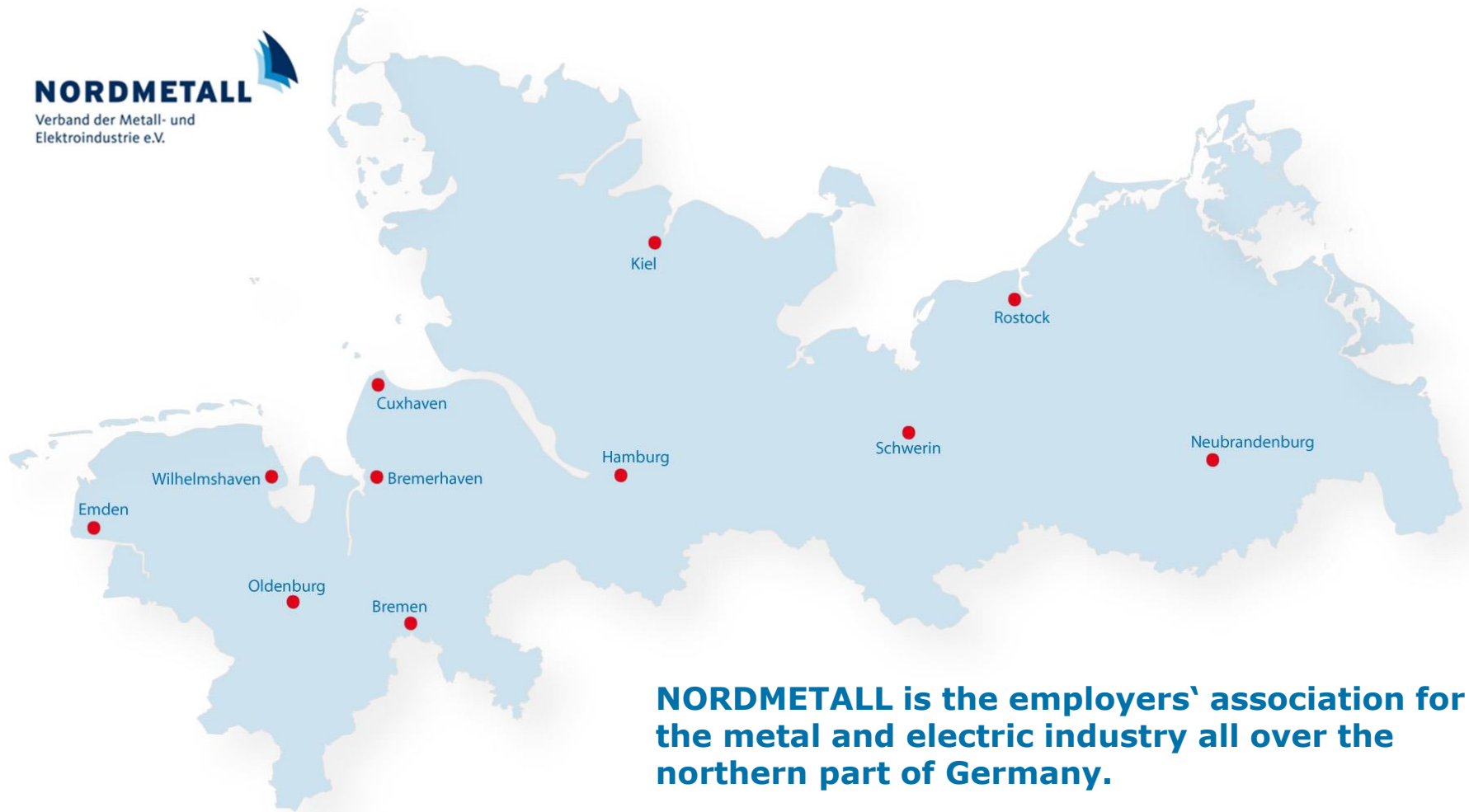


northern germany

NORDMETALL

Verband der Metall- und
Elektroindustrie e.V.



**NORDMETALL is the employers' association for
the metal and electric industry all over the
northern part of Germany.**

250 manufacturing companies

110.000 employees

We support

being efficient in the present

We advise

becoming fit for the future

We speak up

**representing interests towards
trade unions and politics**

staff



**More than 60 experts in law,
management, engineering,
Economy, Education and
communications**

Who are our members?

And: What are they doing?

