

# **Future of Jobs Report** 2025

INSIGHT REPORT JANUARY 2025

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# Preface



Saadia Zahidi Managing Director World Economic Forum

Over the past decade, the World Economic Forum's bi-annual *Future of Jobs Report* has followed evolving technological, societal and economic trends to understand occupational disruption and identify opportunities for workers to transition to the jobs of the future.

As we enter 2025, the landscape of work continues to evolve at a rapid pace. Transformational breakthroughs, particularly in generative artificial intelligence (GenAI), are reshaping industries and tasks across all sectors. These technological advances, however, are converging with a broader array of challenges, including economic volatility, geoeconomic realignments, environmental challenges and evolving societal expectations. In response, this fifth edition of the *Future of Jobs Report* expands its focus, offering a comprehensive analysis of the interconnected trends shaping the global labour market.

Central to the report is a unique dataset derived from an extensive survey of global employers. This year's edition captures the perspectives of over 1,000 employers – representing more than 14 million workers across 22 industry clusters and 55 economies – providing unparalleled insights into the emerging jobs landscape for the 2025-2030 period. This report would not be possible without their openness to contributing their views and insights, and we sincerely thank them all. We greatly appreciate, too, the support of our survey partners, which have enhanced the report's geographical coverage.

These perspectives are further enriched by research collaborations and data partnerships with ADP, Coursera, Indeed and LinkedIn, whose innovative data and analysis complement the survey findings.

This publication has been made possible by the dedication and expertise of its project team: Till Leopold, Attilio Di Battista, Ximena Játiva, Shuvasish Sharma, Ricky Li and Sam Grayling, alongside the wider team at the Centre for the New Economy and Society.

The disruptions of recent years have underscored the importance of foresight and collective action. We hope this report will inspire an ambitious, multistakeholder agenda – one that equips workers, businesses, governments, educators and civil society to navigate the complex transitions ahead.

# Key findings

Technological change, geoeconomic fragmentation, economic uncertainty, demographic shifts and the green transition – individually and in combination – are among the major drivers expected to shape and transform the global labour market by 2030. The *Future of Jobs Report 2025* brings together the perspective of over 1,000 leading global employers—collectively representing more than 14 million workers across 22 industry clusters and 55 economies from around the world—to examine how these macrotrends impact jobs and skills, and the workforce transformation strategies employers plan to embark on in response, across the 2025 to 2030 timeframe.

- Broadening digital access is expected to be the most transformative trend – both across technology-related trends and overall - with 60% of employers expecting it to transform their business by 2030. Advancements in technologies, particularly AI and information processing (86%); robotics and automation (58%); and energy generation, storage and distribution (41%), are also expected to be transformative. These trends are expected to have a divergent effect on jobs, driving both the fastest-growing and fastest-declining roles, and fueling demand for technology-related skills, including AI and big data, networks and cybersecurity and technological literacy, which are anticipated to be the top three fastestgrowing skills.
- Increasing cost of living ranks as the secondmost transformative trend overall – and the top trend related to economic conditions – with half of employers expecting it to transform their business by 2030, despite an anticipated reduction in global inflation. General economic slowdown, to a lesser extent, also remains top of mind and is expected to transform 42% of businesses. Inflation is predicted to have a mixed outlook for net job creation to 2030, while slower growth is expected to displace 1.6 million jobs globally. These two impacts on job creation are expected to increase the demand for creative thinking and resilience, flexibility, and agility skills.
- Climate-change mitigation is the third-most transformative trend overall – and the top trend related to the green transition – while climatechange adaptation ranks sixth with 47% and 41% of employers, respectively, expecting these trends to transform their business in the next five years. This is driving demand for roles such as renewable energy engineers, environmental

engineers and electric and autonomous vehicle specialists, all among the 15 fastest-growing jobs. Climate trends are also expected to drive an increased focus on environmental stewardship, which has entered the *Future of Jobs Report's* list of top 10 fastest growing skills for the first time.

- Two demographic shifts are increasingly seen to be transforming global economies and labour markets: aging and declining working age populations, predominantly in higherincome economies, and expanding working age populations, predominantly in lower-income economies. These trends drive an increase in demand for skills in talent management, teaching and mentoring, and motivation and self-awareness. Aging populations drive growth in healthcare jobs such as nursing professionals, while growing working-age populations fuel growth in education-related professions, such as higher education teachers.
- Geoeconomic fragmentation and geopolitical tensions are expected to drive business model transformation in one-third (34%) of surveyed organizations in the next five years. Over onefifth (23%) of global employers identify increased restrictions on trade and investment, as well as subsidies and industrial policies (21%), as factors shaping their operations. Almost all economies for which respondents expect these trends to be most transformative have significant trade with the United States and/or China. Employers who expect geoeconomic trends to transform their business are also more likely to offshore - and even more likely to re-shore – operations. These trends are driving demand for security related job roles and increasing demand for network and cybersecurity skills. They are also increasing demand for other human-centred skills such as resilience, flexibility and agility skills, and leadership and social influence.

Extrapolating from the predictions shared by Future of Jobs Survey respondents, on current trends over the 2025 to 2030 period job creation and destruction due to structural labour-market transformation will amount to 22% of today's total jobs. This is expected to entail the creation of new jobs equivalent to 14% of today's total employment, amounting to 170 million jobs. However, this growth is expected to be offset by the displacement of the equivalent of 8% (or 92 million) of current jobs, resulting in net growth of 7% of total employment, or 78 million jobs.

- Frontline job roles are predicted to see the largest growth in absolute terms of volume and include Farmworkers, Delivery Drivers, Construction Workers, Salespersons, and Food Processing Workers. Care economy jobs, such as Nursing Professionals, Social Work and Counselling Professionals and Personal Care Aides are also expected to grow significantly over the next five years, alongside Education roles such as Tertiary and Secondary Education Teachers.
- Technology-related roles are the fastestgrowing jobs in percentage terms, including Big Data Specialists, Fintech Engineers, AI and Machine Learning Specialists and Software and Application Developers. Green and energy transition roles, including Autonomous and Electric Vehicle Specialists, Environmental Engineers, and Renewable Energy Engineers, also feature within the top fastest-growing roles.
- Clerical and Secretarial Workers including Cashiers and Ticket Clerks, and Administrative Assistants and Executive Secretaries – are expected to see the largest decline in absolute numbers. Similarly, businesses expect the fastest-declining roles to include Postal Service Clerks, Bank Tellers and Data Entry Clerks.

On average, workers can expect that two-fifths (39%) of their existing skill sets will be transformed or become outdated over the 2025-2030 period. However, this measure of "skill instability" has slowed compared to previous editions of the report, from 44% in 2023 and a high point of 57% in 2020 in the wake of the pandemic. This finding could potentially be due to an increasing share of workers (50%) having completed training, reskilling or upskilling measures, compared to 41% in the report's 2023 edition.

- Analytical thinking remains the most soughtafter core skill among employers, with seven out of 10 companies considering it as essential in 2025. This is followed by resilience, flexibility and agility, along with leadership and social influence.
- Al and big data top the list of fastest-growing skills, followed closely by networks and cybersecurity as well as technology literacy. Complementing these technology-related skills, creative thinking, resilience, flexibility and agility, along with curiosity and lifelong learning, are also expected to continue to rise in importance over the 2025-2030 period. Conversely, manual dexterity, endurance and precision stand out with notable net declines in skills demand, with 24% of respondents foreseeing a decrease in their importance.

While global job numbers are projected to grow by 2030, existing and emerging skills differences between growing and declining roles could exacerbate existing skills gaps. The most prominent skills differentiating growing from declining jobs are anticipated to comprise resilience, flexibility and agility; resource management and operations; quality control; programming and technological literacy.

Given these evolving skill demands, the scale of workforce upskilling and reskilling expected to be needed remains significant: if the world's workforce was made up of 100 people, 59 would need training by 2030. Of these, employers foresee that 29 could be upskilled in their current roles and 19 could be upskilled and redeployed elsewhere within their organization. However, 11 would be unlikely to receive the reskilling or upkskilling needed, leaving their employment prospects increasingly at risk.

Skill gaps are categorically considered the biggest barrier to business transformation by Future of Jobs Survey respondents, with 63% of employers identifying them as a major barrier over the 2025-2030 period. Accordingly, 85% of employers surveyed plan to prioritize upskilling their workforce, with 70% of employers expecting to hire staff with new skills, 40% planning to reduce staff as their skills become less relevant, and 50% planning to transition staff from declining to growing roles.

Supporting employee health and well-being is expected to be a top focus for talent attraction, with 64% of employers surveyed identifying it as a key strategy to increase talent availability. Effective reskilling and upskilling initiatives, along with improving talent progression and promotion, are also seen as holding high potential for talent attraction. Funding for - and provision of - reskilling and upskilling are seen as the two most welcomed public policies to boost talent availability.

The Future of Jobs Survey also finds that adoption of diversity, equity and inclusion initiatives remains on the rise. The potential for expanding talent availability by tapping into diverse talent pools is highlighted by four times more employers (47%) than two years ago (10%). Diversity, equity and inclusion initiatives have become more prevalent, with 83% of employers reporting such an initiative in place, compared to 67% in 2023. Such initiatives are particularly popular for companies headquartered in North America, with a 96% uptake rate, and for employers with over 50,000 employees (95%).

By 2030, just over half of employers (52%) anticipate allocating a greater share of their revenue to wages, with only 8% expecting this share to decline. Wage strategies are driven primarily by goals of aligning wages with workers' productivity and performance and competing for retaining talent and skills. Finally, half of employers plan to reorient their business in response to AI, two-thirds plan to hire talent with specific AI skills, while 40% anticipate reducing their workforce where AI can automate tasks.

# Part I: The Future of Jobs 2025

# Introduction: The global labour market landscape in 2025

The year 2025 unfolds amid ongoing transformations in global labour markets. Since the COVID-19 pandemic, rising cost of living, geopolitical conflicts, the climate emergency and economic downturns have added further turbulence to technology-driven global employment changes. While the global economic outlook appears to be stabilizing, it does so amid weaker global growth projections of 3.2% for 2025.<sup>1</sup> Global inflation appears to have eased and is now projected to reach 3.5% by the end of 2025 – below the average global rate of the first two decades of the 21<sup>st</sup> century. However, living costs remain elevated around the world.

Aided by a stabilizing economic outlook and easing inflation, the global unemployment rate, at 4.9%,<sup>2</sup> stands at the lowest level since 1991. However, this headline figure hides a range of disparities. While middle-income countries are experiencing reductions in unemployment, low-income countries have seen an increase, from 5.1% in 2022 to 5.3% by 2024.

Reductions in unemployment have also lagged for women. Since 2020, when the global unemployment rate peaked for both sexes at 6.6%, the rate for men has declined to 4.8%, while the rate for women remains elevated at 5.2%. This trend is driven mainly by lower-middle income countries, where the female unemployment rate (of 5.5%) is 1.1% higher than the male equivalent. High-income countries have an unemployment rate gender disparity of 0.4%; however, this disparity has existed for over a decade – rather than opening up during the post-COVID recovery. For lowincome and upper-middle income countries, male and female unemployment rates remain even.

Youth unemployment rates tell another story of labour-market health. While the global youth unemployment rate has tracked the total global unemployment rate, it remains elevated at 13%. Assessing rates of youth not in employment education or training (NEETs) highlights disparities between economies at different national income levels. While the global NEET rate remains flat at 21.7%, it stands at just 10.1% for high-income economies, rising to 17.3% for upper-middle income ones. The rate then jumps to 25.9% for lower-middle income economies and 27.6% for low-income ones.

The jobs gap – a measure by the International Labour Organization (ILO) to incorporate a broader understanding of unemployment and underemployment - adds additional nuance to our understanding of the labour-market situation. Similarly to global headline unemployment, the jobs gap has been decreasing and stood at a need for 402 million additional jobs in 2024. While most of the world has experienced this downward trend, low-income economies saw their jobs gap increase by 0.4 percentage points compared to prepandemic levels. Lower-middle income economies saw the largest reduction in the jobs gap (by 2 percentage points compared to 2019 levels). Across all country income groups, the jobs gap for women is higher than that for men, but gender differences are most pronounced in low-income and especially lower-income economies, where the jobs gap for women surpasses that of men by 7.5 percentage points.

The global labour-force participation rate has rebounded after a drop during the pandemic and now stands at similar levels to 2019 for all income groups except lower-middle income economies. In lower-income economies the labour-force participation rate has spiked beyond the levels seen in 2019. This is noteworthy considering lowermiddle income economies – who make up around 40% of the global population – will drive the bulk of working-age population growth in the coming years and decades. The combination of growing workingage populations and labour-force participation rates emphasizes the importance of job creation in these economies.

Against the backdrop of this current labour-market landscape, the *Future of Jobs Report 2025* analyses how organizations expect the labour market to evolve over the next five years until 2030. Like previous editions of the report, this analysis is based on the World Economic Forum's Future of Jobs Survey, conducted in late 2024, which brings together the perspectives of more than 1,000 global employers, collectively employing more than 14.1 million workers across 22 industry clusters and 55 economies. The survey highlights how macrotrends and technology will influence industry transformation and employment, the jobs and skills outlook over the next five years and the corresponding workforce transformation strategies companies plan to use to address these issues.

The report begins by outlining five macrotrends impacting the labour market – technological change, the green transition, geoeconomic fragmentation, economic uncertainty and demographic shifts. In Chapter 2, the report discusses how organizations expect jobs to evolve, including which jobs are predicted to grow and decline fastest, and the trends driving these changes. Chapter 3 looks at projected changes to the skills needed in the labour market, before Chapter 4 analyses the workforce practices that employers plan to adopt in their organizations. Finally, Chapter 5 provides insights for the nine regions, 55 economies, and 22 industry clusters that meet the report's statistical thresholds for standalone analysis. The appendix provides a detailed overview of the report's survey and analysis methodology.

In addition, the *Future of Jobs Report 2025* features a comprehensive set of Region, Economy and Industry Profiles. User guides are provided for each of these profiles to support their use as practical, standalone tools.

## Drivers of 1) labour-market transformation

Technological developments, the green transition, macroeconomic and geoeconomic shifts, and demographic changes are driving transformation in the global labour market, reshaping both jobs and

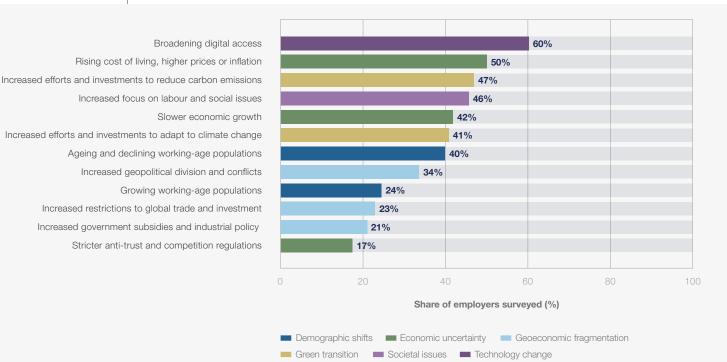
required skills. This chapter provides a picture of how companies expect these macrotrends to drive industry transformation by 2030.

#### 1.1 Expected impact of macrotrends on business transformation

#### FIGURE 1.1

#### Macrotrends driving business transformation

Share of employers surveyed that identify the stated trend as likely to drive business transformation.



Source

World Economic Forum, Future of Jobs Survey 2024.

#### **Technological change**

More employers - 60% - expect broadening digital access to transform their business than any other trend, with similar proportions of employers across

all regions selecting this trend. This growing digital access is a critical enabler for new technologies to transform labour markets (Figure 1.1).

The Future of Jobs Survey asked employers how advances in nine key technologies are transforming their business. Of the nine technologies, three stand out as being expected to have the greatest impact. Robots and autonomous systems are expected to transform 58% of employers' businesses, while energy generation and storage technologies are expected to transform 41%. But it is artificial intelligence (AI) and information processing technologies that are expected to have the biggest impact – with 86% of respondents expecting these technologies to transform their business by 2030 (Figure 1.2).

86%

#### FIGURE 1.2 Technology trends driving business transformation, 2025-2030

Share of employers surveyed that identify the stated technology trend as likely to drive business transformation

Al and information processing technologies Robots and autonomous systems 58% Energy generation, storage and distribution 41% New materials and composites 30% Semiconductors and computing technologies 20% 18% Sensing, laser and optical technologies Quantum and encryption 12% Biotechnology and gene technologies 11% Satellites and space technologies 9%

Share of employers surveyed (%)

#### Source

World Economic Forum, Future of Jobs Survey 2024.

Generative AI (GenAI), in particular, has witnessed a rapid surge in both investment and adoption across various sectors. Since the release of Chat GPT in November 2022, investment flows into AI have increased nearly eightfold.<sup>3</sup> This influx of capital has been accompanied by investment in the physical infrastructure needed to support these emerging technologies, including servers and energy generation plants. By leveraging natural language processing technology, GenAl enables users to interact with it as though they were conversing with a human, considerably reducing barriers to usage and the need for specialized technical knowledge.<sup>4</sup> Accordingly, the demand for GenAl skills by both businesses and individuals has also grown significantly (Box B1.1).

Although more generalized adoption of Al applications remains comparatively low, with only a small fraction of firms using it in 2023, adoption is growing rapidly, albeit unevenly across sectors. The information technology sector is leading the way in Al adoption, while industries such as construction are lagging behind.<sup>5</sup> This disparity mirrors broader trends, with advanced and middleincome economies experiencing unprecedented diffusion of generative Al technologies among individual users, while low-income economies remain largely on the margins, with currently minimal use of this technology.<sup>6</sup>

While the full extent of long-term productivity gains from the technology remains uncertain,

workplace studies have identified various initial ways for generative AI to enhance human skills and performance. Some of these studies have highlighted ways for generative AI to enhance human core skills, or to substitute for tacit knowledge among newer or average performing workers.<sup>7,8</sup> Other studies have shown generative AI can enhance knowledge work if applied appropriately within its capability, but risks producing adverse outcomes where users unknowingly stretch it beyond its capability.<sup>9</sup>

Looking further ahead, some observers argue generative AI could empower less specialized employees to perform a greater range of "expert" tasks – expanding the possible functions of roles such as Accounting Clerks, Nurses, and Teaching Assistants.<sup>10</sup> Similarly, the technology could equip skilled professionals such as Electricians, Doctors or Engineers with the world's forefront knowledge - enabling them to solve complex problems more efficiently.11 Outcomes such as these – which create genuine shifts in the quantity or quality of output - are more likely to come about if technology development is focused on enhancing rather than substituting for human capabilities.12 However, without appropriate decision-making frameworks, economic incentive structures and, possibly, government regulations, there remains a risk that technological development will be focused on replacing human work, which could increase inequality and unemployment.

While currently seen as less transformative than GenAl, robots and autonomous systems have seen steady growth of around 5-7% annually since 2020.<sup>13</sup> In 2023, global average robot density reached 162 units per 10,000 employees, double the number measured seven years ago.<sup>14</sup> Currently robot installations are heavily concentrated, with 80% of installations occurring in China, Japan, United States, the Republic of Korea, and Germany.<sup>15</sup> This is partially reflected in Future of Jobs Survey data, which shows significant expectations for the transformative impact of these technologies in these five countries (more than 60% of respondents in each); but much lower expectations among employers headquartered in Sub-Saharan Africa (39%), Central Asia (45%) and the Middle East and North Africa (44%).

#### BOX 1.1 Demand for generative AI skills

In collaboration with Coursera

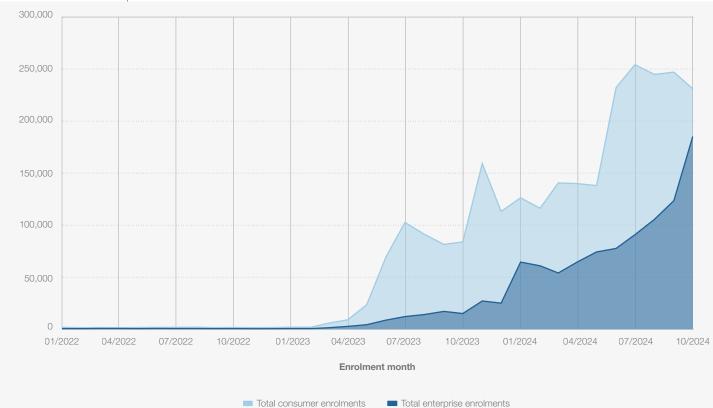
Coursera data generated for the *Future of Jobs Report 2025* reveals significant growth in demand for Generative AI training among both individual learners and enterprises (Figure B1.1). Demand for AI skills has accelerated globally, with India and the United States leading in enrolment numbers. However, the drivers of demand differ. In the United States demand is primarily driven by individual users, whereas in India, corporate sponsorship plays a significant role in boosting GenAI training uptake.

Globally, individual learners on Coursera have focused on foundational GenAl skills and

conceptual topics, such as prompt engineering, trustworthy AI practices, and strategic decisionmaking around AI. Institution-sponsored learners, on the other hand, emphasize practical applications within the workplace, including leveraging AI tools to enhance efficiency in Excel or leveraging the technology to develop applications. These trends reflect a tailored approach to GenAI learning, where individuals focus on foundational knowledge-building while organizations prioritize training that delivers immediate workplace productivity gains.

#### FIGURE B1.1 Demand for generative AI skills

Generative AI enrolment trend 2022-2024.



Enrolments

#### Economic uncertainty

As of early 2025, the global economic outlook appears to be shaped by a combination of cautious optimism and persistent uncertainties. According to the World Economic Forum's September 2024 Chief Economists Outlook,<sup>16</sup> while there are signs of improving global conditions, vulnerabilities persist. Most surveyed chief economists (54%) expect economic conditions to hold steady in the short term. However, among those anticipating change, more expect conditions to worsen rather than strengthen.

The 2024 economic performance was marked by a global decrease in inflation and an unusually resilient economy throughout the disinflationary process. While easing inflation and looser monetary policy offer some optimism, slow growth and political volatility keep many countries at risk of economic shocks. The International Monetary Fund (IMF) projects growth to hold steady at 3.2 percent in 2025, despite sizable downward growth revisions in a few economies, particularly low-income developing ones.<sup>17</sup>

Despite this comparatively steady outlook, price pressures persist in many economies. Inflation remains particularly high in services – at almost twice pre-pandemic levels – and is especially persistent in low-income countries. Low-income countries are disproportionately affected by rising inflationary pressures because of elevated food prices due to supply disruptions influenced by climate shocks, regional conflicts and geopolitical tensions.<sup>18</sup>

Against this backdrop, companies expect economic pressures to be among the most transformative drivers. Figure 1.1 shows rising cost of living remains a top concern, with half of all surveyed employers expecting it to drive transformation, making it the second-most influential trend. Slower economic growth is also a major concern, with 42% of respondents expecting it to impact their operations.

Views on the impact of inflation and economic growth notably vary across regions. For example, in Sub-Saharan Africa, six in 10 respondents cite inflation as a key factor, whereas in Eastern and South-Eastern Asia, slower economic growth is seen as the more important issue.

Finally, stricter anti-trust and competition regulations, though a lower priority overall, are expected to impact one in six employers globally

#### Geoeconomic fragmentation

Intensifying geoeconomic tensions threaten trade and supply chains, with lower-income economies particularly vulnerable, given that essential goods like food and energy comprise a larger share of household expenditures in these countries.<sup>19</sup> Globally, governments are responding to geoeconomic challenges by imposing trade and investment restrictions, increasing subsidies, and adjusting industrial policies. The World Trade Organization (WTO) reports that trade restrictions doubled between 2020 and 2024, with the value of import restrictions reaching nearly 10% of global imports in 2024.<sup>20</sup> These increasing protectionist measures may pose a medium-term risk to global economic growth, as they reduce opportunities for open innovation and technology transfer – factors that historically fuelled growth in emerging economies during periods of globalization.<sup>21</sup>

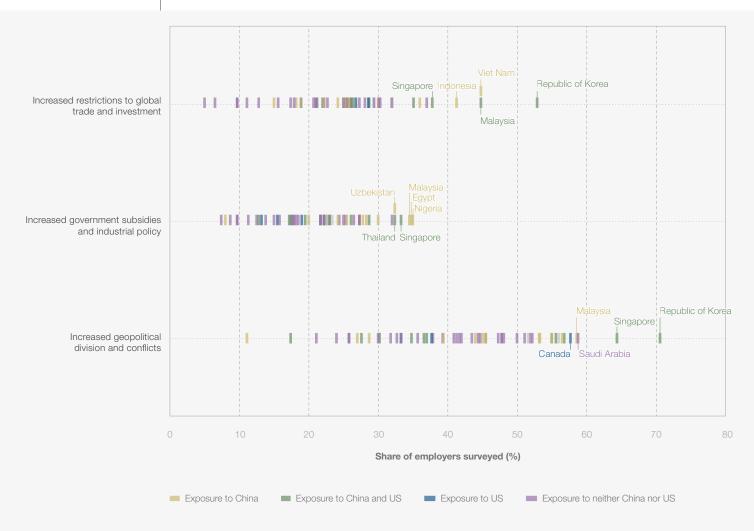
This shift toward geoeconomic fragmentation carries substantial macroeconomic implications, with the IMF estimating potential global output losses from trade fragmentation ranging from 0.2% to 7% of GDP, and losses deepening in scenarios of technological decoupling.<sup>22</sup> Emerging and developing economies are particularly vulnerable to such disruptions. For example, Sub-Saharan Africa could see long-term welfare losses of approximately 4% of GDP due to declining global integration.<sup>23</sup>

The Future of Jobs Survey reveals that around onethird (34%) of surveyed employers see heightened geopolitical tensions and conflicts as a key driver of organizational transformation. Meanwhile just over one-fifth of surveyed organizations identify increased restrictions on trade and investment (23%), as well as subsidies and industrial policies (21%), as factors reshaping their operations.

Geoeconomic concerns vary by economy. Employers in Eastern Asia and Northern America identify rising geoeconomic fragmentation as a key driver shaping labour markets, with nearly half of surveyed employers in these regions citing this trend. These regions also show significant concern about restrictions on global trade and investment, though to a lesser extent than in the Middle East and North Africa. Economies with comparatively high trade volumes with the United States, China, or both – such as Singapore (64%) and the Republic of Korea (71%) – tend to expect greater transformation from each of these geoeconomic trends, as shown in Figure 1.3 below.

#### FIGURE 1.3 Geoeconomic trends, by economy

Share of employers surveyed that expect the stated geoeconomic trend to transform their business.



#### Source

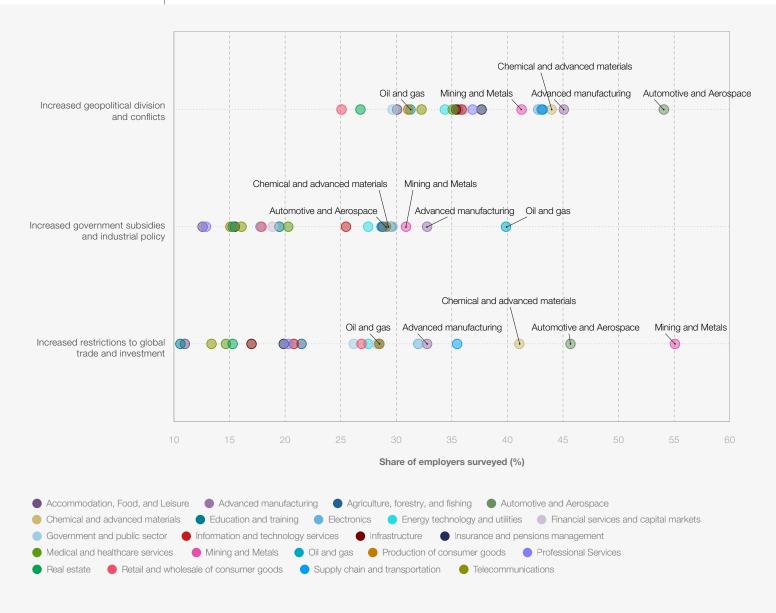
World Economic Forum, Future of Jobs Survey 2024.

