



Lünendonk® Flash Survey 2021

# Personnel Requirements for Electromobility

With the kind support of



# Foreword



**Thomas Ball**

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Everyone is talking about the transformation of the automotive industry toward electromobility. Hardly a day goes by without the media reporting on technical advances in the development of vehicle batteries, ranges and vehicle models. From almost 40 years of market research, Lünendonk knows: Public attention to a topic and its actual importance for companies are not always congruent.

At the same time, hardly any other industry in Germany and probably worldwide relies so heavily on processes based on the division of labor and external suppliers and service providers as the automotive industry. Lünendonk has been studying B2B service markets and their value contribution to the economy since 1983. Especially in phases of upheaval, it is often B2B service companies that offer their customers flexibility, limit economic risks and provide specialist knowledge. This also and especially applies to the transformation of the automotive industry currently underway. This summer, Lünendonk already prepared and published a white paper on the value contribution of technical services for the transformation toward electromobility. This flash survey builds on that paper and takes an in-depth look at the question of how great the need is for external expertise and personnel.

Personnel service providers act as an early economic indicator. If new demand arises or if there is a particularly large shortage of personnel, it is not only the automotive industry that quickly turns to personnel service providers. That's why we conducted a short flash survey among personnel service providers to find out: What significance does the transformation of the automotive industry toward battery-electric vehicles have for personnel service providers now, and what demand do they expect? You will find the results on the following pages.

Our thanks go to the 50 companies included, some of which provided sensitive information. Our special thanks go to Leadec for providing the impetus for the study and making the survey possible.

We look forward to sharing these results with you.

