí

Strategic focus:

- The company has entered the era of e-mobility in its home country, the Czech Republic



* Electrified variant available

CURRENT MODEL RANGE



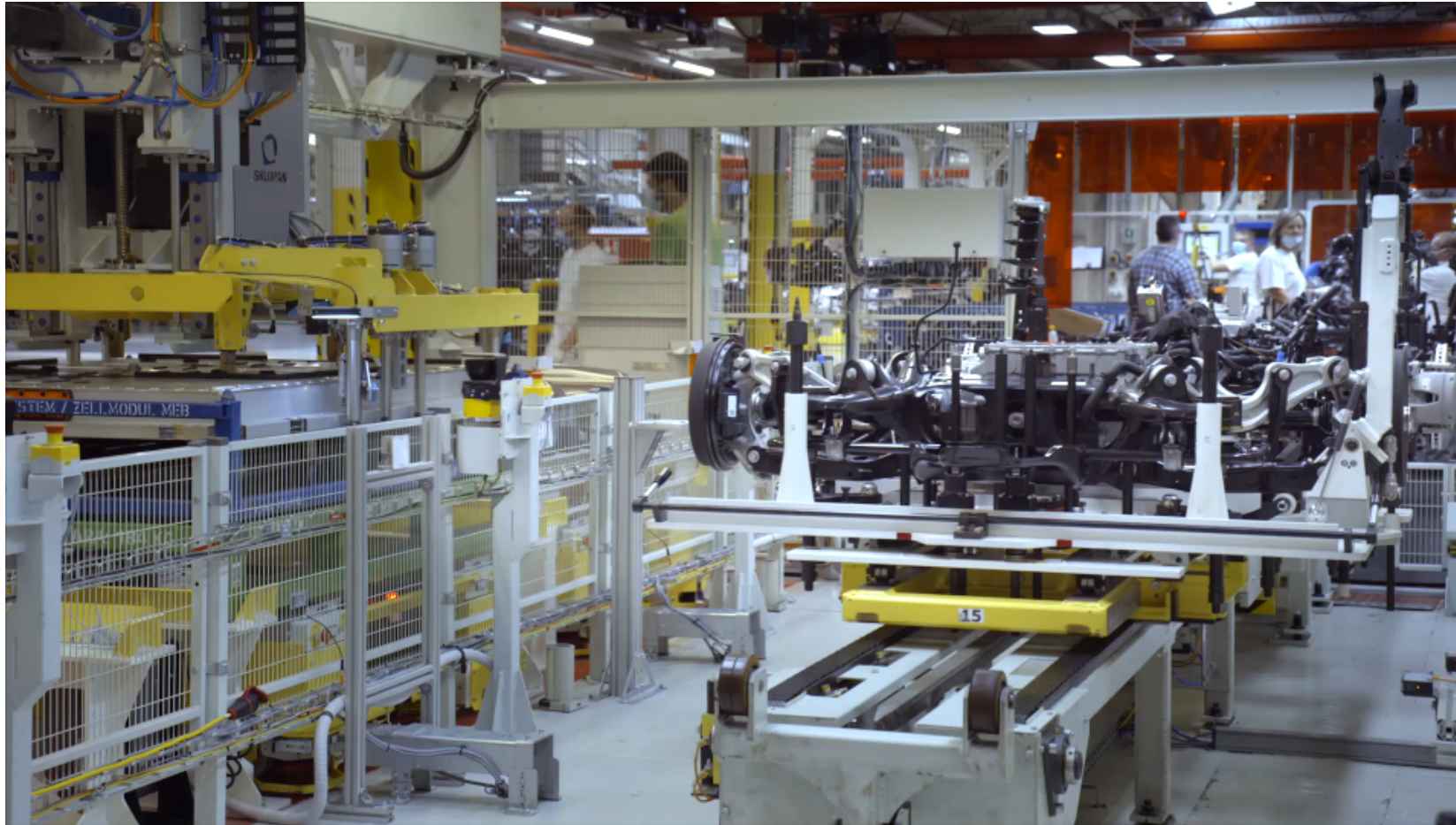
* Models available in Russia, China and India

