

PLANNING TODAY FOR THE AUTOMOTIVE WORKFORCE OF TOMORROW

INDUSTRIAL STRATEGY GRAND CHALLENGES



Digitalisation AI & Data



Future of Mobility



Clean Growth



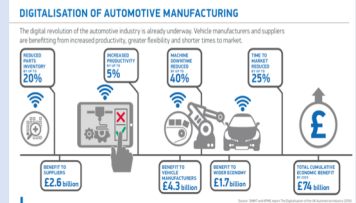
Ageing Society

Increasing pace of technological change has significant implications for employment and skills

MORE CHANGE IN THE NEXT 10 YEARS IN AUTOMOTIVE THAN IN THE PAST 100 YEARS

INDUSTRIAL DIGITALISATION

33% of industrial robots deployed in Automotive
2017 data. Int. Fed. Of Robotics, 2018



SMMT, KPMG, The Digitalisation of the UK Automotive Industry (2016)



25,000 Job in UK Manufacturing By 2030
SMMT, KPMG, 2014

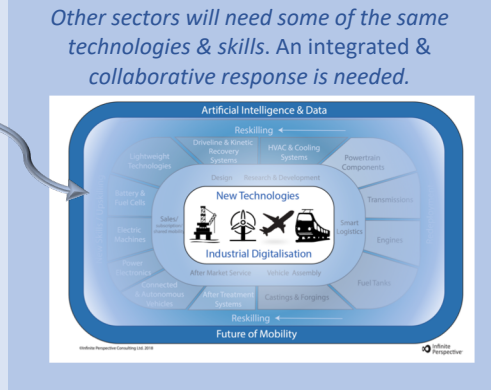
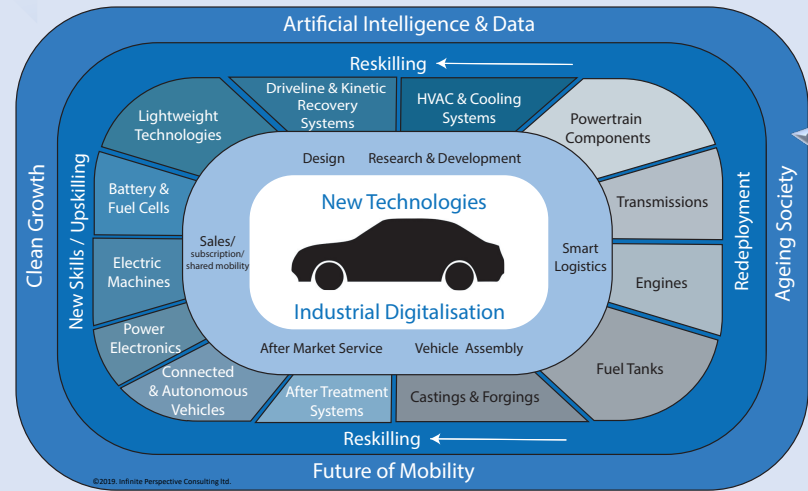


3x more SOFTWARE CONTENT
30% 10%
2030 D Segment vehicles, McKinsey Center for Future Mobility, 2018

CHANGING WORK

CHANGING PRODUCT

CHANGING PROCESS



Other sectors will need some of the same technologies & skills. An integrated & collaborative response is needed.

CHANGING WORK

- 14%** vulnerable to automation
OECD, March, 2018
- 32%** jobs likely to change
OECD, March, 2018
- 12%** reduction in manual hours worked
McKinsey Global Institute, May 2018

CHANGING SKILLS

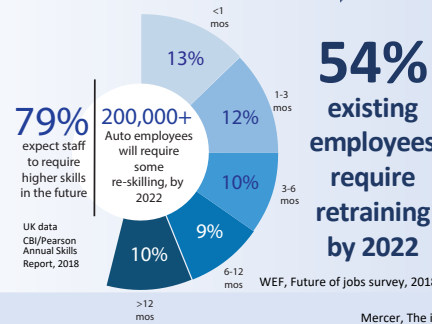
Re-skilling

- Those working on legacy technologies & processes need to be **REDPLOYED & RE-SKILLED**.
- Automation and digitalisation** requires **UPSKILLING**.
- NEW SKILLS** will be needed to drive innovation through emerging technologies.

New skills

Re-deployment

CHANGING AVAILABILITY



1.9m Workforce Shortfall by 2025

- Ageing Workforce
- Reduced Migration
- More Inclusive Employment Practices

CHANGE IN APPROACH

Aligned & responsive Education & Training critical to deliver skills required



INTEGRATED WORKFORCE PLANNING TO ENABLE & MANAGE CHANGE