



DISCUS

Digital Transformation in the Construction Sector: Challenges and Opportunities

Second Transnational Workshop
Rome, January 23, 2020

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- Digitization - State of the Art
- Most relevant impacts
 - Employers' Associations
 - Trade Union
 - Companies
- Social partners

Interviews

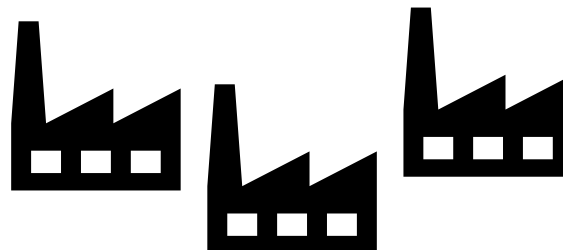
- Representatives of employers' associations



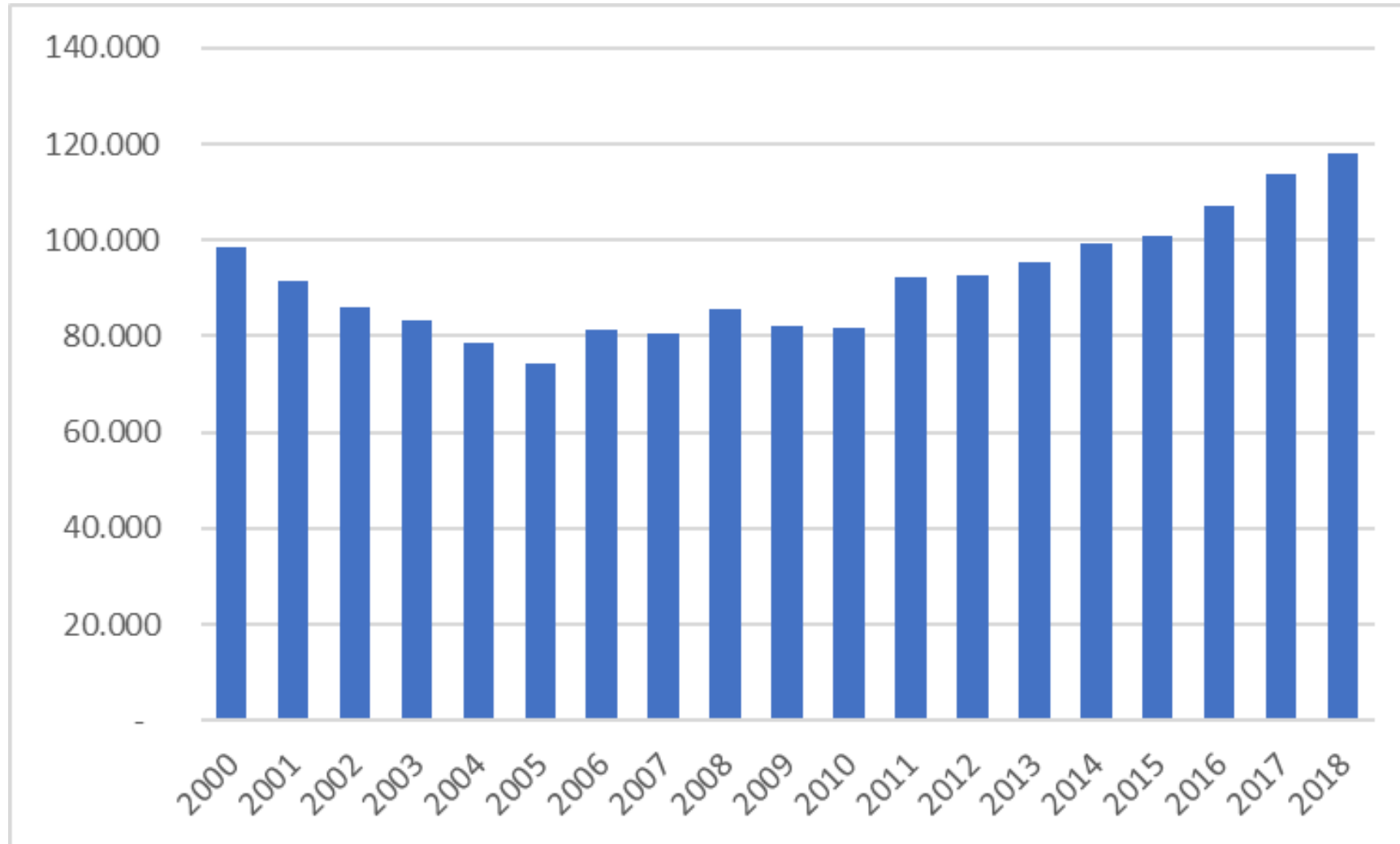
- Trade union representatives



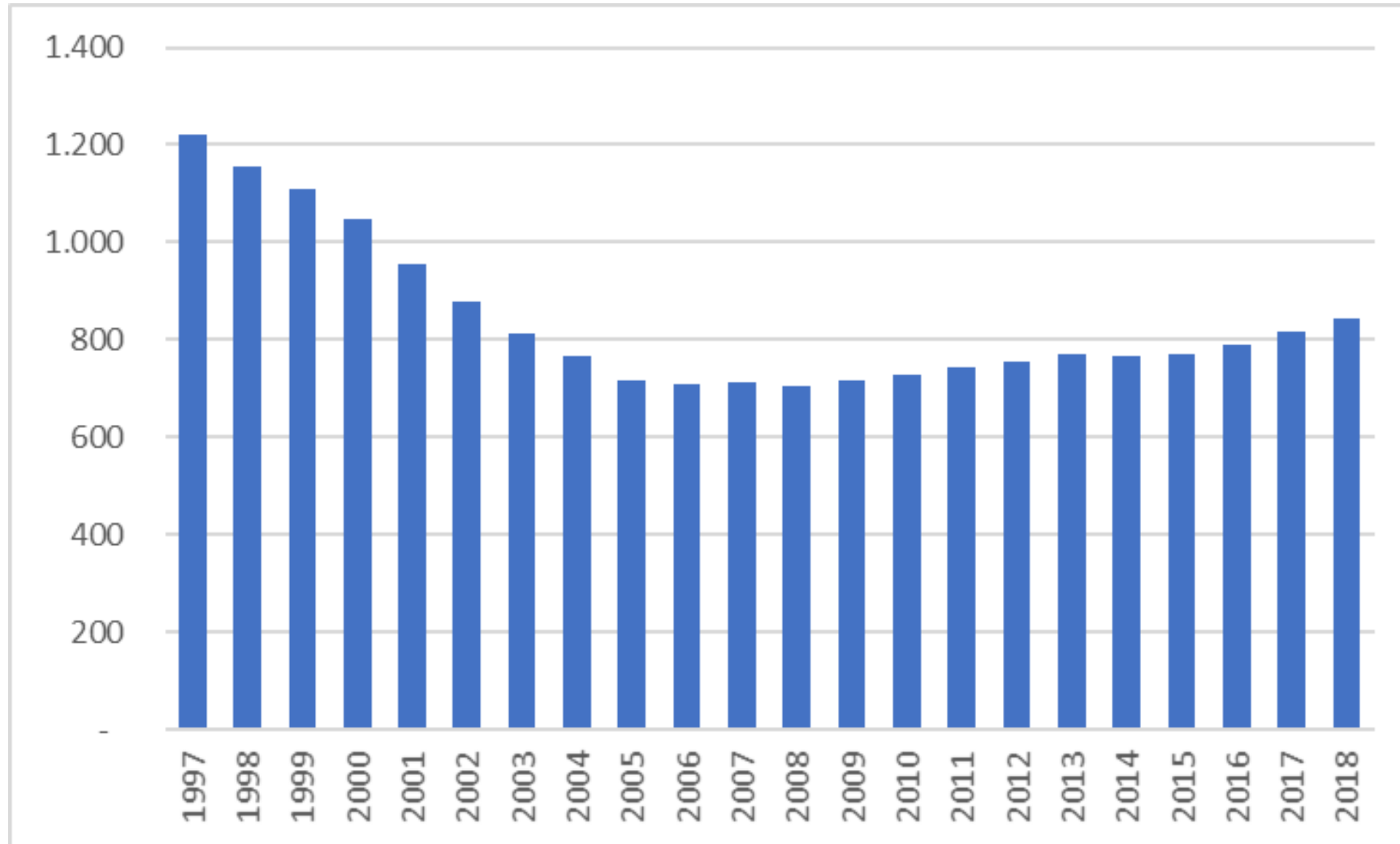
- Company representatives



Main construction trade: **Turnover**, 2000-2018, Germany



Main construction trade: **Employment**, 2000-2018, Germany



Key points

- All interviewees see the digital transformation as an opportunity - mostly with regard to the unused potential for increasing productivity
- All interviewees see challenges and need for action
- There is the concern that Germany is falling behind in the digital transformation of the construction sector
- Digital collaboration will change business models - this can also lead to job losses
- The fragmentation of the German construction sector is a special challenge regarding the digital transformation
- Construction sector is very conservative and in many companies are still old thinking patterns and little openness for new

Digitization – State of the art

- The topic has become very important in the last 2-3 years
- Digital Collaboration (BIM) is seen as a key issue - but so far there are few developments and therefore assessment of the companies varies
- The Government has so far taken too little initiative, and other countries (i.e. England) have made more progress
- Two government initiatives are perceived very positively