** Models available in China



ŠKODA ENYAQ - ASSEMBLY LINE

So called „Wedding“



Compulsory training system for electric / hybrid cars

	Qualification title	Authorized work activities (target groups of employees)	Compulsory electrotechnical training		Compulsory type training		
			Training title	Validity	Training title	Validity	
Level 3	High-voltage battery expert (VNEb)	All activities below and in addition: Evaluation, analyses, classification of safety and repair of damaged HV batteries (all NIO statuses)	Regulation no. 50/1978 Coll., on the professional qualifications in electrotechnics (at least §6) (technical development also § 11 Art.2) (course no. 1-09-001) (3 days) Conditions for application: • Electrotechnical education • Confirmation of the length of practice from the employer	3 years	+	Analysis of traction batteries (course no. 1-14-234) (1 day)	forever**
	High-voltage expert (HVE)	Measurement and analysis of the energized HV system All work on a car with an attached HV system Creating working instructions for work with energized elements De / activation (disconnection / connection) of the HV system				Type training E-Car for electrical engineering (course no. 1-14-222) (6 lessons) Course content: • Electrical safety E-Car - Sensitization (Course no. 1-14-205) • Work conditions for electromobility (Course no. 1-14-209) • Safety instructions and vehicle operating instructions • Commissioning of the HV system	forever** 1 year forever** forever**
Level 2	High-voltage technician (HVT)	All activities below and in addition: De / activation (disconnection / connection) of the HV system only according to the serial car work instructions	Instructions under §4 for electromobility (Course no. 1-14-208) (2 lessons) (note: forms part of type training no. 1-14-221)	3 years	+	Deactivation and activation of the HV system for non-electrical subjects (Course no. 1-14-223) (2 days)	forever**
	Electrically-educated person (EEP)	All activities below and in addition: Work or repair with deactivated (disconnected) HV system on HV components, HV lines and in their vicinity (see definition below) To be classified according to the safety protocol of the HV-battery according to the work instructions (not in the NIO dangerous status) Occupational health and safety training - syllabus for HV vehicles				Type training E-Car for non-electrical subjects (Course no. 1-14-221) (4 lessons) Course content: • Electrical safety E-Car - Sensitization (Course no. 1-14-205) • Instructions under §4 for electromobility (Course no. 1-14-208) • Safety instructions and vehicle operating instructions	forever** 3 years forever**
Level 1	Electrically-acquainted person (EAP)	All assembly work on the car before the first activation (connection) of the HV system First activation (connection) of the HV system in the assembly line (ECOS / UPS) Outside the assembly line: work / repair / replacement of parts on an electric car, if this activity is not in the vicinity (see definition below) HV-component or HV-line (HV-system can be both active and deactive) Visual assessment and diagnostics of the HV battery (not in the NIO dangerous status) Handling, transport and packing of HV-batteries (not in the NIO dangerous status) Car charging Car use and operation Management or coordination of employees - workplaces with electric cars	OHS training (initial, initial or periodic training) (under §3 of regulation 50/1978 Coll.)	According to the rules of the organizational unit		Electrical safety E-Car - Sensitization (Course no. 1-14-205) (1 lesson)	forever**

Compulsory training system for high voltage batteries

	Qualification title	Authorized work activities (target groups)		Compulsory electrotechnical training		Mandatory type training	
				Training title	Validity	Training title	Validity
Level 3	HV battery expert	Battery check in quality management processes	Regulation no. 50/1978 Coll., on the professional qualifications in electrotechnics (at least §6) (technical development also § 11 Art.2) (Course no. 1-09-001) Conditions for application: <ul style="list-style-type: none"> Electrotechnical education Confirmation of the length of practice from the employer 	3 years	High voltage batteries for electrotechnical workers (Course no. 1-14-232) Course content:	<ul style="list-style-type: none"> Electrical safety E-Car - Sensitization (Course no. 1-14-205) 	Forever *
		Repair work, analysis, HV Expert				<ul style="list-style-type: none"> Work conditions for electromobility (Course no. 1-14-209) ESD protective measures HV battery design HV battery diagnostics 	1 year
		Creating work instructions					Forever *
Level 2	HV battery technician	Assembly work on the HV battery assembly line.	Instructions under §4 of regulation No. 50/1978 Coll., for electromobility (Course no. 1-14-208) (note: forms part of basic training no. 1-14-231, after three years prolonged separately)	3 years	High voltage batteries for workers without electrotechnical education (Course no. 1-14-231) Course content:	<ul style="list-style-type: none"> Electrical safety E-Car - Sensitization (Course no. 1-14-205) 	Forever *
		Team leader/foreman, shift co-ordinator and HV battery production setter				<ul style="list-style-type: none"> Instructions under §4 of regulation No. 50/1978 Coll. (Course no. 1-14-208) Work conditions for electromobility (Course no. 1-14-209) Measurement of electrical quantities ESD protective measures HV battery design HV battery diagnostics 	3 years 1 year Forever *
Level 1	Electrically acquainted person	Entrance to the hall where the HV batteries are assembled	OHS training (initial, initial or periodic training) (under §3 of regulation 50/1978 Coll.)	According to the rules of the organizational unit	Electrical safety E-Car - Sensitization (Course no. 1-14-205)	Forever *	
		Handling batteries and their components (shall not be critically damaged)					
		Pre-assembly of parts without voltage					
		Management or coordination of employees (workplace with HV batteries)					
Level 0	Anybody	Entrance to the hall where batteries are assembled by a person with minimal knowledge.	OHS training (initial, initial or periodic training) (under §3 of regulation 50/1978 Coll.) ŠKODA AUTO Visiting Regulations	According to the rules of the organizational unit -	To enter the workplace, a person shall be aware of the danger and their entry is possible only if accompanied by a person at least acquainted.		
		Employees (internal / external) who enter the hall occasionally and do no work on batteries or handle with HV batteries and their components ----- Visits					

