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FEATURE

Expected skills needs for the future of work

Understanding the expectations of the European workforce

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Introduction: Skills in the future of work

EMERGING TECHNOLOGY is reshaping the world of work. Automation is revolutionizing business models, tools, tasks and delivery modes. Workers can already see the transformation happening, as artificial intelligence (AI), robotics and other digital innovations are being used increasingly in the workplace.[1] The likely effects of automation are mixed. On the one hand, some jobs are at risk of being fully or partially automated and/or replaced by robots and AI. On the other hand, these changes could increase efficiency and access to services. Employers and workers require the necessary digital and soft skills to take advantage of the new opportunities they are expected to face.[2] However, almost half the population of the EU is considered as lacking basic digital skills[3] and one-third of the European citizens reportedly have no or almost no digital skills at all.[4] Approximately 40 per cent of employers are struggling to fill their job vacancies due largely to a lack of necessary skills, while 30 per cent of graduates are working in a job where the competences they acquired at university are not required.[5] This skills gap could threaten the stability of the labour market as well as the ability of EU industry to innovate.

The challenges of upskilling and reskilling could be imminent for many individuals, businesses and governments. The dignity, well-being and self-fulfilment of individuals as well as the prosperity of society could depend on it. Within this context, impactful public policies for workers' inclusiveness are important. In this vein, the involvement of a wide range of stakeholders, including workers, companies, public authorities, education institutions, training providers and social partners[6] can be crucial.

The 'future of skills' receives considerable attention from governments around the world and stands high on the political agenda of many international organizations. As an example, the EU has adopted an overarching strategy – the *New Skills Agenda*[7] – to tackle a wide range of skills-related challenges. Many of the tools contained in this initiative aim at empowering individuals to develop new skills or to exploit the skills they already have. Nevertheless, even with the most innovative policies in place and the mobilization of huge public resources,[8] the success of any skills strategy depends heavily on the motivation of individuals and their decisions to take a step forward. Hence, it is of great importance for policymakers and other stakeholders to understand the impact of technological change from the perspective of workers in order to develop effective policy tools to create a future that works for all.

A number of academic studies already shed light on the potential changes in the labour force of the future. This article which presents the opinions of more than 15,000 workers across ten European countries, was designed to contribute to the overall debate by giving voice to the workers themselves and potentially bring them closer to policymakers.

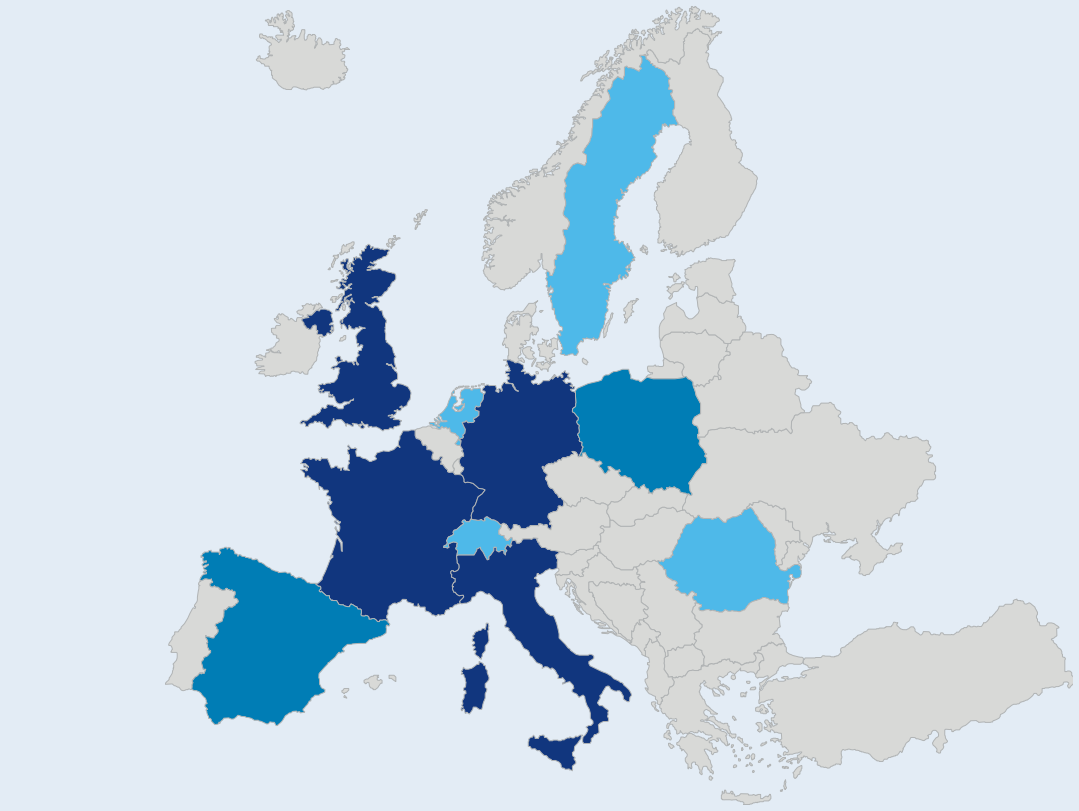
This paper provides insights on how the workers surveyed view the impact of new technologies on their work, how they perceive their own preparedness for automation and technological change, and which policy measures they expect from governments and others. Building on the analysis of workers' attitudes, the paper concludes with a number of suggestions for further consideration at policy level to address the skills gap and its challenges.