Mindelheim, November 2021

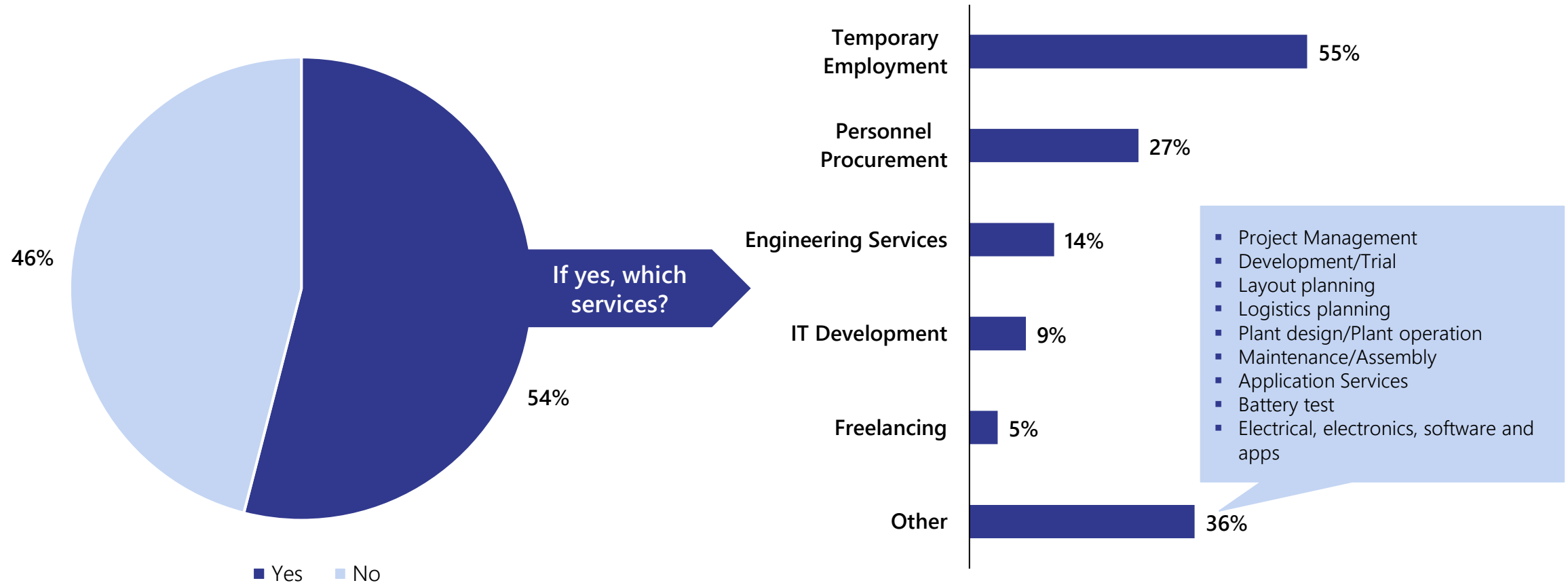




A person is holding a tablet that displays a 3D digital model of a car chassis. The model is shown from a top-down perspective, highlighting the frame, wheels, and internal components. The background is a blurred industrial environment, likely a factory or assembly line, with various mechanical parts and equipment visible. The overall image has a blue tint.

# Results of the Flash Survey

# More than half of the respondents are offering personnel services in electromobility



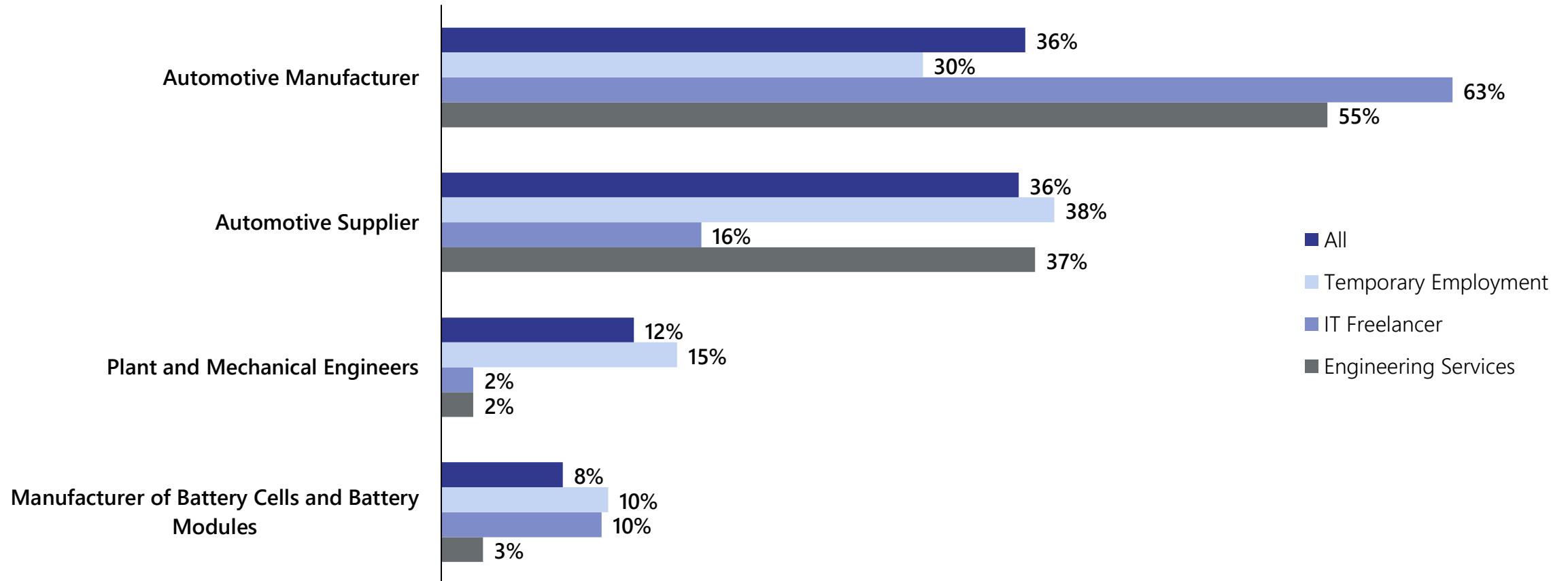
Does your company already provide personnel services (temporary staffing, placement of freelancers, personnel placement, engineering services, etc.) on a larger scale for electromobility? All; n = 50. If yes, with which services? Multiple answers possible; all; n = 22.