our members



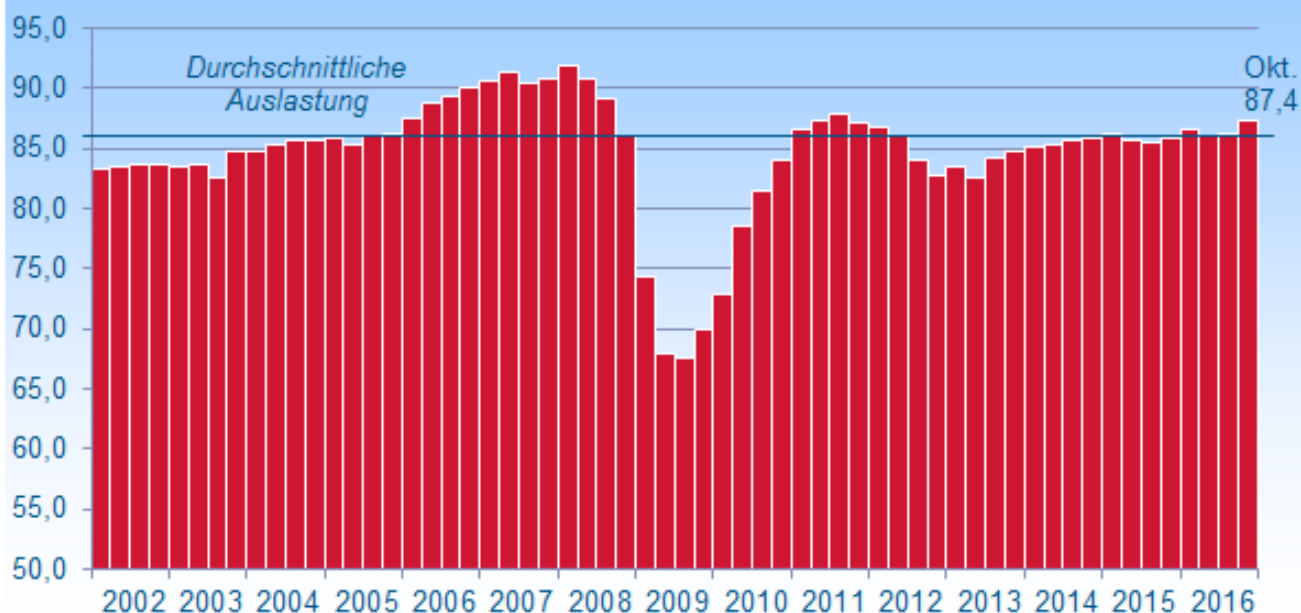
Economic Surveys

autumn 2016

Die Arbeitgeber im Norden

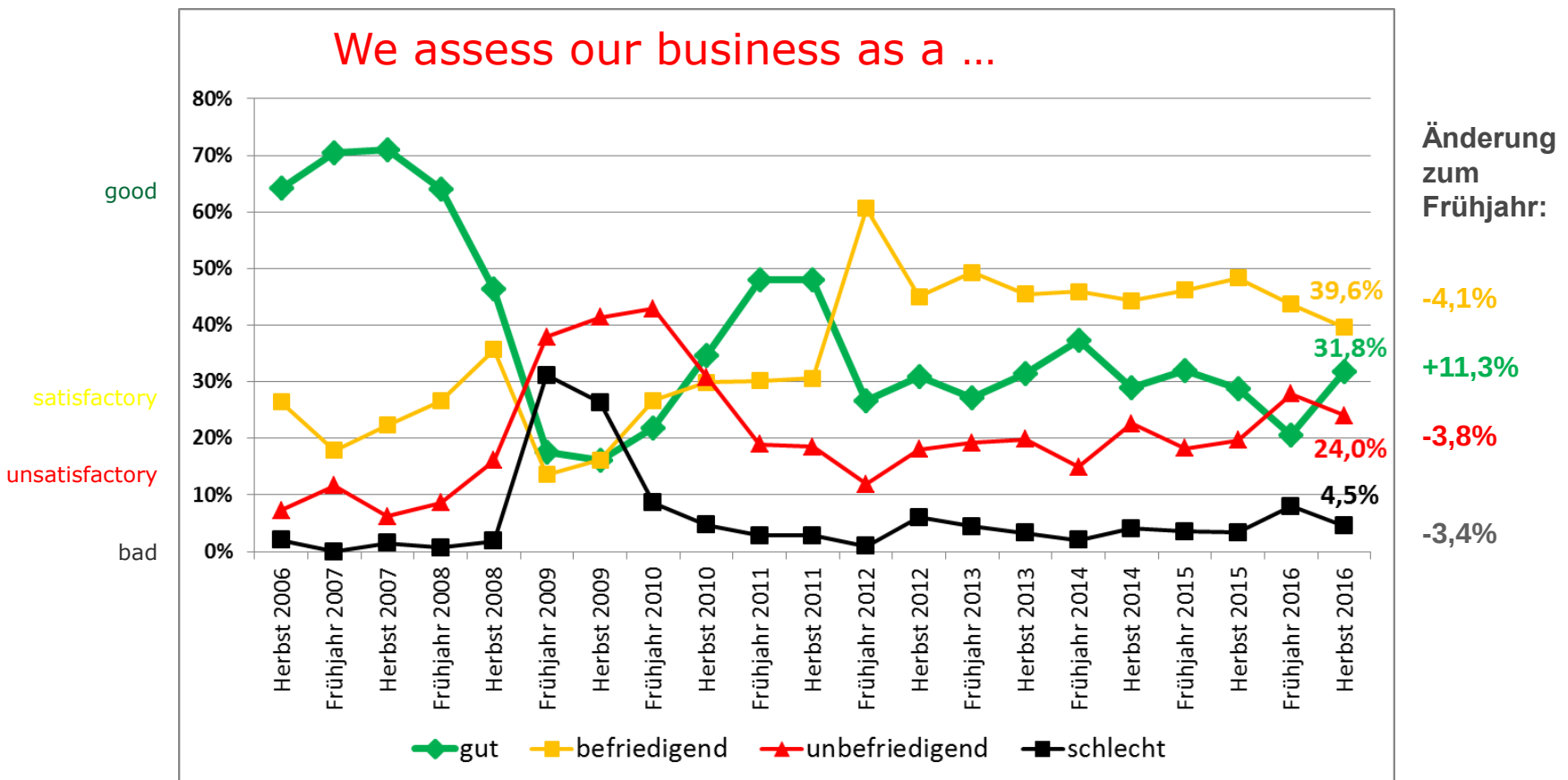
Weak Summer – Stronger Autumn

Durchschnitt der von den M+E-Firmen gemeldeten Auslastung ihrer Produktionsanlagen in Prozent der betriebsüblichen Vollausslastung



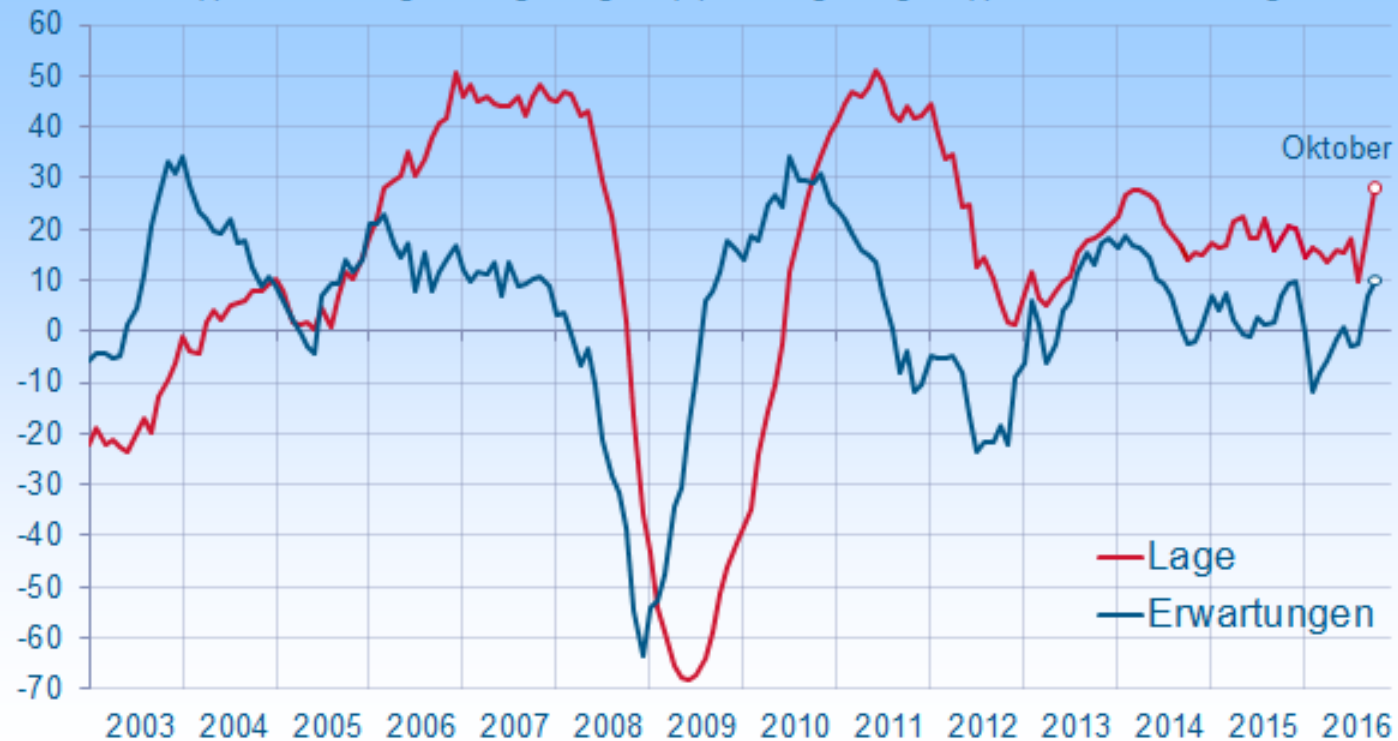
business situation

- Recovery from the downturn in summer
- "Wellblack business" for 4 years



Optimism Comes Back

M+E-Industrie Deutschland, saisonbereinigte Entwicklung. Saldo der Firmenmeldungen über gute (+) und schlechte (-) Geschäftslage bzw. günstigere (+) und ungünstigere (-) Geschäftserwartungen



Quelle: ifo Konjunkturtest

SURVEY about real situation in our companies

(two times per year; April / October)