On an industry level, as shown in Figure 1.4, sectors with a high degree of dependence on global supply chains, such as Automotive and Aerospace (46%), and Mining and Metals (55%), expect industry transformation driven by trade restrictions. By contrast, industries with less exposure to global markets, such as Education, are less focused on this trend, with fewer than 14% of surveyed employers seeing trade restrictions as disruptive. Mining and Metals, Advanced Manufacturing, and Oil and Gas anticipate industry transformation stemming from increased government subsidies and industrial policies, with, respectively, 31%, 33%, and 40% of employers across these industries citing these factors; whereas more domestic-focused sectors such as Accommodation, Food, and Leisure expect minimal impact from such policies.

The broader implications of geoeconomic fragmentation extend beyond individual business strategies to long-term economic stability and growth, and limit multilateral cooperation on critical issues such as climate change and pandemic preparedness.<sup>24</sup>

#### FIGURE 1.4 Geoeconomic trends, by industry cluster

Share of employers surveyed that expect the stated geoeconomic trend to transform their business.



#### Source

World Economic Forum, Future of Jobs Survey 2024.

#### Green transition

Despite an increasingly complex outlook for global climate negotiations, the green transition remains a priority for many organizations globally. Nearly half of surveyed employers (47%) anticipate the ramping up of efforts and investments to reduce carbon emissions as a key driver for organizational transformation. Similarly, 41% expect that increased efforts and investments to adapt to climate change will drive significant organizational changes. These two trends rank 3rd and 6th, respectively, among the drivers of business transformation identified by the Future of Jobs Survey. These priorities have enabled green jobs to demonstrate resilience in recent years, with hiring rates in green sectors remaining relatively stable even throughout the pandemic-related disruptions of 2020.25

The Future of Jobs Survey finds that the industrial sector – encompassing industries such as Automotive and Aerospace, and Mining and Metals – anticipates significant organizational transformation as companies ramp up efforts to decarbonize: 71% of employers in the Automotive and Aerospace industry and 69% of those in the Mining and Metals industry expect carbon emissions reductions to transform their organizations. Given the carbon-intensive nature of these industries,<sup>26</sup> decarbonization will significantly transform these industries and their workforces, with workers requiring upskilling and reskilling to transition to alternative jobs.

A similar picture emerges across regions. For example, in South-Eastern Asia, 72% of employers expect climate mitigation efforts to transform their organizations by 2030, while over half expect climate adaptation to do so. By contrast, in Central Asia, only 19% of respondents see climate trends as relevant to their business activities.

As countries seek to meet climate goals, questions arise regarding whether their workforces are equipped with the necessary skills to meet the demands of a net-zero future. The shift toward sustainable practices will require specialized expertise which will incur transition costs, particularly for those working in production occupations such as assemblers and fabricators.27 Despite a global 12% increase in workers acquiring green skills between 2022 and 2023, demand continues to outpace supply, with the number of job postings requiring at least one green skill rising by nearly 22% over the same period. To fully capitalize on opportunities created by the green transition and harness them in a way that is fair and inclusive, prioritizing green skilling is essential.

#### **Demographic shifts**

The world is currently experiencing two fundamental demographic shifts: an aging and declining working-age population predominantly in higherincome economies, due to declining birth rates and longer life expectancy, and a growing working-age population in many lower-income economies, where younger populations are progressively entering the labour market. In higher-income nations, aging populations are increasing dependency ratios, potentially putting greater pressure on a smaller pool of working-age individuals and raising concerns about long-term labour availability. In contrast, lower-income economies may benefit from a demographic dividend.

These demographic shifts have a direct impact on global labour supply: currently balanced between lower-income (49%) and higher-income (51%) working-age populations, this distribution is expected to shift by 2050, with lower-income countries projected to hold 59% of the global working-age population.<sup>29</sup> Geographies with a demographic dividend, such as India and Sub-Saharan African nations, will supply nearly two-thirds of new workforce entrants in the coming years.<sup>30</sup>

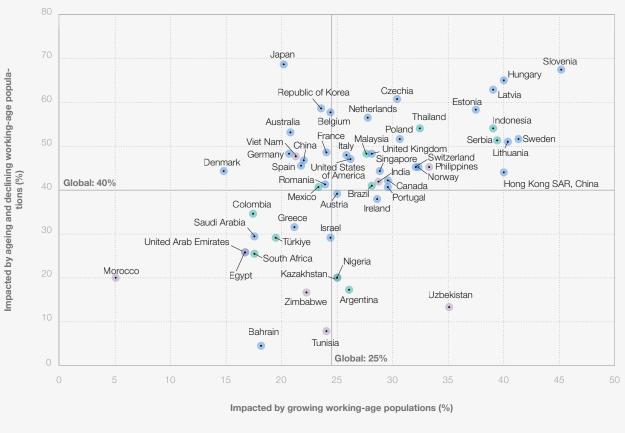
Findings from the Future of Jobs Survey indicate that for 40% of employers worldwide, aging and declining working-age populations are driving transformation, while 25% are being transformed by growing working-age populations. Many highincome economies experience the combined effects of both trends. Certain countries, including Australia, Germany and Japan, experience more significant effects from declining working-age populations. While few companies operating in Sub-Saharan African countries expect to see transformation due to aging and declining working age populations, their expectations regarding the impact of growing working-age populations are also relatively tempered, illustrating relatively greater concern with other macrotrends (Figure 1.5).

Compared to global averages, employers facing the effects of aging population are more pessimistic about talent availability and expect facing bigger challenges in attracting industry talent. More encouragingly, with a shrinking labour pool, many of these companies (60%) increasingly prioritize transitioning current employees into growing roles as a key workforce strategy. Some observers have also predicted that aging high-income economies with shrinking labour forces might increasingly look to deeper automation to counterbalance some of these demographic trends.<sup>31</sup> For example, the Future of Jobs Survey finds that employers expecting to be impacted by aging populations are more likely to accelerate process automation (79% versus 73% globally) and advance workforce augmentation (67% versus 63% globally) in the next five years.

Conversely, many economies' actual ability to leverage demographic dividends will depend on their accompanying success, or otherwise, in inclusive job creation. According to the World Bank, over the next 10 years, an unprecedented 1.2 billion young people in emerging economies will become working-age adults, while the job market in these economies is only expected to create 420 million additional jobs - risking leaving nearly 800 million young people in economic uncertainty.32 Encouragingly, employers responding to the Future of Jobs Survey that identify growing working-age populations as a driver of transformation plan to prioritize reskilling and upskilling, with 92% indicating they will be focusing on these strategies by 2030.

Dual impact of declining and growing labour forces, by economy and income group, 2025-2030

Share of surveyed employers impacted by growing working-age populations and share of surveyed employers impacted by ageing and declining working-age populations.



💻 High income 🛛 🔳 Lower-middle income 🗖 Upper-middle income

#### Source

World Economic Forum, Future of Jobs Survey 2024.

2

# Jobs outlook

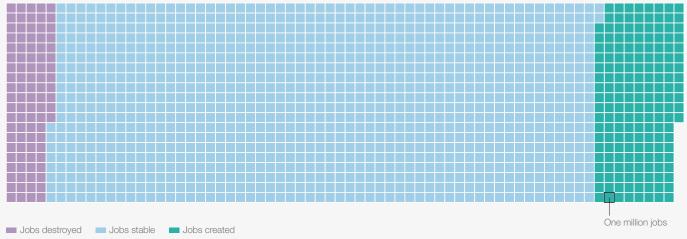
Technological change, the green transition, economic uncertainty, geoeconomic fragmentation and demographic shifts are reshaping the labour market. This chapter analyses how employers expect various kinds of jobs to grow and decline in response to these macrotrends and assesses the role of each of these trends in contributing to labour-market transformation.

### 2.1 **Total job growth and loss**

By combining respondents' job growth and decline expectations with hard data on global employment collected by the ILO, the *Future of Jobs Report 2025* estimates that, by 2030, on current predictions, new job creation and job displacement due to macrotrends will represent a combined total of 22% of today's total (formal) jobs. Specifically, macrotrend-driven creation of new jobs is estimated to amount to 170 million jobs, equivalent to 14% of today's total employment. This growth is expected to be offset by the displacement of 92 million current jobs, or 8% of total employment, resulting in a net growth of 78 million jobs (7% of today's total employment) by 2030, Figure 2.1 illustrates the total number of jobs expected to be created and displaced due to labour-market transformation relative to total employment today.

#### FIGURE 2.1 Global employment change by 2030

In the next five years, 170 million jobs are projected to be created and 92 million jobs to be displaced, constituting a structural labour market churn of 22% of the 1.2 billion formal jobs in the dataset being studied. This amounts to a net employment increase of 7%, or 78 million jobs.



#### Source

#### Note

Please refer to the Appendix for the methodology.

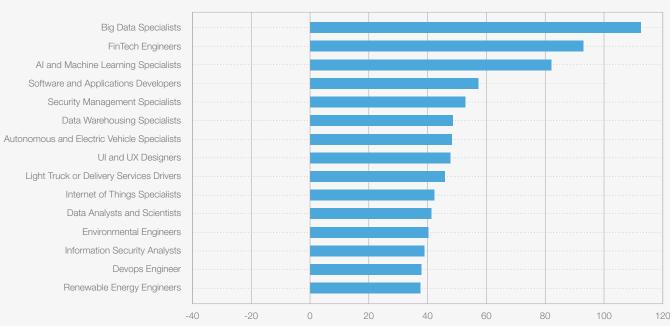
World Economic Forum, Future of Jobs Survey 2024; International Labour Organization, *ILOSTAT.* 

#### Growing and declining jobs

The Future of Jobs Survey gathered insights from employers on job roles expected to grow, decline or remain stable within their organizations over the next five years. Respondents were then asked to identify the macrotrends and technological advancements driving job growth and decline in their organizations. According to the surveyed executives, the fastestgrowing job roles by 2030, in percentage terms, tend to be driven by technological developments, such as advancements in Al and robotics and increasing digital access (See section 2.2). Leading the fastest growing jobs list are roles such as Big Data Specialist, FinTech Engineers, AI and Machine Learning Specialists and Software and Applications Developers (Figure 2.2).

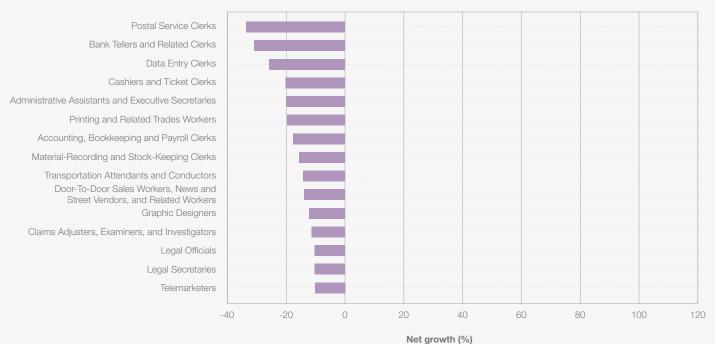
#### FIGURE 2.2 Fastest-growing and fastest-declining jobs, 2025-2030

Top jobs by fastest net growth and net decline, projected by surveyed employers



#### Top fastest growing jobs

Net growth (%)



#### Top fastest declining jobs

#### Source

World Economic Forum, Future of Jobs Survey 2024.

While technology trends partly contribute to the growth of security-related roles such as Security Management Specialists, which ranks among the top five fastest-growing roles, increased geopolitical fragmentation contributes in large part to the growth of this role. Driven by the same combination of technology and geoeconomic trends, another security-related role, Information Security Analysts, also appears among the top 15.

Green and energy-transition roles, including Autonomous and Electric Vehicle Specialists, Environmental Engineers, and Renewable Energy Engineers, also feature within the top 15 fastest-growing roles. The growth of these roles is driven by increased efforts and investments to reduce carbon emissions and adapt to climate change. The growing adoption of energy generation, storage and distribution technologies, alongside other technology trends, are additional contributing factors.

By contrast, respondents expect the fastestdeclining roles to include various clerical roles, such as Cashiers and Ticket Clerks, alongside Administrative Assistants and Executive Secretaries, Printing Workers, and Accountants and Auditors. Broadening digital access, AI and information processing technologies, and robots and autonomous systems are the primary drivers for this decline. Aging and declining working-age populations and slower economic growth also contribute to the decline in clerical roles.

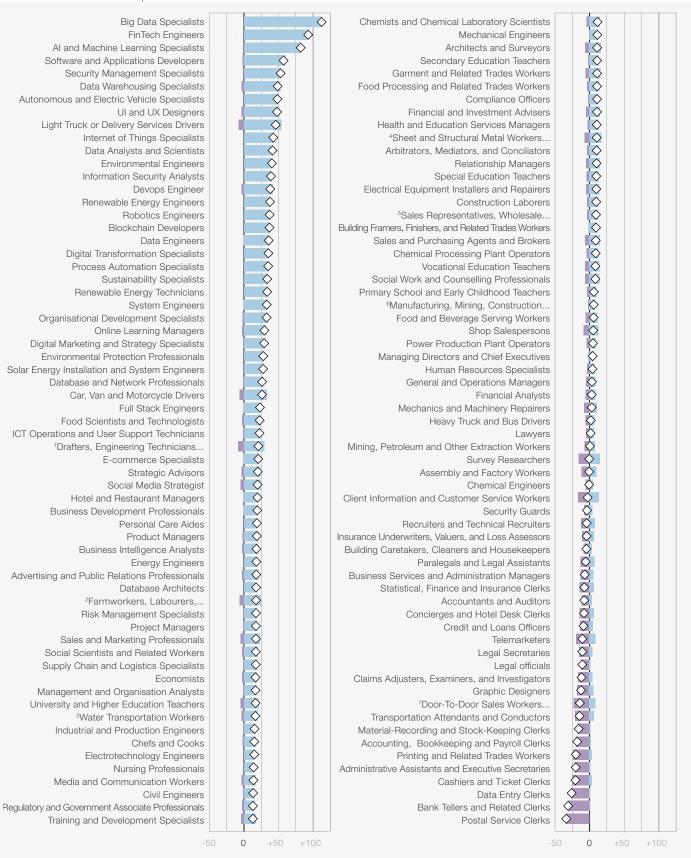
Figure 2.3 provides the percentage growth and decline, alongside net growth outlook, for all roles featured in the Future of Jobs Survey that meet response thresholds.



#### FIGURE 2.3

#### Job growth and decline (%), 2025-2030

Projected job creation (blue) and displacement (purple) between 2025 and 2030, as a percentage of total current employment in the corresponding job role. The projected net growth or decline for each occupation over the next five years (diamonds) is calculated by subtracting total job displacement from total job creation.



Share of current workforce (%)

Jobs created Jobs displaced Vet growth or decline

#### Note

Share of current workforce (%)

#### Source

World Economic Forum, Future of Jobs Survey 2024.

<sup>1</sup>Drafters, Engineering Technicians, and Mapping Technicians; <sup>2</sup>Farmworkers, Labourers, and Other Agricultural Workers; <sup>3</sup>Water Transportation Workers, including Ship and Marine Cargo Workers, Controllers, and Technicians; <sup>4</sup>Sheet and Structural Metal Workers, Moulders and Welders; <sup>5</sup>Sales Representatives, Wholesale and Manufacturing, Technical and Scientific Products; <sup>6</sup>Manufacturing, Mining, Construction, and Distribution Managers; <sup>7</sup>Door-To-Door Sales Workers, News and Street Vendors, and Related Workers



To approximate the total impact of job growth and decline, this report combines the job outlook expectations of surveyed employers with estimates of the total number of workers in the corresponding roles, based on ILO employment data. However, the Future of Jobs data set only provides information on roles for which survey data availability meets a minimum coverage threshold, and corresponds to 1.18 billion workers in total, which is a subset of the ILO's total employment data. The conclusions derived for this subset should not be treated as comprehensive, but rather as providing insights on selected segments of the global workforce.

Figure 2.4 shows the 15 largest net growth and decline job roles in absolute numbers. The highest growth in absolute numbers of jobs is driven by roles that make up the core of many economies.

Farmworkers top the list of the largest growing job roles in the next five years and are expected to see 35 million more jobs by 2030. Green transition trends, including increased efforts and investments to reduce carbon emissions and adapt to climate change, are the driving forces behind this job growth. Broadening digital access and rising cost of living also contribute to the growth of this job role, which currently employs more than 200 million workers worldwide.

Delivery Drivers, Building Construction Workers, Salespersons and Food Processing Workers are also among the largest-growing job types in the next five years. While technology is impacting growth in almost all occupations, demographic trends and economic trends also contribute to the projected net increase in these job roles.

Care jobs, including Nursing Professionals, Social Work and Counselling Professionals, and Personal

Care Aides are expected to see significant growth over the next five years, driven by demographic trends, especially aging populations. Increased focus on labour and social issues is also identified as a contributing factor.

Education-related roles such as University and Higher Education Teachers and Secondary Education Teachers are also predicted to be among the biggest job creators in absolute terms over the next five years globally. Broadening digital access and growing working-age populations are the top two contributing drivers of this job growth, while increased focus on labour and social issues is seen as an additional factor.

Additionally, Software and Applications Developers, General and Operations Managers, and Project Managers, are among the job categories driving the most net job growth.

Conversely, in parallel to the fastest-declining job roles, Clerical and Secretarial Workers are among the job categories predicted to see the largest net job decline in absolute terms (Figure 2.5).

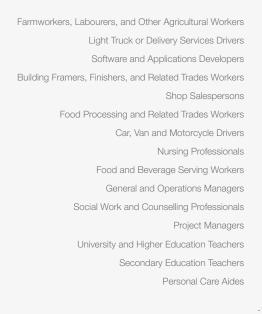
Section 2.2 further analyses the impact of each of the five identified labour-market macrotrends on growing and declining jobs. However, there is also a group of large and growing jobs that are driven by many trends in combination. This includes Building Framers, Finishers, and Related Trades Workers; Light Truck or Delivery Services Drivers; Car, Van and Motorcycle Drivers; General and Operations Managers; and Social Work and Counselling Professionals. For these jobs, it is the broad sweep of transformative forces, rather than one or two specific labour-market drivers, which is generating growth expectations.

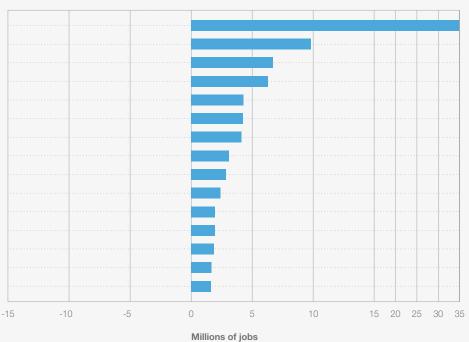
#### FIGURE 2.4

#### Largest growing and declining jobs, 2025-2030

Top jobs, ordered by largest net job growth and decline, in absolute terms, calculated based on ILO occupation employment statistics and expected net growth reported by employers surveyed.

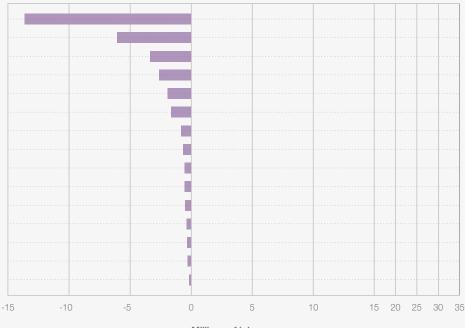
#### Top largest growing jobs





#### Top largest declining jobs

Cashiers and Ticket Clerks



#### Administrative Assistants and Executive Secretaries Building Caretakers, Cleaners and Housekeepers Material-Recording and Stock-Keeping Clerks Printing and Related Trades Workers Accounting, Bookkeeping and Payroll Clerks Accountants and Auditors Transportation Attendants and Conductors Security Guards Bank Tellers and Related Clerks Data Entry Clerks Client Information and Customer Service Workers Graphic Designers Business Services and Administration Managers Claims Adjusters, Examiners, and Investigators

Millions of jobs

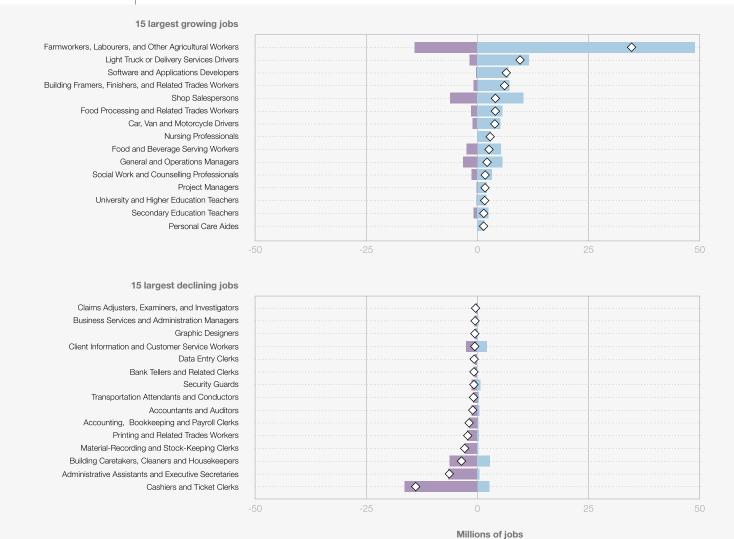
#### Source

World Economic Forum, Future of Jobs Survey 2024; International Labour Organization, ILOSTAT.

#### FIGURE 2.5

#### Job growth and decline (number of employees), 2025-2030

Projected job creation (blue) and displacement (purple) between 2025 and 2030, in absolute number of jobs, estimated by surveyed employers and calculated based on ILO occupational employment statistics. Projected net number of jobs created or displaced for each occupation over the next five years (diamonds) is calculated by subtracting total job displacement from total job creation.



#### Source

World Economic Forum, Future of Jobs Survey 2024; International Labour Organization, ILOSTAT.



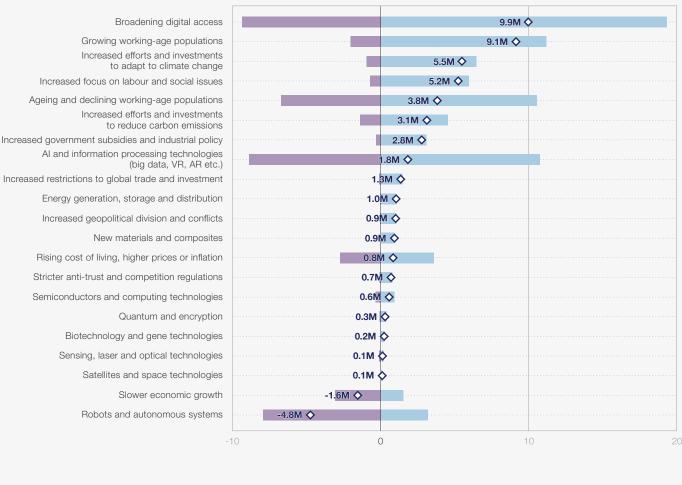
### 2.2 Expected impact of macrotrends on employment

The remainder of this chapter discusses how Future of Jobs Survey respondents expect each of the five macrotrends driving labour market transformation – technological change, geoeconomic fragmentation, green transition, demographic shifts and economic uncertainty – to influence job growth and decline by 2030 (see Figure 2.6).

#### FIGURE 2.6

#### Expected impact of macrotrends and technology trends on jobs, 2025-2030

Projected job creation attributed to each trend (blue) and projected job displacement attributed to each trend (purple) between 2025 and 2030, based on the job growth and decline attribution expectations of surveyed employers and ILO employment figures by occupation. The projected net number of jobs created or destroyed attributed to each trend in the next five years (diamonds) is calculated by subtracting the total number of declining jobs from the total number of growing jobs. The Appendix provides additional details and the data behind this figure.



Jobs created Jobs displaced Vet effect

#### Source

World Economic Forum, Future of Jobs Survey 2024; International Labour Organization, ILOSTAT.

#### Technological change

Technology is predicted to be the most divergent driver of labour-market change, with broadening digital access expected to both create and displace more jobs than any other macrotrend (19 million and 9 million, respectively). Meanwhile, trends in Al and information processing technology are expected to create 11 million jobs, while simultaneously displacing 9 million others, more than any other technology trend. Robotics and autonomous systems are expected to be the largest net job displacer, with a net decline of 5 million jobs.

These three trends – broadening digital access, advancements in AI and information processing, and robotics and autonomous systems technologies – also feature prominently as drivers of the fastest growing and declining jobs. In fact, they are among the top drivers of growth for the 10 fastest-growing jobs: Al and information processing technologies are among the top three drivers of growth for all 10 of these jobs; whereas broadening digital access is a top three driver for nine out of these 10 (all except Autonomous and Electric Vehicle Specialists); and robotics and autonomous systems technologies for seven out of these 10 (all except Security Management Specialists, UI and UX Designers, and Light Truck or Delivery Services Drivers). In addition, of the 10 fastest- and 10 largest-declining roles, only two (Printing and Related Trades Workers, and Building Caretakers, Cleaners and Housekeepers) feature other trends among their top three drivers of job decline.

By contrast, the largest-growth jobs are influenced by a broader range of macrotrends. The three technology-based trends stand out as expected growth drivers only for light truck and delivery services drivers, software and applications developers, and nursing professionals. This projected growth in demand for nursing professionals is also driven by aging and declining working-age populations, further explored in the demographic shifts section of this chapter.

The presence of both Graphic Designers and Legal Secretaries just outside the top 10 fastest-declining

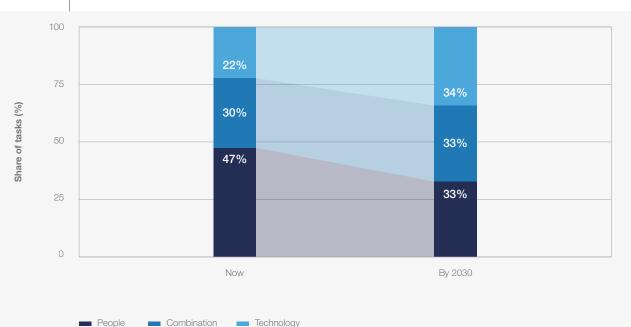
job roles, a first-time prediction not seen in previous editions of the *Future of Jobs Report*, may illustrate GenAl's increasing capacity to perform knowledge work. Job decline in both roles is seen as driven by both Al and information processing technologies as well as by broadening digital access. This is a major change from the report's 2023 edition, when Graphic Designers were considered a moderately growing job and Legal Secretaries did not feature in the expected job growth/decline list.

### The Shifting human-machine frontier: automation versus augmentation

The interplay between humans, machines and algorithms is redefining job roles across industries. Automation is expected to drive changes in people's ways of working, with the proportional share of tasks performed solely or predominantly by humans expected to decline as technology becomes more versatile. Future of Jobs Survey respondents estimate that, today, 47% of work tasks are performed mainly by humans alone, with 22% performed mainly by technology (machines and algorithms), and 30% completed by a combination of both. By 2030, employers expect these proportions to be nearly evenly split across these three categories/approaches (Figure 2.7).

#### FIGURE 2.7 The shifting human-machine frontier: automation versus augmentation, 2025-2030

Share of total work tasks expected to be delivered predominantly by human workers, by technology (machines and algorithms), or by a combination of both.