ABOUT THE RESEARCH

To amplify the 'voice of the workforce,' in August 2018 Deloitte conducted the European Workforce Survey, reaching out to more than 15,000 people across ten European countries (France, Germany, Italy, the Netherlands, Poland, Romania, Spain, Sweden, Switzerland and the United Kingdom) (figure 1). For this online survey, the sample was restricted to individuals at least 25 years old and active in the labour market (either working or looking for a job, and all referred to in this paper as 'workers'). The age and gender composition of the sample was designed to reflect the current composition of the workforce in each country. Professional translators adapted the questionnaire into their local (native) language, and native-speaking professionals refined the translations to optimise the comprehensibility of the questions.

FIGURE 1

Sample sizes, by country



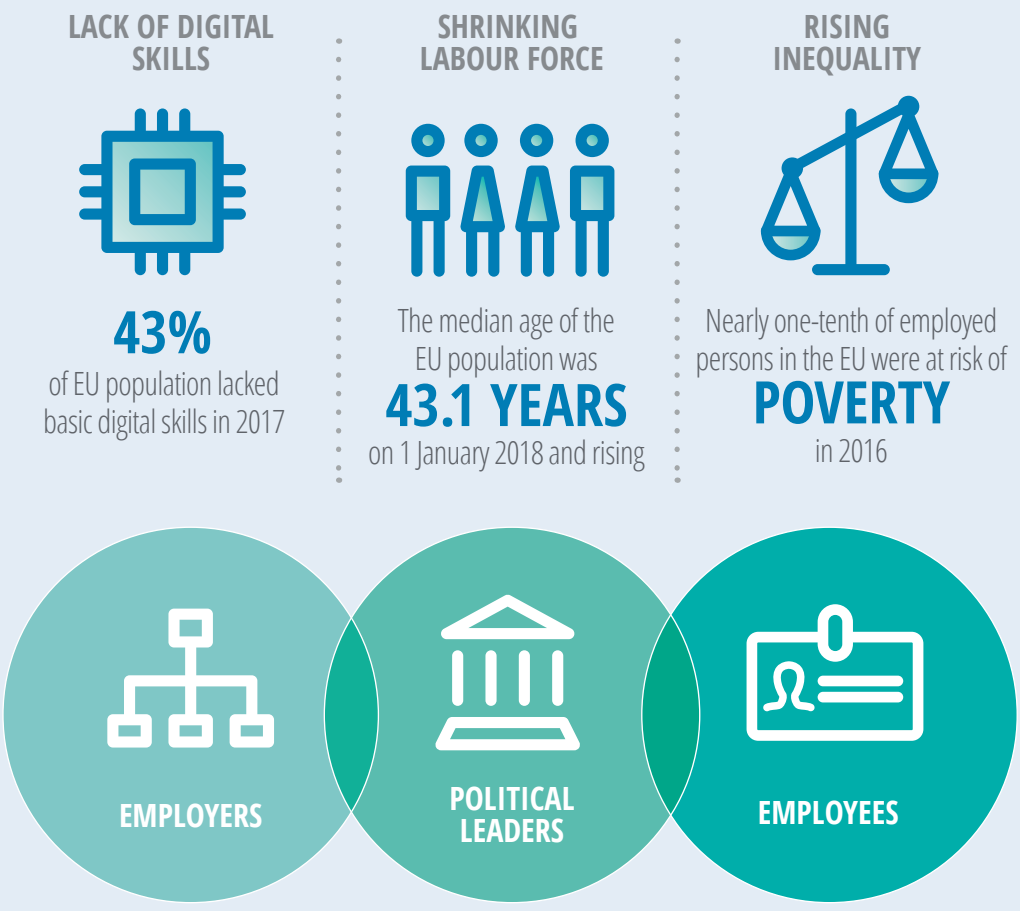
Source: The Deloitte European Workforce Survey 2018.

Expectations and perceived preparedness of the workforce

BOTH the EU and national governments aim to close the skills gap and increase digital skills significantly through a wide range of initiatives, one of the most important being vocational education and training. But how do European workers see the need for action in order to equip themselves with all the skills necessary for Industry 4.0?

