

Investing in the Future of Jobs and Skills. Scenarios, implications and options in anticipation of future skills and knowledge needs for the Transport and Logistics Sector. Policy Summary

The transport sector is one of the most important sectors for the European economy. Its importance stems not only from its size (which is estimated to be € 803 billion or 6.6% of European GDP in 2007), but also from the fact that it plays a crucial role in connecting other economic actors with each other. The transport sector is characterized by a great diversity and different transport modes that come with different technologies, regulations, challenges, know how, and skills requirements. It is also an important employer in Europe with some 9.62 million workers in the EU in 2006. During this time it had a total added value of € 530.2 billion in 2006, most of which was generated by the road sector. The annual growth rate in added value between 1995 and 2006 has been 4.3%, which is almost double the annual growth of 2.3% in added value in the total European economy for the period. The transport sector (especially freight) is affected strongly by the current economic crisis. SMEs are important in the sector, especially in road freight transport, with a large share taken by micro companies of less than 10 employees. In 2006 a total of 5.84 million persons worked in road transport, i.e. 61% of the whole transport and logistics sector. There has been nearly no growth in employment for the road transport sector (0.6%) from 2000 to 2006 within the EU. Labour force survey data shows that only 21.1% of the persons employed in the sector in 2005 were women. Employees with medium qualification comprise the highest share in the transport and logistics sector. There is a visible tendency for skill needs to shift from low qualification levels towards medium and higher qualification levels.

Strengths, weaknesses, opportunities and threats (SWOT) vary between the different transport modes. Some major cross-cutting issues affecting the sector are environmental aspects, skills requirements, regulation and technological developments, although they are being perceived differently by different transport sectors. In general, technological developments are being seen as opportunities and shortages of qualified labour as threats.

In addressing future skills and knowledge needs, appropriate and timely joint action is needed by all stakeholders: industry (firms, sector organisations and social partners), training and education institutes, intermediary organisations and government (EU, national, regional and local). Targeted and reliable monitoring to enable balanced decision-making is vital. Adapting and modernising vocational education and training (VET) systems are key, especially in respect to new technological developments, e.g. in ICT, safety, modern logistics and environmental improvements. In-company training, the use of simulations and lifelong learning need support, especially for SMEs. Improving information exchange between firms and training institutes on skills requirements, developing sectoral learning strategies and establishing partnerships for innovation and job creation need to be taken up proactively. Providing benchmarks, best practice solutions, better career guidance, re-training and the constant skills updating are important solutions. It is also expected that many older workers in the transport sector will soon enter retirement age which could pose a problem since some long-term experience will disappear and the recruitment of young people becoming increasingly difficult. More attention should be paid to interdisciplinary and multidisciplinary knowledge and multi-skilling, especially in view of the introduction of new technologies and the importance of intermodal transport concepts. Furthermore, it is essential to improve the image of the sector and attract higher skilled people. Investing strongly in human capital and lifelong learning, modern forms of training and improving the work-life balance as well as communicating that the work requires much responsibility and a diverse range of skills are very important issues to achieve this goal.