#### Source

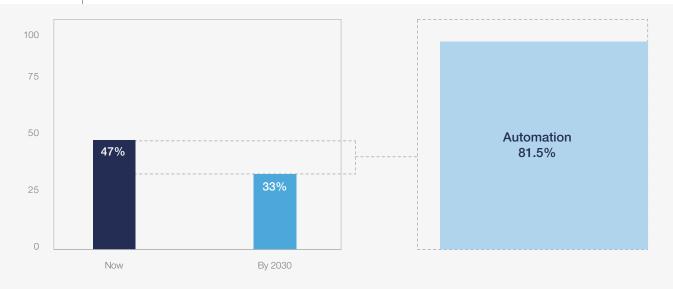
World Economic Forum, Future of Jobs Survey 2024.

Globally, the expected reduction in the proportion of work tasks performed by humans is driven primarily by increased automation. Of the nearly 15 percentage point reduction in the proportion of total work tasks delivered by humans in 2030 versus 2025, nearly 82% is attributable to advancing automation, while 19% is projected to derive from expanded human-machine collaboration (Figure 2.8).

#### FIGURE 2.8

### Expected shift in the human share of work task delivery in total firm output driven by automation versus augmentation, 2025-2030, global average

Change in proportion of human-performed tasks attributable to increasing automation.



#### Source

World Economic Forum, Future of Jobs Survey 2024.

Importantly, this analysis only compares the 2025 and 2030 proportions of total task delivery attributable to human employees, technology or collaboration between the two, respectively, and does not consider the potential change in the absolute amount of work tasks (output) getting done. In other words, both machines and humans might be significantly more productive in 2030 – performing more or higher value tasks in the same or less amount of time than it would have taken them to do so in 2025 – so any concern about humans "running out of things to do" due to automation would be misplaced.

However, a potentially more complex question raised by these projections concerns the on-going share of total economic value creation participated in by human workers: If an increasing amount of a firm's total output and income is derived from advanced machines and proprietary algorithms, to what extent will human workers be able to share in this prosperity?33 It is in this context that the relevance of the third category/approach, humanmachine collaboration (or "augmentation") should be highlighted: technology could be designed and developed in a way that complements and enhances, rather than displaces, human work; and, as discussed further in the next chapter (Box 3.1), talent development, reskilling and upskilling strategies may be designed and delivered in a way to enable and optimize human-machine collaboration.<sup>34</sup> It is the investment decisions and policy choices made today that will shape these outcomes in the coming years.35

At an industry level, while all sectors are expected to see a reduction in the proportion of work tasks performed by humans alone by 2030, they differ in the share of this reduction that is projected to be attributable to automation versus augmentation and human-machine collaboration (Figure 2.9). Insurance and Pensions Management and Telecommunications are leading the automation trend – with more than 95% of human standalone task share reduction in both sectors expected to derive from deeper automation. By contrast, nearly half of the proportional reduction in work tasks done by humans alone in the Medical and Healthcare Services and Government and Public sectors are instead expected to be driven by increased augmentation and human-machine collaboration.

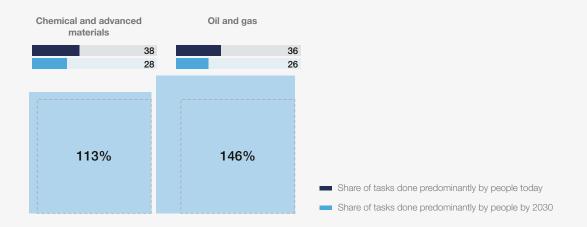
In four sectors – Oil and Gas, Chemicals and Advanced Materials, Financial Services and Capital Markets, and Electronics – automation is projected not only to reduce the proportion of total work tasks predominantly done today standalone by humans, but even to reduce the share of total work tasks currently delivered through humanmachine collaboration (resulting in calculated "automation shares" of more than 100%, as depicted in Figure 2.9).

#### FIGURE 2.9

## Expected shift in the human share of work task delivery in total firm output driven by automation versus augmentation, 2025-2030, by industry

Change in proportion of human-performed tasks attributable to increasing automation.





#### Source

World Economic Forum, Future of Jobs Survey 2024.

#### Geoeconomic fragmentation

The Future of Jobs Survey asked employers about the impacts of three key geoeconomic trends: increased government subsidies and industrial policy; increased geopolitical division and conflicts; and increased restrictions to global trade and investment. On average, respondents expect these trends to be net job creators. Although projected to be three of the four lowest net job-creating macrotrends – above only slower economic growth – these estimates still equate to 5 million net additional jobs by 2030, most prominently in logistics, security and strategy roles.

Increased government subsidies and industrial policy are expected to drive increased demand for Business Intelligence Analysts and Business Development Professionals. Increased restrictions to global trade and investment are also predicted to drive growth in these roles, as well as in Strategic Advisors and Supply Chain and Logistics specialists. Increased geopolitical division and conflicts, meanwhile, are projected to drive growth in all of the aforementioned roles, in addition to Information Security Analysts and Security Management Specialists.

The Future of Jobs Survey also asked respondents whether they expected to offshore parts of their workforce, or move operations closer to home through reshoring, nearshoring, or friendshoring. An analysis of the responses to these questions for the subset of employers who expect geoeconomic trends to affect their business provides insight into how these trends affect workforce decisions. Table 2.1 shows the share of employers who expect each geoeconomic trend to transform their business that additionally also expect to offshore or re-shore significant segments of their workforce. All three geoeconomic trends analysed appear to drive more re-shoring, with respondents who expect their business to be transformed by increasing restrictions to global trade and investment 50% more likely to plan to reshore than the global average employer. Employers who expect government subsidies and industrial policy to transform their business, however, are almost as likely to plan to offshore as they are to reshore

#### TABLE 2.1

Impact of geoeconomic trends on off-shoring and re-shoring

Share of employers who expect the specified trend to transform their business who plan to 'off-shore' or 're-shore' significant segments of their workforce.

	Off-shore	Re-shoring
Global Average	8.3	9.5
Increased government subsidies and industrial policy	11.2	12.4
Increased geopolitical division and conflicts	9.3	13.2
Increased restrictions to global trade and investment	8.7	14.5

Source: World Economic Forum, Future of Jobs Survey 2024.

#### Green transition

Climate change adaptation is expected to be the third-largest contributor to net growth in global jobs by 2030, projected to contribute an additional 5 million net jobs, while climate-change mitigation comes in 6th with an additional 3 million net jobs. Trends in energy generation, storage and distribution, meanwhile, are expected to create an additional 1 million net jobs – the second-largest technology-based contribution to net job growth (after trends in Al and information processing technology).

Expectations around climate-change adaptation and mitigation trends are pushing Environmental

Engineers and Renewable Energy Engineers into the top 15 fastest-growing jobs, as well as driving growth in roles such as Sustainability Specialists and Renewable Energy Technicians. This is corroborated by evidence that "green hiring" has consistently outperformed overall labour-market hiring trends in recent years (Box 2.1).

Both green transition-related macrotrends are also expected to drive some of the largest labour-market transformation, in absolute terms, in the global economy. This includes being the largest drivers of both job growth and decline in Farmworkers, Labourers, and Other Agricultural Workers as well as being among the strongest drivers of net job growth for Building Framers, Finishers and Related Trades Workers.

#### BOX 2.1 Green hiring rates

In collaboration with LinkedIn

LinkedIn data, generated up to July 2024 for the *Future of Jobs Report 2025*, assesses the progression of green hiring rates compared to overall hiring rates. By comparing the share of LinkedIn members with green skills being hired with the overall hiring rate, it is possible to assess differences in employment outcomes between these two groups. Figure B2.1 shows that LinkedIn members with green skills are being hired at a significantly higher rate than other members. Despite a dip in green hiring throughout 2021 and early 2022, green hiring has consistently outperformed the overall hiring, and this outperformance has been consistently getting larger since its low point of May 2022.

#### FIGURE B2.1

#### Green hiring rates

Outperformance in hiring rate for LinkedIn members with green skills versus all LinkedIn members, percent, January 2021 to July 2024



Month

#### Source

LinkedIn analysis.

#### **Demographic shifts**

Growing working-age populations are the macrotrend expected to be the second-biggest driver of global net job creation – with 9 million net additional jobs by 2030 – surpassed only by broadening digital access. Aging and declining working-age populations, meanwhile, are simultaneously expected to be, overall, the third-largest driver of job creation (11 million additional jobs) as well the primary factor in a global reduction in 7 million jobs, making this trend the 5th largest driver of net job creation, on balance, resulting in 4 million net additional jobs by 2030.

These two demographic trends are notably among the top three drivers of growth in roles for Assembly and Factory Workers and Vocational Education Teachers. Aging and declining working-age populations also appear to drive growth in roles for Nurses, Sales and Hospitality professionals as well as being among the largest drivers of growth for shop salespersons, wholesale and manufacturing sales representatives, food and beverage serving workers and food processing and related trades workers. Growing working age populations, meanwhile, are expected to be a key driver of growth for Education roles, including University and Higher Education Teachers and Secondary Education Teachers.

#### Economic uncertainty

Slower economic growth is the only macrotrend that Future of Jobs Survey respondents expect to drive more job destruction (3 million jobs) than creation (2 million jobs), while rising cost of living and higher prices are expected to drive job creation of 4 million jobs and displacement of 3 million jobs by 2030.

These two trends are both significant contributors to an expected decline in roles for Building Caretakers, Cleaners, and Housekeepers, while slower economic growth is also among the top contributors to job decline in Business Services and Administration Managers, General and Operations Managers, and Sales and Marketing Professionals.

However, slower economic growth is also projected to be a top driver for growth in roles such as Business Development Professionals and Sales Representatives. Growth in roles driven by increasing cost of living is concentrated in jobs associated with finding ways of increasing efficiency, such as Al and Machine Learning Specialists, Business Development Professionals, and Supply Chain and Logistics Specialists.

# 3 Skills outlook

This chapter presents the results of the Future of Jobs Survey concerning skills, as classified by the World Economic Forum's Global Skills Taxonomy.<sup>36</sup> It begins by analysing respondents' expectations of skill disruption by 2030, as well as the skills currently required for work and whether employers anticipate these skills will increase or decrease in importance over the next five years. The chapter then assesses the skills expected to become core skills by 2030, based on their current significance and anticipated evolution. It also contrasts the skills required for growing and declining jobs, revealing windows of opportunity for enabling dynamic job transitions. Finally, it offers an overview of the key drivers of skill transformation and concludes with an exploration of anticipated training needs and trends.



### 3.1 Expected disruptions to skills

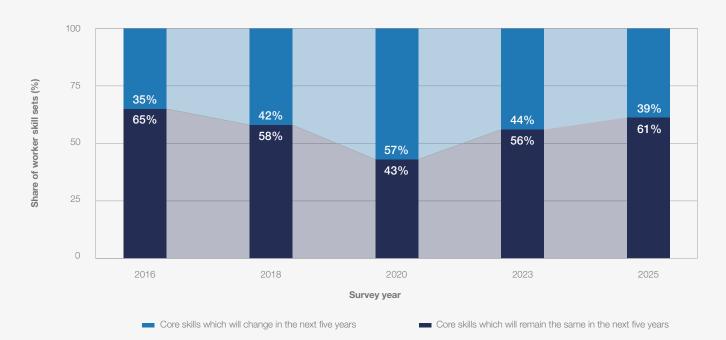
When the Future of Jobs Report was first published in 2016, surveyed employers expected that 35% of workers' skills would face disruption in the coming years. The COVID-19 pandemic, along with rapid advancements in frontier technologies, led to significant disruptions in working life and skills, prompting respondents to predict high levels of skills instability in subsequent editions of the report. The post-pandemic period, however, has seen employers adapt to these changes. The accelerated adoption of digital tools, remote work solutions, and advanced technologies such as machine learning and generative AI provided companies with relevant experience to better understand the critical skills required to navigate rapid technological change.

Despite current uncertainty around the long-term impact of generative AI, the expected ongoing pace of disruption of skills has begun to stabilize, albeit at a high level. Overall, employers expect 39% of workers' core skills to change by 2030 (Figure 3.1). While this represents significant ongoing skill disruption, it is down from 44% in 2023. One element contributing to this finding may be a growing focus on continuous learning, upskilling and reskilling programmes, enabling companies to better anticipate and manage future skill requirements. This is reflected in an increasing share of the workforce (50%) having completing training as part of long-term learning strategies compared to 2023 (41%) - a finding that is consistent across almost all industries. This is discussed further in section 3.3.

#### FIGURE 3.1

#### Disruptions to skills

Evolution in the share of workers' core skills expected to change and to remain the same within the next five years, 2016-2025.



#### Source

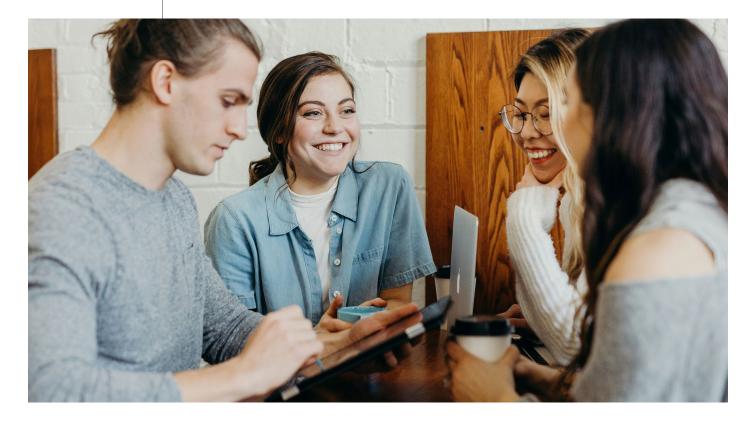
World Economic Forum Future of Jobs Surveys 2016, 2018, 2020, 2022 and 2024.

Values reported are the mean skill stability percentages estimated by employers surveyed in each edition of the survey.

However, the extent of skills disruption is not uniform across economies and industries. Lowermiddle and upper middle-income economies and

Note

those affected by conflict tend to expect greater disruption in workers' skills, while high-income economies foresee less instability (Figure 3.2).



#### FIGURE 3.2

#### Disruption to skills 2025-2030, by economy

Share of workers' core skills that will change in the next five years

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Netherlands 200/		30%		Netherlands
Denmark 28%		20%		Denmark

#### Share of skills expected to change (%)

#### Source

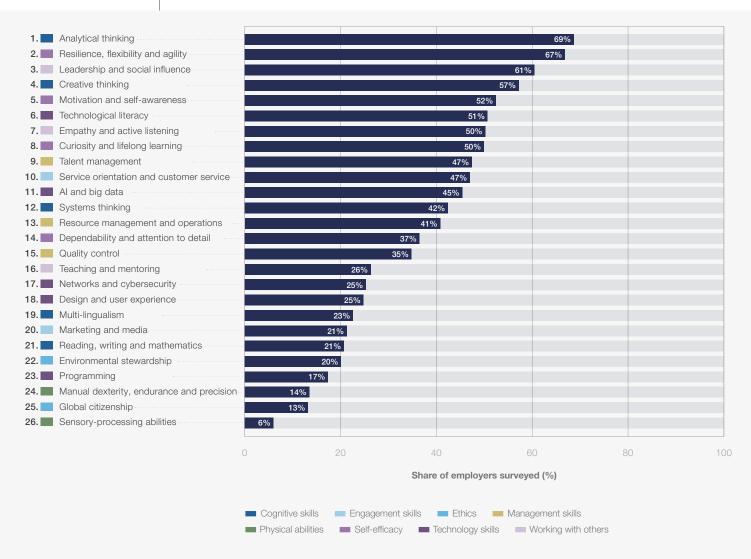
World Economic Forum, Future of Jobs Survey 2024.

Note Values reported are the mean skill stability percentages estimated by organizations surveyed.

#### FIGURE 3.3

#### Core skills in 2025

Share of employers who consider the stated skills to be core skills for their workforce.



#### Source

World Economic Forum, Future of Jobs Survey 2024.

Note

The Future of Jobs Survey uses the World Economic Forum's Global Skills Taxonomy.

#### Core skills

Figure 3.3 shows the core skills Future of Jobs Survey respondents identify as required by workers today. As in the two previous editions of this report, analytical thinking remains the top core skill for employers, with seven out of 10 companies considering it as essential. This is followed by resilience, flexibility and agility, along with leadership and social influence, underscoring the critical role of adaptability and collaboration alongside cognitive skills. Creative thinking and motivation and self-awareness rank fourth and fifth, respectively. This combination of cognitive, self-efficacy and interpersonal skills within the top five emphasizes the importance ascribed by respondents to having an agile, innovative and collaborative workforce, where both problem-solving abilities and personal resilience are critical for success.

The top 10 core skills are complemented by

technological literacy, empathy and active listening, curiosity and lifelong learning, talent management, and service orientation and customer service. Skills that reflect the important role of technical proficiency, strong interpersonal abilities, emotional intelligence, and a commitment to continuous learning demonstrate respondents' expectation that workers must balance hard and soft skills to thrive in today's work environments.

While the core skill sets are relatively consistent across broader industries and geographical regions, there are notable distinctions within specific sectors and geographies. For instance, the Insurance and Pensions Management industry places a significantly higher value on curiosity and lifelong learning, with 83% of respondents identifying it as a core skill compared to the global average of 50%. Resilience, flexibility and agility are also considered as especially crucial in this sector, with 94% of respondents emphasizing their importance versus a global average of 67%. The Mining and Metals industry distinguishes itself with a strong focus on environmental stewardship, as 50% of respondents view it as a core skill – 2.5 times the global average. This emphasis on environmental skills is also evident in the Government and Public Sector, where it is double the global average. Additionally, both the Mining and Metals and Advanced Manufacturing industries place higher importance on manual dexterity, endurance and precision skills compared to other sectors, with roughly 25% of respondents identifying this as a core skill.

The Telecommunications industry stands out for prioritizing design and user experience, networks and cybersecurity, and programming skills, with twice the global average of respondents considering these as core skills in their organizations. Similarly, the Information and Technology Services sector places greater emphasis on programming skills.

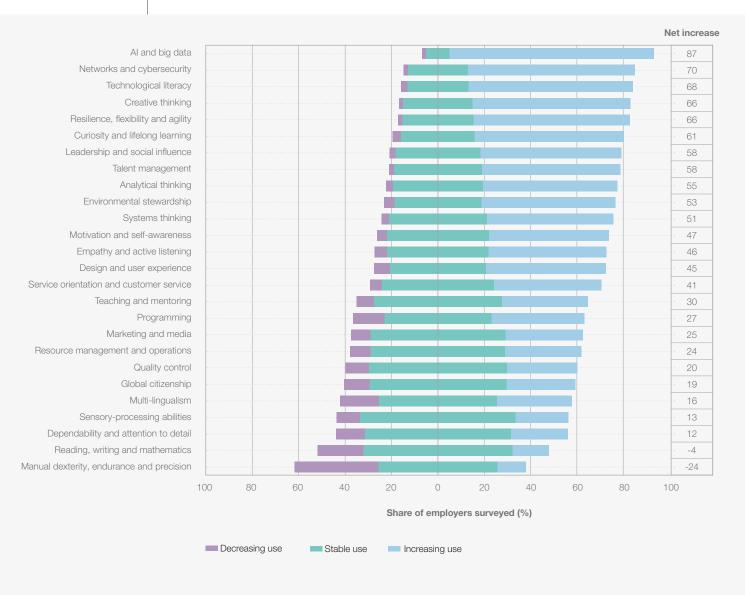
Compared to the 2023 edition of this report, some significant shifts in core skills have emerged. Leadership and social influence, AI and big data, talent management, and service orientation and customer service have all seen marked increases in relevance. Conversely, skills like dependability, attention to detail, and quality control have decreased in importance for organizations compared to the 2023 data.

Overall, leadership and social influence, resilience, flexibility and agility, and AI and big data have seen the most substantial increase in importance, with 22, 17, and 17 percentage-point rises, respectively, in the share of respondents identifying them as core skills compared to the 2023 edition of the report.



## FIGURE 3.4 | Skills on the rise, 2025-2030

Share of employers that consider skills to be increasing, decreasing, or remaining stable in importance. Skills are ranked based on net increase, which is the difference between the share of employers that consider a skill category to be increasing in use and those that consider it to be decreasing in use.



#### Source

World Economic Forum, Future of Jobs Survey 2024.

Note

The Future of Jobs Survey uses the World Economic Forum's Global Skills Taxonomy.

# **Skill evolution**

According to employer expectations for the evolution of skills in the next five years, as shown in Figure 3.4, technological skills are projected to grow in importance more rapidly than any other type of skills. Among these, **AI and big data** top the list as the fastest-growing skills, followed closely by **networks and cybersecurity** and **technological literacy**. Complementing these technological skills, creative thinking and two socio-emotional attitudes – resilience, flexibility, and agility, along with **curiosity and lifelong learning** – are also seen as rising in importance. Also ranking among the top 10 skills on the rise are leadership and social influence, talent management, analytical thinking, and environmental stewardship. These skills highlight the need for workers who can lead teams, manage talent effectively and adapt to sustainability and green transitions in an increasingly complex and interconnected world.

At the other end of the spectrum, respondents identified sensory-processing abilities; reading, writing and mathematics; dependability and attention to detail; quality control; and global citizenship as among the most stable skills. However, a small net decline is anticipated in reading, writing, and mathematics. Manual dexterity, endurance, and precision stands out with a notable anticipated net decline, with 24% of respondents foreseeing a decrease in its importance. The declining relevance of physical abilities has been a trend in previous *Future of Jobs Reports*, but this is the first time it has seen a net negative decline.

Comparisons with previous editions of the Future of Jobs Survey reveal a notable shift in skill demands, with technology skills such as AI and big data, networks and cybersecurity, and environmental stewardship showing the largest net increase in the share of respondents identifying them as critical for the next five years. Conversely, skills like reading, writing, and mathematics; manual dexterity, endurance, and precision; and dependability and attention to detail have seen the largest decline in projected future demand.

Figure 3.5 illustrates industry-specific variations in the evolving importance of skills. Al and big data are predicted to see significant growth across nearly all sectors. In the top 10 industries, over 90% of respondents expect this skill to increase in use. The lowest growth shares are observed in Agriculture, Forestry, and Fishing (70%) and Accommodation, Food, and ILisure industries (69%). This highlights a broad-based but uneven embrace of advanced technological skills across industries. Resilience, flexibility and agility are growing in demand more quickly in the Agriculture, Forestry, and Fishing; Telecommunications; and Information and Technology Services sectors. The Insurance and Pensions Management industry stands out as the industry forecasting the fastest growth in importance in creative thinking skills. This industry, along with Education and Training and Telecommunications forecast fast growth in the importance of curiosity and lifelong learning.

Increasing skill demands in environmental stewardship skills are particularly evident in the Oil and Gas and Chemical and Advanced Materials industries.

Furthermore, the net decline in the demand for manual dexterity, endurance, and precision skills is observed across sectors, with the most significant decreases in Energy Technology and Utilities, Chemicals and Advanced Materials, and Information Technology Services, each experiencing declines exceeding 39%. By contrast, the Accommodation, Food, and Leisure sector and the Automotive and Aerospace industries show the smallest declines, with net reductions below 14%.



# FIGURE 3.5

## Top 10 industries for increasing skill requirements, 2025-2030

Share of employers considering skills within the corresponding skill category to be growing in importance for their workforce from 2025 to 2030, as opposed to having stable or declining importance. The top 10 industries out of the 22 studied in this report are selected in each case and ranked.

# AI and big data

1. Automotive and aerospace	100%
2. Telecommunications	100%
3. Professional services	98%
4. Information and technology services	97%
5. Insurance and pensions management	97%
6. Financial services and capital markets	95%
7. Supply chain and transportation	94%
8. Medical and healthcare services	92%
9. Energy technology and utilities	90%
10.Government and public sector	90%

# Networks and cybersecurity

1. Financial services and capital markets	82%
2. Insurance and pensions management	81%
3. Energy technology and utilities	79%
4. Medical and healthcare services	78%
5. Automotive and aerospace	78%
6. Government and public sector	78%
7. Supply chain and transportation	76%
8. Telecommunications	75%
9. Advanced manufacturing	74%
10.Information and technology services	74%

## **Technological literacy**

1. Automotive and aerospace	84%
2. Financial services and capital markets	84%
3. Medical and healthcare services	81%
4. Insurance and pensions management	81%
5. Supply chain and transportation	77%
6. Education and training	76%
7. Oil and gas	76%
8. Professional services	75%
9. Advanced manufacturing	73%
10.Production of consumer goods	72%

# Resilience, flexibility and agility

1. Agriculture, forestry, and fishing	83%
2. Telecommunications	79%
3. Information and technology services	78%
4. Production of consumer goods	73%
5. Insurance and pensions management	72%
6. Automotive and aerospace	71%
7. Advanced manufacturing	71%
8. Retail and wholesale of consumer goods	69%
9. Financial services and capital markets	68%
10.Electronics	68%

# Creative thinking

1. Insurance and pensions management	86%
2. Education and training	79%
3. Medical and healthcare services	76%
4. Advanced manufacturing	76%
5. Telecommunications	75%
6. Information and technology services	75%
7. Real estate	73%
8. Professional services	69%
9. Supply chain and transportation	69%
10.Production of consumer goods	69%

## Curiosity and lifelong learning

1. Education and training	79%
2. Insurance and pensions management	77%
3. Telecommunications	75%
4. Real estate	68%
5. Information and technology services	68%
6. Automotive and aerospace	68%
7. Energy technology and utilities	67%
8. Retail and wholesale of consumer goods	67%
9. Oil and gas	64%
10.Medical and healthcare services	64%

#### Leadership and social influence

71%
69%
68%
67%
66%
64%
63%
63%
62%
61%

# Talent management

1. Infrastructure	70%
2. Automotive and aerospace	68%
3. Mining and metals	68%
4. Chemical and advanced materials	67%
5. Supply chain and transportation	65%
6. Telecommunications	64%
7. Production of consumer goods	63%
8. Oil and gas	62%
9. Education and training	60%
10.Real estate	59%

## Analytical thinking

#### 1. Education and training 70% Supply chain and transportation 70% Automotive and aerospace 68% 4. Telecommunications 67% 5. Production of consumer goods 65% 6. Insurance and pensions management 61% Advanced manufacturing 61% 8. Financial services and capital markets 60% 9. Infrastructure 59% 10.Real estate 59%

# Environmental stewardship

1. Oil and gas	80%
2. Chemical and advanced materials	75%
3. Agriculture, forestry, and fishing	71%
4. Automotive and aerospace	70%
5. Mining and metals	68%
6. Supply chain and transportation	68%
7. Infrastructure	67%
8. Production of consumer goods	66%
9. Professional services	63%
10.Energy technology and utilities	60%

Technology skills

Working with others

#### Source

Cognitive skills

World Economic Forum, Future of Jobs Survey 2024.

Ethics

The Future of Jobs Survey uses the World Economic Forum's Global Skills Taxonomy.

# Core skills in 2030

Management skills

Looking ahead to 2030, Figure 3.6 provides further insights into key priority areas for workforce development for organizations, by comparing core and emerging skills by 2030 based on their relative importance today and their future evolution. The top right quadrant highlights skills that are already core to organizations today and are expected to continue growing rapidly. Skills such as **AI and big data; analytical thinking; creative thinking; resilience, flexibility and agility;** and **technological literacy** are not only considered critical now but are also projected to become even more important. Moreover, **leadership and social influence,** 

Self-efficacy

Note

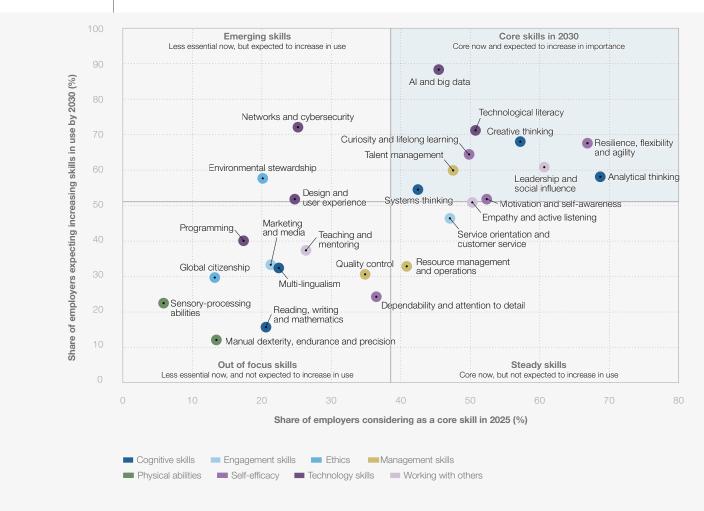
curiosity and lifelong learning, systems thinking, talent management, and motivation and selfawareness solidify their importance, emphasizing the continued relevance of human-centric skills amid rapid technological advances.