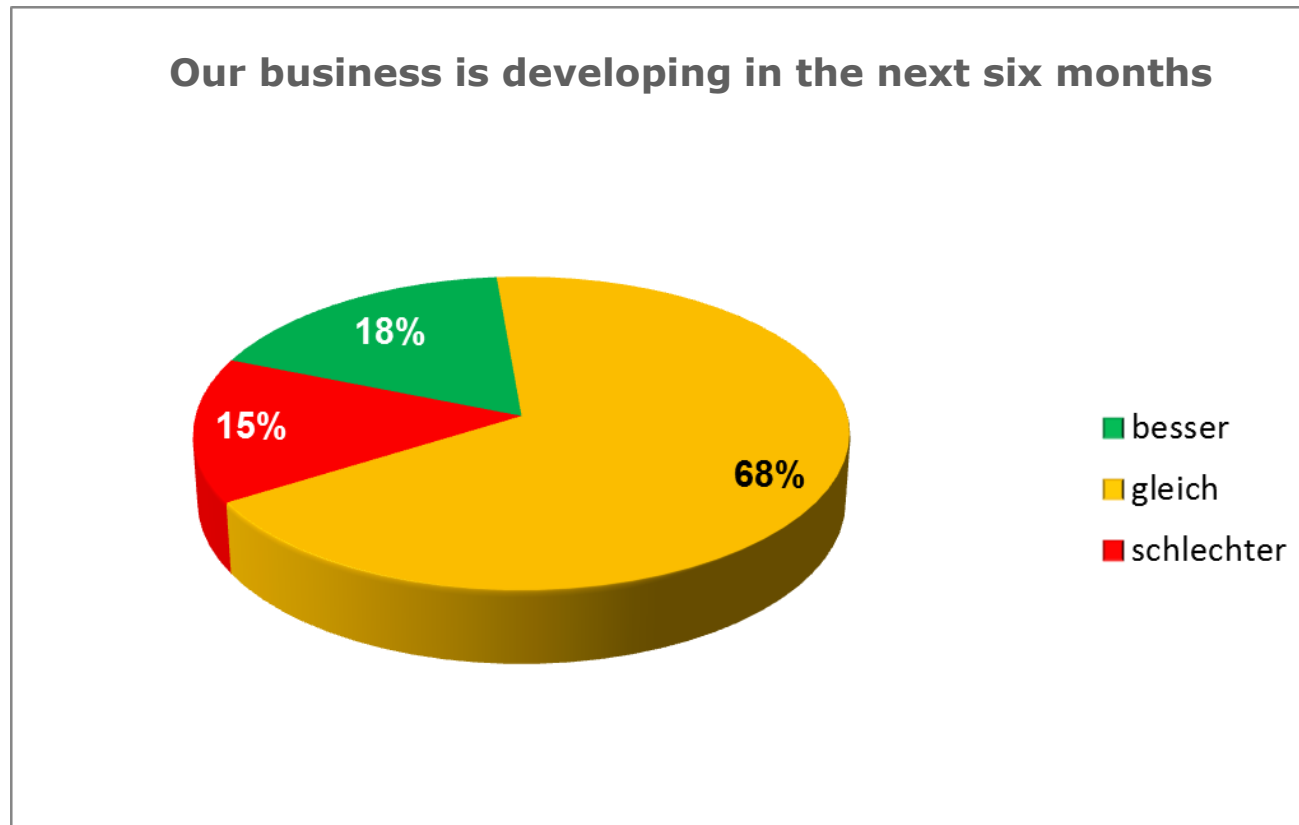
- ✎ Forecast
- ✎ Capacity utilization
- ✎ Turnover
- ✎ Prices and costs
- ✎ main export countries
- ✎ Employment
- ✎ Staff planning
- ✎ Labour Market
- ✎ Location G (Germany)

**NORDMETALL**

Verband der Metall- und
Elektroindustrie e.V.