FIGURE 2

Challenges and stakeholders related to skills policies in Europe

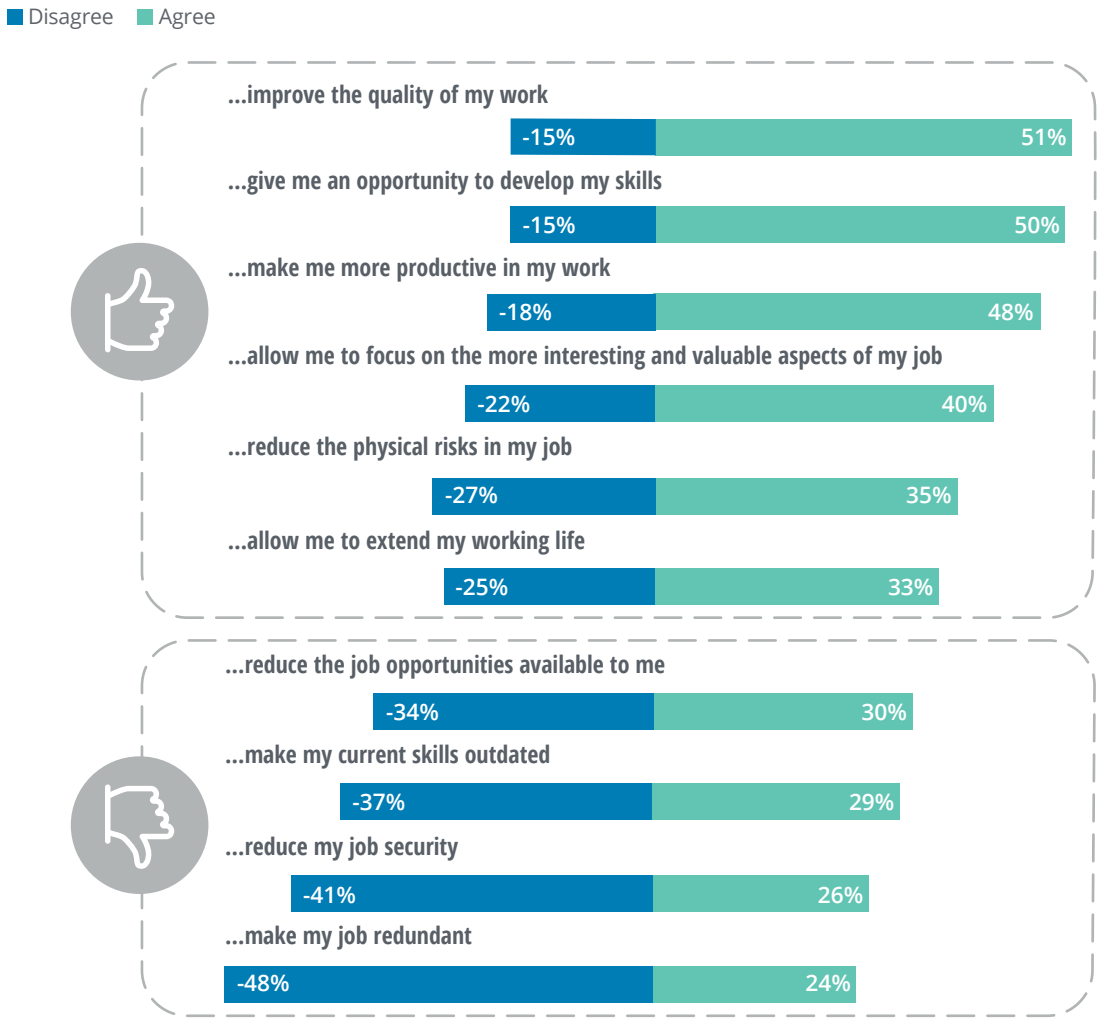


Source: Deloitte analysis based on the following sources:
Digital Economy and Society Index (DESI) 2019: Questions and Answers, https://europa.eu/rapid/press-release_MEMO-19-2933_en.htm; Eurostat, Population structure and ageing, https://ec.europa.eu/eurostat/statistics-explained/index.php/Population_structure_and_ageing#Median_age_is_highest_in_Italy; Eurostat, In-work poverty on the EU, https://ec.europa.eu/eurostat/web/products-erostat-news/-/DDN-20180316-1.[9]

FIGURE 3

Surveyed workers' perceptions of the impact of automation on their jobs in 10 years (Agree – Disagree question)

% of "Agree" and "Disagree" to the statement: "in 10 years, automation will..."



Source: The Deloitte European Workforce Survey 2018.