Meanwhile, **networks and cybersecurity** and **environmental stewardship** – in the top left quadrant of the figure – rank among the top 10 skills expected to increase significantly in use by 2030, yet they are not currently considered core skills for most organizations. These emerging skills represent areas where businesses may need to anticipate growing demands and develop capabilities before they become critical. On the other hand, skills that are core today, but expected to remain stable over the next five years without significant increase in use, displayed in the lower right quadrant, include empathy and active listening, service orientation and customer service and resource management and operations. Finally, the bottom left quadrant of Figure 3.6 highlights skills that are neither critical now nor expected to increase significantly in use over the next five years. While most of these skills remain important, they may represent areas where less investment is required, allowing employers to prioritize resources toward more rapidly evolving skill sets.

# FIGURE 3.6 C

#### Core skills in 2030

Share of employers considering skills to be a core skill in 2025 and share of employers expecting skills to increase in importance by 2030.



#### Source

World Economic Forum, Future of Jobs Survey 2024.

Note

The Future of Jobs Survey uses the World Economic Forum's Global Skills Taxonomy. Bold lines represent the median values across all skills.

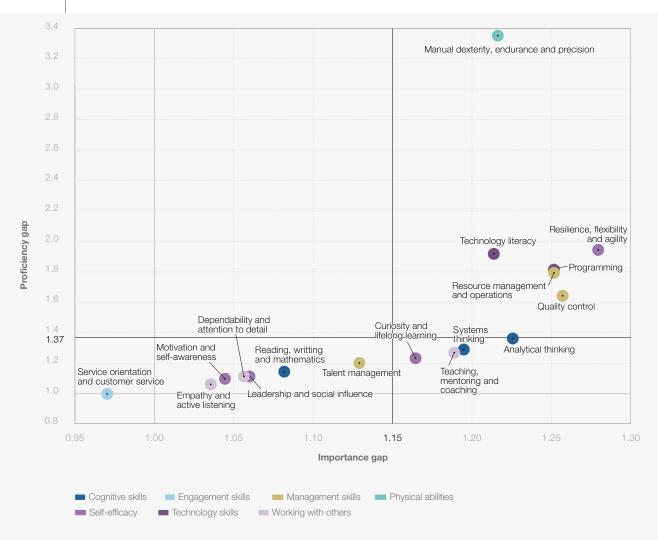
# Skill differences between growing and declining jobs

While a diverse set of skills is essential for navigating the evolving workforce landscape, contrasting the skills requirements particularly associated with growing jobs, and those associated with declining ones, reveals windows of opportunity that exist for enabling dynamic job transitions.<sup>37,38</sup> Figure 3.7 illustrates these differences based on two metrics derived from the O\*NET skills inventory:<sup>39</sup> the "importance gap", which measures how much more essential a skill is for growing jobs, and the "proficiency gap", which indicates the level of expertise required for each skill in growing jobs compared to declining jobs. For example, a score of 2 in either metric means a skill is twice as critical or requires double the proficiency in growing roles.

# FIGURE 3.7

#### Skill importance gap and skill proficiency gap between growing and declining jobs

When growing and declining job roles attach the same level of importance and proficiency to a skill, the index equals one. The bigger the value, the bigger the gap between growing and declining jobs.



#### Source

Note

Bold lines represent the average across all skills.

World Economy Forum analysis, based on Future of Jobs Survey 2024, the World Economic Forum's Global Skills Taxonomy and O\*NET skill importance and level for each occupation.

At an aggregate level across all growing and declining roles, resilience, flexibility and agility skills are the most significant differentiator between growing and declining job roles, ranking higher in both importance and proficiency for growing roles. Programming and technological literacy also differentiates growing and declining roles, reflecting the increasing integration of technology across occupational fields. While programming scores higher in importance, it requires less proficiency compared to technological literacy.

Resource management and operations, and quality control skills also show marked gaps in both proficiency and importance. Analytical thinking completes the list of top five skills for the importance gap, while ranking 6th for the skill proficiency gap.

Manual dexterity, endurance, and precision display a notable difference in proficiency requirements rather than importance. This suggests that in roles in which manual skills remain critical, businesses are seeking a higher degree of specialization that combines manual abilities with technological literacy, and problem-solving skills. Growing roles demanding high manual skill proficiency include Drafters, Engineering and Mapping Technicians, Electrotechnology Engineers, Mechanics, Machinery Repairers, and Solar Energy Installation Engineers. By contrast, declining roles, such as printing trades workers and transportation attendants, generally require lower levels of manual skill proficiency. Notably, the only skill with an equal or lesser requirement in importance or proficiency for growing jobs is service orientation and customer service.

These findings underscore the importance of targeted skills development efforts to support workers in transitioning to growing roles as well as to ensure employers can access a talent pool with the skills required for the future of work.

# 3.2 Drivers of skill disruption

This section discusses how each of the five identified macrotrends driving labour-market transformation – technological change, geoeconomic fragmentation, green transition, demographic shifts and economic uncertainty – are expected to influence skill evolution by 2030.

# Technological change

Technological advances are expected to drive skills change more than any other trend over the next five years. The increasing importance of Al and big data, networks and cybersecurity, and technological literacy is driven by the expansion of digital access and the integration of Al and information processing technologies. These trends are not only seen as responsible for the growth of these three fastest-growing skills but also for the rising importance of analytical thinking and systems thinking. These shifts highlight the increasing complexity of decision-making and the need for critical problem solving in a data-driven world.

Beyond the top 10 fastest-growing skills, design and user experience, along with marketing and media skills, are also expected to see growth driven by technological advancements. These skills are closely linked to digital transformation, reflecting the rising importance of delivering seamless digital experiences and understanding the impact of consumer behaviour.

Robots and autonomous systems are also seen as a key driver of skills change, contributing to the increased demand for not only the three top-growing skills, but also programming and systems thinking – skills essential for managing and optimizing interactions with autonomous technology. As noted in Chapter 2, robots and autonomous systems are also among the primary drivers behind the fastest-growing jobs. Coupled with the rising demand for the three top growing

# BOX 3.1 Generative AI and human-centred skills

The release of ChatGPT 3.5 in November 2022 marked an inflection point in public awareness of GenAI technologies, which sparked both excitement and apprehension regarding their potential impact on the workforce.<sup>40</sup> In this context, research conducted by Indeed for this report highlights the continued importance of human-centred skills in an age of GenAI. Figure B3.1 illustrates the capacity of GenAI to substitute a human in executing specific skills, based on an assessment by GPT-40 of its own ability to utilize skills across three areas: its ability to provide theoretical knowledge about a given skill, its skills, and programming, this trend underscores the importance of technological expertise and systems thinking as core skills in technical fields. These capabilities are crucial for enabling employees to adapt to, and collaborate effectively with, automated systems across a range of industries.

While technology fuels demand for certain skills, it also accelerates the decline of others. Skills such as manual dexterity, endurance, precision, and reading, writing, and mathematics are expected to diminish in relevance as digital access, Al and information processing, and robotics increasingly automate these tasks. Interestingly, whereas programming remains stable as an in-demand skill, both respondents expecting growth in its use and those expecting decline consistently point to technological change as the primary driver behind this change. As discussed in more depth in Chapter 2, this highlights the dual effect of technology, underscoring how the same technological forces that drive job creation may also contribute to job displacement. Additionally, as also discussed in Chapter 2, the primary impact of technologies such as GenAl on skills may lie in their potential for "augmenting" human skills through human-machine collaboration, rather than in outright replacement, particularly given the continued importance of human-centred skills (Box 3.1).

These findings underscore an urgent need for appropriate reskilling and upskilling strategies to bridge emerging divides. Such strategies will be essential in helping workers transition to roles that blend technical expertise with human-centred capabilities, supporting a more adaptable workforce in an increasingly technology-driven landscape.

problem-solving abilities related to that skill, and the need for physical presence or manual actions in performing that skill.<sup>41</sup> The chart categorizes more than 2,800 granular skills into the World Economic Forum's Global Skills Taxonomy and evaluates their capacity of substitution by GenAl according to five categories: very low capacity, low capacity, moderate capacity, high capacity, and very high capacity.

Zero of the more than 2,800 skills assessed were determined to exhibit "very high capacity" to be replaced by the current generation of GenAl

tools, with the majority of examined skills (69%) determined to have either "very low capacity" or "low capacity" to be substituted, indicating that GenAl currently remains limited in performing tasks that require physical execution, nuanced judgment or hands-on application. Skills rooted in human interaction – including empathy and active listening, and sensory processing abilities - and manual dexterity, endurance and precision, currently show no substitution potential due to their physical and deeply human components. These findings underscore the practical limitations of current GenAl models, which lack the physicality to perform tasks that require hands-on interaction - although advances in robotics and the integration of GenAl into robotic systems could impact this in the future.

Where GenAl demonstrates higher substitution potential is in skills that can be effectively performed by leveraging theoretical knowledge alongside digital manipulation. These include granular skills within Al and big data, such as data mining and machine learning applications. Furthermore, GenAl shows strengths in reading, writing, and mathematics, and multi-lingualism, where it can assist in summarizing complex information, drafting text, performing calculations, and translation. Notably, more than one-quarter (28.5%) of the more than 2,800 granular skills examined currently exhibit a moderate capacity of substitution, highlighting areas where, as the technology continues to evolve, its capacity of substitution could increase in the near future.

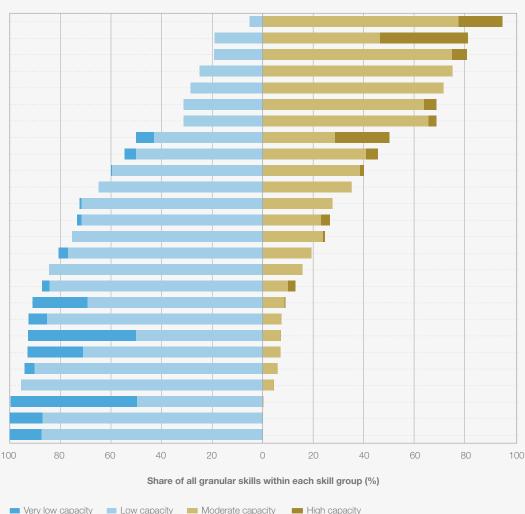
These findings highlight the potential of GenAl for augmenting human work through human-machine collaboration, rather than fully replacing it in most areas. Skills requiring nuanced understanding, complex problem-solving or sensory processing show limited current risk of replacement by GenAl, affirming that human oversight remains crucial even in areas where GenAl can provide assistance. For employers, these insights emphasize the need for training and upskilling initiatives that focus on both advanced prompt-writing skills and broader GenAl literacy.

# FIGURE B3.1

#### Current capacity for substitution by Generative AI, by skill group

Capacity of GenAl substituting a human in performing a given skill as a percentage share of all granular skills within each skill group. Analysis based on GPT-40, with over 2800 granular skills from the Indeed database as of August 2024.





#### Source

Note

# Geoeconomic fragmentation and economic uncertainty

The Future of Jobs Survey also examined the impact of geoeconomic trends on skill evolution. Increasing geoeconomic fragmentation, coupled with the rapid adoption of new technologies and expansion of digital access, has significantly increased cybersecurity concerns.<sup>42</sup> These geoeconomic trends have led to a surge in demand for network and cybersecurity skills as organizations seek to protect digital infrastructure from emerging threats.

Geoeconomic fragmentation is also driving a need for human-centred skills such as resilience, flexibility, agility, leadership and social influence, and global citizenship. In a world where crises are becoming more frequent, employers need leaders and teams capable of adapting to uncertainty and managing complex social dynamics.

Slower economic growth and increased restrictions to global trade are contributing to the increased importance of creative thinking and resilience, flexibility, and agility. These skills are crucial for navigating uncertain economic landscapes, as businesses seek to innovate and remain competitive despite market constraints.

# Green transition

A growing focus on environmental stewardship as a critical skill reflects an evolving alignment between business strategies and sustainability objectives. This rise, driven by climate adaptation efforts, carbon reduction initiatives, and energy generation, storage and distribution technologies, points to a profound shift whereby environmental skills are becoming increasingly integral across diverse sectors. As previously shown in Chapter 2 and Box 2.1, an increasing prioritization of climate adaptation and energy solutions by employers responding to the Future of Jobs Survey is not only evident in skill requirements but also appears as a significant factor in net job growth by 2030.

While demand for global citizenship skills is expected by most respondents to remain stable over the next five years, employers that anticipate a rise in its importance cite the convergence of climate-change adaptation, geoeconomic fragmentation and broadening digital access as key factors. This highlights the growing interconnectedness of sustainability and global collaboration, particularly as businesses operate in increasingly fragmented and climate-sensitive environments.

# Demographic shifts

Ongoing demographic shifts, particularly aging and declining workforces in developed economies, are expected to emerge as a significant driver of skill demand. Aging and declining working-age populations are pressing organizations to prioritize talent management, teaching and mentoring and motivation and self-awareness. Alongside these priorities, there is a rising focus on empathy and active listening, resource management, and customer service, highlighting a growing need for interpersonal and operational skills that can address the specific needs of an aging workforce and foster more inclusive work environments.

Increasing demand for talent management and motivation and self-awareness skills is also driven by growing working-age populations. Findings reported in Chapter 2 underscore similar patterns, where aging and growing working-age populations are major drivers of growth in jobs across Education, Sales, and Hospitality. These trends reveal the dual role demographic changes play in shaping both job availability and the types of skills needed, emphasizing the interconnectedness of workforce demographics with skills development and talent strategies across sectors.

# 3.3 Reskilling and upskilling strategies

Having anticipated significant skill disruptions, employers have increasingly invested in reskilling and upskilling initiatives to align workforce skills with evolving demands (see Section 3.1).

This section explores training trends, how employers expect to finance their training initiatives, and their expectations regarding the outcomes of these investments.

# Training needs

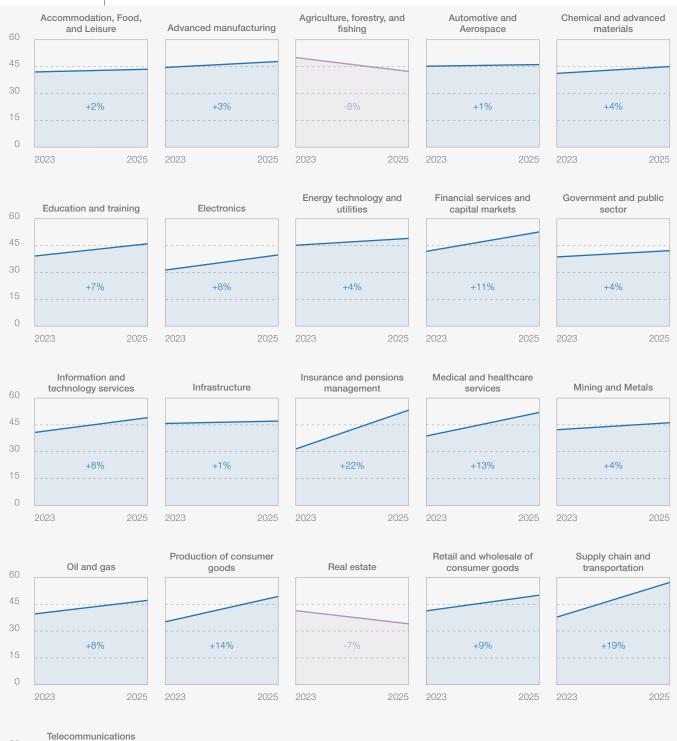
Future of Jobs Survey respondents indicate that

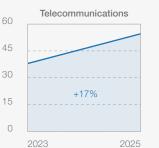
50% of their workforce has completed training as part of their learning and development initiatives. This reflects a positive global trend compared to 2023, when only 41% of the workforce had received training. The rise in training completion is evident across nearly all industries (Figure 3.8), suggesting a growing recognition of the importance of continuous skill development.

However, a few industries stand out from this trend. Agriculture, Forestry and Fishing, and Real Estate are the only sectors that have seen a decline in training completion between the two last editions of this report. On the other hand, industries like Insurance and Pensions Management, Supply

# FIGURE 3.8 Training completion as part of learning and development strategies, 2023 vs. 2025, by industry

Evolution in the share of the workforce that has completed training as part of employers' learning and development strategies. Only industries with data points for both years are included in the analysis.





Share of the workforce (%)

Source



World Economic Forum, Future of Jobs Survey 2024 and Future of Jobs Survey 2022.

Only industries with data points for both years are included in this analysis. Professional Services has data available only for 2025.

Chain and Transportation and Telecommunications have seen the most significant rise in the share of workers completing training.

Looking ahead, Figure 3.9 provides an overview of expectations around workforce training needs by 2030. According to surveyed employers, for a representative sample of 100 workers 41 will not require significant training by 2030; 11 will require training, but it will not be accessible to them in the foreseeable future; and 29 will require training and be upskilled within their current roles. Additionally, employers anticipate that 19 out of 100 workers will require training and will be reskilled and redeployed within their organization by 2030.

The anticipated need for training varies significantly across industries and geographies. While companies headquartered in North America estimate that 67% of their workforce will require training by 2030, those in Central Asia and the Middle East and North Africa project that under 50% of their workforce will need training by 2030.

Industries, such as Telecommunications, and Information and Technology Services, which saw some of the largest uptake in reskilling and upskilling (Figure 3.8), still anticipate significant training needs, with 63% and 62% of their workforce, respectively, expected to need further training by 2030. By contrast, sectors with declining trendlines in training completion are among the sectors with the lowest projected additional training needs.

The share of employees estimated as unlikely to receive upskilling opportunities is somewhat uniform across industries and geographies, suggesting that while the demand for skills may vary, access to reskilling and upskilling opportunities remains similarly constrained globally.

# FIGURE 3.9 Upskilling and reskilling outlook, 2025-2030

Breakdown of the typical training outlook for a representative group of 100 workers, calculated based on averages of the training requirements reported by employers surveyed.



#### Source

World Economic Forum, Future of Jobs Survey 2024.

# Funding for training programmes

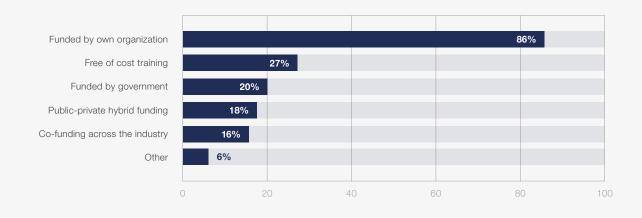
When it comes to funding of reskilling and upskilling initiatives, employers predominantly expect to fund their own training programmes, as shown in Figure 3.10. The second-most common funding mechanism is free of cost training, followed by government and public-private funding.

With funding for reskilling and upskilling being the most-welcomed public-policy support by Future of Jobs Survey respondents, government funding plays a more significant role in industries such as Accommodation, Food, and Leisure; Government and Public Sector; and Education and Training, where over 30% of companies expect to rely on public financing for training initiatives. On the other hand, only 3% of companies in the Insurance and Pensions Management industry expect to rely on government funding for training.

While co-funding across industries is the least utilized funding model overall, it is expected to have the largest use in industries such as Care, Personal Services and Wellbeing; Agriculture, Forestry, and Fishing; and Automotive and Aerospace. This highlights the importance of cross industry collaboration in these industries.

# FIGURE 3.10 Funding for training, 2025-2030

Share of employers anticipating use of stated funding source for worker training programmes from 2025 to 2030.



# Source

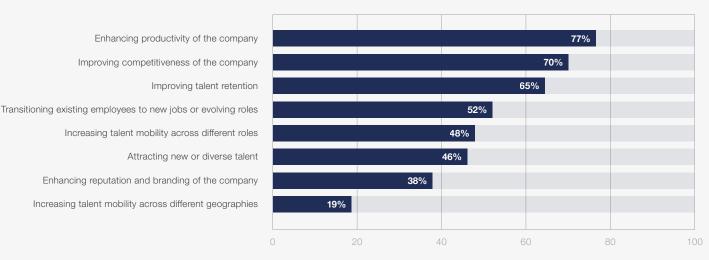
World Economic Forum, Future of Jobs Survey 2024.

The most common outcomes employers expect from their investment in training are enhanced productivity (cited by 77% of respondents) and improved competitiveness (70%). Talent retention ranks as the third-most important expected outcome of training programmes, though it plays a more central role in sectors such as Automotive and Aerospace, Electronics, and Production of Consumer Goods, where over 72% of employers highlight this as a key priority (Figure 3.11).

# FIGURE 3.11

## Expected outcomes from investing in training, 2025-2030

Share of employers expecting the stated outcome from investing in worker training programmes from 2025 to 2030.



Share of employers surveyed (%)

Share of employers surveyed (%)

#### Source

World Economic Forum, Future of Jobs Surveys 2024.



# Workforce strategies

This chapter discusses workforce strategies that employers anticipate adopting in response to the macrotrends shaping the future of work and key barriers to organizational transformation. It also analyses employers' outlook on talent availability from now to 2030, and explores planned workplace practices and policies to achieve their organization's business goals, with a particular focus on the shifting relationship between humans and technologies.

# 4.1 Barriers to transformation

Skill gaps in the labour market are the primary barrier to business transformation perceived by Future of Jobs Survey respondents for the 2025-2030 period, cited by 63% of surveyed employers (Figure 4.1). This is even more pronounced than the results described in the 2023 edition of the report, where skills gaps in the local labour market also topped the transformation barriers, backed by 60% of executives. This skill challenge persists across almost all industries and geographies, ranking first in 52 out of 55 economies and 19 out of 22 sectors.

## FIGURE 4.1 | Barriers to organizational transformation, 2025-2030

Share of employers surveyed expecting the stated barrier will hinder their organisational transformation.

1.	Skills gaps in the labour market	63%
2.	Organizational culture and resistance to change	46%
3.	Outdated or inflexible regulatory framework	39%
4.	Inability to attract talent to the industry	37%
5.	Lack of adequate data and technical infrastructure	32%
6.	Inability to attract talent to my firm	27%
7.	Shortage of investment capital	26%
8.	Insufficient understanding of opportunities	25%

#### Source

World Economic Forum, Future of Jobs Survey 2024.

The second most significant perceived barrier is organizational culture and resistance to change, identified by 46% of respondents as a key obstacle, which highlights the anticipated challenge of aligning internal processes, organizational structures, hierarchies and mindsets in responding to the trends and disruptions companies expect to face. Regulatory concerns are considered the third most relevant barrier, identified by 39% of employers. Moreover, 32% of respondents highlight a lack of adequate data and technical infrastructure as an additional obstacle. Other barriers, such as shortage of investment capital (26%) and insufficient understanding of opportunities (25%), are cited less frequently. In the report's 2023 edition, more than half of respondents identified difficulties in attracting talent as a primary barrier. This year's survey distinguishes between industry attractiveness and firm-level attractiveness, and results show that 37% of companies view lack of industry attractiveness as a notable barrier, while 27% cite firm-specific issues.

# Talent availability outlook

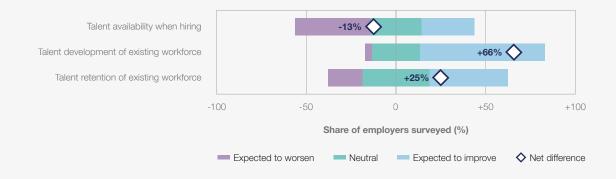
Employers' outlook on talent availability has decreased compared to the results highlighted in the report's 2023 edition. This year, only 29% of businesses expect talent availability to improve over the 2025-2030 period, a drop from 39% in 2023. By contrast, 42% of employers expect talent availability to decline over this period, resulting in a net negative talent availability outlook (-13% net expectation of improvement) and highlighting increasing concern among businesses regarding their ability to find the right future talent (Figure 4.2).

However, employers remain more broadly optimistic about the outlook for talent development. Seven in 10 respondents expect improvements in talent development within their organization by 2030. However, as noted in the report's 2023 edition, 77% of businesses expressed a positive view on the outlook for talent development, suggesting that some companies are re-evaluating their expectations.

With regard to talent retention, employers are similarly less positive than in the report's previous edition: Only 44% of surveyed organizations expect improvements in their ability to retain talent, a decline from 53% two years ago.

# FIGURE 4.2 Talent outlook, 2025-2030

Share of employers surveyed expecting a positive, neutral and negative outlook for talent availability, talent development and talent retention over the next five years.



#### Source

World Economic Forum, Future of Jobs Survey 2024.

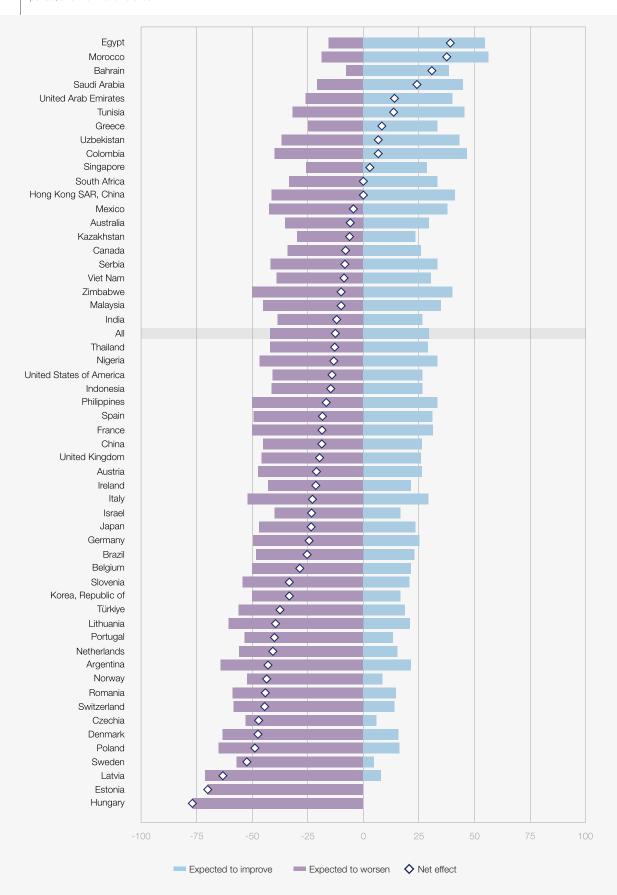
Country-specific variations in talent availability outlook, as shown for hiring in Figure 4.3, reflect broader demographic dynamics. For example, in the Middle East and North Africa, employers in countries such as Egypt (+39% net expectation of improvement), Morocco (+38%), and Bahrain (+31%) display high levels of optimism about talent availability, with the majority of respondents expecting hiring conditions to improve by 2030. By contrast, employers in European economies anticipate increasing challenges in hiring availability.

Expectations around talent development shows significant regional variation. For example, companies headquartered in Eastern Asia, Sub-Saharan Africa, and Central Asia generally report high levels of optimism for the next five years. By contrast, businesses headquartered in Europe, the Middle East and Northern Africa, and Northern America are more cautious than global averages with regard to their expectations. As for talent retention, employers in high-income and upper-middle-income economies express greater concern compared to their counterparts in lower-middle-income economies.