Prognosis / forecast

Stable business



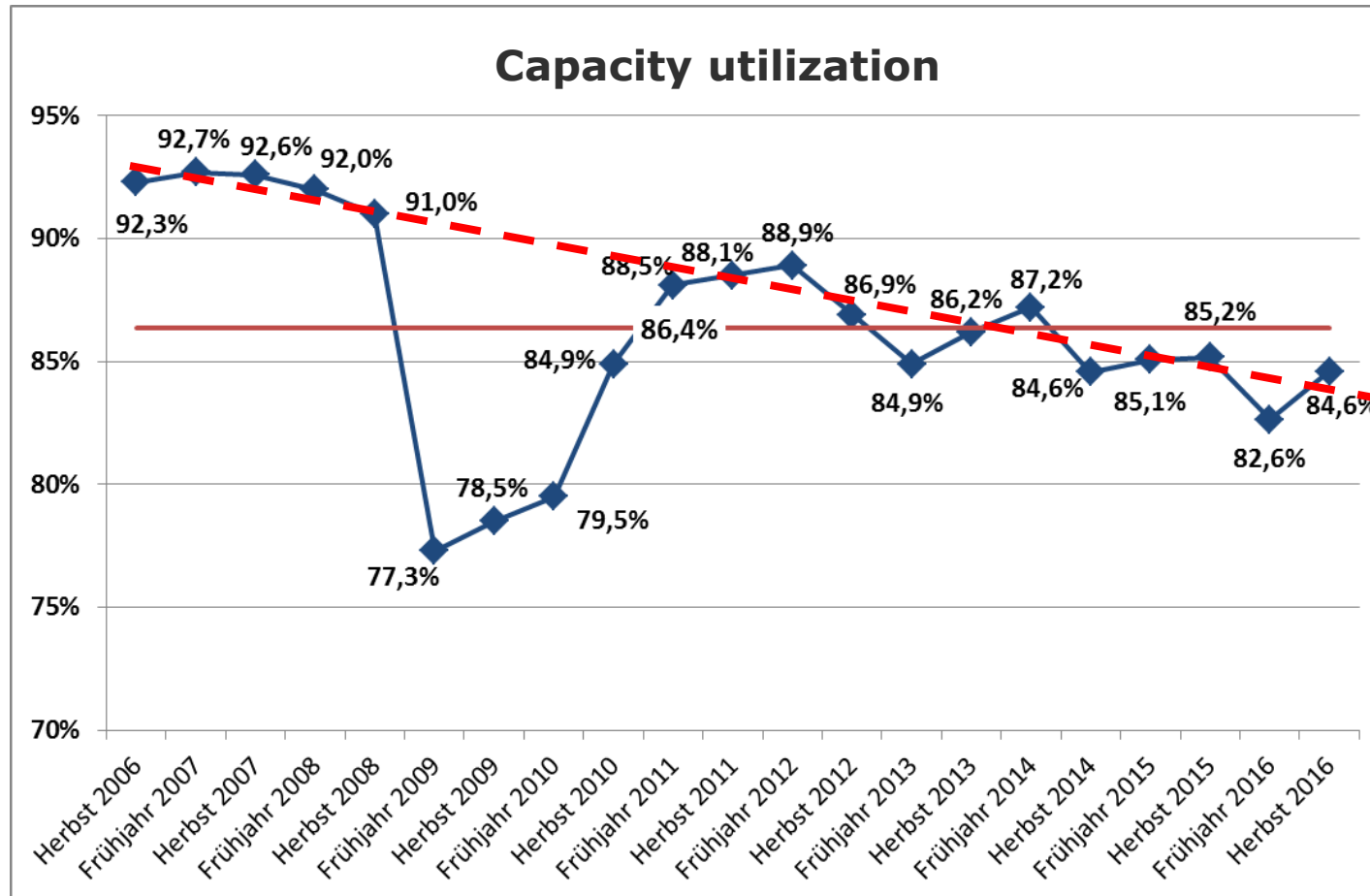
Better

Equal

worse

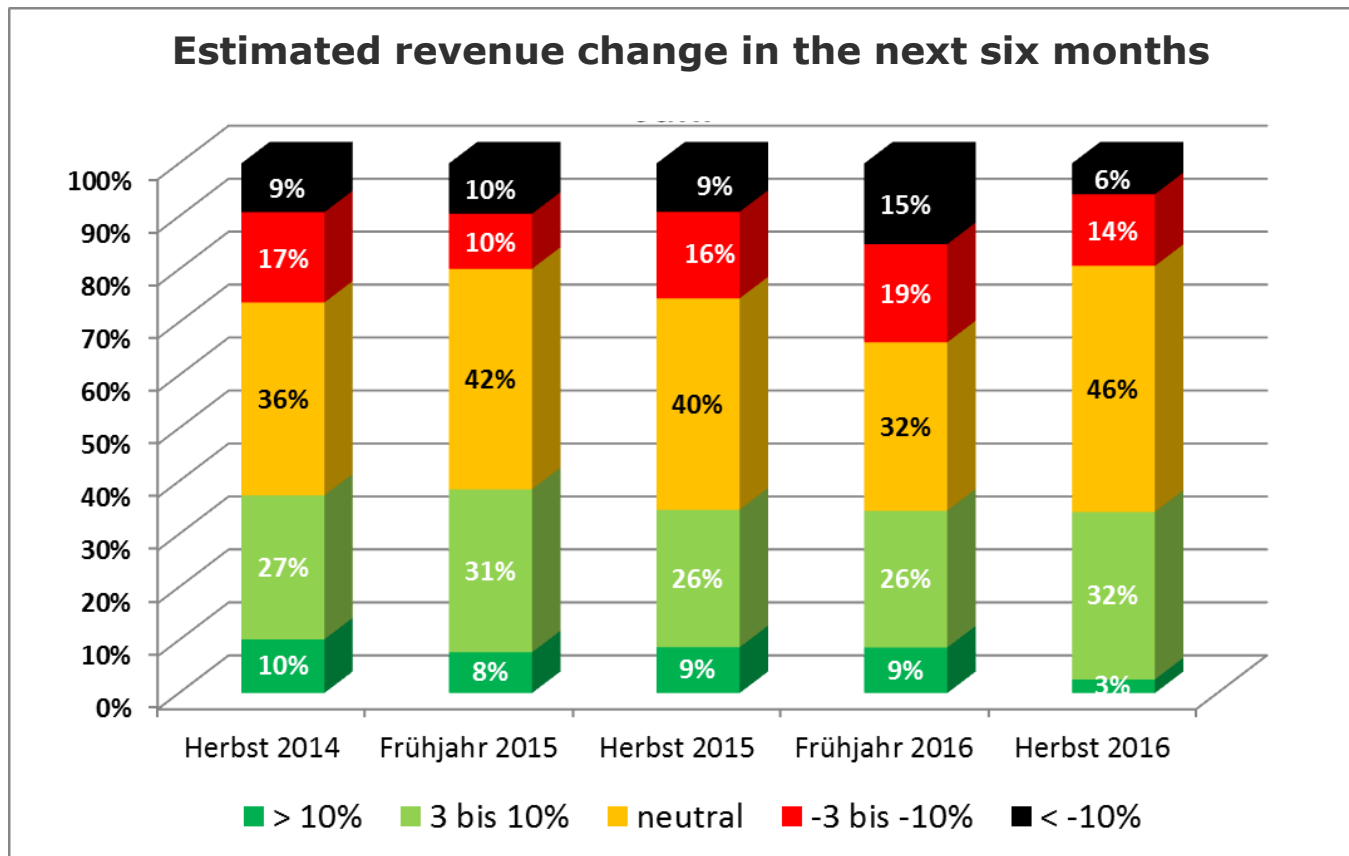
Capacity utilization

- Demand is not enough to fill machines



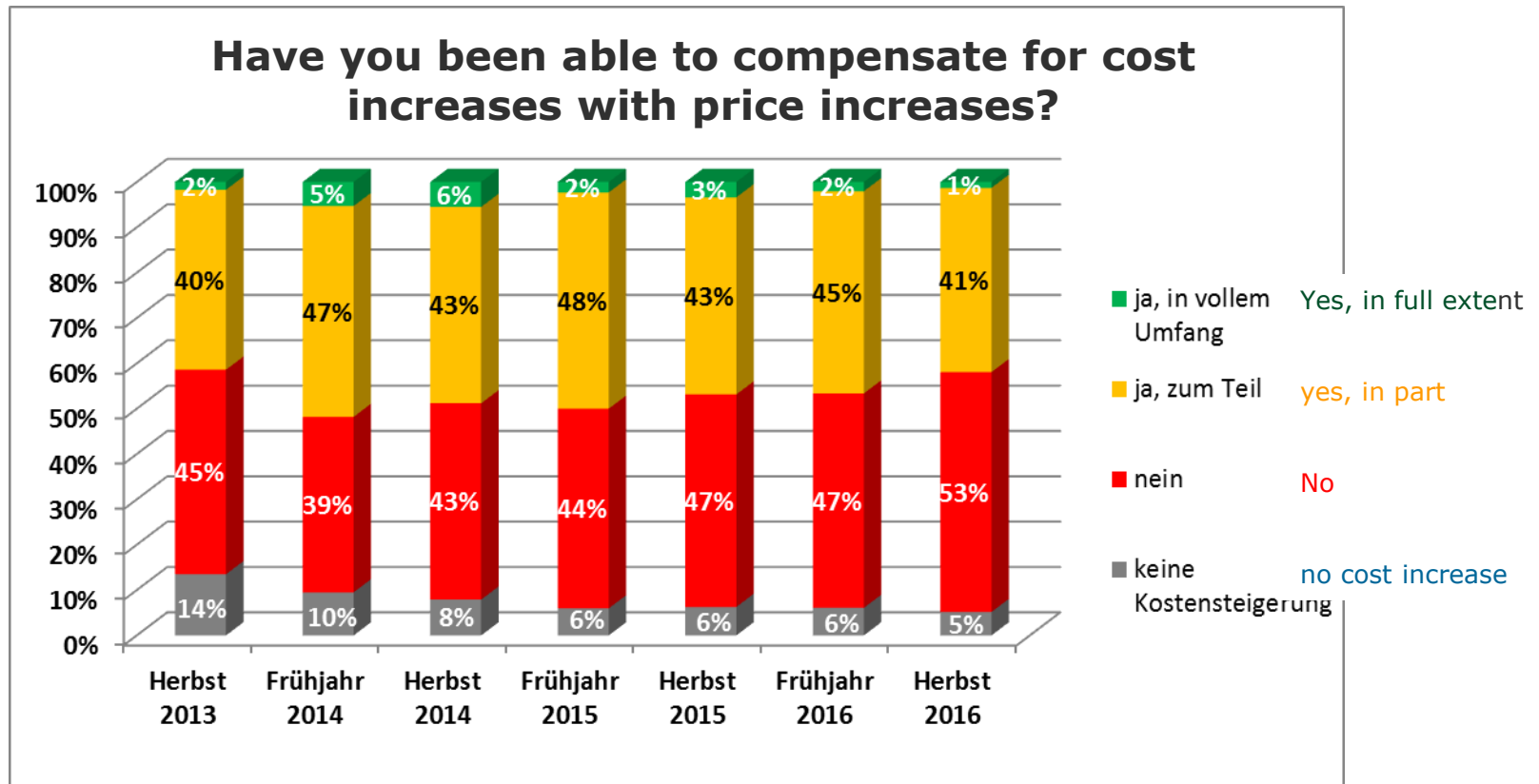
turnover

- 2/3 of the enterprises without perspective on sales increases
- The golden years are over.