A general positive attitude towards the potential impact of automation

Despite the often gloomy perceptions about the possible impact of robots and automation on jobs and the demand for skills, the attitude of workers is relatively positive (figure 3). For example, only 24 per cent of the survey respondents believe that automation will make their job redundant, and only 30 per cent of respondents think that their job opportunities will be reduced. On the contrary, 51 per cent of workers surveyed believe that automation will improve the quality of their work and 50 per cent believe it will give them an opportunity to develop their skills.

Nevertheless, a closer look into the results of the survey reveals some differences among certain groups from this overall positive perception. It appears that a majority of individuals with a lower level of education tend to see automation as a threat, whereas those with higher educational attainment are more likely to see it as an opportunity. Indeed, while 57 per cent of respondents with a university degree agree with the statement

"*automation will improve the quality of my work*", only 46 per cent of respondents who did not attend high school share this view. Within this latter group, more than one in three agree with the statement "*automation will reduce the job opportunities available to me*", compared to less than 30 per cent of respondents with a university degree. In general, it appears that workers with lower educational attainments are more inclined to agree with 'negative' statements about the consequences of automation, possibly because they feel their jobs could be at higher risk. Nonetheless, it is striking that even among this group of respondents, the majority are more likely to agree with 'positive' statements about the effects of automation rather than having negative views.

This could raise interesting questions at a policy level about the potential winners and losers from automation, as well as the consequences of a widening inequality gap. Without suitable opportunities to reskill or upskill, workers with a lower level of educational achievement could struggle to find a secure new position in the event of their current job being automated. Hence, an increasing polarisation of skills may allow highly-educated individuals to enjoy better access to the jobs market and greater job security. Many policymakers are taking steps to develop tailored training schemes for workers in occupations with higher risk of automation, and ensuring access to training across all levels of educational achievement.[10]

The overall positive attitude of low-skilled workers towards automation, emerging from the survey replies, suggests that presenting these training schemes as empowerment, rather than as a defensive or preventive measure, can further increase their impact.

AUTOMATION AS AN OPPORTUNITY TO DEVELOP SKILLS

Even if workers do not perceive a threat of losing their job due to automation, most still expect some changes in the nature of their job and the skills required for it.

About 50 per cent of workers surveyed across all sectors believe that automation will give them an opportunity to develop their skills. This is particularly true among respondents with higher levels of education: 57 per cent of those with a university degree hold this view, compared to just 41 per cent of those surveyed with lower educational attainments.

When asked about the expected impact of automation on the nature of their skills, more than 35 per cent of respondents do not think that it will make their current skills outdated, whilst 28 per cent believe that it will. This divergence of opinions may be explained partly by different expectations across occupations.

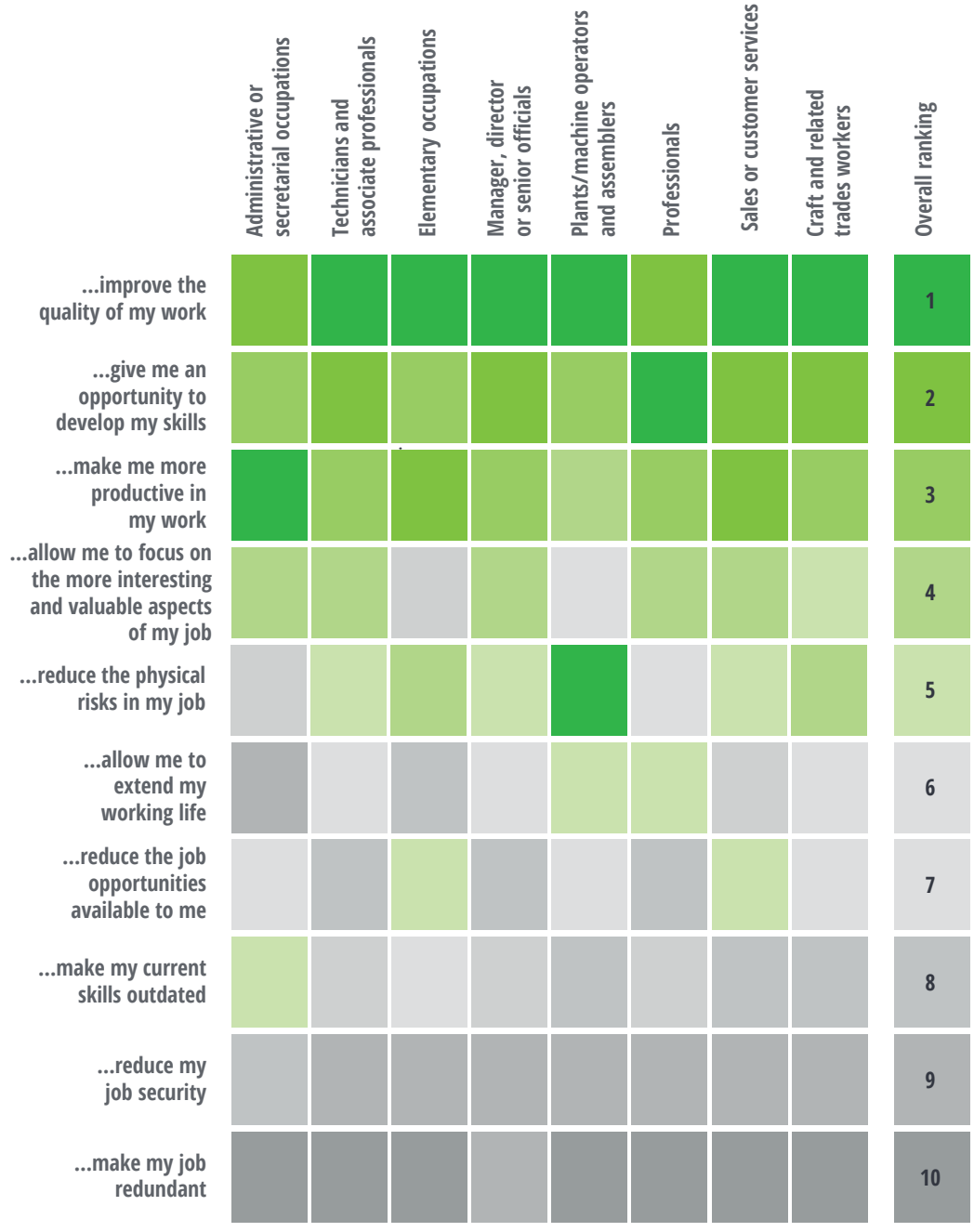
For instance, in the survey results, workers in elementary occupations (e.g. manufacturing labourers, agricultural labourers, etc.[11]) show a greater tendency to believe that technology will reduce their job opportunities, whereas workers in other occupations tend to disagree with this statement (figure 4).