# FIGURE 4.3

## Talent hiring availability, by economy, 2025-2030

Share of employers surveyed expecting a positive and negative outlook for talent availability in terms of hiring over the 2025 to 2030 period, and their net difference.



#### Source

World Economic Forum, Future of Jobs Survey 2024.

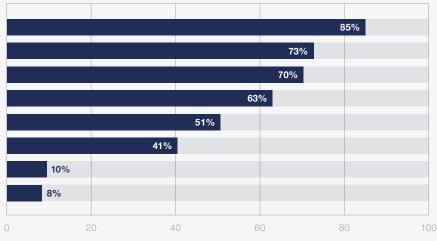
# FIGURE 4.4 Workforce strategies, 2025-2030

Share of employers surveyed planning to adopt the stated workforce strategies.

Upskill workforce Accelerate the automation of processes and tasks Hire staff with new skills to meet emerging business needs Complement and augment workforce with new technologies Transition existing staff from declining to growing roles Reduce staff whose skills are becoming less relevant or

where roles are no longer needed Move operations within closer control through re-shoring, near-shoring or friend-shoring

Off-shore significant parts of workforce



Share of employers surveyed (%)

#### Source

World Economic Forum, Future of Jobs Survey 2024.

# Workforce strategy

Upskilling the workforce emerges as the most common workforce strategy in response to macrotrends, over the 2025-2030 period, with 85% of surveyed employers anticipating adopting this approach (Figure 4.4). Upskilling is identified as a top 3 priority across all geographies, and economies at all income levels, with employers in high-income economies (87%) slightly ahead of those in upper-middle-income (84%) and lowermiddle-income (82%) ones.

Process and task automation is expected to be the second most common workforce strategy, with 73% of employers planning to accelerate their use of this approach – down from 80% as noted in the report's 2023 edition. Additionally, 63% of employers intend to complement and augment their workforce with new technologies. Automation is a more pronounced strategy in high-income economies (77%), compared to upper-middle-income (74%) and lower-middleincome economies (57%).

Regarding adjusting the composition of their workforce, 70% of organizations surveyed plan to hire new staff with emerging in-demand skills, 51% intend to transition staff from declining to growing roles internally, while 41% foresee staff reductions due to skills obsolescence. A slightly higher share of employers plan to move operations within closer control through reshoring, nearshoring or friendshoring (10%) than those who plan to offshore significant parts of their workforce (8%).

# 4.2 Improving talent availability

# **Business practices**

The importance of supporting employee health and well-being has newly emerged as a top priority to increase talent availability over the 2025-2030 period. As shown in Figure 4.5, 64% of employers now see promise in this approach, a marked rise from 9th place in the 2023 edition of this report to 1st this year. In fact, this newfound emphasis on this practice holds importance across industries, ranking first in eight sectors and consistently within the top four across all others. In the Insurance and Pensions Management sector, 85% of companies expect this practice to improve talent availability. The Accommodation, Food, and Leisure, and Education and Training sectors witnessed the largest jump in prioritizing employee well-being between 2023 and 2025.

Additional business practices identified as promising to increase talent availability include providing effective reskilling and upskilling opportunities<sup>43</sup>, highlighted by 63% of organizations, this is particularly evident in the Government and Public sector, where four out of five respondents expect such measures to grow their talent base. Following closely behind, improving talent progression and promotion, previously ranked highest in the 2023 edition, remains a key focus for 62% of surveyed organizations. Higher wages are identified as a Share of employers surveyed identifying the stated business practices as promising to increase talent availability.

Supporting employee health and well-being	64%	Articulate business purpose and impact	37%
Providing effective reskilling and upskilling	63%	Offering remote work across national borders	27%
Improving talent progression and promotion processes	62%	Supplementing childcare for working parents	26%
Offering higher wages	50%	Improving safety in the workplace	25%
Tapping into diverse talent pools	47%	Supporting workers with caregiving responsibilities	24%
Offering remote and hybrid work opportunities within countries	43%	Removing degree requirements and conduct skills-based hiring	19%
Offering diversity, equity and inclusion policies and programmes	39%	Changes to pension schemes and extend their retirement age	14%
Improving working hours and overtime policies	38%	Supporting worker representation	11%

#### Source

World Economic Forum, Future of Jobs Survey 2024.

priority by 50% of respondents, with particular significance in the Education and Training sector, where 61% of employers emphasize this measure.

Tapping into diverse talent pools continues to increase in importance, with almost half of surveyed employers (47%) now emphasizing the potential of this strategy – a substantial increase from just over 10% in the report's 2023 edition. These findings highlight the potential of skills-first approaches in identifying and attracting talent based on skills rather than traditional credentials.<sup>44</sup> In line with this, employers also show increased interest in offering flexibility measures, such as enabling remote work across national borders (27%) and supporting workers with caregiving responsibilities (26%).

By contrast, articulating business purpose and impact has seen a decline in emphasis, dropping from 4th place in the report's 2023 edition, with 37% of employers highlighting the promise of this measure.

## BOX 4.1 | Talent availability: an employee perspective

In collaboration with ADP Research

To complement the Future of Jobs Survey's focus on employer perspectives on talent availability, collaboration for this report with ADP Research has produced a data set that provides the employee perspective, aiming to understand the key factors and priorities that would make workers want to stay in a job. The resulting analysis reveals both convergences and divergences in priorities for talent attraction and retention (Figure B4.1).

Where employees' reasons to stay and employers' practices align include: improving talent progression and promotion processes (employer rank 3rd vs. employee rank 2nd), offering higher wages (employer rank 4th vs. employee rank 3rd), and providing remote or hybrid work opportunities (employer 6th vs. employee 4th).

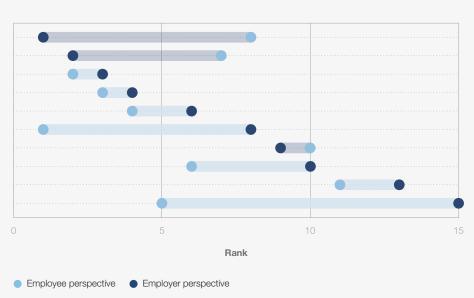
The findings also highlight areas of misalignment between employee and employer expectations. The divergence is most pronounced around supporting health and well-being and upskilling and reskilling, which are viewed as essential by employers, but less so by employees, who rank them 8th and 7th, respectively. By contrast, employees place higher value on working hours, which tops the list of desired policies, while employers rank this measure the eighth most effective strategy to boost talent availability; and pension policies, which rank 5th for employees – 10 places higher than for employers.

Both employees and employers placed less emphasis on supporting workers with caregiving responsibilities and articulating business purpose and social impact.

## FIGURE B4.1 Business practices to boost talent availability: employee vs. employer perspective

Employee (ADP Research) and employer (Future of Jobs Survey) ranking of stated business practice to boost talent availability, and gap between the two.

Supporting employee health and well-being Providing effective reskilling and upskilling Improving talent progression and promotion processes Offering higher wages Offering remote and hybrid work opportunities within countries Improving working hours and overtime policies Articulating business purpose and impact Offering remote work across national borders Supporting workers with caregiving responsibilities Changes to pension schemes and extend their retirement age



#### Source

ADP Research and World Economic Forum analysis.

#### Note

In the ADP Research survey, the question is framed as follows: From the following list, which are the top three (perks) reasons you stay with your current employer? The options were matched with the list of business practices to boost talent availability in the Future of Jobs Survey.

# **Public policies**

Globally, when asked about the public-policy interventions with the highest perceived potential to increase access to talent over the 2025-2030 period, employers identified funding for reskilling and upskilling (55%) and provision of reskilling and upskilling (52%) as the two most crucial policy measures (Figure 4.6). This points to businesses' desire for sustained public investment in skills development to align workforce capabilities with future labour-market demands.

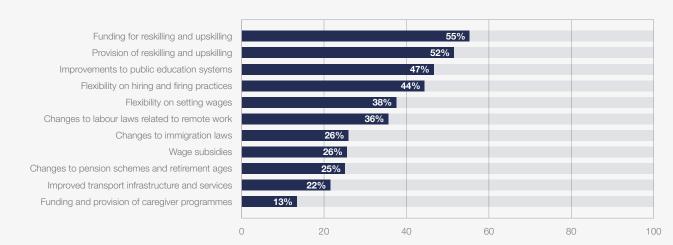
Improving public education systems has risen in perceived priority and now ranks 3rd, with 47% of respondents highlighting this policy measure, up from 4th in the report's 2023 edition. In Israel, Kazakhstan and the Philippines, public education system improvements saw the largest increase in priority as a public policy measure to enhance talent availability, rising seven, six, and six places, respectively, compared to 2023. Simultaneously, wage-setting flexibility has moved to 5th place globally, up from 6th in 2023, with 38% of respondents highlighting this policy measure.

Wage subsidies saw the biggest decline in perceived importance, moving from 3rd in 2023 to 8th in this year's edition, with 26% of respondents pointing to it as a critical policy tool. Flexibility in hiring and firing practices, ranked 4th, has declined two places since 2023, now highlighted by 44% of employers. Despite the overall decline in emphasis on this measure, wage subsidies remain the top highlighted policy in Türkiye and Morocco, while hiring and firing flexibility is the most emphasized priority in eleven countries, including Australia, Brazil, Republic of Korea and Singapore.

In light of demographic shifts, companies are increasingly exploring policy interventions aimed at broadening the talent pool. Changes to labour laws related to remote work are highlighted as a priority by 36% of employers, with strong demand in particular from companies headquartered in Sub-Saharan Africa, as well as, from an industry perspective, in the finance industry (both Financial Services and Capital markets and Insurance and Pensions Management). Changes to immigration laws (26%) are less emphasized, with the exception of industries such as Production of Consumer Goods; Accommodation, Food, and Leisure; and Electronics. Meanwhile, a quarter of respondents (25%) highlight changes to pension schemes and retirement ages. Companies headquartered in Eastern Asia, where the effect of ageing workforces is currently more pronounced, favour this public policy. By contrast, few organizations headquartered in regions with younger populations, such as Sub-Saharan Africa and Southern Asia, see the potential of such policy intervention.

# FIGURE 4.6 Public policies to increase talent availability, 2025-2030

Share of employers surveyed identifying the stated public policies as promising to increase talent availability.



Share of employers surveyed (%)

#### Source

World Economic Forum, Future of Jobs Survey 2024.

# Diversity, equity and inclusion

Globally, the Future of Jobs Survey finds increased emphasis by employers on diversity, equity and inclusion in the workplace, connected to a growing perception of its potential to increase talent availability. Tapping into diverse talent pools is now considered among the top 5 most impactful business practices to increase talent availability, compared to its 11th place ranking in the report's 2023 edition.

Eighty-three percent of surveyed employers have implemented diversity, equity and inclusion measures, an increase from 67% in 2023. This trend is especially strong among larger organizations, where nearly all companies with over 50,000 employees (95%) and those headquartered in Northern America (96%) report having such measures in place. By contrast, companies headquartered in lower-middle-income economies (75%) and smaller organizations (73%) are less likely to implement diversity, equity and inclusion measures.

As shown in Figure 4.7, 51% of employers plan to run diversity, equity and inclusion trainings for managers and staff, which remains the most

common such programme element anticipated to be implemented by organizations in the next five years. This is closely followed by targeted recruitment, retention and progression initiatives (48%), with diversity, equity and inclusion goals, targets and quotas (42%) experiencing the fastest growth in anticipated adoption. In the report's 2023 edition, only one-quarter of companies had planned to adopt such targets (Figure 4.8). Pay equity reviews and salary audits, anti-harassment protocols and support for workers with caregiving responsibilities are also increasingly highlighted, with 39%, 33% and 26% of companies, respectively, planning to adopt these measures. Hiring diversity, equity and inclusion officers and supporting employee resource groups (ERGs) are less commonly mentioned, adopted by 15% and 22% of surveyed organizations, respectively.

Share of employers surveyed which plan to implement the stated measure.

Comprehensive diversity, equity and inclusion training for managers and staff	51%
Targeted recruitment, retention and progression initiatives	48%
Set diversity, equity and inclusion goals, targets or quotas	42%
Pay equity reviews and salary audits	39%
Anti-harrasment protocols	33%
Embed diversity, equity and inclusion goals and solutions across the supply chain	27%
Support workers with caregiving responsibilities	26%
Set up Employee Resource Groups (ERG)	22%
Employ a diversity, equity and inclusion officer	15%

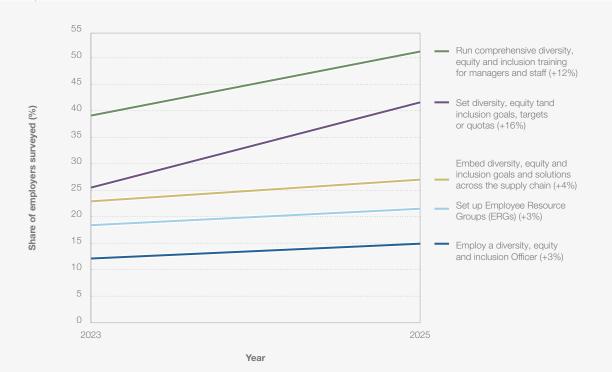
#### Source

World Economic Forum, Future of Jobs Survey 2024.

FIGURE 4.8 Pla

# Planned implementation of diversity, equity and inclusion measures, 2023 vs. 2025

Change in share of employers surveyed planning to implement the stated measure.



#### Source

World Economic Forum, Future of Jobs Survey 2022 and Future of Jobs Survey 2024.

Geographic differences persist. For example, as shown in Table 4.1, companies headquartered in the Middle East and Northern Africa are less likely to engage in pay equity reviews (23%), while those in

Latin America and the Caribbean are more inclined to implement anti-harassment protocols (54%). In Northern America, a significantly higher share (42%) of employers anticipates setting up ERGs.

TABLE 4.1

## Planned implementation of diversity, equity and inclusion measures, 2025-2030, by region

Share of employers surveyed headquartered in each region planning to implement the measure.

	Central Asia	Eastern Asia	Europe	Latin America and the Caribbean	Middle East and Northern Africa	Northern America	South-eastern Asia	Southern Asia	Sub-Saharan Africa
Comprehensive diversity, equity and inclusion training for managers and staff	31	60	52	66	34	67	46	61	57
Targeted recruitment, retention and progression initiatives	42	36	44	59	35	79	46	54	71
Set diversity, equity and inclusion goals, targets or quotas	22	36	44	37	36	54	59	57	39
Pay equity reviews and salary audits	38	23	46	36	19	64	41	32	32
Anti-harrasment protocols	20	38	31	54	17	44	46	36	36
Embed diversity, equity and inclusion goals and solutions across the supply chain	9	30	28	31	21	44	23	25	32
Support workers with caregiving responsibilities	20	34	25	30	23	37	32	7	18
Set up Employee Resource Groups (ERGs)	9	9	22	29	17	42	32	21	11
Employ a diversity, equity and inclusion officer	16	9	16	7	11	27	18	21	11

100

75

Share of employers surveyed (%) 0

Source

World Economic Forum, Future of Jobs Survey 2024.

In terms of employee demographics, women are considered the highest priority group for surveyed employers' diversity, equity and inclusion programmes worldwide, with 76% of respondents anticipating a focus of their measures on this group (Figure 4.9). Workers with disabilities (56%) and 'Gen Z' youth (those under the age of 25) (52%) are the second- and third most considered groups. Older workers (those over the age of 55) and those identifying as LGBTQI+ are anticipated to be a

25

50

focus for 42% and 33% of surveyed employers, respectively. Finally, 27% of respondents anticipate a focus on individuals from disadvantaged religious, ethnic, or racial backgrounds. This represents a decline from the report's 2023 edition, when nearly two-fifths of employers expected to be focusing on individuals from these groups. Workers from low-income backgrounds (24%) and migrants, refugees and displaced workers (21%) are the least commonly mentioned groups.

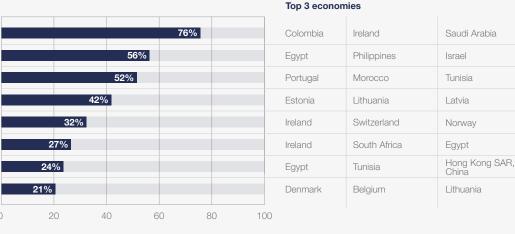


# FIGURE 4.9

### Diversity, equity, and inclusion priority groups, 2025-2030

Share of employers surveyed expecting to focus diversity, equity and inclusion measures on the stated demographic group over the 2025 to 2030 period. Top three economies with the highest share of employer responses for each group.

Women Those with disabilities Youth from Gen Z (under age 25) Older workers (over age 55) Those who identify as LGBTQI+ Those from a disadvantaged religious, ethnic or racial background Those from a low-income background Migrants, refugees and displaced workers





#### Source

World Economic Forum, Future of Jobs Survey 2024.

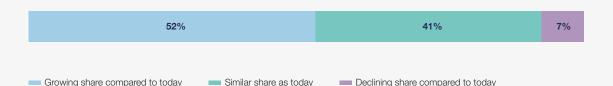
Wages

As the labour market experiences shifts in workforce dynamics due to macrotrends such as technological change, demographic shifts and economic uncertainty, wage dynamics have become an increasingly important factor for understanding the shape of future labour markets. As revealed by the Future of Jobs Survey, more than half (52%) of employers globally expect to see an increase in the share of their revenue allocated to wages over the 2025-2030 period, 41% of surveyed employers anticipate their current wage allocation to remain stable, while 7% foresee a reduction by 2030 (Figure 4.10).

# FIGURE 4.10

#### Wage outlook, 2025-2030

Share of employers surveyed projecting the share of wages and other forms of workers' compensation as a percentage of the company's total revenue to increase, remain stable or decline.



#### Source

World Economic Forum, Future of Jobs Survey 2024.

Smaller companies exhibit higher expectations regarding growth of wages as a share of total revenues, with 57% of employers with fewer than 1,000 employees anticipating an increase in wage share. By contrast, only 45% of employers with 10,000–50,000 employees and 47% of those with over 50,000 employees expect to see the same.

In shaping wage and compensation policies, two factors stand out globally: workers' productivity and performance (cited by 77% of respondents) and competing to retain talent (cited by 71%) (Figure

4.11). Sector-wise, only six industries expect an emphasis on competition for talent over productivity and performance as a factor in their wage considerations: Electronics, Insurance and Pensions Management, Professional Services, Real Estate, Medical and Healthcare Services, and Government and Public Sector. All other industries anticipate a focus on productivity as the more crucial factor when designing wage strategies over the 2025-2030 period.

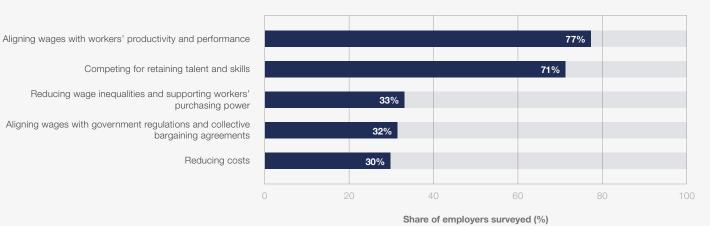
#### Future of Jobs Report 2025 58

Geographically, surveyed companies operating in 32 economies highlight wage alignment with productivity and performance as the key factor, while respondents in 28 economies indicate a greater focus on competition for talent when determining wage strategies. Wage inequalities (cited by 33% of respondents), government regulations and collective bargaining (32%), and cost reduction strategies (30%) are also influencing compensation decisions globally.

# FIGURE 4.11

# Wage strategies, 2025-2030

Share of employers surveyed expecting the stated factor will drive decisions in designing wage and compensation policies over the 2025 to 2030 period.



#### Source

World Economic Forum, Future of Jobs Survey 2024.

# BOX 4.2

# Wage premium for skills and experience

In collaboration with ADP Research

Given shifting global workforce dynamics, how are differences in education, training and experience reflected in wages? Analysis conducted by ADP Research for the Future of Jobs Report 2025 addresses this question by analysing monthly wage data of workers in the United States according to Occupation Information Network (O\*NET) job zones. The O\*NET data assigns all occupations to job zones, from entry-level positions needing minimal preparation (Job zone 1) to highly specialized roles with extensive preparation, usually demanding graduate school education and extensive job training and work experience (Job zone 5). The research analyses wages at each job zone to calculate a wage premium from one level of workforce preparedness to another.

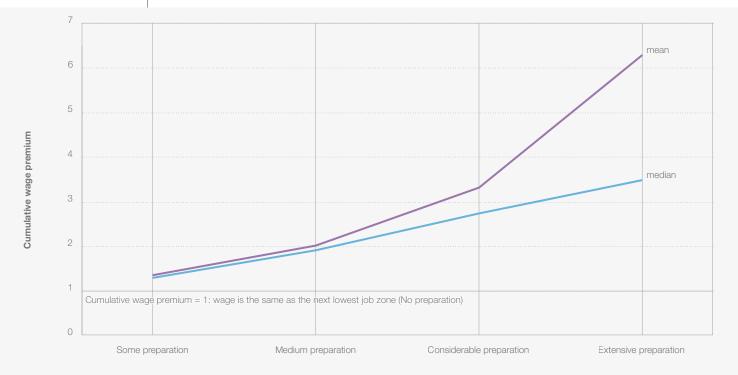
Workers' median and mean wages increase as the job zone level increases (Figure B4.2A). On average, the median wage is 37% higher for each job zone level (Figure B4.2B). The highest gap between levels is 48%, which is the difference in median wage between job zone 3, where workers such as Security Guards and Dental Laboratory Technicians usually receive vocational training or an associate degree, and job zone 4, where workers have considerable preparation for the job. The lowest median wage premium gap is 27%, between job zone 4 and job zone 5, which is made up of primarily specialized roles that require extensive training, such as Pharmacists, Lawyers and Biologists.

The mean wage premium is higher, averaging 58% per job zone level, with the marginal premium spiking the jump from jobs requiring considerable preparation, such as Real Estate Brokers and Sales Managers, to specialized roles with extensive preparation, the highest level.

The gap between the median and mean wage premium – the two curves in Figures B4.2A and B – indicates that there exists a wide pay range within the same job zone, and that wider pay ranges are more prevalent for workers in more specialized roles.

# FIGURE B4.2A Cumulative wage premium by skill level

Ratio to the lowest job zone for mean and median gross wages.



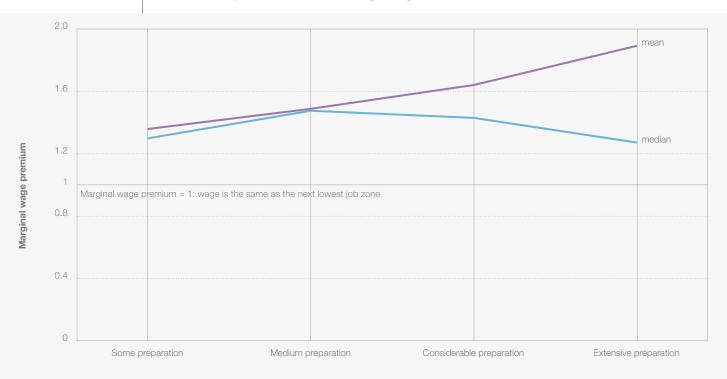
#### Source

ADP Research



# Marginal wage premium by skill level

Ratio to next-lowest job zone for mean and median of gross wages.



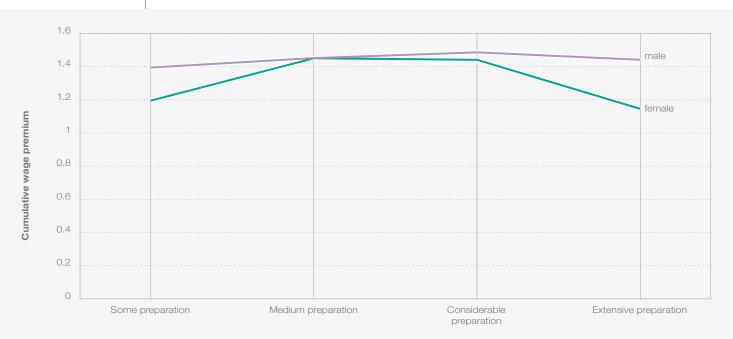
Assessing the wage premium for skills through a gender lens reveals that men tend to have a higher wage premium across all zone transitions except one. Men, on average, experience a 44% wage premium between job zones, whereas women see a 30% premium (Figure B4.3).

Gender disparities are most pronounced at specific transitions. While male workers receive a wage premium of 39% at the point of transition

from jobs that require little preparation to jobs that require some preparation, the equivalent wage premium for female workers is only 19%. At the upper end of the job complexity spectrum, women only receive a 15% higher wage for working in specialized jobs that require extensive preparation compared to jobs that require considerable preparation. This contrasts sharply with a 44% higher median wage at this transition point for men.

# FIGURE B4.3 | Marginal wage premium: female vs. male workers

Marginal wage premium (ratio to next-lowest job zone) for median of gross wages.



## Source

ADP Research

# Approaches to skills assessment

Removing academic degree requirements and conducting skill-based hiring is an increasingly recognized approach to expanding talent availability.<sup>45</sup> As shown in Figure 4.12, work experience continues to be the most common assessment mechanism in hiring processes, with 81% of businesses expecting to continue to rely on it over the 2025-2030 period. This is consistent with previous editions of the report, underlining the value employers place on practical, on-the-job learning and achievements. Only 4% of companies report that they do not assess the skills of prospective employees, highlighting that skills evaluation is almost universal across industries.

The second most common method of evaluation is skills assessments, expected to be utilized by 48% of employers, highlighting a growing emphasis on directly testing candidates' competencies rather than relying solely on their resumes. In addition, psychometric tests are planned to be used by 34% of businesses, reflecting an increased focus on evaluating candidates' behavioural traits, cognitive abilities and cultural fit.

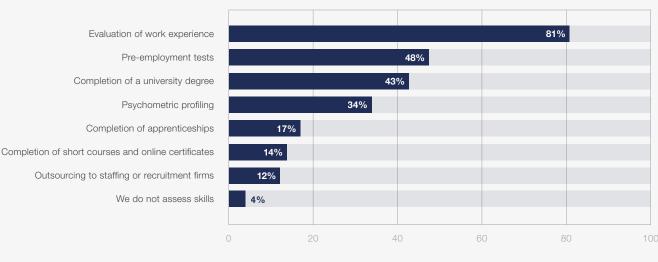
The requirement of a university degree features in third place of employers' approaches to skills assessment, with 43% of respondents expecting to continue to use degrees as a requirement by 2030. Comparison with the previous edition of this report shows that employers are increasingly focusing on work experience and psychometric testing over traditional credentials like university degrees. This shift signals a growing recognition that practical skills and cognitive abilities may be more indicative of future job performance than formal educational qualifications, in addition to expanding the talent pool. O\*NET's database of job experience requirements reveals that 14 of the 15 fastestgrowing jobs over 2025 to 2030 primarily require a university degree, while only seven of the 15 largest-growing roles demand an advanced degree. This reliance on traditional credentials in rapidly

expanding roles could exacerbate talent shortages. Adopting a skills-first approach can broaden talent pools and strengthen talent pipelines for these future roles.<sup>46</sup> Moreover, the diverse requirements of the largest-growing jobs highlight the critical role of occupations that are often accessible through vocational training, apprenticeships, on-the-job experience, or associate degrees.

However, the expected use of apprenticeships, short courses and online certificates in skills assessment has seen a slight decline since the report's 2023 edition: 17% of employers anticipate prioritizing apprenticeships while 14% plan to consider online certificates in their hiring decisions.