# Share of sales in electromobility



What total sales does your company plan to generate in 2021 from orders from the automotive industry (manufacturers and suppliers), and what proportion of these will come from e-mobility? Figures in million euros, mean values; n = 33

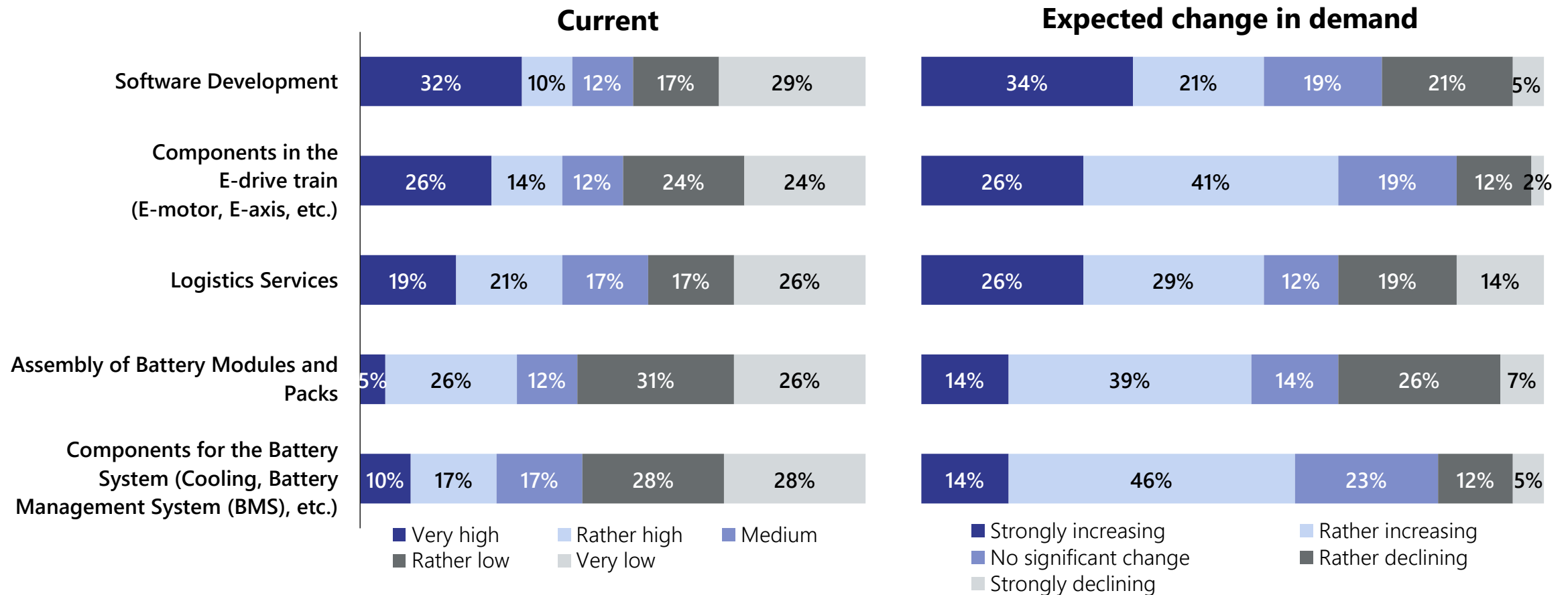
# Distribution of orders by sales: Automotive manufacturers and suppliers with the largest share



How are e-mobility orders distributed by sales among the following segments within the automotive industry? Mean values; according to evaluation groups; n = 40