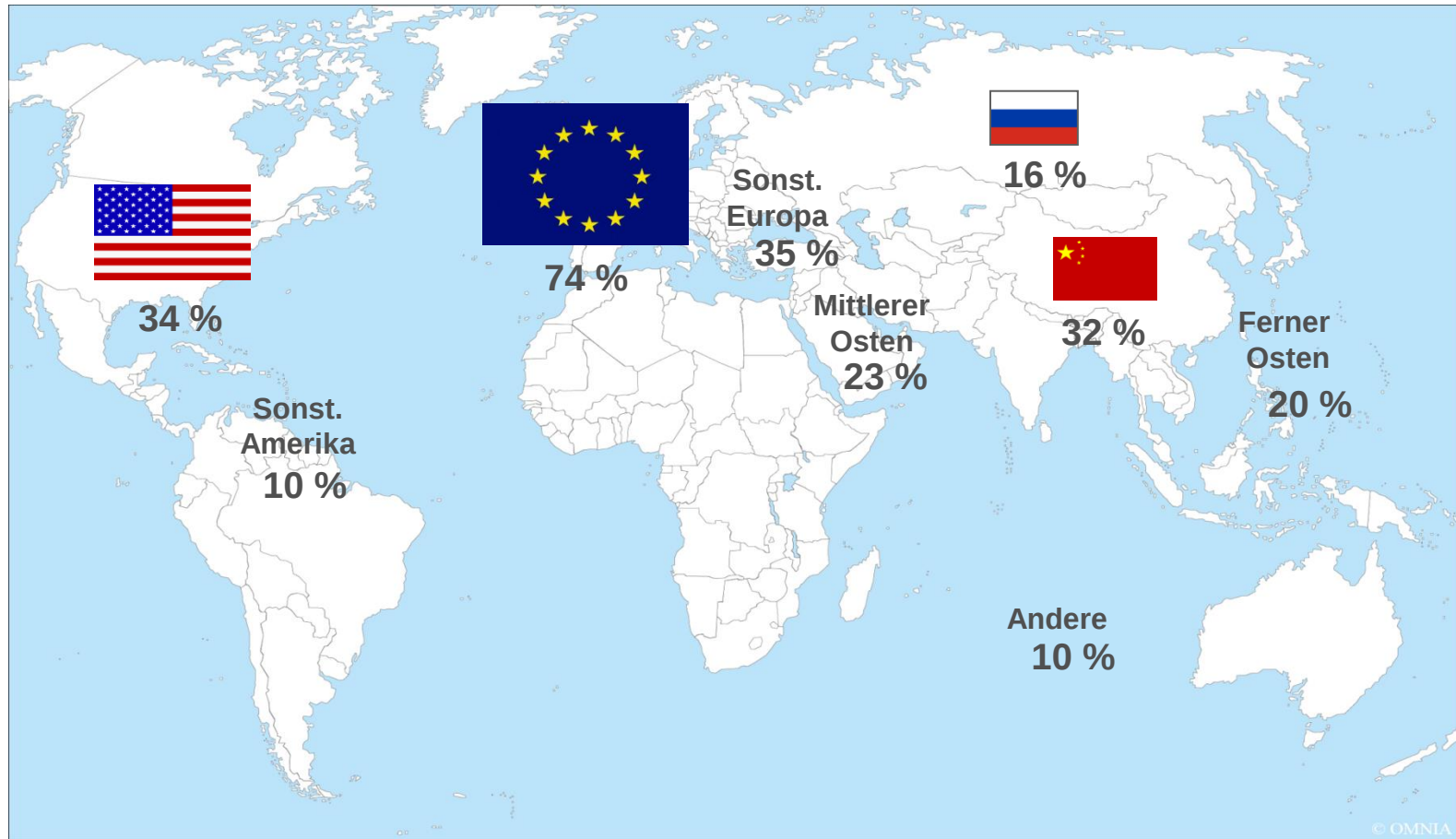
Prices and costs

94% of the farms remain at their expense.