## FIGURE 4.12 | Skill assessment mechanisms, 2025-2030

Share of employers surveyed which will prioritize the following ways to assess skills when hiring.



Share of employers surveyed (%)

#### Source

World Economic Forum, Future of Jobs Survey 2024.

# Workforce strategies in response to AI adoption

The Future of Jobs Survey finds that 86% of employers expect AI and information processing technologies to transform their business by 2030. In the Financial Services (97%) and Electronics (95%) sectors, anticipated Al exposure is notably higher than the global average. By contrast, employers in sectors such as Energy Technology and Utilities (72%) and Government and Public Sector (76%) expect lower exposure to AI disruption by 2030. Larger organizations are considering it more likely that their business model will be transformed by AI: only 6% of companies with over 50,000 employees expect low AI exposure by 2030, compared to 16% of companies with fewer than 1,000 employees and 15% of those with 1,000-5,000 employees.

Complementing the Future of Jobs Survey, the World Economic Forum's Executive Opinion Survey captures insights from more than 11,000 executives worldwide. Regarding barriers to Al adoption, as presented in Figure 4.13, half of executives worldwide highlight a lack of skills to support adoption as the top barrier. This is closely followed by a lack of vision among managers and leaders (43%). Other obstacles include high costs of Al products and services (29%), lack of customization to local business needs (24%), complex regulations around Al and data usage (21%), and limited consumer demand (16%). Overall, these results point to a persistent gap in skills required for Al adoption, both for managers and workers.

In response to expected AI disruption, reskilling and upskilling of the existing workforce to work more effectively alongside AI emerges as the most anticipated workforce strategy for companies headquartered in 45 out of the 55 economies covered by the report. By 2030, 77% of surveyed employers plan to implement this strategy (Figure 4.14).

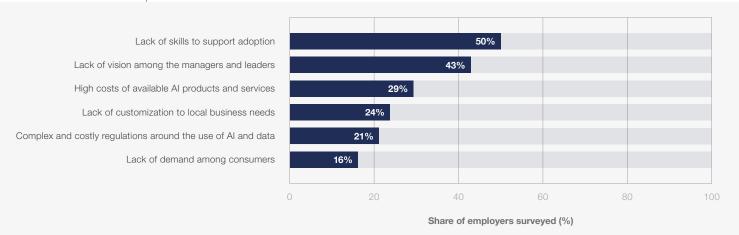
In addition, 69% of respondents plan to recruit talent skilled in Al tool design and enhancement,

and 62% anticipate focusing on hiring individuals with skills to work with Al. Almost half of organizations are expecting to reorient their business models toward new Al-driven opportunities (49%), while 47% plan to transition employees from Al-disrupted roles to other positions. While most employers plan to hire new people with Al relevant skills, a significant share (41%) also expect to downsize their workforce as Al capabilities to replicate roles expand.

# FIGURE 4.13

# Barriers to AI adoption

Share of employers expecting the stated barrier will hinder the adoption of AI among local businesses.



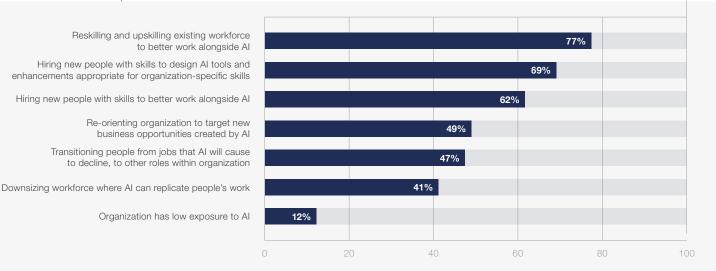
#### Source

World Economic Forum, Executive Opinion Survey 2024.

FIGURE 4.14

#### Workforce strategy in response to AI, 2025-2030

Share of employers surveyed planning to implement the stated strategy in response to AI's increasing capability and prevalence.



Share of employers surveyed (%)

#### Source

World Economic Forum, Future of Jobs Survey 2024.

# BOX 4.3 Relative AI job and skill concentration, by industry

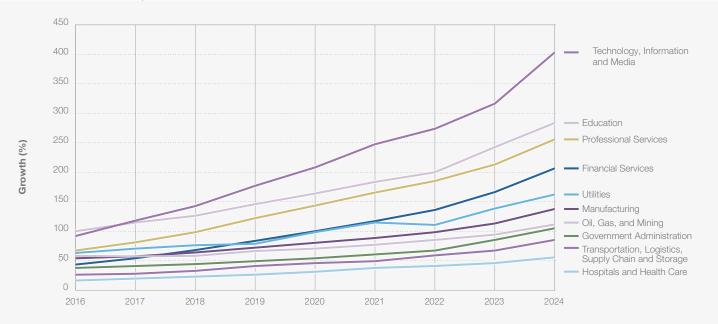
In collaboration with LinkedIn

Analysis conducted by LinkedIn for the Future of Jobs Report 2025 assesses the relative AI job and skill concentration for 10 industries. This data is calculated by assessing the number of AI occupations and the number of LinkedIn members with at least two reported AI-related skills for each industry. As shown in Figure B4.4, to enable industry comparisons, each sector's AI concentration is benchmarked against the 2016 value of the industry with the highest AI concentration in 2016 (Education). This analysis helps illustrate which industries have seen the greatest AI uptake, in terms of AIrelated jobs and skills as well as AI concentration trends over time. While AI concentration has at least doubled across nearly all industries since 2016, the relative ranking of industries has stayed largely stable. Over the last five years, the order of industries with the highest AI concentration has remained unchanged.

FIGURE B4.4

4 Growth in relative concentration of AI technologies, by industry, 2016-2024





Source

LinkedIn.

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# Region, economy and industry insights

The impact of macrotrends on labour markets over the 2025-2030 period will have both common and sector- and region/economy-specific characteristics across industries and geographies around the world. This chapter highlights key findings from the Future of Jobs Survey as they relate to the expected jobs landscape, anticipated skills needs and planned workforce strategies of employers at regional, economy and industry levels – and offers insights into how businesses in specific economies and sectors are navigating these transformations.

In addition to the insights presented in this chapter, Part 2 of the report provides detailed region, economy and industry profiles for all geographies and sectors featured in the report, and the corresponding data may also be accessed online, via an interactive data explorer tool, at: https://www.weforum.org/publications/the-futureofjobs-report-2025/future-of-jobs-data-explorer-2025.

# 5.1 Region and economy insights

# Eastern Asia and Oceania

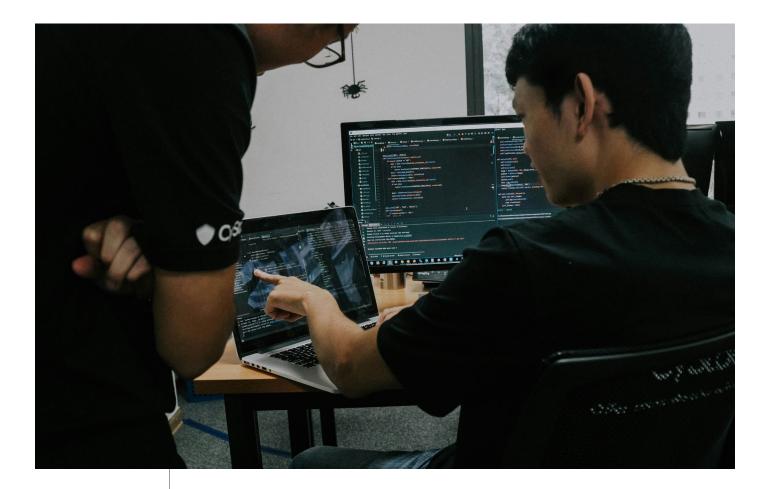
Companies headquartered in **Eastern Asia** expect aging and declining working-age populations and slower economic growth to transform the region's labour markets by 2030. Organizational culture and resistance to change are perceived as a significant barrier to business transformation by 64% of employers in the region, above the global average of 46%. Industry talent shortages are likewise seen as a key barrier to transformation by 53% of companies. To address these challenges, businesses operating in China and Republic of Korea are investing in technologies to automate and augment their workforce, while those operating in Japan and Hong Kong SAR, China, are increasingly tapping into diverse talent pools.

Over the next five years, more than half of companies operating in **China** expect geoeconomic fragmentation and increased efforts in climate mitigation to shape their businesses, above a global average of 34% and 47%, respectively. More than 90% of employers identify AI and robotics as key technologies to transform their organization, while 43% identify new materials and 19% identify biotechnology, a higher share than their global peers (30% and 11%, respectively). Industry talent shortages are highlighted by 38% of businesses operating in the country. According to more than half of employers, government's funding for reskilling and upskilling and increased flexibility on hiring and firing practices could contribute to

increase talent availability, while only 9% expect to see benefits from increased public support for caregivers.

In Hong Kong SAR, China, 60% of businesses include increased focus on labour and social issues among the top trends impacting their organization, which is significantly higher than the global average of 46%. This is followed by broadening digital access (60%) and increased climate-mitigation efforts (56%). Technology is seen as central to workforce planning, with 76% of companies aiming to augment their workforce using new technologies. Businesses operating in Hong Kong SAR, China expect 43% of tasks to be completed primarily by technology by 2030, surpassing the global estimate of 34%. Efforts to broaden hiring are evident, as 76% of employers plan to tap into diverse talent pools, compared to 47% globally. Moreover, 82% of businesses are planning to implement targeted recruitment, retention, and progression initiatives, exceeding the global average of 48%.

Overall, 69% of employers in **Japan** highlight ageing and declining working-age populations as a critical trend impacting their organization by 2030, exceeding the global average of 40%. According to 55% of respondents, cultural resistance to change remains a barrier to business transformation, alongside skills gaps (41%) and industry talent shortages (49%). Information Security Analysts and Data Analysts and Scientists are projected to be among the top growing jobs in the country. In response, businesses operating in the country are planning to prioritize access to diverse talent



and supporting reskilling. Employers also share expectations for greater government involvement in provisioning and funding of reskilling and upskilling.

Geoeconomic fragmentation and advances in frontier technologies are likely to drive labour-market transformation in Republic of Korea in the next five years: 71% of companies operating in the country highlight increased geopolitical tensions as a key trend impacting their business, more than twice the global average, and 53% mention increased restrictions to global trade. Businesses in Republic of Korea are ahead of global peers in technologies such as semiconductors and new materials. Talent shortages at the industry level are a concern for 47% of respondents. Companies are planning on addressing skills gaps by hiring staff with emerging skills (92%) and adopting technologies to augment the workforce (83%). Additionally, employers operating in Republic of Korea plan to explore workforce strategies such as supplementing childcare for working parents (50%) to attract and retain talent.

Businesses operating in **Australia** foresee a complex mix of technological, green and demographic transitions, as well as geoeconomic fragmentation: 65% of employers identify skills gaps, while 45% view inability to attract talent to the industry as a key business challenge over the 2025-2030 period. To address the increasing need for skilled talent, 45% of respondents hope for changes to immigration policies to attract global talent, compared to a global average of 26%. Additionally, 49% of businesses operating in Australia anticipate offering cross-border remote work options, nearly double the global average, and 63% identify tapping into diverse talent pools as an effective approach to increasing talent availability in the country.

# South-Eastern Asia

Advances in technology, uncertain economic outlook and increasing geoeconomic fragmentation are foreseen to be shaping labour markets in South-Eastern Asia over the 2025-2030 period. To prepare for these disruptions and meet emerging business needs, employers headquartered in the region are particularly focused on upskilling their workforce (96%, compared to 85% globally) and hiring staff with new skills (86%, compared to 70% globally), with a large number of businesses in Indonesia, Malaysia and the Philippines also expecting to address these challenges by facilitating internal job transitions. Finding skilled talent continues to be seen as a main barrier to business transformation, with employers in Singapore and Viet Nam, in particular, calling for policy reforms to expand the talent base in these countries.

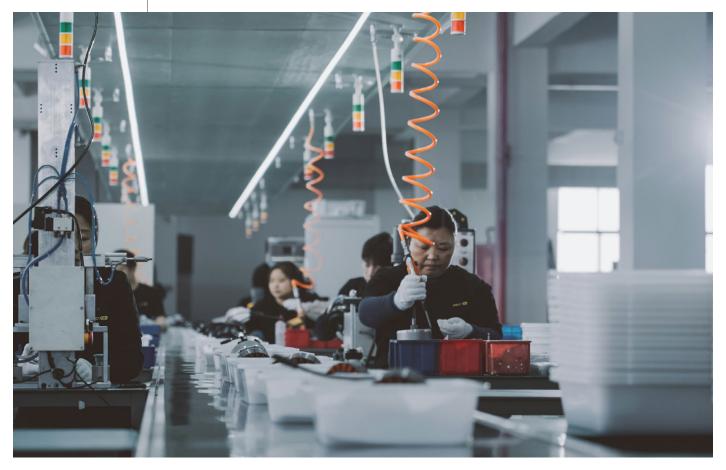
Digitalization is perceived as the most important driver of labour-market transformation in **Indonesia** by 2030, with 83% of businesses operating in the country expecting this trend to impact their organization, compared to 60% globally. Fortyone percent of employers also highlight increased restrictions on trade and investment as a key trend impacting their businesses, which is almost twice the global average. A higher share than global peers aim to leverage new materials and composites (52%) as well as sensing, laser and optical technologies (39%). Workforce strategies are expected to focus on transitioning employees from declining to growing roles, with AI Specialists and Sustainability Specialists leading job growth, and administrative and data entry roles in decline.

Overall, companies operating in Malaysia expect increased restrictions on global trade and investment (45%), alongside a heightened focus on government subsidies and industrial policy (34%) and stricter anti-trust regulations (31%) to drive transformation of their businesses by 2030. These responses are all above the respective global averages. Employers also regard broadening digital access as a key driver of transformation, highlighted by 79% of respondents. In response to these disruptions, businesses in Malaysia are exploring distinct approaches to reskilling: While most organizations anticipate self-funding their training programmes, 32% of reskilling efforts are expected to be co-funded across the industry, twice the global level. In addition, 35% of employers in the country plan to consider completion of short courses and online certifications when assessing skills of job candidates, more than twice the global average (14%).

Broadening digital access and climate mitigation and adaptation efforts are expected to jointly shape labour-market dynamics in **the Philippines** by 2030. With two-thirds of employers in the country identifying skills gaps as a barrier over the next half decade, businesses are planning to scale up their reskilling efforts: 68% of Filipino workers are expected to require training to meet evolving skill demands (compared to 59% globally), but only 38% of workers are reported to have completed training today (compared to 50% globally). Employers operating in the Philippines anticipate that almost three in 10 workers will be upskilled and then redeployed to new roles.

In Singapore, 64% of employers operating in the country expect their business to be impacted by geoeconomic fragmentation, twice the global average. Similar to global and regional peers, firms in Singapore expect skills gaps, regulatory barriers and organizational resistance to hinder business transformation. Notably, 97% of companies plan to prioritize upskilling as their key workforce strategy, significantly above global levels. Hiring staff with emerging skills and process automation are also among anticipated key workforce strategies. While a skills-first approach is perceived as having the potential to expand Singapore's talent pool, 58% of employers expect to continue prioritizing university degrees in hiring decisions, which is higher than the 43% global average.

Economic uncertainty is top of mind for employers operating in **Thailand**, with 73% of respondents expecting slower growth to impact their business by 2030 – above the global average of 42% – and rising inflation and climate-mitigation efforts among other anticipated key trends. Talent acquisition is seen as challenging, with 62% of respondents facing difficulty attracting talent to their industry and 46% to their firms. Employers in Thailand are increasingly planning on leveraging diversity,



equity and inclusion programmes (64%) and supplementing childcare for working parents (45%). With regard to public policies, funding for reskilling and upskilling and flexibility on hiring and firing practices are seen as the two most beneficial policies to expand the talent base.

A majority of companies operating in **Viet Nam** expect increased digitalization, climate mitigation action and higher cost of living to shape the transformation of their business models over the 2025-2030 period. About one in two employers also highlights restrictions on global trade and investment among the most impactful trends for their business, twice the global average of 23%. For more than 60% of firms in the country, adapting to these trends is perceived to be made more difficult by existing skills gaps in the labour market, while 55% of respondents mention inadequate data and technical infrastructure and 41% point to limited understanding of emerging opportunities. To close skills gaps, a majority of employers in the country expect the most impactful public-policy measures to be increased public funding for reskilling and upskilling as well as more flexible hiring and firing practices. Half of respondents also point to adjustments to immigration laws (50%, compared to 26% globally) and retirement ages (46%, compared to 25% globally).

# Central Asia and Southern Asia

Increased digital access, geopolitical tensions and climate-mitigation efforts are the primary trends expected to shape the future of jobs in India by 2030. Similar to their global peers, companies operating in the country are heavily investing in AI, robotics and autonomous systems, and energy technologies. Employers in India are also planning to outpace global adoption in certain technologies, with 35% expecting semiconductors and computing technologies and 21% expecting quantum and encryption to transform their operations. The country's projected fastestgrowing job roles - including Big Data Specialists, Al and Machine Learning Specialists, and Security Management Specialists - align closely with these trends. To address talent needs, companies operating in India expect tapping into diverse talent pools (67%, compared to 47% globally) and adopting skills-based hiring by removing degree requirements (30%, compared to 19% globally) to be effective.

Companies operating in **Kazakhstan** expect broadening digital access, rising cost of living and slower economic growth to significantly impact their business models in the next five years. Technological trends related to AI, robotics and autonomous systems are also expected to have a significant – although lower than global average – impact, with energy generation, storage and distribution identified as the second-most impactful technological trend (highlighted by 54% of respondents). Skills gaps in the labour market are top-of-mind for seven in 10 firms in the country.

Addressing skills gaps in the labour market is identified as a primary challenge to business transformation over the 2025 to 2030 period in Uzbekistan. While 71% of employers in the country expect improvements in talent retention, significantly above the global average, there remains strong need for reskilling and upskilling the current workforce. Overall, only 22% of Uzbekistan's workforce today is expected to be able to upskill in their current role, with an additional 14% projected to be upskilled and then re-deployed, both of which are lower figures than global averages at 29% and 19%, respectively. Fifty-two percent of employers anticipate implementing strategies for reskilling their workforce to work alongside AI. Skills such as programming, teaching and mentoring, and multilingualism have higher-than-global projected demand increases.

# Middle East and Northern Africa

Companies headquartered in the **Middle East and Northern Africa** region are more positive about talent availability by 2030 than their global peers, with 46% of employers expecting the hiring outlook to improve. Employers in the region, notably in Saudi Arabia and the United Arab Emirates, are also planning on accelerating automation. With 46% of on-the-job skills projected to change, compared to 39% worldwide, the region's rate of skill disruption is most pronounced in countries such as Egypt and Bahrain, highlighting the need for reskilling and upskilling at a time of multi-dimensional change.

Only 5% of firms operating in Bahrain identify aging and declining working-age populations as a transformative trend by 2030, compared to 40% of respondents globally. Talent availability is expected to remain stable, with only 8% of employers anticipating a deterioration, which is far below the global average. However, two-thirds of employers expect skills gaps in the labour market to remain the top barrier to business transformation. Twentyfour percent of Bahrain's employees are expected to be able to upskill in their current roles, and an additional 14% to be redeployed after upskilling; both figures are below global averages. To attract skilled talent, employers in the country are focused on improving working hours and overtime policies and expecting to leverage government wage subsidies.

In **Egypt**, rising cost of living, slower economic growth and broadening digital access are the key trends expected to influence the labour market by 2030. Fifty-five percent of employers operating in the country expect talent availability to improve, significantly above global average, in spite of a heightened rate of skill disruption, as 48% of on-the-job skills of the Egyptian workforce are projected to change over the next half-decade (compared to 39% globally). Upskilling emerges as the most-anticipated workforce strategy. Compared to global averages, companies see an increasing need for skills in resource management and operations (43%, compared to 24% globally) and reading, writing and mathematics.

Amidst geopolitical tensions, a majority of employers operating in Israel highlight broadening digital access and rising cost of living as key drivers of business transformation by 2030. Fortysix percent of firms in the country also identify increased focus on labour and social issues as a key trend, and a similar number expect stricter antitrust and competition regulations to impact their business models; this rate is significantly above the global average of 17%. By 2030, anticipated key workforce strategies for firms in Israel include hiring talent with emerging skills, accelerating automation, and upskilling employees: 80% of employers are planning on re-orienting their operations to capitalize on new Al-driven business opportunities. Skills such as resilience, flexibility and agility are seen as increasingly in demand, alongside systems thinking.

Businesses operating in Morocco identify the green transition and uncertain economic conditions as the key forces shaping labour-market transformation by 2030. Skills gaps and internal resistance to change are perceived as the top barriers to business transformation. Employers in Morocco are expecting increasing demand for skills in AI and big data, creative thinking, and leadership and social influence over the next five years. Talent availability might benefit from a stronger focus on tapping into diverse talent pools, a workforce strategy envisaged by 24% of firms in the country, compared to 47% globally. Efforts by employers to address the country's youth unemployment are evident, as 86% of businesses plan to prioritize youth as part of their diversity, equity and inclusion measures, which is significantly above the global average.

As the country continues to pursue economic

transformation, Saudi Arabia's labour market is expected to be shaped by increased digitalization, geoeconomic fragmentation and rising cost of living over the 2025 to 2030 period. Companies operating in the country anticipate a focus on technology adoption, aiming particularly to automate existing tasks, with the proportion of total work tasks mainly delivered autonomously by technology projected to reach 45% by 2030, above global averages. As employers in Saudi Arabia scale up technology investments, over 70% identify technological literacy as a skill on the rise in the country, followed by demand for skills in networks and cybersecurity and AI and big data. Workforce strategies are expected to be dynamic: 38% of companies operating in Saudi Arabia expecting to remove degree requirements to improve talent availability, compared to a global average of 19%.

Addressing skills gaps is seen as a critical priority in **Tunisia**, with 80% of companies operating in the country identifying skills gaps as the top barrier to business transformation by 2030 and 86% aiming to upskill their workforce to respond to key business trends. Employers in Tunisia see a particularly strong increase in demand for skills in leadership and social influence, creative thinking, and Al and big data skills. Demand for programming skills is also on the rise, with 72% of firms identifying it as a growth area. Seven out of 10 employers plan to fund internally their training needs, and about 41% aim to leverage hybrid, public-private, co-funding models.

In the **United Arab Emirates**, companies are expecting increased digitalization and efforts to adapt to and mitigate climate change to significantly impact their business models by 2030. Focus on technological shifts is reflected in increasing adoption of technology in day-today operations, with the proportion of total work tasks predominantly delivered by autonomous technologies projected to reach 43% over the next five years, above an expected rate of 34% globally. Companies operating in the country expect rising demand for technological literacy, with 87% of



respondents emphasizing increased need for this skill. Other growing skills include AI and big data, networks and cybersecurity as well as leadership and social influence.

# Sub-Saharan Africa

In **Sub-Saharan Africa**, 64% of businesses expect increasing focus on labour and social issues to be a key trend impacting their business strategy over the 2025-2030 period, followed by rising cost of living and broadening digital access (both highlighted by 59% of respondents). Companies headquartered in the region are navigating significant transformation barriers, including perceived widespread skills gaps and shortage of investment capital. Employers in Nigeria and Zimbabwe are anticipating stepping up efforts on workforce development over the next five years, while their South African peers are planning to invest in diversity, equity and inclusiont programmes to improve access to skilled talent.

Skills gaps and challenges in attracting talent are expected to be key barriers to business transformation in Nigeria over the next five years. As the country develops its Business Process Outsourcing (BPO) industry and creates more digital jobs, network and cybersecurity skills are projected to be the fastest-growing skills in demand in the country, with 87% of employers reporting an increasing need by 2030 (compared to a global average of 70% of respondents). This is followed by anticipated employer demand for skills in AI and big data as well as systems thinking. Additionally, service orientation and customer service as well as global citizenship skills are expected to exhibit higher-than-global demand. To help address these talent and skills gaps, 73% of firms operating in Nigeria see benefit in increased public-sector funding for reskilling and upskilling programmes, while 40% state that improving transport services and infrastructure would be equally important to support talent availability.

More than 60% of businesses operating in South Africa identify skills gaps as a key barrier to business transformation by 2030, followed by organizational culture and resistance to change (43%). With jobs such as AI and Machine Learning Specialists and Robotics Engineers on the rise, companies are planning to upskill employees and hire talent with new skills to meet evolving business needs. To expand their talent pool and improve skills matching, 34% of companies plan to remove degree requirements, creating more accessible pathways to emerging jobs. In addition, many employers in South Africa expect to focus on diversity, equity and inclusion, with 55% anticipating targeting individuals from disadvantaged religious or ethnic and racial backgrounds, and 41% those from low-income backgrounds, compared to 27% and 24%, respectively, globally.

In Zimbabwe, nearly half of on-the-job skills are

expected to change over the next five years, higher than the global average of 39%. Accordingly, 90% of employers have plans to upskill their existing workforce. Skills like systems thinking, marketing and media, customer service, dependability and attention to detail, quality control, and global citizenship are all increasing in demand more rapidly than global averages. Finally, 70% of respondents see benefit in public-policy interventions to improve the education system to better equip the workforce for future demands, above a global average of 47%.

# Europe

Digitalization, climate mitigation and rising cost of living are the key trends expected to impact labourmarket transformation in **Europe** over the 2025-2030 period. As companies headquartered in the region aim to adjust to these trends, skills gaps and talent shortages in the labour market remain a key barrier: 54% of employers expect talent availability to worsen, significantly above the global average.

Austria's labour market is anticipated to change over the next five years, as businesses plan to adapt their strategies in response to growth of the digital economy, rising cost of living, and increased investments in climate adaptation. With a majority of businesses planning to prioritize automating processes and tasks as a key workforce strategy, employers operating in Austria are ahead of many global peers in human-technology collaboration: 42% of all human work tasks are projected to be augmented by technology by 2030 (compared to a global average of 33%). Demand for skills such as motivation and self-awareness is on the rise, with 60% of employers predicting a net increase in their importance.

By 2030, companies operating in **Belgium** expect to see their business models transformed by climate-mitigation efforts, an aging population and rising cost of living. Reflecting these trends, Belgian employers report growing demand for skills such as environmental stewardship (75%, compared to 53% globally) and talent management (69%, compared to 58%). Companies also plan to adopt business practices to boost talent availability, with 85% anticipating investing in reskilling and upskilling programmes, 78% supporting employee health and well-being, and nearly half (48%) facilitating remote work across national borders – all figures are above global averages.

In **Czechia**, businesses anticipate navigating the green transition, demographic shifts, and the digital transformation of industries. Over the next five years, over 80% of employers operating in the country plan to focus their workforce strategies on automation and upskilling, while 76% aim to prioritize transitioning staff from declining to growing roles, a higher share than global average. The labour market is expected to remain tight: only 6% of companies anticipate improvements in talent



availability, compared to a global average of 29%. Further, 70% of employers hope to improve their talent pipeline by investing in reskilling and upskilling of their current workforce, while 65% plan to offer higher wages to become more attractive.

By 2030, employers in **Denmark** expect to see business transformation in light of increased investments in climate adaptation, greater emphasis on labour and social issues, and growing geoeconomic fragmentation, while they express less focus than their global peers on digitalization and inflation as potential drivers of change. Denmark's labour market is projected to exhibit a higher degree of skill stability than most other countries, with 71% of today's on-the-job skills expected to remain stable, compared to 61% globally. Skills relevant to AI and big data, networks and cybersecurity, as well as curiosity and lifelong learning are expected to increase in use. Global citizenship skills are also set to grow in importance by 2030, with 47% of employers operating in Denmark projecting a net increase in demand, compared to 19% globally.