The expectation among workers that some of their skills may be outdated by technology could influence both the self-perception of their level of preparedness and their motivation to engage in training activities.

FIGURE 4

Workers' attitudes towards technology across sectors

Ranking of the level of agreement with different statements about the role of technology across occupational groups (where 1 (dark green) corresponds to the most highly agreed statement and 10 (dark grey) to the least agreed statement)



Source: The Deloitte European Workforce Survey 2018.

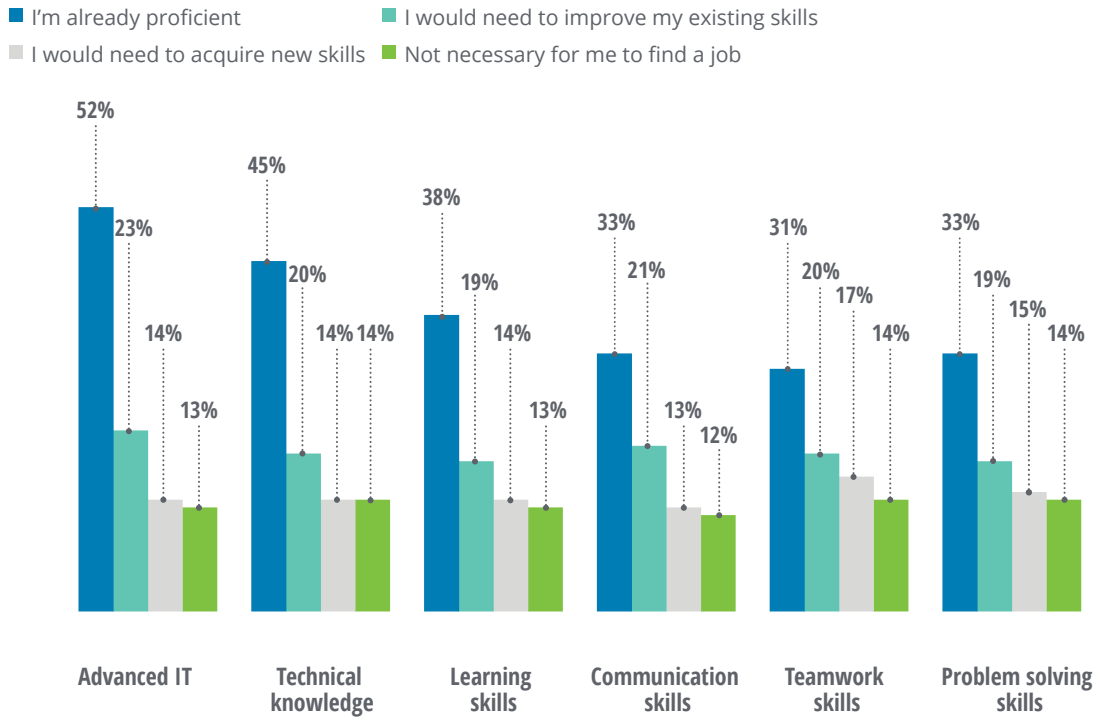
A HIGH LEVEL OF "FEELING PREPARED"