 - Stufenplan digitales Planen und Bauen (BMVI)
 - Kompetenzzentrum BIM (BMVI / BMI)
- New technology such as 3D printing is being experimented with, but digitization is more likely to be seen through the use of mobile devices on the construction site
- Digitization does not only take place on the construction site but also in other areas (e.g. administration)

Most relevant impacts (Employers' Associations)

“The most important question is: How will we work together in the future? This concerns the topics interfaces, data and (digital) collaboration.”

(Interviewee - Hauptverband der Deutschen Bauindustrie)

Most relevant impacts (Trade Union)

“Digitization is seen as new and chic, but the effects are misjudged. We from the trade union try to sensitize the works councils to this, then they realize that this is also subject to co-determination.”

(Interviewee – IG BAU)

Most relevant impacts (Companies)

“It is difficult to get digitization into people's heads. There are some employees who oppose the implementation (of digital processes). How do we convince them?”

(Managing director)

Social partners

- Employers' associations, trade unions and companies see more need for action by the government
- The employers' organisations pursue both common and divergent interests
 - common approach to the planned regulations to limit asphalt fumes in road construction
 - Potential for conflict regarding new business models
- The trade union considers the employers' associations and companies to be responsible
 - To increase wages
 - To improve working conditions (working hours)
 - To ensure the qualification of employees

Many thanks for your attention!

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