An aging and shrinking workforce, slower economic growth, and a growing focus on labour and social issues are identified as key trends impacting businesses in **Estonia** by 2030. Compared to global averages, businesses operating in Estonia are less focused on the green transition, with only 29% expecting their business models to be significantly impacted by investments in carbon reduction and 21% by climate adaptation. Overall, 79% of employers identify skills gaps in the labour market as a primary barrier to transformation, which is above the global average. Firms in Estonia plan to address these talent and skill challenges through business practices such as reskilling and upskilling and supporting employee well-being.

Employers in **France** expect their business models to be impacted by digital transformation, climatemitigation efforts, and rising cost of living. To address these trends, companies are planning on prioritizing upskilling and hiring talent with emerging skill sets, alongside accelerating automation. A significant 71% of employers are focused on complementing and augmenting their workforce with new technologies, above the global average of 63%. By 2030, demand is expected to grow for roles such as Security Management Specialists, Digital Transformation Specialists, and Software Developers, while jobs such as Material-Recording and Stock-Keeping Clerks and Data Entry Clerks are projected to decline in the country.

By 2030, companies in Germany expect their business models to be re-shaped by increasing digitalization, climate-mitigation efforts and ongoing geoeconomic fragmentation. For example, 52% of employers operating in Germany are anticipating impacts from growing geopolitical divisions, above the global average of 34%. Businesses are planning to embrace technologies to stay competitive, with 93% expecting that AI and information processing tools, and 67% that robots and autonomous systems, will be transformative to their operations. To prepare for these changes, 81% of companies plan to actively hire staff with new capabilities. Examples of growing roles in the country include Software Developers, UI/UX Designers, and AI and Machine Learning Specialists.

Broadening digital access and rising cost of living are the top trends expected to shape business transformation in **Greece** by 2030. Sixty-three percent of employers in Greece also identify growing focus on labour and social issues as a key source of transformation for their organization, above the global average of 46%. More than half of companies operating in the country have identified skills gaps in the labour market and inability to attract talent to their industry as key barriers to business transformation. To improve talent availability, a large majority (82%) of firms identifies increased public funding for reskilling and upskilling as a key policy priority, and 64% call for government support through wage subsidies; both exceed global averages. Additionally, 46% of employers suggest that changes to pension regulations and retirement ages could increase talent availability over the next five years. For their part, 92% of companies plan to strengthen their own talent retention by improving talent progression and promotion.

In **Hungary**, rising cost of living, increasing digitalization, and an aging and shrinking population are expected to shape business models and labourmarket outcomes by 2030. A significant 70% of employers identify inflation as a top concern, above the global average of 50%. Talent availability is highlighted as a concern, with 77% of firms operating in the country foreseeing difficulties when hiring. Almost 80% of businesses are planning to offer remote and hybrid work opportunities within the country and nearly 40% envisage doing so across national borders, with almost 70% pointing to more flexible regulation on this matter as a promising public policy to support talent availability in the country.

Anticipating labour-market changes due to increased investment in climate adaptation and growing focus on labour and social issues, companies in Ireland identify talent attraction as a key barrier to business transformation by 2030. Alongside skills gaps, 43% of employers operating in the country expect difficulties in drawing the right talent to their firms, compared to a global average of 27%. To address talent shortages, 40% of companies plan to provide additional support to workers with caregiving responsibilities, and 27% highlight the effectiveness of additional funding for government programmes supporting caregivers. Employers in Ireland are also expanding their diversity, equity and inclusion measures, with 73% conducting pay equity reviews, 53% establishing employee resource groups, and 40% employing diversity, equity and inclusion officers. Additionally, 69% of respondents state a commitment to reducing wage inequalities.

By 2030, employers operating in **Italy** expect business model transformation in response to increased climate-mitigation efforts, continued digitalization and rising cost of living. In particular, 70% anticipate changes due to investments to reduce carbon emissions, compared to a global average of 47%. Employers in Italy project net job growth in Robotics Engineers, Renewable Energy Engineers, and Environmental Engineers, driving increasing demand for skills such as AI, networks, cybersecurity and environmental stewardship. To adapt to these trends, 85% of respondents aim to upskill their workforce and 73% plan to enhance their workforce through technology augmentation.

Employers in **Latvia** are anticipating labourmarket changes over the next five years due to aging and shrinking population, rising cost of living, and stronger focus on labour and social issues. Diverging from global trends, businesses operating in the country expect to see lower levels of disruption from broadening digital access and investments in carbon reduction and climate adaptation. Talent availability is a stated concern, with 71% of employers expecting hiring challenges. In response, companies in Latvia are planning to emphasize workforce strategies such as accelerating automation and upskilling to mitigate talent shortages.

In Lithuania, employers identify rising cost of living, aging and shrinking population, and broadening digital access as the top three drivers of labourmarket changes by 2030. Skills gaps are perceived as a significant barrier to business transformation, with 83% of firms operating in the country citing this issue, compared to a global average of 63%. To address these trends, 86% of firms in Lithuania plan on investing in reskilling and upskilling. Seven in 10 respondents plan to support employee health and well-being while six in 10 aim to improve talent progression and promotion processes in order to increase talent availability. Anticipated workforce strategies also focus on automation and hiring talent with emerging skills to keep pace with evolving business needs.



Talent shortages at the industry level are expected to be a key challenge in the Netherlands over the 2025-2030 period: 56% of firms operating in the country expect hiring difficulties, while only 15% foresee improvements in talent availability. In response, 86% of businesses are planning on accelerating the automation of processes and tasks as a key workforce strategy to address talent shortages, a higher level than their global peers. Upskilling (envisaged by 83% of respondents) and recruiting talent with new skills (anticipated by 71%) are also areas of focus. Furthermore, companies in the Netherlands plan to utilize diversity, equity and inclusion efforts to expand their talent base, with 64% of firms expecting to set specific goals and 46% to embed diversity, equity and inclusion initiatives across their supply chains.

By 2030, employers in Norway expect their business models to be significantly impacted by the green and digital transitions. Alongside Al and big data, curiosity and lifelong learning, resilience, flexibility, and agility are expected to be skills with increasing demand, with more employers emphasizing these competencies than in other countries. Seventy-four percent of companies operating in Norway highlight the benefits of public funding for reskilling and upskilling, exceeding the global average. Furthermore, three in every five respondents plan to expand their talent base by leveraging diversity, equity and inclusion policies, surpassing global averages. Additionally, a lower proportion of companies in Norway anticipates wages to account for a growing share of their total revenue over the next five years (26%, compared to 52% globally) and a higher proportion anticipates the reverse (22%, compared to 8% globally).

In **Poland**, broadening digital access is expected to be the predominant trend driving shifts in the labour market by 2030. The impact of this trend is evident in firms' expectations regarding changing skills demand, with employers unanimously anticipating increased need for Al and big data skills. Talent availability is also seen as a concern, with 52% of employers operating in the country expecting aging and shrinking workforce to impact their business over the next five years and 65% foreseeing hiring challenges. To address these issues, companies in Poland see potential in supporting employee health and well-being and expanding remote and hybrid work options within the country to attract and retain talent.

In **Portugal**, 71% of the workforce is expected to require training by 2030, above the global average of 58%. Key skills in demand over the next five years are anticipated to include curiosity and lifelong learning, talent management, and leadership and social influence. Skills such as teaching and mentoring as well as resource management are also increasingly sought after in the country. Firms operating in Portugal plan to invest in reskilling and upskilling, with 87% of employers expecting improved talent retention and 73% transitioning employees to new or evolving roles. Forty percent of respondents regard government as a key funding source for their reskilling and upskilling efforts, which is twice the global average.

Broadening digital access, rising cost of living, and growing geoeconomic fragmentation are seen to be shaping the labour market in Romania over the 2025-2030 period. One out of three companies operating in the country also cite stricter anti-trust and competition regulations as a factor impacting their business models in the next five years, nearly twice the global average. Seventy-six percent of businesses in Romania identify skills gaps in the labour market as a key barrier to transformation, alongside challenges related to talent attraction to industry. To address these concerns, 94% of employers are planning on investing in workforce upskilling, a higher share than their global peers (85%). Firms in the country also anticipate hiring staff with new skills (79%) and accelerating automation (68%) as key workforce strategies in the next half-decade.

Rising cost of living and increased digitalization are expected to be key trends impacting businesses operating in **Serbia** over the next five years. In addition to skills in AI and big data and technological literacy, talent management and resource management are the skills anticipated to be most in demand in the country. Two-thirds of employers identify skills gaps in the labour market as a key barrier for transforming their business. With regard to policies seen as effective to improve talent availability, 67% of firms point to increased flexibility in hiring and firing practices and 50% to wage subsidies, both above global averages.

In Slovenia, demographic shifts are identified as top-of-mind by employers, with 68% and 45%, respectively, identifying aging and shrinking workforces in some parts of the world and growing working-age populations in others as key trends impacting business models over the next five years. Both shares are above the global average. Skills gaps in the labour market are seen as a key barrier to transformation by two-thirds of companies operating in the country, followed by organizational culture and resistance to change. To improve talent availability, 71% of employers suggest considering more flexible policies regarding hiring and firing, while 50% point to reforming immigration laws. Seven in 10 firms plan to offer higher wages and nearly six in 10 plan to review working hours and overtime policies to improve their attractiveness as employers.

Increasing investments in carbon reduction, broadening digital access, and rising cost of living are expected to shape the labour market in **Spain** over the 2025-2030 period. Key barriers to transformation perceived by respondents include skills gaps, regulatory frameworks, and resistance to change and organizational cultures. To address talent availability challenges via public policy, 60% of employers in Spain see potential in increased flexibility in hiring and firing practices, and 49% in increased flexibility in setting wages, in addition to public funding for reskilling and upskilling (65%). Regarding business practices, 77% of respondents plan to enhance progression and promotion processes to become more attractive as employers. Moreover, an above-global-average share of employers operating in the country plan to offer remote and hybrid work opportunities and provide support for workers with caregiving responsibilities.

By 2030, **Sweden**'s employers anticipate business transformation in response to broadening digitalization, demographic shifts and rising cost of living. About 50% identify aging and shrinking workforces in some parts of the world as a key trend, while 41% highlight growing working-age populations elsewhere. Only 5% of firms operating in the country expect hiring conditions to improve over the next five years, significantly below the global average. In response, employers are planning on enhancing talent progression and promotion processes, expanding remote and hybrid work options, and investing in reskilling and upskilling to increase talent availability.

In Switzerland, continuous digitalization is seen as the key driver of business transformation by 2030, followed by climate mitigation and adaptation. This is reflected in 96% of companies expecting Al and information processing technologies to transform their operations. Workforce strategies are anticipated to focus on automation, upskilling, and hiring talent with emerging skills, with 73% of businesses actively integrating new technologies to complement and augment their human workforce. However, talent retention is seen as a concern, with 36% of employers expecting retention to worsen, nearly twice the global average. To address these challenges, firms in Switzerland plan to place a bigger emphasis on flexibility in the workplace than their global peers and to increase talent availability through remote work options across national borders and support for workers with caregiving responsibilities.

Broadening digital access is expected to drive labour market change in Türkiye over the 2025-2030 period, with firms operating in the country anticipating technologies such as AI, robotics and energy technologies to transform their operations. These expectations are reflected in the list of predicted fastest-growing job roles in the country, which includes Robotics Engineers, Renewable Energy Engineers, and Autonomous and Electric Vehicle Specialists. Employers anticipate 44% of on-the-job skills to be disrupted by 2030, higher than the global average of 39%. Al and big data, technological literacy, and networks and cybersecurity are identified as the fastest-growing skills in the country, in addition to a higher-thanaverage expected growth in the importance of multilingualism.

In the **United Kingdom**, the labour market is expected to be influenced by increased digitalization as well as climate mitigation and adaptation efforts over the next five years: 56% of companies operating in the country anticipate seeing their business transformed because of increased investments in climate adaptation, a higher share than their global peers. Fifty-six percent of employers also expect geoeconomic fragmentation to impact their business strategy, compared to 34% globally. As a result of these perceived trends, respondents expect rising demand for skills such as technological literacy, AI, big data and resilience, flexibility and agility. Key job roles anticipated to see significant growth by 2030 include Big Data Specialists, FinTech Engineers, and AI and Machine Learning Specialists.

# Northern America

Technological advancements, demographic shifts, and economic uncertainties are driving strategic decisions of companies headquartered in Northern America. A higher share of employers in this part of the world is evaluating options in both offshoring (23%) and re-shoring (19%), pointing to a possibility of wider global supply chain re-organization. Additionally, companies in the region share a higher-than-average focus on diversity, equity and inclusion, including through measures such as payequity audits. Only 35% of companies in Northern America anticipate an increase in wages as a share of total revenues (compared to 52% globally). As macrotrend-driven disruptions reshape the jobs and skills landscape, 67% of the workforce in the region is projected to require upskilling or reskilling by 2030, a rate exceeding the global average.

Employers in Canada are anticipating an evolving business landscape marked by advances in digital technologies, geoeconomic fragmentation, and increased climate-mitigation efforts by 2030. Reflecting these trends, 97% of companies expect Al and information processing technologies to transform their operations. Robotics and autonomous systems, along with energy generation and storage technologies, are also expected to gain traction. Demand for job roles such as Security Management Specialists, Al and Machine Learning Specialists, and Software Developers is expected to be on the rise. To ensure a steady talent pipeline, employers in Canada are looking to bolster talent progression and promotion processes and investing in reskilling and upskilling.

In the **United States**, technological trends and climate adaptation are expected to shape business and workforce strategies over the 2025-2030 period: 55% of employers highlight climate adaptation as a key trend expected to influence business models. Additionally, 94% of firms in the United States expect AI and information processing technologies to transform their operations in the next five years. Big Data Specialists, AI and Machine Learning Specialists and Data Warehousing Specialists are anticipated to be among the fastest-growing jobs in the country. However, roles such as Data Entry Clerks and Software Testers are seen as in decline as automation reshapes the workforce. To enhance talent availability, respondents see potential in government support for reskilling and upskilling programmes as well as increased flexibility in hiring and firing practices.

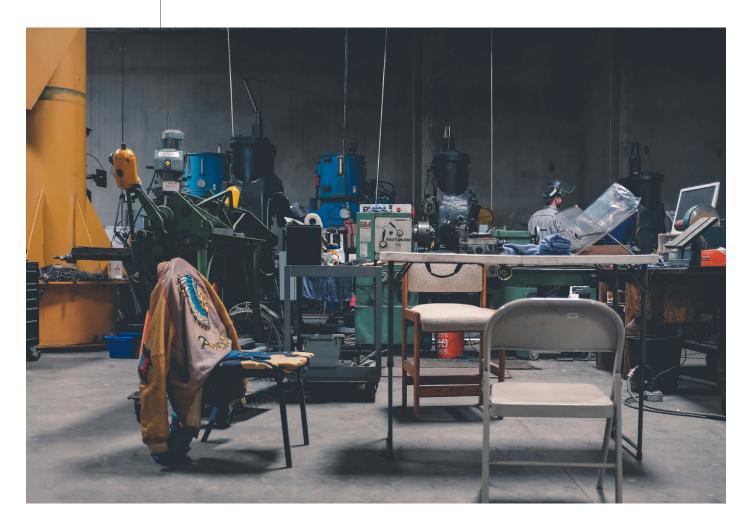
# Latin America and the Caribbean

Companies headquartered in Latin America and the Caribbean expect increased digitalization, stronger focus on labour and social issues, and increased efforts towards climate mitigation to drive labour market change over the 2025-2030 period. Skills gaps in the labour market, organizational cultures, and outdated regulations are the perceived top barriers to business transformation in the region, each highlighted by about 50% of respondents. Eighty percent of firms expect talent development to improve over the next five years, surpassing global averages. A large majority of employers in the region plans to respond to skills gap by upskilling their own workforce (84%), accelerating the automation of tasks (81%), or hiring staff with new skills (68%).

Employers in **Argentina** expect broadening digital access, climate mitigation and economic uncertainty to shape labour market change over the next five years. Skills gaps are seen as a barrier to business transformation by 65% of companies,

followed by outdated regulations (57%) and organizational cultures and resistance to change (48%). To address skills gaps, firms operating in the country are planning to hire staff with new skills, to automate tasks where possible, and - to a lesser extent - to invest in reskilling and upskilling (71%, compared to a global average of 85%). Expected fastest-growing jobs in the country include Data Analysts and Scientists and AI and Machine Learning Specialists. While only one out of five companies expect wages to account for a growing share of total revenues in the next five years (compared to 52% globally), 57% of employers are planning to design their salary and compensation strategy to support workers' purchasing power (compared to 33% globally).

In **Brazil**, like in many other countries, skills gaps are perceived as a primary barrier to business transformation by 2030. Employers operating in the country foresee growth in job roles such as Digital Transformation Specialists, AI and Machine Learning Experts, and Supply Chain and Logistics Specialists. Almost nine in 10 companies in Brazil plan to upskill their workforce over the next five years. While AI and big data, creative thinking, and technological literacy are anticipated to be the fastest-growing skills in the country, companies also expect a greater focus on empathy and active listening, cited by 60% of respondents, as well as resilience, flexibility, agility, and curiosity and lifelong learning.



Companies in **Colombia** anticipate labour-market changes due to broadening digital access, increased efforts to reduce carbon emissions and greater focus on labour and social issues over the 2025-2030 period: 65% identify skills gaps as a key barrier to transformation and 61% cite outdated or inflexible regulatory frameworks. However, employers operating in Colombia are more positive than global peers regarding their future talent availability outlook, with 47% expecting talent availability to improve by 2030. To improve talent retention, respondents are planning to focus on employee health and well-being and improving employee progression.

By 2030, broadening digital access and climatechange mitigation are expected to shape the labour market in **Mexico**. Ninety-five percent of companies operating in the country expect Al tools to transform their operations in the next five years, and 63% anticipate making greater use of robotics, with 82% of employers aiming to accelerate automation of tasks over the same time horizon. Information Security Analysts and Big Data Specialists are projected to be among the fastest-growing job roles in the country. Employers in Mexico are positive about talent retention, with 53% expecting improvements (compared to 44% globally). In addition to AI and big data and creative thinking skills, companies anticipate placing greater emphasis on resilience, flexibility and agility as well as environmental stewardship, with 73% and 69% of firms, respectively, expecting these skills to see rising demand.



TABLE 5.1

## Impact of macrotrends, 2025-2030, by region

Share of employers which expect macrotrends to drive transformation in their organization (%), by region.

Ageing and declining working-age populations	15	84	49	33	18	48	38	11	13
Broadening digital access	61	66	57	70	53	67	72	63	59
Growing working-age populations	27	20	27	23	13	35	34	18	15
Increased efforts and investments to adapt to climate change	19	47	44	43	33	45	55	37	33
Increased efforts and investments to reduce carbon emissions	23	61	51	50	35	43	72	45	33
Increased focus on labour and social issues	37	52	47	57	28	48	28	45	64
Increased geopolitical division and conflicts	27	48	36	16	35	45	31	39	21
Increased government subsidies and industrial policy	30	22	16	14	31	22	24	24	26
Increased restrictions to global trade and investment	19	28	23	19	29	28	21	16	23
Rising cost of living, higher prices or inflation	52	58	51	43	54	45	52	34	59
Slower economic growth	32	66	37	42	47	52	69	8	49
Stricter anti-trust and competition regulations	14	9	19	14	24	25	14	18	3
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#### Source

### TABLE 5.2

### Impact of technology related trends, 2025-2030, by region

Share of employers which expect technology related trends to drive transformation in their organization (%), by region.

Al and information processing technologies (big data, VR, AR etc.)	69	92	87	93	79	96	90	79	85
Biotechnology and gene technologies	9	27	9	15	8	9	3	18	8
Energy generation, storage and distribution	50	39	44	38	31	33	45	26	49
New materials and composites	36	34	30	34	25	22	38	34	18
Quantum and encryption	10	27	9	13	6	28	10	11	13
Robots and autonomous systems	45	61	62	63	44	61	72	53	38
Satellites and space technologies	8	19	5	13	7	9	10	18	15
Semiconductors and computing technologies	14	39	17	20	20	36	21	24	8
Sensing, laser and optical technologies	10	31	15	28	14	16	14	29	8
	Latin Eastern	Michael Provide and Provident	"UCILE East and the Carth,"	NOTHER JOGEN	VOTHER MICA	OUTH-BASE	Southern	C.S. Asia	ANICA CONTRACT
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### TABLE 5.3Skill importance in 2025, by region

Share of employers which consider skills to be core skills for their workers (%), by region.

Environmental stewardship	23	11	18	22	14	28	50	19	33	Ethics	
Global citizenship	3	29	11	9	11	26	25	6	24	Eth	
Curiosity and lifelong learning	41	64	58	53	29	58	54	29	24	×.	
Dependability and attention to detail	46	41	30	38	26	57	46	45	48	Self-efficacy	
Motivation and self-awareness	62	59	59	48	32	51	46	29	58	Self-	Attitudes
Resilience, flexibility and agility	70	54	70	81	50	79	71	35	64		A
Empathy and active listening	34	52	56	67	28	66	54	39	33	رم رو	
Leadership and social influence	62	66	63	69	46	68	67	29	61	Working with others	
Teaching and mentoring	59	30	25	22	13	28	21	26	24	With	
Analytical thinking	75	71	71	74	47	79	67	71	61		
Creative thinking	68	64	54	58	57	62	63	55	48		
Multi-lingualism	45	23	21	17	23	21	13	10	27	Cognitive skills	
Reading, writing and mathematics	18	27	17	22	18	26	25	26	30	0	
Systems thinking	59	43	35	67	33	47	38	26	45		
Marketing and media	28	27	18	19	20	21	33	32	27	ment	abilities
Service orientation and customer service	28	52	48	67	32	60	46	42	48	Engagement skills	Skills, knowledge and abilities
Quality control	44	16	35	30	36	32	29	48	30		wledg
Resource management and operations	48	27	43	45	31	40	46	32	39	Management skills	lls, kno
Talent management	49	36	48	53	41	53	50	52	45	Mana s	SKi
Manual dexterity, endurance and precision	11	4	16	8	16	6	13	19	9	es	
Sensory-processing abilities	7	11	6	7	4	4	8	6	9	Physical abilities	
Al and big data	32	45	44	40	46	62	58	55	55		
Design and user experience	14	39	23	29	21	28	33	19	30	ŝ	
Networks and cybersecurity	20	27	24	21	20	40	42	13	39	Technology skills	
Programming	17	16	16	16	19	26	13	13	24	Techno	
Technological literacy	52	30	54	51	35	64	67	52	64		





#### Source

#### TABLE 5.4

#### Skill evolution, 2025-2030, by region

Net difference between the share of employers which consider skills to be increasing and decreasing in importance to their workers from 2025 to 2030 (%), by region. The share of employers predicting skill stability is not used in the calculation.

Environmental stewardship	54	48	56	68	39	46	70	46	46	Ethics	
Global citizenship	4	33	17	29	4	14	43	33	33	Eth	
Curiosity and lifelong learning	38	66	70	61	52	60	52	56	33	Ň	
Dependability and attention to detail	14	-5	-1	24	30	23	17	28	37	Self-efficacy	
Motivation and self-awareness	40	52	49	56	33	47	52	46	56	Self-	Attitudes
Resilience, flexibility and agility	52	54	69	65	64	67	83	64	79		Ä
Empathy and active listening	26	55	47	67	25	47	57	36	46	ίω	
Leadership and social influence	45	61	57	64	60	62	65	50	62	Working with others	
Teaching and mentoring	46	30	27	28	20	25	43	33	37	W	
Analytical thinking	52	46	52	64	55	49	78	62	70		
Creative thinking	55	71	65	81	62	65	74	67	72		
Multi-lingualism	59	23	5	26	18	14	22	-8	11	Cognitive skills	
Reading, writing and mathematics	-14	13	-8	-4	11	-8	0	4	21	0	
Systems thinking	43	49	50	59	48	42	63	52	75		
Marketing and media	31	29	17	24	39	10	57	52	41	ment	Skills, knowledge and abilities
Service orientation and customer service	35	41	37	61	45	21	30	50	55	Engagement skills	e and
Quality control	25	13	13	21	28	17	23	62	41		wedge
Resource management and operations	27	13	18	23	37	22	35	38	24	Management skills	ls, kno
Talent management	53	59	58	61	60	45	70	56	67	Mana	Skil
Manual dexterity, endurance and precision	-24	-45	-28	-29	-7	-36	-17	-13	14	ss al	
Sensory-processing abilities	23	7	11	12	20	-13	30	24	20	Physical abilities	
Al and big data	79	87	90	91	68	90	96	89	86		
Design and user experience	24	46	43	63	43	24	68	60	54	Sills S	
Networks and cybersecurity	69	64	74	67	70	61	92	54	71	Technology skills	
Programming	48	-4	24	32	35	10	29	15	57	Techno	
Technological literacy	53	43	71	76	64	80	78	63	84	F	

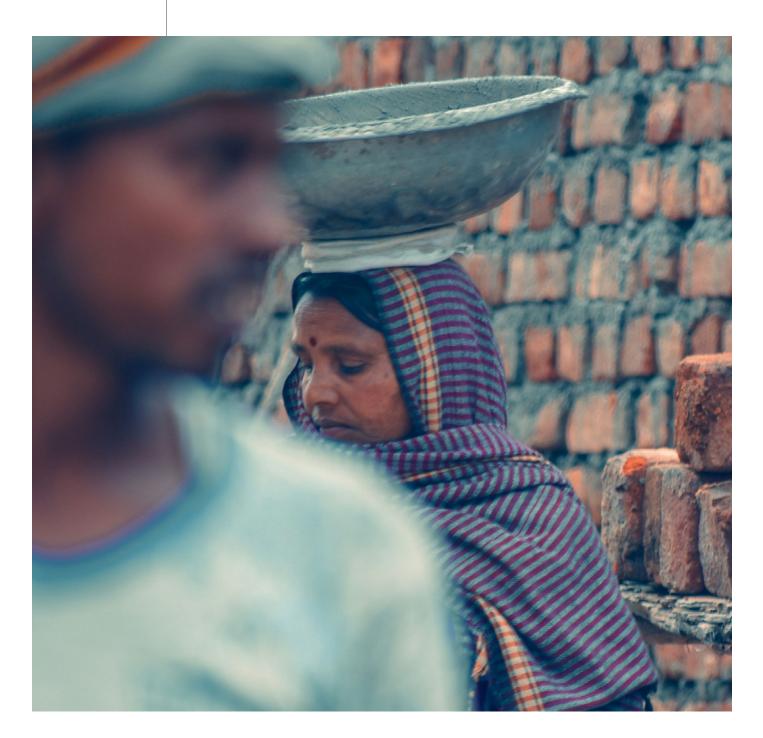


#### Source

# 5.2 Industry insights

# Cross-industry trends and scope for collaboration

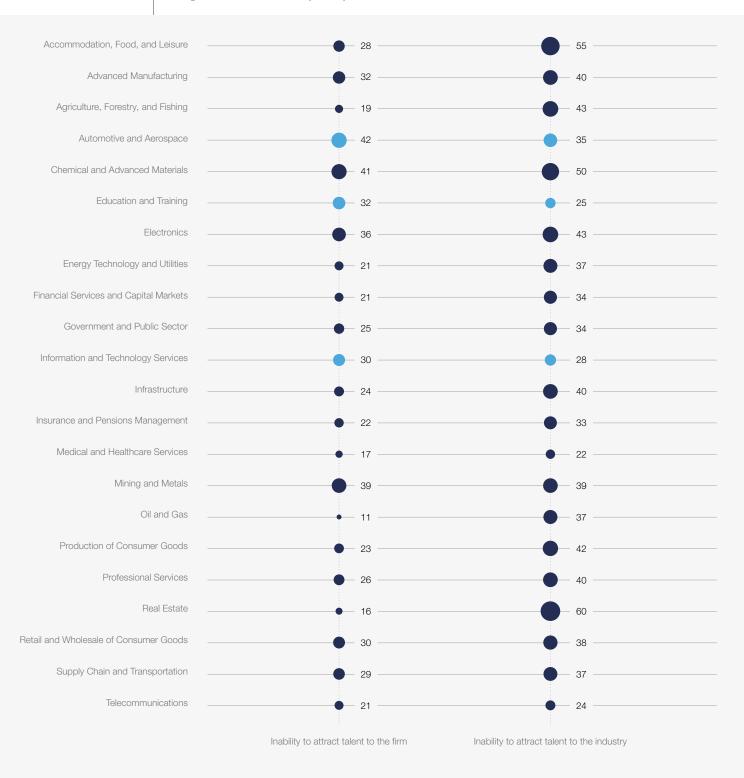
The anticipated impact of macrotrends on the future of jobs is multi-faceted across both geographies and sectors. Specific industries are seeing points of convergence as well as distinct barriers to transformation and thus are prioritizing different workforce strategies in response to labour-market transformation by 2030. While 19 out of 22 global industries covered by the report identify skills gaps in the local labour market as the top barrier to industry transformation, each sector also anticipates distinct additional challenges in the next five years. In both the Government and Public sector and Medical and Healthcare sector, for example, organizational culture and resistance to change features as the most-selected barrier to transformation. In the Real Estate sector, inability to attract talent to the industry is seen as the key obstacle. Four sectors – Agriculture, Forestry, and Fishing; Information and Technology Services; Oil and Gas; and Retail and Wholesale of Consumer Goods - view data and technical infrastructure as one of the key barriers. As shown in Figure 5.1, most industries see talent attractiveness at the industry level as a bigger issue than at the firm level over the 2025-2030 period (with Automotive and Aerospace, Education and Training, and Information Technology being the three exceptions).