# Significant demand in the field of software development

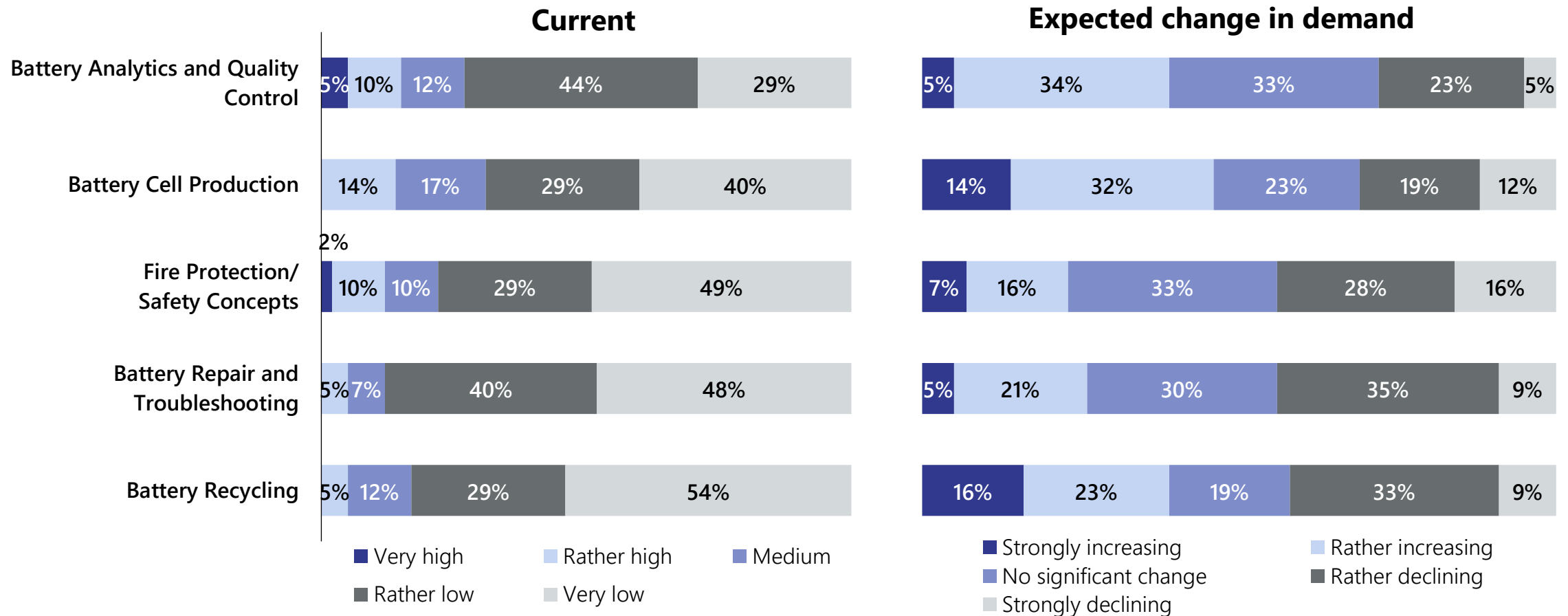
(1/2)



For which stages in the value chain are you currently experiencing significant demand for services? How do you expect demand to develop over the next three years?  
 Relative frequency distribution; scale from -2 = very low to +2 = very high; all; n = 42.

# Battery recycling still plays a minor role

(2/2)



For which stages in the value chain are you currently experiencing significant demand for services? How do you expect demand to develop over the next three years?  
 Relative frequency distribution; scale from -2 = very low to +2 = very high and from -2 = strongly decreasing to +2 = strongly increasing; all; n = 42.



# Conclusion



# Conclusion

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B2B service companies are playing a key role in the transformation of the automotive industry toward electromobility. More than half of the participating companies stated that they already receive orders from this to a significant extent.

The companies analyzed are already active in the various stages of the value chain - but to a variable extent. Demand is particularly high in the (further) development of components and the associated software. In manufacturing, quality control and recycling, the manufacturing companies are still gathering experience and are intensively engaged in process optimization. This currently results in lower demand than when it comes to keeping the speed high.

The outlook for the future is positive across the board for the companies analyzed: Regardless of the focus of their activities, they expect - with few exceptions - a significant increase in demand for their services. These results are remarkable in view of the intense debate about the widely predicted loss of numerous jobs due to changes in production and increasing automation.

Two-thirds of the personnel service providers surveyed expect demand for personnel to support the development, production and assembly of components around e-drive trains to increase over the next three years. A particularly strong increase in demand is also forecast around vehicle batteries.

Software is particularly important in the transformation of the automotive industry toward electromobility. This is shown by the analyses of the separately conducted survey on the market for engineering services in Germany as well as by the results of this flash survey.