main export countries

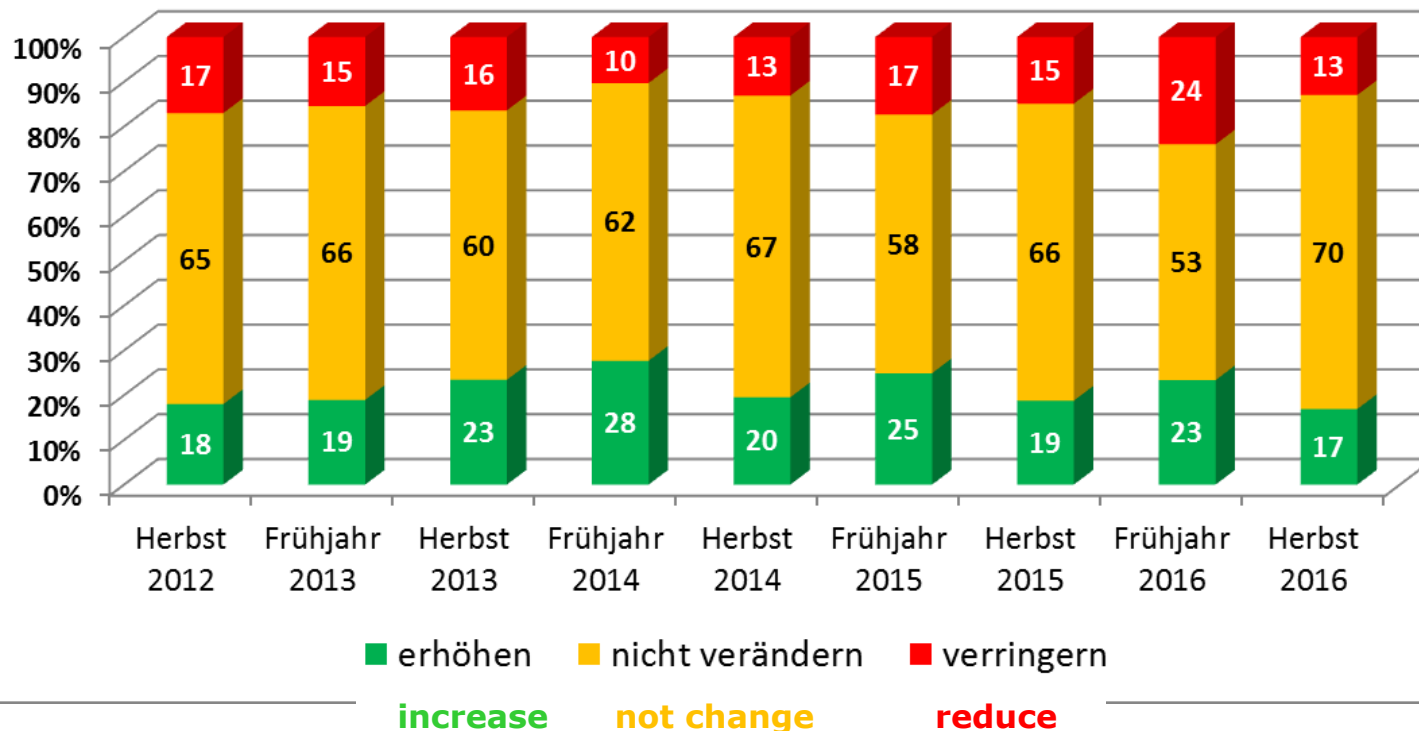
Export structure remains unchanged



employment

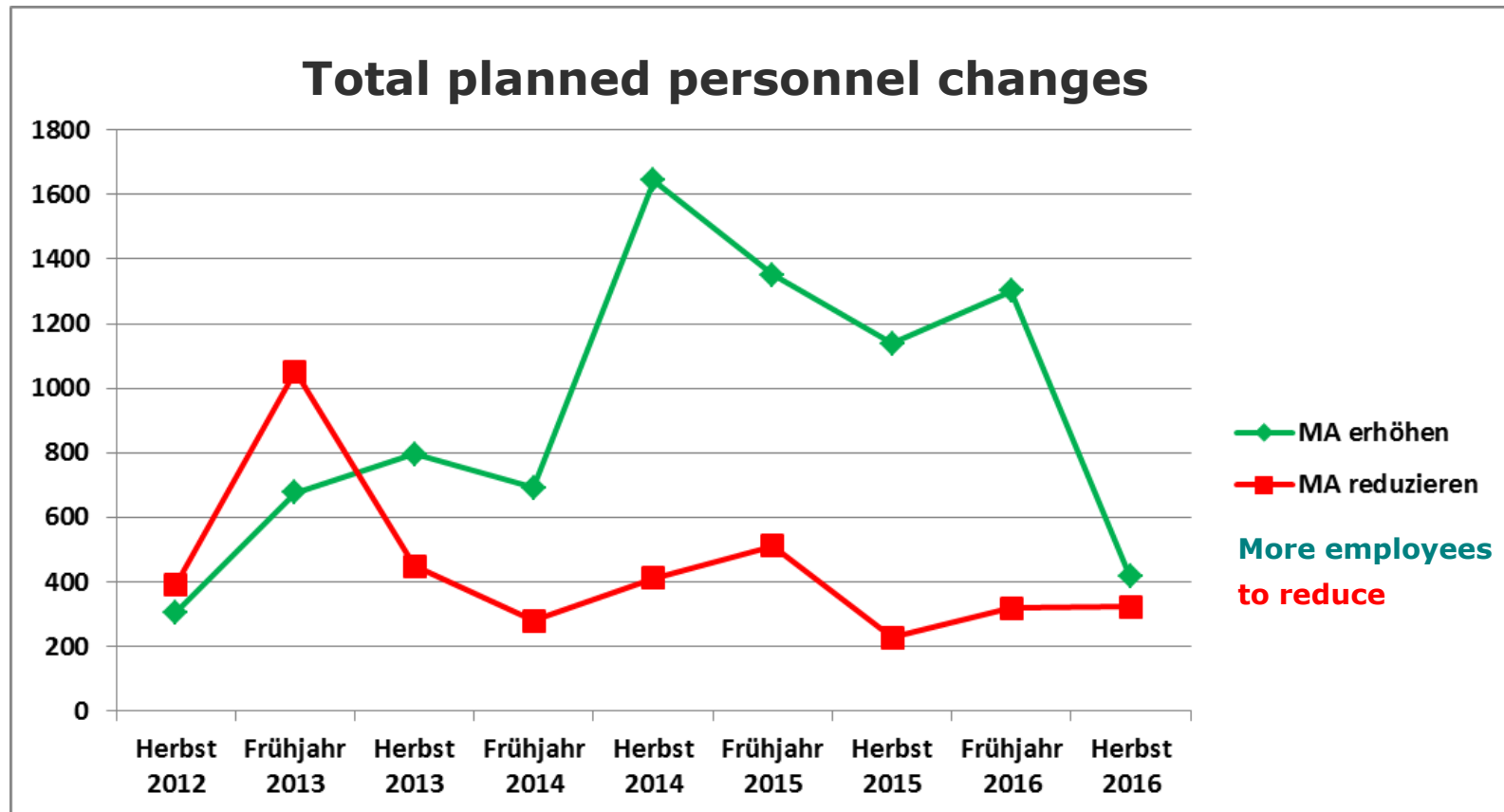
Further high level of employment

We will increase the number of our employees in the next 3 months ...



Staff planning

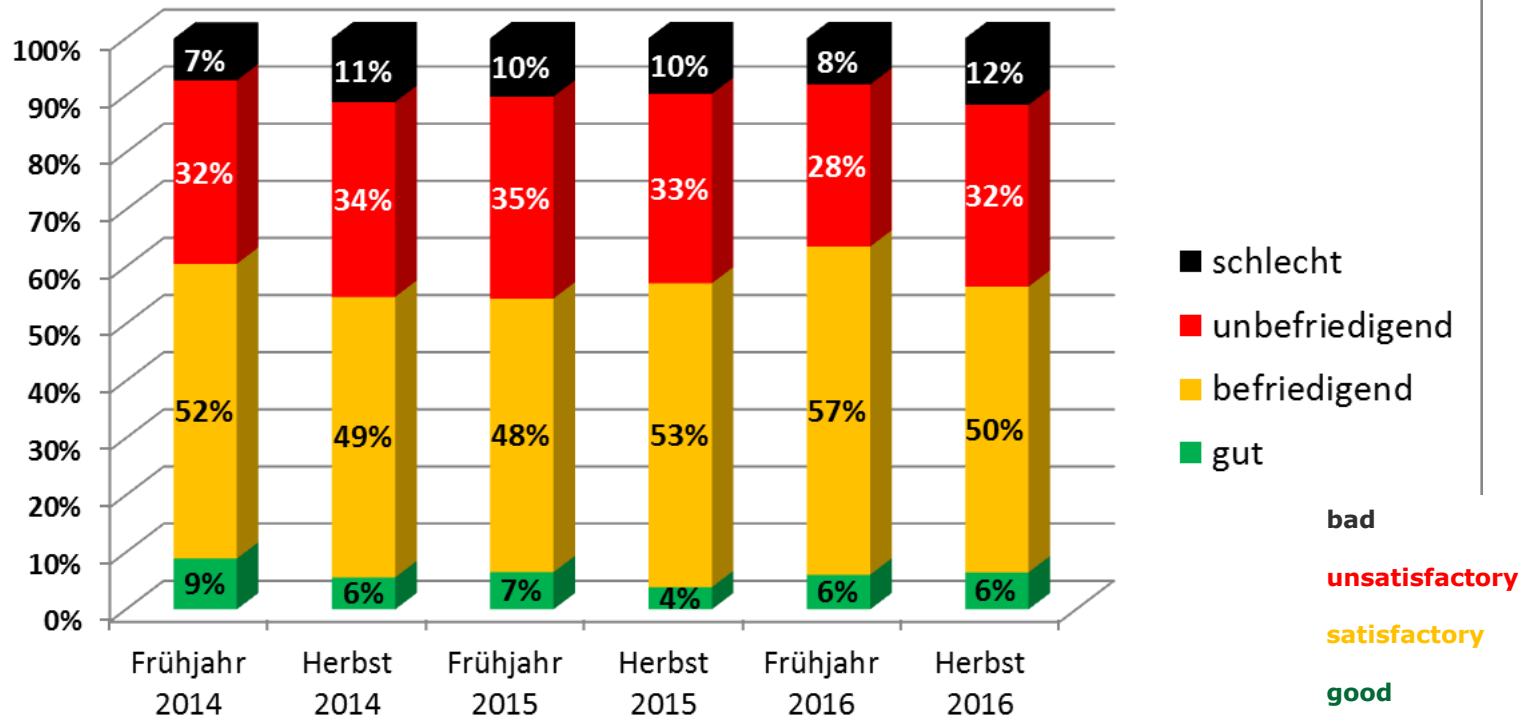
- Number of planned settings
- End of the adjustment boom?



