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Our future workplace – digital transformation in the chemical industry

A social partner approach in the chemical, pharmaceutical, plastics and rubber industries:

Project 2018-2019

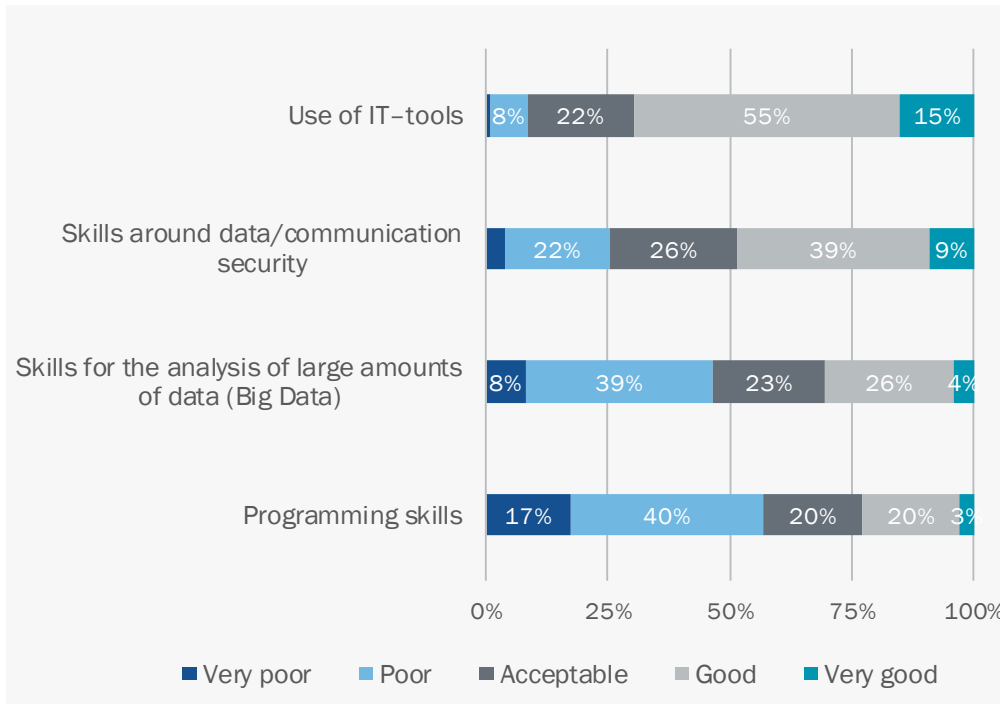
- Survey + interviews
- 2 conferences
- Recommendations
- Follow-up / post-project topics

Survey

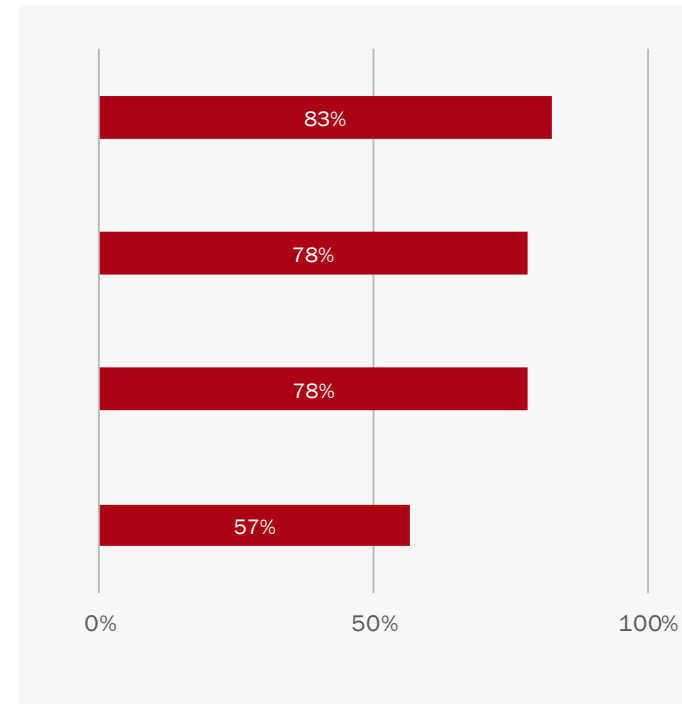
- Online + in-depth interviews
 - Around 500 participants (80% company level)
- Managers and workers at company level, trade unions, employers' organisations
- Skills, working patterns, health & safety
- Level of awareness, (perceived) sector-specific challenges

Assessment of technical skills of employees /industry in the context of digitalisation