Bearing in mind that less than one-third of respondents surveyed expect their skills to become outdated, it is not surprising that only 11 per cent of them reported feeling unprepared for the future when thinking about developments brought on by emerging technologies. The remaining 89 per cent surveyed believe themselves to be *"prepared to some extent"* or *"very prepared"*. A closer look at the survey results shows that the self-perception of being prepared increases with the level of proficiency in certain skills, especially in advanced information technology (IT) (figure 5). Interestingly, the level of feeling prepared seems to correlate with expectations about potential changes in the job. Almost half of the respondents who do not expect their job to change also reported seeing themselves as well prepared. This suggests that some workers may feel prepared due to a lack of awareness about the actual impact that automation might have on the demand for skills. This highlights the importance of raising awareness by providing information, in order to encourage and motivate workers to engage in reskilling and upskilling.

FIGURE 5

Self-perceived proficiency in different skills

Share of respondents considering themselves "very prepared" by self-perceived proficiency level in different skills



Source: The Deloitte European Workforce Survey 2018.

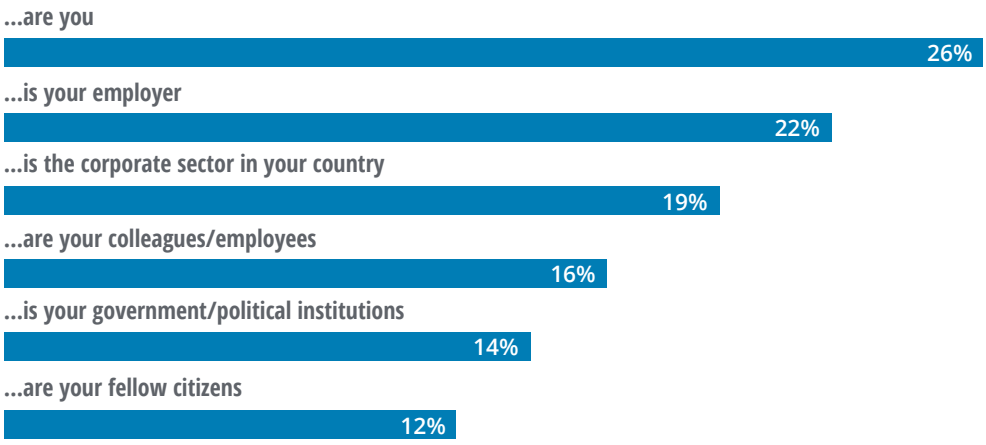
The Workforce survey also shows that, compared with the perceived preparedness of others, workers tend to consider themselves the most well-prepared. They feel better-equipped to face evolution in the workplace than their employers, the corporate sector in their country, their colleagues, their government and their fellow citizens (Figure 6).

Interestingly, respondents believe that their employers and (more generally) the corporate sector in their country, are better prepared than their government and political institutions. In fact, 33 per cent consider that their government is not ready for the developments brought on by emerging technologies, which seems to indicate a lack of confidence. A reason for this could be the public sector's tardiness to fully exploring the potential of digitalization to provide better and more efficient public services in some countries. Governments which refrain to set an example may limit the confidence of workers in the effects of public policies. Hence, they are more likely to be disengaged and not to take full advantage of the guidance on re-skilling that governments provide.

FIGURE 6

Perceived preparedness of other actors

Thinking about the developments brought on by emerging technologies, how prepared...?
(% answering "Very prepared")



Source: The Deloitte European Workforce Survey 2018.

Addressing reskilling and upskilling: Insights on policy priorities

To provide the right guidance on reskilling and upskilling, governments and employers should identify the main drivers that motivate workers to engage in training.

The Workforce survey shows that 70 per cent of respondents had participated in a training programme within the previous 12 months. Workers who expect their job to be affected by technology in the near future would be more likely to engage in training in order to prepare for the upcoming change. Indeed, 80 per cent of these individuals had participated in a training programme, again highlighting the importance of awareness among workers about the changes that might affect them.[12]

42 per cent of respondents agreed that a potential impediment to upgrading skills is the *"lack of guidance in what to learn"*. This could be seen as part of a broader problem, namely the provision of appropriate support measures, which requires identification of the right skills that will be required, developing training programmes and finding the resources to deliver the training.