* Only significant change in technology will end the validity of the training qualification certificate

ŠKODA ACADEMY: Secondary vocational school of engineering

ALMOST **1 000**
STUDENTS



OVER
100
GIRLS



OVER **100** TEACHERS

15
PLANNED PROFESSIONS FOR THE YEAR
2021/2022

OVER
23 000
TOTAL GRADUATES
SINCE 1927

Recruitment and HR Marketing

Information from Recruitment Centre

Current total number of staff in the Component production –
- HV battery assembly department: **200**

Number of workers for assembly (Level 2): **140**

Number of workers for analysis and repair of batteries (Level 3): **30**

Battery relevant qualifications currently missing at the job market:

Graduates of Secondary Technical Schools of Electrical Engineering

Graduates of Secondary Vocational Schools in professions:

Car Electronics, Car Electrician, Electrician

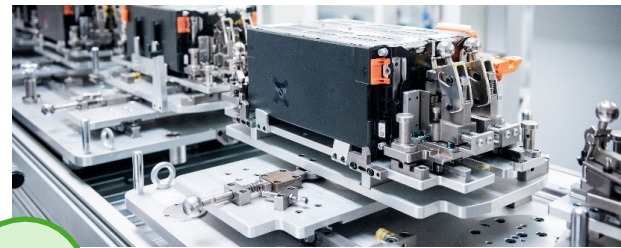
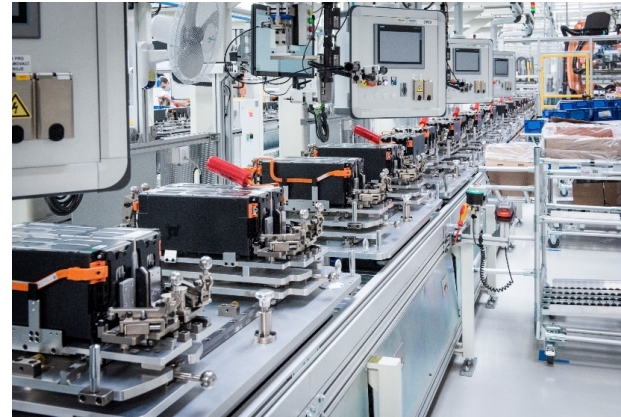
Recommendations – to support for education in two directions:

➤ Full-time study

- Higher number of teachers
- Higher number of students in electrical engineering fields

➤ Retraining - distance learning

- Study of a completely new technical field
- Supplementing electrical engineering education



Play video

**ŠKODA TECHNICAL - High Voltage
Batteries Assembly Line**

SE – ŠKODA Academy

Furthering your professional excellence.

Wir fördern Ihre fachliche Exzellenz.

Prohlubujeme Vaši profesní dokonalost.



ŠKODA Akademie





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EMPLOYMENT 2030

EFFECTS OF ELECTRIC MOBILITY AND DIGITALISATION ON THE QUALITY AND QUANTITY
OF EMPLOYMENT AT VOLKSWAGEN