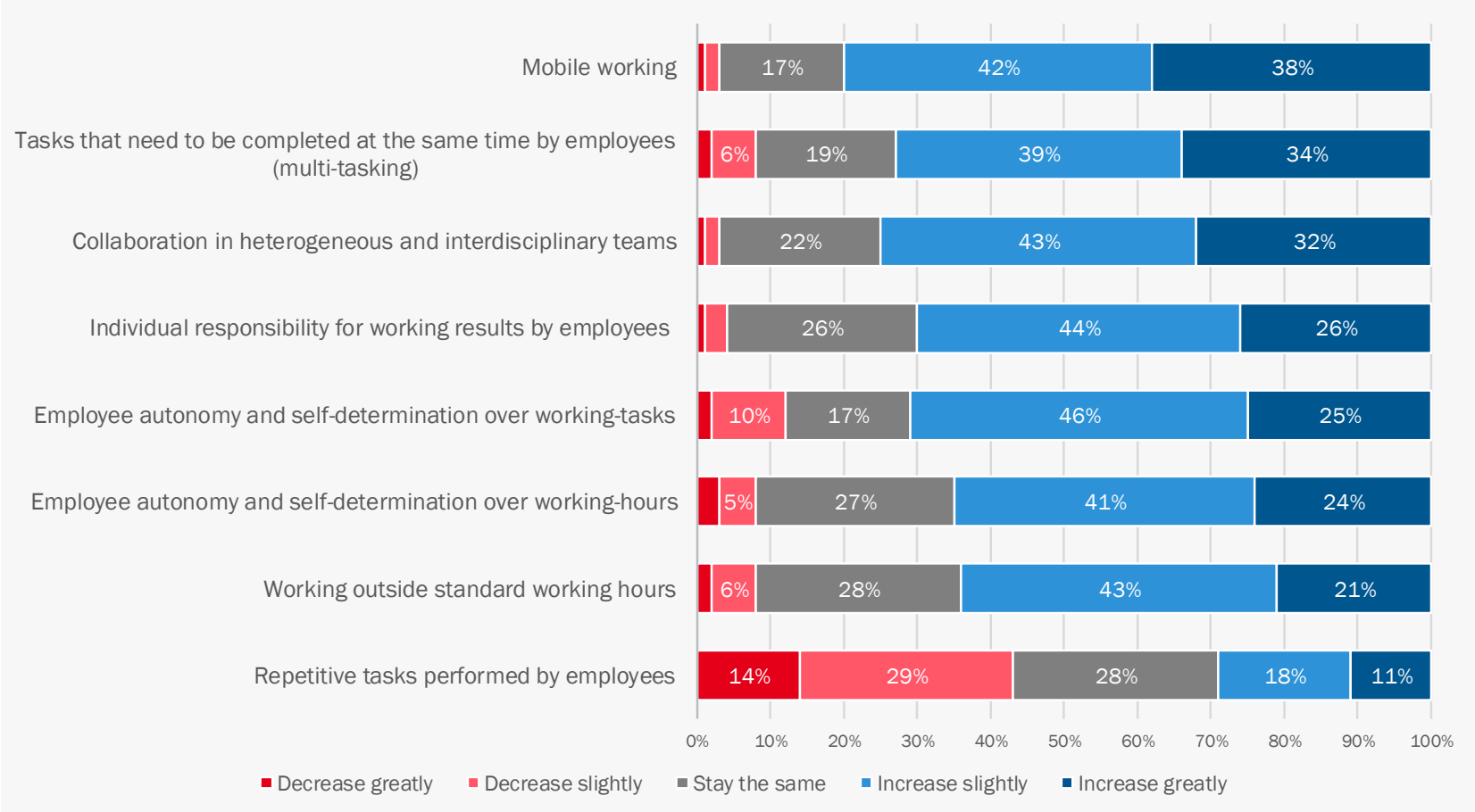
Assessment of current skills of employees



More important in next 5 years?