Labour Market

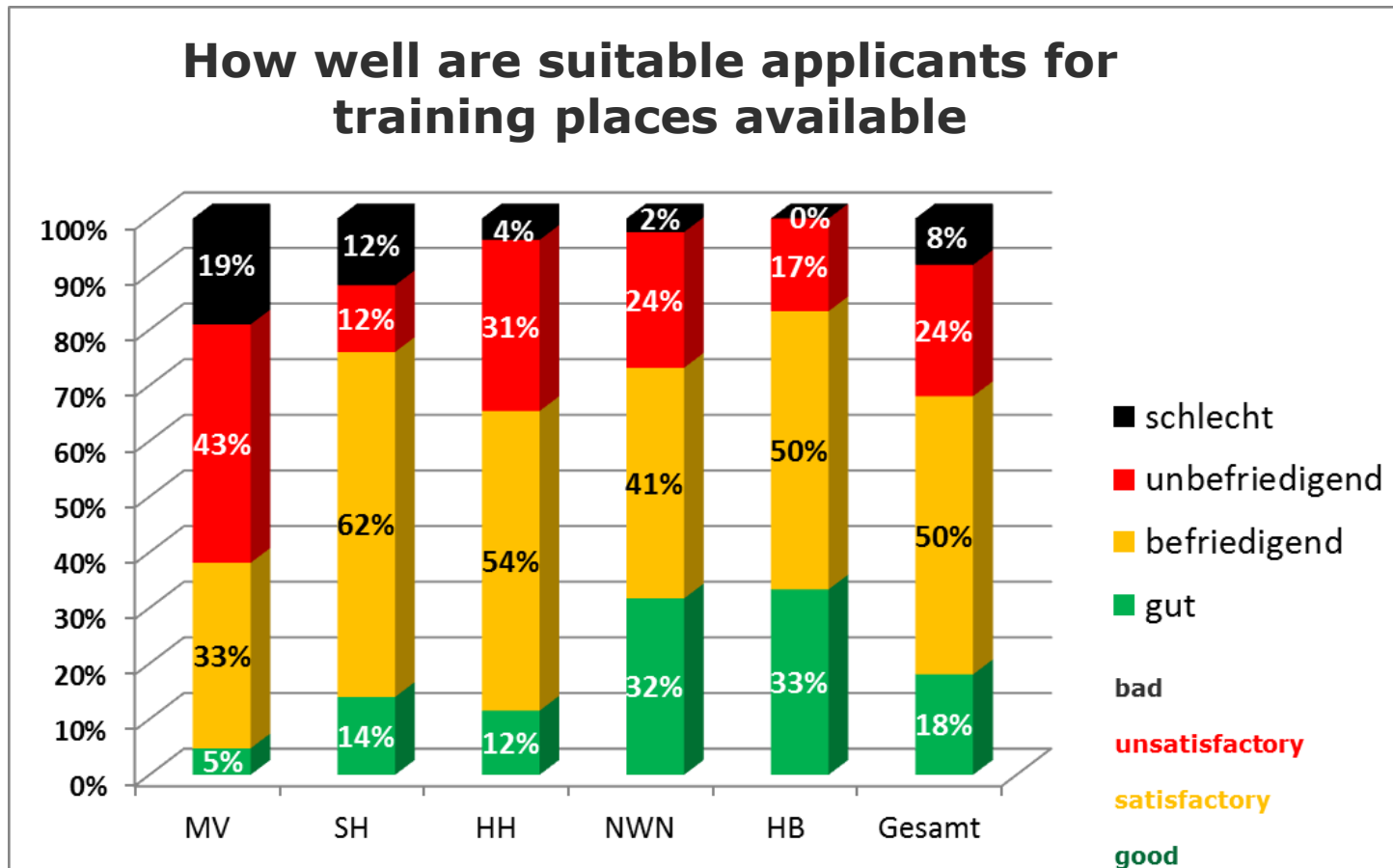
- Experts ...skills shortage remains a persistent problem

How well are skilled workers on the labor market available?



Labour Market

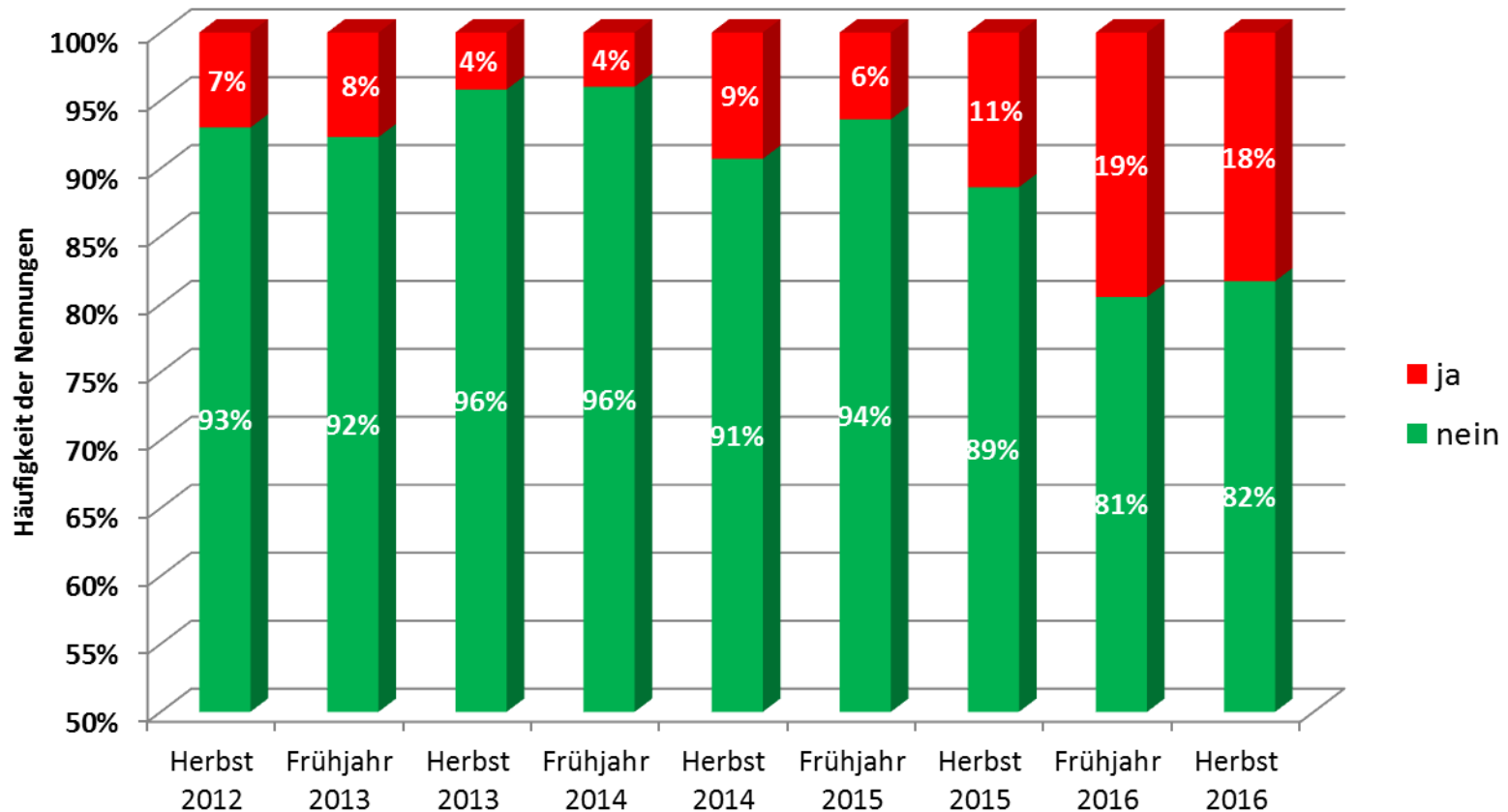
- Every 3rd company complains about lack of trainee
- Biggest problems in Mecklenburg-Vorpommern