When asked about responsibilities for the provision of training, most respondents agree that employers have the biggest responsibility, both for identifying the skills required and also for financing and providing training opportunities.[13]

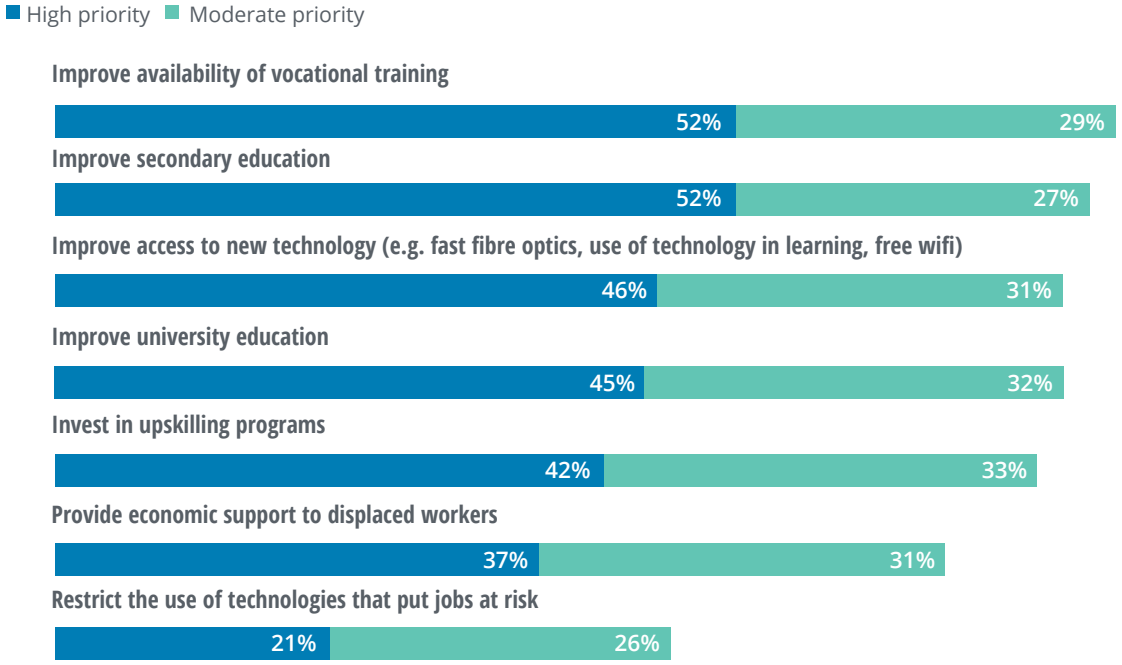
Interestingly, even though one-third of respondents consider that public institutions in their country are not prepared for technological change, a substantial proportion of them would like to see their government playing a bigger role in both the provision and funding of training. Looking into differences across educational levels, there is a tendency for individuals with a lower level of education to attach more importance to involvement by the government. This could be a result of either better knowledge of existing opportunities or a consequence of greater dependence on government support.

When asked about the different measures that the government might initiate, workers tend to attach higher priority to education and training, rather than measures to restrict the advance of automation. Indeed, improving the availability of vocational training is the top priority for the survey respondents (52 per cent high priority, 29 per cent moderate priority), closely followed by improving secondary and university education (52 per cent high priority, 27 per cent moderate priority). Facilitating access to emerging technologies, improving the offer of high-level education, investing in upskilling programmes, and providing economic support to displaced workers are also considered high priorities by more than one-third of respondents. Only 21 per cent of the respondents would prioritise a restriction on the use of technology that puts jobs at risks (figure 7).

FIGURE 7

Perception of policy priorities

Proportion of respondents considering several policy measures to support the labor market as high/moderate priority



Source: The Deloitte European Workforce Survey 2018.

It appears that respondents with lower educational attainments are more likely to support a restriction on new technologies. This raises, once again, the question of the different impact of new technologies across educational groups. However, it is worth mentioning that even among less formally educated respondents, limiting the use of technologies remains the least preferred of all suggested policy priorities. Only 25 per cent of less formally educated respondents consider restricting the use of new technologies as a high priority.

Conclusions and recommendations

KEY TAKEAWAYS FOR POLICYMAKERS

- Public authorities should focus on developing a positive narrative around the digital revolution that is occurring, highlighting the opportunities and how to respond to them.
- Governments should take action to ensure that everyone is aware of and prepared for Industry 4.0, by helping those who are at the highest risk of being affected with tailored policy measures.
- A way for political leaders to gain trust is to embrace digital change by adopting technologies to improve the provision of public services and foster innovation.
- Policymakers should involve other key players, such as universities, companies and professional centres, to facilitate the delivery of training schemes and raise awareness about the importance of continuous learning.

Europe is facing considerable challenges to guarantee a future of work for everyone. Governments and employers share a responsibility to identify skills needs and provide training and guidance to workers about which new skills to develop. The following summary of results from the Workforce survey about workers' perceptions can help policymakers in planning the most appropriate and sustainable ways forward.