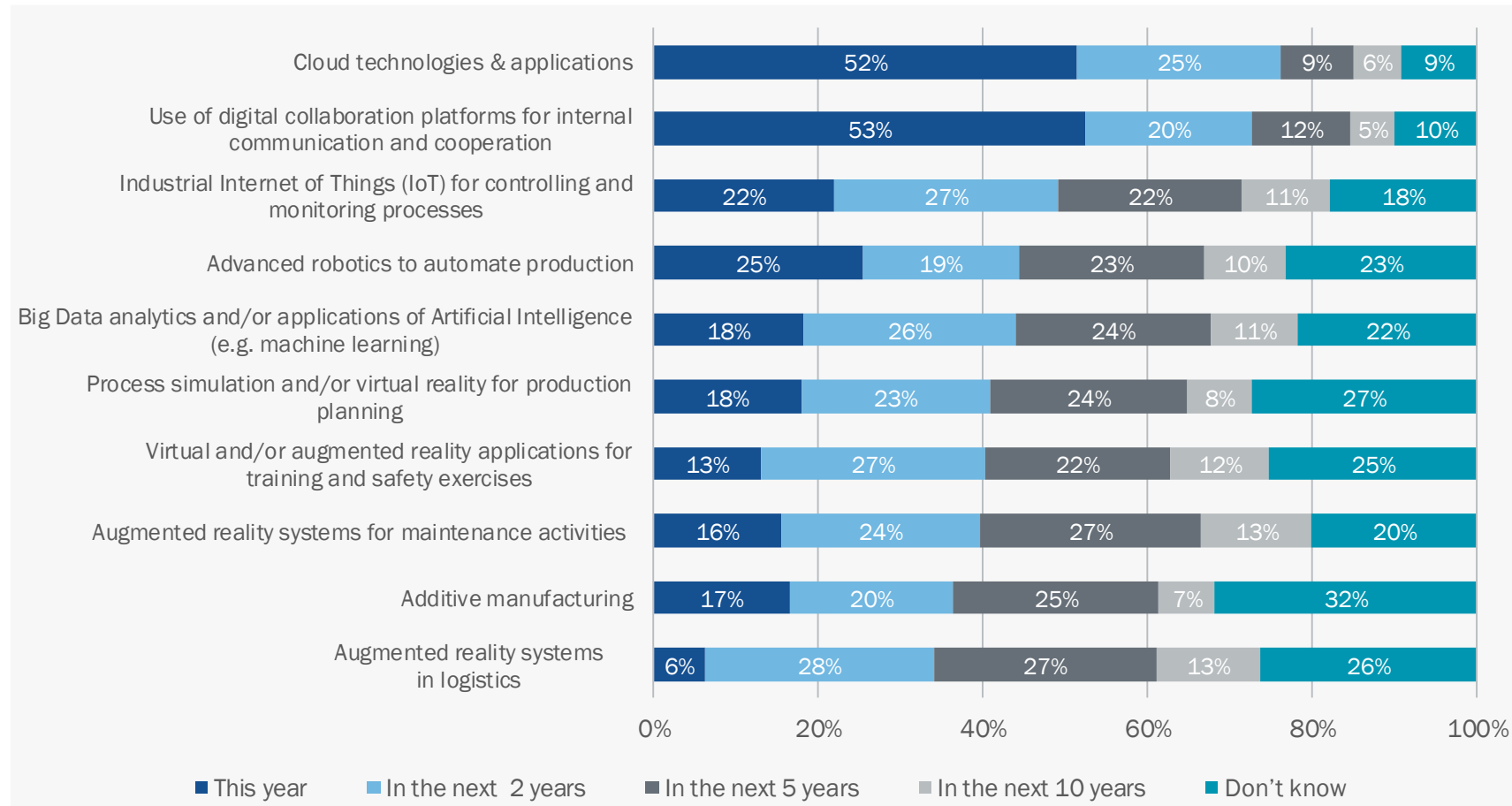


Assessment of the impact of digitalisation on the working environment



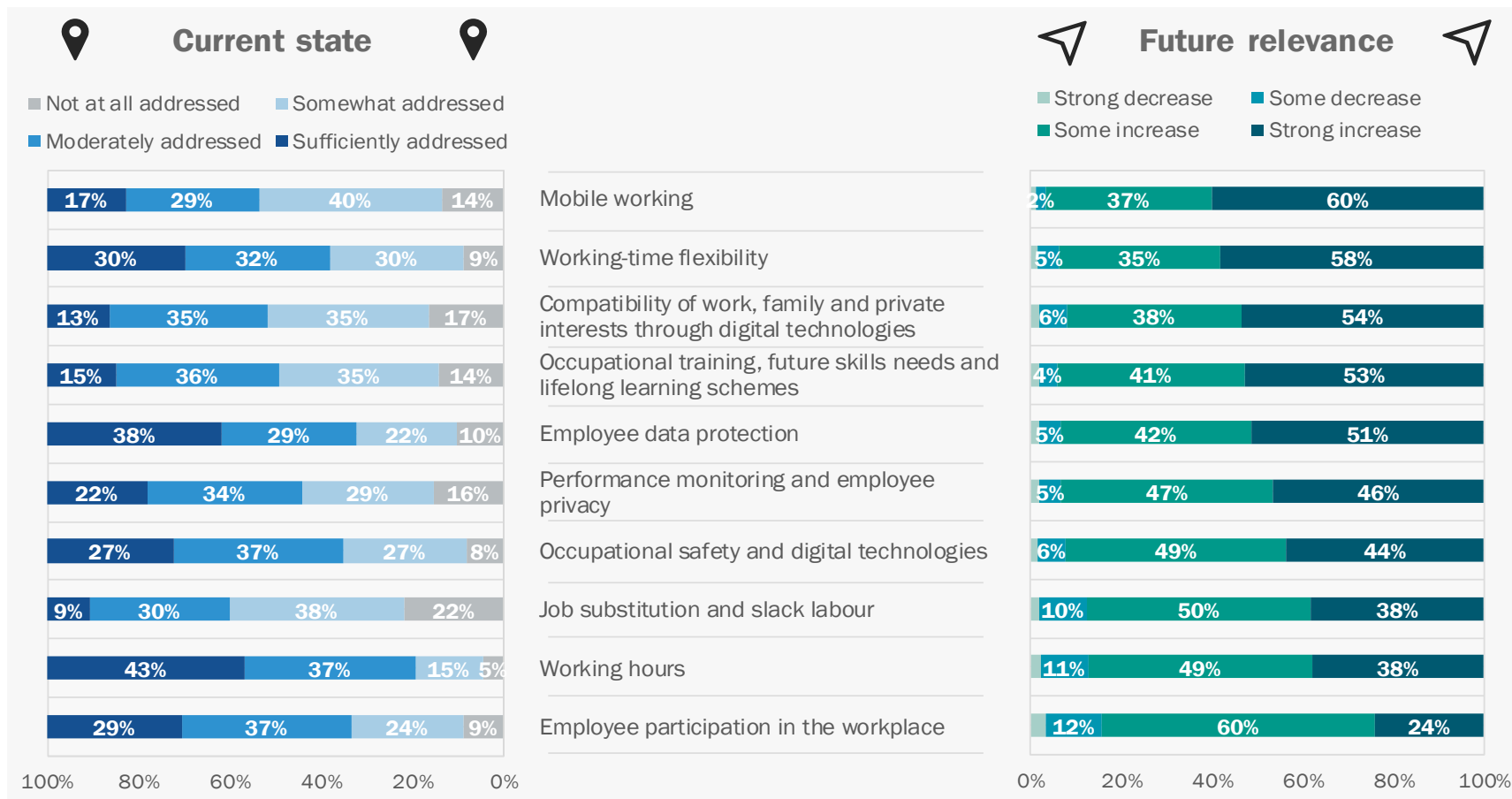
Timeframe for the utilisation of digital technologies

“Please indicate the timeframe for the utilisation of the previously mentioned digital technologies”



Assessment of current collective agreements

“What aspects of the digital transformation are sufficiently addressed by collective agreements in your country & what will be their relevance in the next 5 years?”



Overall conclusions



1. The **1st wave of the digital transformation** (i.e. digitising analogue data and integrating cloud solutions) is successfully accomplished in the European chemicals sector. However, the implementation rate increases with the company size: especially the implementation rate of digital solutions in micro and small enterprises (<50 employees) is lagging.



2. The **2nd wave of the digital transformation** will be driven by the Industrial Internet of Things, Big Data, Artificial Intelligence, automation and augmented reality – and it will come into effect in the near future (within the next 5 years). The transformation around **AI** might cause more drastic implementation gaps between very large enterprises and SMEs.



3. A **shift in skills in the European chemicals sector is clearly visible** – basic digital skills are broadly existing in the sector. However, more advanced digital skills & transversal skills require attention by all stakeholders in the industry. Especially SMEs currently lack dedicated training programmes for digital upskilling and rate their digital skills less positive than larger firms.