Location G (Germany)

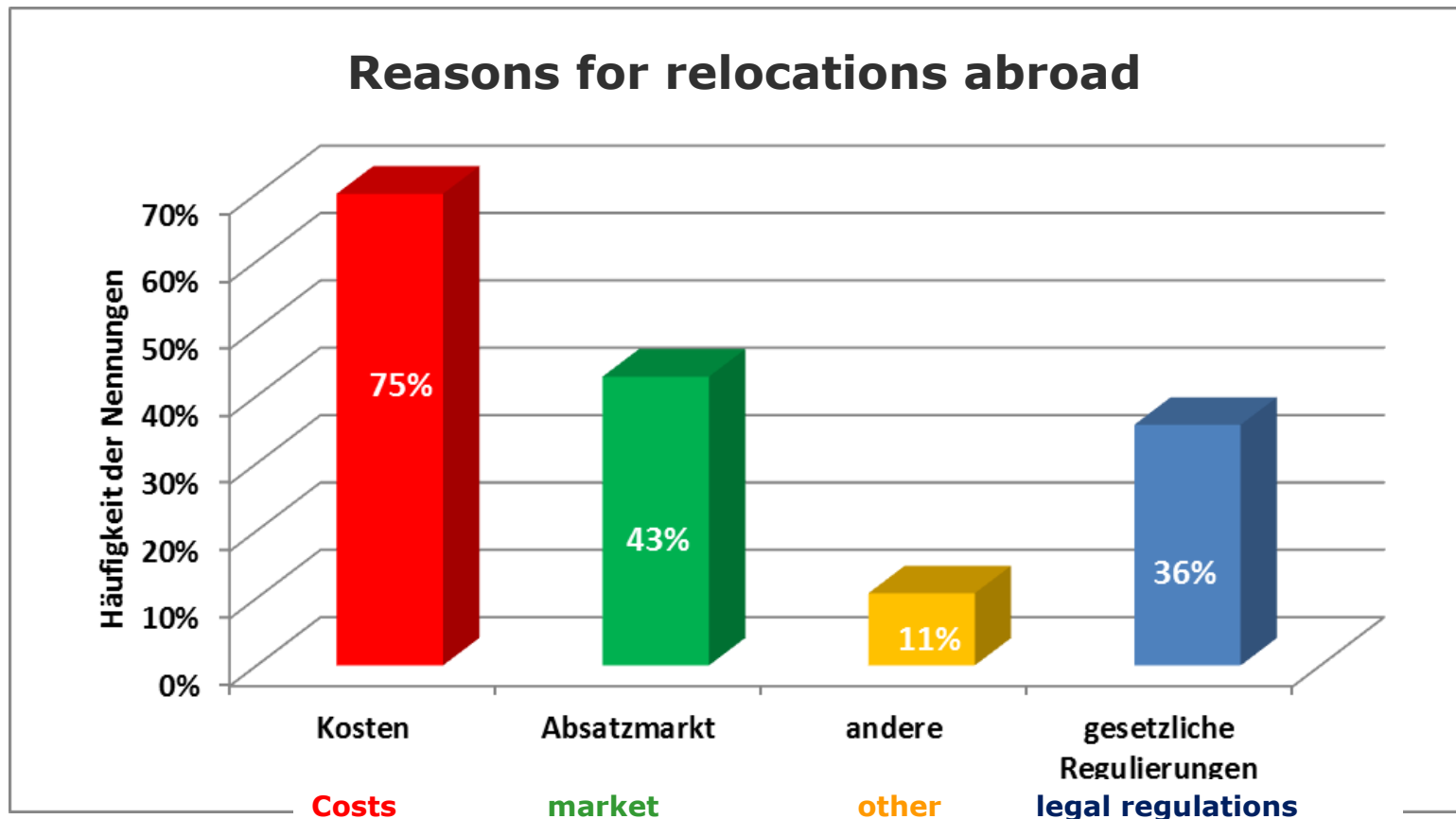
Increased displacement pressure is confirmed

We plan to relocate production abroad



Location G (Germany)

- Costs drive companies abroad.
- Statutory regulations frighten off.



Final evaluation / rating

- Recovery from the summer flaute
 - Sub-average order situation and capacity utilization
 - Tense price level and little scope for sales growth
 - Employment development is weakening

 - Displacement pressure continues
 - Labor costs remain a significant burden on farms
 - Every third company complains about new laws
-
- Erholung von der Sommerflaute
 - Unterdurchschnittliche Auftragslage und Kapazitätsauslastung
 - Angespanntes Preisniveau und wenig Spielraum für Umsatzsteigerungen
 - Beschäftigungsaufbau schwächt sich ab

 - Verlagerungsdruck dauert an
 - Arbeitskosten bleiben maßgebliche Belastung der Betriebe
 - Jeder 3. Betrieb bemängelt neue Gesetze

Activities

- ✦ Projects together in the Baltics ERASMUS+
- ✦ Lithuania / LPK: New social co-operation model:
Raising employees' involvement in the companies' financial management and economic performance
- ✦ Partnership short term project in the Ukraine and Moldova
- ✦ Partnership in VET / Bildungswerek in South Caucasus region

✦ INDUSTRY4EU



Digitalisation ... Industry 4.0

INDUSTRY 4EU (Industry 4.0 for the future of manufacturing in the EU) is aimed at

- ✓ bringing together social partners and institutions
- ✓ from Italy, Germany and Slovenia
- ✓ in an effort to identify concrete actions to cope with challenges and opportunities of Industry 4.0.

INDUSTRY 4EU is intended to identify good practices and possibilities **for employers** to successfully support the implementation of Industry 4.0, especially by the means **of social dialogue at all levels**, from firm to the European Union. ... the players involved in the process, such as enterprises, unions, educational institutions and public authorities.



❖ The 3rd German Round

Best practices sharing and Policy implications

- ❖ January 17, 2017
Hosted by NORDBILDUNG
Venue: Kapstadtring 10
Hamburg – Germany

❖ Participants

selected members, educational institutions, trade unions, Special guests from IG Metall; Partner assoziations AGV NORD, NORDWINDaktiv, VUMV, UV NORD; Project partner Italy, Slovenia, CEEMET. Participants from NORDMETALL



Industry4EU

Study Report on the Online Survey conducted for NORDBILDUNG gGmbH



Thanks
for attention!

Hans Manzke
NORDETALL – International relations