1 THE MAJORITY OF WORKERS ARE READY TO EMBRACE THE POTENTIAL OF TECHNOLOGY

Contrary to the conventional wisdom that workers are afraid of the expected digital revolution and resistant to change, one of the key findings from the workforce survey is the overall positive attitude towards the impact of technological change on skills. Technology is generally considered an opportunity to develop new skills. Only a small proportion of respondents would prioritise a restriction on the use of emerging technologies, whereas the vast majority would prefer to have easier access to training and education opportunities in technology. Workers seem to be willing to change, and policymakers should find a way to involve them actively in the transition process. Public authorities should focus on developing a positive narrative around the digital revolution that is occurring, highlighting the opportunities and how to respond to them. Such a narrative could focus on the potential of technology to create jobs and tasks that require new combinations of human skills, and thus increase the importance of people's contribution in work. Given appropriate supportive public policies, technology could empower workers and fuel economic growth.

2 LOW-SKILLED WORKERS COULD BE LEFT BEHIND UNLESS APPROPRIATE ACTION IS TAKEN

Notably, employees with a high level of educational attainment are more optimistic about future developments, while workers whose jobs are at higher risk of automation those who have less formal education tend to be more sceptical about technology. It is therefore important, in order to prevent an increasing inequality gap and leave no one behind, that lower-skilled workers at high risk of falling out of the labour market should be guided and supported in developing the necessary skills to remain employable. This is further emphasised by the fact that even if the vast majority of surveyed workers feel prepared for the future, having a proficiency in

certain skills correlates positively with the self-perceived readiness. Governments should take action to ensure that everyone is aware of and prepared for the realities of Industry 4.0, by helping those who are at the highest risk of being left behind with tailored policy measures.

3 WORKERS EXPECT THE GOVERNMENT TO SET AN EXAMPLE AND PROVIDE AN OVERARCHING FRAMEWORK

The self-perceived preparedness for change among respondents could mean that workers are underestimating the impact of future changes, so that there is a general lack of awareness of the need for upskilling and reskilling. In addition to providing information to workers, governments and public authorities should set a positive example. A way for political leaders to gain trust is to embrace digital change by adopting technologies to improve the provision of public services and foster innovation.

4 GOVERNMENTS SHOULD PROVIDE THE RIGHT ENVIRONMENT FOR STAKEHOLDERS TO ADDRESS SKILLS GAPS

Workers give the highest priority to education and training policies, but they also believe that the provision of training is mainly the responsibility of employers rather than public authorities. Companies should lead the transition by instituting a learning culture rather than providing ad hoc training programmes. It is also important to have the support of governments, enabling investment in vocational education and training and in life-long learning. Policymakers should involve other key players, such as universities and professional centres to facilitate the delivery of training schemes and raising awareness about the importance of continuous learning.

Technology will likely lead to a new world of work, and the actions we take now have the power to define its foundations.

ZOOM IN: THE FUTURE OF SKILLS AND THE EU

The European labour market is facing considerable challenges due to demographic trends and the digital revolution. The demand for skills is expected to be affected significantly by such changes. To address the need for skills, the European Union in 2016 launched a comprehensive strategy: a *New Skills Agenda for Europe*, which aims at supporting member states in addressing the skills gap and increasing the level of preparedness of the workforce. Divided into three pillars and organized in ten actions, it proposes a mix of measures to equip national governments, giving priority to basic and digital skills for all. More specifically, with its 2016 Recommendation *Upskilling Pathways – New opportunities for adults*, the EU recognized the importance of life-long learning, by supporting low-skilled individuals to progress towards an upper secondary qualification or equivalent and attempting to reduce the risks of unemployment, poverty and social exclusion. At the same time, the *Digital Skills* and *Jobs Coalition* in 2016 has brought together various key actors to work together to foster the development of digital skills in the entire workforce, including advanced skills among IT professionals.

However, despite the multiple existing initiatives and policy tools, there often remains a high level of uncertainty about the future of skills in Europe. In the view of the incoming new European Commission, it is important for the EU to maintain its focus on skills. To continue addressing skill gaps and shortages, the European Union should keep on boosting collaboration among member states and key stakeholders and should pursue its efforts to modernize vocational education and training. Skills should also remain a priority, and the EU can build on the outcomes of cooperation initiatives such as the *Blueprint for Sectoral Cooperation on Skills*. In summary, increasing preparedness for digital revolution should continue to be a priority in the new Commission, given the existing digital gap and the consequent risks.

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Acknowledgements

The authors would like to thank Lies Maurissen, Tina Tindemans and Sophie Flores and the entire Deloitte EU Policy Center for their valuable input to this article.

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Responsible publisher: Deloitte University EMEA CVBA, with registered office at B-1831 Diegem, Berkenlaan 8b.