4. The **working environment** in the chemicals sector is predominantly changed through mobile working with greater employee autonomy but also an increased level of multi-tasking. Close attention needs to be paid to the level of psychological stress, which is expected to increase significantly due to digitalisation, especially in larger firms.



5. **Collective agreements** need to pay greater attention to the issue of mobile working & working-time arrangements and qualification. Other sensitive issues linked to the digital transformation (data protection, performance monitoring) also need to be addressed with collective agreements or accompanied by other initiatives (e.g. open dialogue processes).



6. **Change management** and the **involvement & support of employees** is currently the biggest challenge in the digital transformation process of the European chemicals sector. It is decisive to address this to allow for a successful transformation. The digital maturity assessment shows little variance across Member States and sectors. Southern and Eastern Europe are more likely to have greater challenges. In these regions the issue of employee participation seems to be addressed less by collective agreements at national, regional or sectoral levels.

Focus final conference

- Health and safety – focus mental health
 - “hazardous tasks likely to decrease while psychological stress is expected to decrease”
- Skills shift
 - (what exactly will be needed and how do practically organise appropriate training)
- How exactly can change be managed?
- What can we do about the gap between larger and smaller enterprises?

And then....

- Joint Recommendations
- Follow-up topics in work programme, e.g. more on health impact, data protection and performance monitoring, digitalisation and equal opportunities...

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