# Further Lünendonk ® Surveys and Publications (1/2)



Lünendonk ®-Whitepaper 2021  
Technical Services for Battery  
Production in Europe  
[To the Whitepaper](#)



Lünendonk® Survey 2021  
Industrial Services Companies in  
Germany  
[To the Survey](#)



Lünendonk® Survey 2021  
The Market for Recruitment, Placement  
and Management of  
IT Freelancers in Germany  
[To the Survey](#)

## Further Lünendonk ® Surveys and Publications (2/2)



Lünendonk ® Survey 2021 Temporary  
Employment Agencies in Germany  
[To the Survey](#)



Lünendonk® Survey 2021  
The Market for Engineering Services  
in Germany  
[To the Survey](#)



# Methodology



# Methodology

For the Lünendonk ® Flash Survey "Personnel Requirements for Electromobility", personnel, engineering and industrial service companies in Germany were surveyed via online survey. The companies surveyed are regularly invited to participate in Lünendonk surveys. The survey was addressed to managing directors and those responsible for sales and corporate communications.

The questionnaire was piloted with selected market experts prior to the field phase.

The data set was checked for quality before evaluation. For this purpose, adjustments were made:

- obviously wrong answers (partly all answers of a participant, partly only the answers to single questions)
- Duplicate responses from individual companies
- statistical outliers in the calculation of average values

This leads to different numbers of participants per answer.

The responding companies were assigned to the four markets Engineering Services (ES), Recruitment, Placement and Management of IT Freelancers (ITFL), Industrial Services (IS) and Temporary Staffing (ZA) according to their focus of activity. Companies with significant activities in several segments were assigned to several evaluation groups. Due to the small number of cases, Industrial Services companies are only included in the group of all companies and are not evaluated separately.

The participating companies include both market leaders and specialized small companies. Lünendonk considers the results to be reliable trend statements.

**The evaluations of the flash survey are to be regarded as trend results. This can be classified as such simply because the basic total of all service providers working for the automotive industry in Germany is not known.**



# Survey period and evaluation groups



Survey period: October 29 to November 15, 2021



All Companies

50 Companies

Temporary  
Employment (ZA)

25 Companies

IT Freelancer (ITFL)

6 Companies

Engineering Services  
(ES)

14 Companies

# Company profiles





# Leadec Holding BV & Co KG

Leadec is the leading global service specialist across the entire life cycle of the factory and associated infrastructure. Founded in 1962, the company is headquartered in Stuttgart, Germany. Leadec is based at more than 300 locations on four continents, often directly in customers' plants and factories. In 2020, the Leadec Group generated sales of around 830 million euros and had around 18,000 employees worldwide.

Global services include Engineering (factory planning and optimization, automation and production IT), Installing (electrical installation, mechanical installation and machine relocation), Maintaining (Production Maintenance and Technical Cleaning), Support (Technical Facility Management, Infrastructural Facility Management and Logistics) and other local services. Customers include companies in the manufacturing industry such as automotive, aerospace and consumer goods.

In the area of digitization, Leadec is a pioneer in their market environment.

The Leadec.os digital business platform is used to record all processes end-to-end and integrate proprietary digital services. This allows correspondingly transparent planning and provision of all services as well as their seamless integration into the customers' systems and reveals optimization potential in the factory. The data obtained forms the basis for further transforming processes within and around production in the direction of the „Factory of the Future“.



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# Lünendonk & Hossenfelder GmbH

Lünendonk & Hossenfelder, based in Mindelheim (Bavaria), has been analyzing the European Business-to-Business (B2B) Services markets since 1983. The market researchers focus on the sectors of Management and IT Consulting, Auditing, Tax and Legal Consulting, Facility Management and Maintenance as well as Personnel Services (Temporary Employment, Staffing).

The portfolio includes surveys, publications, benchmarks, and advice on trends, pricing, positioning, or contracting procedures. The large data pool enables Lünendonk to derive insights for recommendations for action. For decades, the market research and consulting company has published the Lünendonk®Rankings and Surveys, which are regarded as market barometers.

Many years of experience, in-depth know-how, an excellent network and, last but not least, a passion for market research and people make the company and our consultants sought-after experts for service providers, their customers and journalists. Every year, Lünendonk and a media jury honor deserving companies and entrepreneurs with the Lünendonk Service Awards.



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# Imprint

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