#### FIGURE 5.1

#### Attracting talent to the firm and to the industry

Share of employers surveyed expecting an inability to attract talent to their firm or an inability to attract talent to their industry will hinder their organizational transformation, by industry.



Firm attractiveness seen as outweighing industry attractiveness

Industry attractiveness seen as outweighingfirm attractiveness

Share 60

#### Source

World Economic Forum, Future of Jobs Survey 2024.

#### Note

Industries in which a larger or equal proportion of companies identify firm-level talent attraction as a greater challenge than industry-level talent attraction are displayed in dark blue. Industries in which industry-level talent attraction is identified as a greater challenge than firm-level talent attraction are displayed in light blue.

The fact that Future of Jobs Survey respondents predominantly evaluate talent availability challenges as industry-level issues points to potentially untapped opportunities for industry stakeholders to collaborate and implement customized intraindustry or cross-industry solutions. However, employers across industries often exhibit different preferences over workforce strategies.

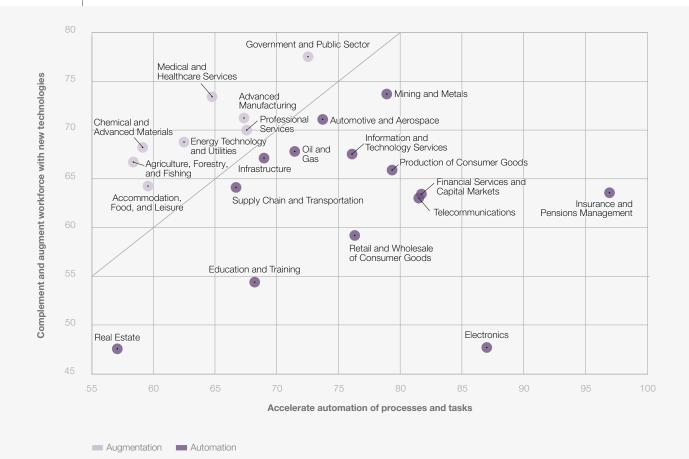
Reaching close to a consensus view, upskilling is selected as the top workforce strategy in 20 industries and ranks second in the remaining two: Electronics and Insurance and Pensions Management. Oil and Gas (96%) and Telecommunications (96%) are the industries most committed to upskilling, while a still significant 73% of Education and Training industry employers plan to focus on this strategy.

There exist more notable industry differences with regard to anticipated use of technologies to either fully automate processes and tasks or complement and augment the human workforce, as shown in Figure 5.2. While most industries aim to pursue a balance of both automation-focused and augmentation-focused workforce strategies over the 2025-2030 period, 87% of respondents in Electronics expect to focus on automating tasks, whereas only 48% plan to focus on workforce augmentation. Industries including Insurance and Pensions as well as Telecommunications exhibit a similar automation-to-augmentation gap. By contrast, sectors such as Healthcare, Agriculture, and Government report a higher preference for augmentation over automation.

Additionally, while hiring staff with new skills to meet emerging business needs features among the top three workforce strategies in 17 out of 22 sectors – possibly precipitating strong intra- and inter-industry competition over talent over the next five years – upskilling and transitioning existing staff from declining to growing job roles appears as an untapped opportunity: only the Automotive and Aerospace, Electronics, and Real Estate sectors currently aim to prioritize such job transitions as one of their top three workforce strategies by 2030.

#### FIGURE 5.2

Workforce strategy: automation or augmentation, by industry



Share of employers surveyed planning to adopt the stated workforce strategies

#### Source

# Industry-level findings

By 2030, transformation of the Accommodation, Food, and Leisure industry is expected to be shaped by rising cost of living and a greater focus on labour and social issues. Increased digitalization - while still relevant for a significant 51% of respondents – appears as less central than in other industries. The focus placed by the industry on human experience and social issues is reflected in the human-technology frontier, as companies anticipate continued reliance on humans to predominantly deliver 43% of total work tasks over the next five years, higher than the global industry average. However, talent availability is a growing concern, with 59% of employers expecting hiring challenges to worsen. To respond to these emerging trends, firms are scaling up upskilling efforts, hiring for emerging skills and augmenting workforce with new technologies, while also aiming to improve the industry's attractiveness by supporting employee health and well-being, improving wages and talent progression. About one third of companies is investing in diversity, equity and inclusion efforts, focusing particularly on young talent (69%, compared to the 52% global industry average) and migrant workers (33%, compared to 20% globally).

The **Advanced Manufacturing** sector expects to undergo transformation shaped by increased investments to reduce carbon emissions and adapt to climate change and rising cost of living. Companies are anticipating the adoption of Al (81%), robotics (69%), and new materials and composites (63%, almost twice as many as in other industries). The industry predicts increasing demand for AI and big data skills, creative thinking, networks and cybersecurity skills, but also systems thinking, design and user experience, and resource management. To prepare for these changes, employers expect to be able to upskill 29% of workers in their current role, while they foresee a need for 15% of workers to be reskilled and re-deployed in the next five years. Fifty percent of firms are planning to tap into diverse talent pools to ease labour shortages, and 55% (more than in most other industries) plan to focus their diversity, equity and inclusion efforts on workers aged 55 years and above.

Skills gaps are seen as the key barrier to transformation for businesses in the Agriculture, Forestry, and Fishing industry by 2030 (selected by 68% of respondents), followed by outdated regulations (51%, compared to the 39% global industry average) and insufficient data infrastructure (46%, compared to 32% globally). Climate mitigation and adaptation are key challenges highlighted by the industry, alongside rising cost of living. As employers address these challenges, they are planning to upgrade their workforce strategies by emphasizing upskilling and reskilling, hiring for new skills, and augmenting their workforce with technology. The top three skills on the rise are predicted to be resilience, flexibility and agility, technological literacy, and environmental stewardship, while skills related to AI and big data, networks, and cybersecurity are growing more slowly than in other industries. One-third of firms in the industry do not have a diversity, equity and



inclusion programme, while 63% expect wages to account for a growing share of employers' total revenues, with 92% intending to align wages with productivity and 46% aiming to reduce wage inequalities.

The Automotive and Aerospace sector stands out for its expectation regarding the significant impact that both climate mitigation and geoeconomic fragmentation might have on the industry in the next five years: 54% of respondents identify rising geopolitical tensions (compared to 34% across other industries) and 46% highlight increasing trade restrictions (compared to 23% in other industries) as key drivers of change. About one-fourth of industry players are evaluating options to reshore, nearshore or friendshore, and 16% to offshore suggesting the possibility of greater supply chain re-organization than in other industries. These trends point to considerable transformation for most companies, with skills gaps in labour markets, organizational cultures and resistance to change identified as top barriers, alongside difficulties to attract talent to the industry (highlighted by 42% of respondents, compared to 37% in other industries) and limited access to investment capital (40%, compared to 26% in other industries). Employers are prioritizing workforce strategies that focus on upskilling, automating processes, and transitioning staff from declining to growing roles. Jobs on the rise are predicted to include Robotics Engineers and Data Analysts and Scientists.

In the Chemical and Advanced Materials sector, industry transformation is foreseen to be heavily influenced by investments in the green and digital transitions, leading to a projected increase in job roles for AI and Machine Learning Specialists and Business Development Professionals by 2030. The industry also anticipates a need for more AI and big data as well as environmental stewardship skills. However, the human factor is expected to pose a significant barrier for the industry, with skills gaps in the labour markets and talent attraction to the industry identified as the top two obstacles to industry transformation. To improve industry attractiveness, companies are planning to focus on talent progression and promotion processes, supporting employees' health and well-being and offering higher wages. Employers suggest governments should support upskilling and reskilling and improve education systems, as well as provide wage subsidies and greater flexibility in wage setting. Nine in 10 companies in the industry plan to align wages closely with productivity while only 9% plan to review wage costs as part of costreduction exercises in the next five years.

Broadening digital access, increased focus on labour and social issues, and slower economic growth are expected to drive the transformation of the **Education and Training** sector by 2030. Al and big data skills as well as creative thinking are foreseen to grow in importance. Emerging job roles within the industry are anticipated to include Al and Machine Learning Specialists and Digital Transformation Specialists. Employers also place greater emphasis than in other industries on curiosity and lifelong learning, marketing and media skills and multilingualism. The industry is less focused than other sectors on upskilling and reskilling its own workforce (73%, compared to the 85% global industry average), while employers aim to improve attractiveness through better talent progression and promotion processes, higher wages, and supporting employee well-being.

By 2030, the landscape of the Electronics sector is expected to be shaped by increased climate mitigation efforts, continued digitalization of the economy, and aging and shrinking workforces, while the industry appears less concerned about economic cycles: only 25% of respondents anticipate significant impact from slower economic growth, compared to 42% across all sectors. With Al, robotics and energy technologies targeted for adoption, industry job growth is predicted for AI and Machine Learning Specialists and Electrotechnology Engineers. Talent availability is seen as a concern, with 61% of employers expecting hiring challenges to worsen but only 9% worried about talent retention (compared to 19% global industry average). Workforce strategies are planned to focus on automation, upskilling, and transitioning staff to growing roles. Other than public policy support on reskilling and upskilling, firms also call for improved transport infrastructure to enhance talent availability.

Over the next five years, climate mitigation is foreseen to be at the centre of the Energy Technology and Utilities sector, as companies plan to invest in greener technologies for energy generation, storage and distribution. As a result, Environmental Engineers, AI and Machine Learning Specialists and Renewable Energy Engineers are among the expected top-growing job roles in the sector. As employers aim to transform their business, industry players are particularly concerned about skills gaps in the labour market (81%, compared to 63% across all industries), alongside outdated or unflexible regulations (44%), organizational culture and resistance to change, and the industry's capacity to attract talent (37%). To improve talent availability and industry attractiveness, businesses are planning on improving talent progression and promotion processes and investing in reskilling and upskilling programmes, for which respondents see a role for increased financial support from the public sector.

Increased digitalization is seen as the primary driver of transformation in the **Financial Services and Capital Markets** sector over the next five years, alongside adaptation to climate change and slower economic growth. The sector also anticipates being particularly exposed to AI, with only 5% of employers expecting no significant adoption of the technology by 2030 (compared to 14% across all industries). As a result, AI and big data skills, technological literacy and cybersecurity skills are estimated to be in high demand and the industry anticipates creation of new job roles for Big Data Specialists, AI and Machine Learning Specialists, and Security Management Specialists. To improve talent availability, the industry is planning on investing in reskilling and upskilling (71% of employers), supporting employees' wellbeing (64%) and improving promotion processes (61%). Remote and hybrid work is also seen as a strategy to stay attractive for 58% of companies in the industry, and one out of two respondents is calling for changes to labour laws that support remote work (compared to 36% in other sectors). The industry is particularly advanced in its plans to remove degree requirements in favour of skillsbased hiring approaches (28%, compared to 19% across all industries).

#### Employers in the **Government and Public Sector** identify organizational culture and resistance to change as the top barrier to transformation by

2030, as the sector plans to continue investing in digital and green transformation over the next five years. In line with global trends, AI and big data, Networks and cybersecurity and Technological literacy are the skills with highest perceived increasing importance, followed by Environmental stewardship and creative thinking skills. Skills gaps in the labour market and outdated regulatory frameworks are seen as potentially slowing down transformation of the sector. Overall, public employers are positive about future talent availability, with 52% of respondents expecting improvements in the next five years. To increase sector attractiveness and strengthen the sector talent base, 80% of employers are planning on enhancing talent progression and providing reskilling and upskilling programmes in the next five years.

Information and Technology Services companies are heavily focused on adopting advanced technologies by 2030, with anticipated nearuniversal uptake of AI and information processing (99%, compared to the 86% global industry average) and a strong focus also on quantum and encryption technologies (41%, compared to 12% globally). Growing job roles in the sector are foreseen to include Digital Transformation Specialists, Software and Applications Developers, and Sales and Marketing Professionals. Alongside Al and cybersecurity skills, the industry expects stronger emphasis on resilience, flexibility, and agility than most other sectors, while more employers expect demand for programming and design and user experience skills to decline than in other industries. Workforce strategies aim to prioritize upskilling and hiring talent with new skills to address emerging needs, alongside a higher tendency to reduce staff with less relevant skills (49%, compared to 41% in other industries) and offshore segments of the workforce (17%, compared to 8%).

By 2030, transformation of the **Infrastructure** sector is foreseen to be driven by a need to increase investments in carbon reduction, climate adaptation and digitalization. As a result, new job roles are expected to be created for Big Data Specialists and Organizational Development





Specialists. Top skills on the rise are anticipated to be linked to AI and big data as well as networks and cybersecurity, and talent management skills are expected to grow in demand at a faster rate than the global industry average. Twenty-seven percent of employees in the sector are anticipated to be able to upskill in their current roles, with an additional 17% projected to be reskilled and redeployed. Almost 70% of respondents expect reskilling and upskilling to improve talent retention and enhance competitiveness and productivity of their company, with 50% planning to increase talent mobility through training programmes.

Over the next five years, evolution of the global economic outlook, and population dynamics across the world are predicted to drive industry transformation in the **Insurance and Pensions** Management sector. Continued adoption of digital technologies is also foreseen to transform the industry, with 97% of employers planning to accelerate automation of processes and tasks, which is significantly above the global industry average. The sector also expects higher-thanaverage levels of workforce augmentation, with 41% of total work tasks projected to be completed by human-technology collaboration by 2030. Al and big data, creative thinking, and technological literacy are seen as the top skills on the rise. While 42% of employers predict talent availability at the point of hiring to worsen, the industry is strongly focused on upskilling and reskilling: 91% of employers plan to upskill their workforce to adapt to evolving needs and - as a result - 82% expect talent development to improve in the next five years.

The digital transition, higher cost of living and an increasingly aging population are among the key drivers of transformation anticipated for **Medical and Healthcare Services** over the 2025-2030 period. In particular, aging population is highlighted as a key factor by 59% of companies in the industry, compared to 40% across all sectors. As they aim to adapt to these trends, firms cite challenges in terms of their own organizational

culture and resistance to change, alongside outdated regulations and skills gaps in the labour market. Emerging job roles in the industry are expected to include Data Analysts and Scientists and Al and Machine Learning Specialists, with significant emphasis on Al and big data and technological literacy as the top skills increasingly in demand. While prioritizing business practices that support employee health and well-being (57%), providing effective reskilling and upskilling (63%), and offering competitive wages (49%) are seen as key workforce strategies, the industry also increasingly plans to tap into diverse talent pools.

With industry transformation by 2030 seen as predominantly shaped by climate adaptation and climate mitigation trends, the Mining and Metals sector is also mindful of growing restrictions on global trade and investment, with 55% of firms identifying this as a key trend (compared to 23% in other industries). Considering the green transition, 79% of industry players expect transformative impact from energy technologies, while AI is anticipated to be less ubiquitous (66%) than in other sectors. The use of autonomous technology to complete work tasks is projected to increase faster than in other industries. Al and Machine Learning Specialists and Mining, Petroleum and Other Extraction Workers are expected to see growing demand in the industry in the next five years, with AI and big data and environmental stewardship seen as leading skills on the rise. To attract and retain talent, firms are planning on prioritizing employee health and well-being (79%) and workplace safety (53%), as well as better articulating business purpose and impact (63%).

By 2030, the **Oil and Gas** sector expects to evolve and transform to reduce carbon emissions and adapt to climate change. According to 40% of respondents from the industry, industrial policy and government subsidies will also impact companies' strategies in the next five years. As companies plan to adopt cleaner technologies they see increasing demand for skills in environmental stewardship, alongside AI and big data and technological literacy. New job roles are expected to be created for AI and Machine Learning Specialists and Data Analysts and Scientists. Anticipated workforce strategies in the sector are oriented toward upskilling, with 96% of firms planning on investing in workforce development (compared to 85% across all industries), as well as accelerating automation and augmenting their human workforce with new technologies.

Industry transformation in the Production of Consumer Goods sector is foreseen to be influenced in particular by rising cost of living and increased investments in carbon reduction over the next five years. Additionally, the industry predicts a need to take into account growing focus on emerging labour and social issues (highlighted by 58% of firms, compared to the 46% global industry average). Companies are anticipating actively adopting advanced technologies, with higher-thanaverage uptake of robots and autonomous systems (71%, compared to 58% across all sectors) and new materials and composites (61%, compared to 30%). However, 56% of employers expect talent availability to become more difficult in the next five years. To address talent shortages, companies are planning on supporting workers' health and wellbeing (73%) and improving working hours (52%), while they see potential in public policy support with regard to flexibility in hiring and firing, flexibility in setting wages, and reforming immigration laws.

By 2030, firms in the **Professional Services** sector expect continued digitalization, rising cost of living and increased focus on labour and social issues

to impact industry transformation. Workforce strategies anticipated for the sector emphasize upskilling, hiring talent with emerging skills, and augmenting the human workforce with new technologies. There is also expected to be a higher focus on reducing job roles with outdated skills, with 48% of companies envisaging prioritizing this approach (compared to 40% across all industries). One in five employers plan to move operations closer to their headquarter location through reshoring or near-shoring. Big Data Specialists and Al and Machine Learning Specialists are among the job roles with the larges projected industry demand, while AI and big data, technological literacy, creative thinking, and cybersecurity are leading the list of skills seen as increasingly in use over the next five years.

Business cycle uncertainty, in terms of both economic growth and inflation, are expected to particularly impact the transformation of the Real Estate industry in the next five years. To react to an evolving landscape, companies plan to adapt their workforce strategies, prioritizing upskilling and reskilling and hiring new talent with relevant skills. Emerging job roles in the industry are foreseen to include AI and Machine Learning Specialists and Business Development Professionals. Demand for Al and big data skills, creative thinking, and curiosity and lifelong learning is projected to grow across all industry roles. Sixty percent of employers highlight the sector's inability to attract talent as a key barrier to transformation by 2030. To increase industry attractiveness, a majority of companies intends to support employee health and well-being and provide better training opportunities, as only 34% of



employees in the industry have currently undergone reskilling or upskilling, compared to a global industry average of 50%. One-third of employers are planning to offer higher wages and one in five plan to leverage diversity, equity and inclusion programmes: both shares are below the global industry averages of 50% and 39%, respectively.

Over the next five years, companies in the Retail and Wholesale of Consumer Goods sector expect industry transformation to be impacted by rising cost of living (68%, compared to 50%) across all industries) and increased focus on labour and social issues (64%, compared to 46%). Talent shortages are seen as pronounced in the sector, with 58% of employers expecting talent availability to become more difficult by 2030 and 28% anticipating declines in talent retention. To adapt workforce strategies, companies are planning on prioritizing upskilling and reskilling of current workers, automation of tasks, and recruitment of talent with emerging skills. Forty-one percent of employers are considering transitioning existing staff from declining job roles to growth areas, presenting an under-utilized opportunity for the industry to invest in job transitions. Emerging job roles in the industry are anticipated to include AI and Machine Learning Specialists, Digital Marketing and Strategy Specialists, and Big Data Specialists.

With 37% of on-the-job skills used today expected to change by 2030, the **Supply Chain and Transportation** industry reports having already put significant effort into reskilling and upskilling, with 57% of employees having completed training programmes, above most other industries. As the industry transforms in response to increased digital access, climate mitigation and adaptation, and rising cost of living, growing job roles in the industry are foreseen to include Light Truck or Delivery Services Drivers; Client Information and Customer Service Workers; and Car, Van and Motorcycle Drivers. Companies see increasing demand in skills such as AI and big data, technological literacy, and networks and cybersecurity. Analytical thinking is also identified as a priority, with 79% of firms expecting increasing its use, a higher share than in other industries. However, a majority of respondents regards the industry's inability to attract talent as a potential risk that could stall transformation.

As digital access and connectivity continue to increase globally, they are expected to drive industry transformation in the **Telecommunications** sector over the next five years. Adoption of AI is anticipated to play a strong role in the future of the industry, while 40% of companies are also preparing to make greater use of space and satellite technologies. Growing job roles in the industry are expected to include AI and Machine Learning Specialists, Big Data Specialists, and Data Analysts and Scientists. To enable industry transformation, 96% of employers plan to upskill and reskill their workforce and 82% intend to increase automation of tasks within work processes. To attract talent, 48% of companies - twice the global industry average - plan to offer remote work across borders, while 22% of respondents are evaluating options for moving operations closer to their homebase through reshoring or nearshoring.

### TABLE 5.5

### Impact of macrotrends, 2025-2030

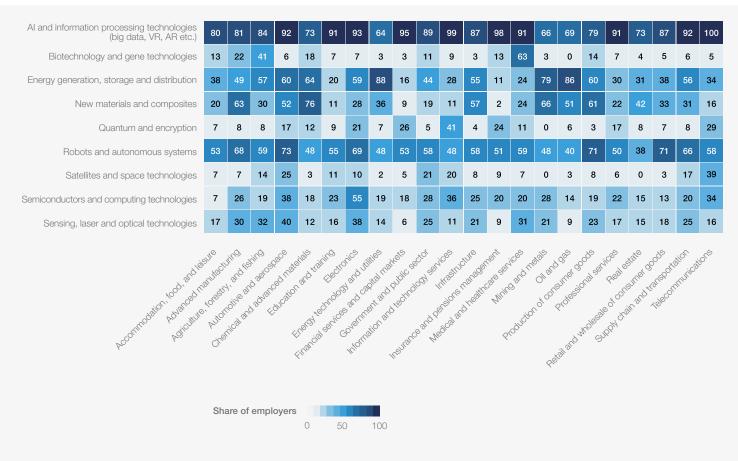
Share of employers which expect macrotrends to drive transformation in their organization (%).

Ageing and declining working-age populations	43	47	43	31	29	29	50	26	37	49	35	41	62	59	38	23	44	43	42	43	44	24
Broadening digital access	51	48	46	63	50	75	57	55	79	60	74	51	78	61	48	26	53	67	58	59	56	81
Growing working-age populations	21	18	24	21	18	27	21	26	23	28	20	21	40	30	28	14	27	26	31	24	26	30
Increased efforts and investments to adapt to climate change	22	49	57	50	65	30	29	53	53	56	31	54	47	43	62	43	47	26	19	30	50	32
Increased efforts and investments to reduce carbon emissions	43	60	57	71	65	16	64	55	34	54	37	61	33	41	69	66	60	37	35	41	66	41
Increased focus on labour and social issues	54	44	41	48	35	54	39	31	33	49	43	42	42	44	52	34	58	52	31	64	44	35
Increased geopolitical division and conflicts	30	45	43	54	44	36	43	34	36	30	36	36	38	35	41	31	31	37	27	25	43	32
Increased government subsidies and industrial policy	13	33	30	29	29	20	18	28	19	30	26	29	16	20	31	40	15	13	15	18	29	16
Increased restrictions to global trade and investment	11	33	22	46	41	11	32	28	28	26	21	17	20	15	55	29	29	20	15	27	36	14
Rising cost of living, higher prices or inflation	63	53	57	56	38	41	46	33	47	39	45	50	67	50	28	37	61	44	58	68	50	46
Slower economic growth	43	34	30	48	47	45	25	29	50	32	45	41	64	30	41	49	46	41	54	47	40	41
Stricter anti-trust and competition regulations	8	16	19	27	15	18	18	16	23	7	22	16	22	24	28	6	14	17	4	17	20	24
Acconnocation, code and it	antaction of the state	ind tel	d agrant	ed mate	inancial training	the de c	And card and	ities not pital not and site and site of and site of a s	technol technol	od of a sand of a	ACES IN A CONSTRUCTION OF A CO	ture hanager d health	Ninin P	oduction	Ja <sup>k</sup> do contraction of the cont	opes of the open o	nolesan Nolesan	Res e	une of the second secon	leecon leecon	stion cati	0 <sup>6</sup>
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#### TABLE 5.6 Impact of technology related trends, 2025-2030

Share of employers which expect technology related trends to drive transformation in their organization (%).



#### Source

### TABLE 5.7

Skill importance in 2025

Share of employers which consider skills to be core skills for their workers (%).

Environmental stewardship	21	24	26	26	28	10	12	27	15	39	12	21	17	8	50	25	34	21	17	15	33	21	S	
Global citizenship	17	18	22	15	14	16	8	16	14	23	17	12	22	14	5	3	15	19	9	14	12	10	Ethics	
Curiosity and lifelong learning	38	53	56	56	48	54	44	41	61	34	66	52	83	43	55	44	46	44	52	61	37	48	×.	
Dependability and attention to detail	45	42	37	41	24	32	44	29	37	48	46	39	33	38	30	31	29	30	52	48	50	24	Self-efficacy	
Motivation and self-awareness	38	64	52	62	52	48	60	49	58	52	55	42	64	43	45	63	54	40	48	64	53	62	Self	Attitudes
Resilience, flexibility and agility	53	73	56	67	66	66	68	67	73	57	70	59	94	65	55	81	65	44	52	73	67	66		<
Empathy and active listening	40	49	48	56	38	42	52	39	55	45	53	46	69	51	35	47	48	53	61	68	43	55	rs S	
Leadership and social influence	49	46	56	59	59	52	60	57	66	66	59	55	75	51	55	69	63	58	57	73	59	76	Working with others	
Teaching and mentoring	19	24	37	28	17	50	16	24	23	32	30	20	33	5	25	31	30	28	26	20	27	38	> .i>	
Analytical thinking	51	71	59	72	48	70	80	80	80	61	83	65	89	59	50	59	68	77	43	71	70	86		
Creative thinking	47	55	56	69	62	64	76	73	65	45	57	59	72	49	65	53	59	67	61	60	48	66	Q	
Multi-lingualism	25	29	37	28	28	36	28	16	28	20	22	26	25	11	25	22	22	30	22	25	26	10	Cognitive skills	
Reading, writing and mathematics	11	27	26	15	17	24	32	16	22	25	28	23	28	16	20	22	20	21	17	24	20	21	0	
Systems thinking	38	42	63	38	31	50	40	47	42	27	50	39	36	57	65	31	51	42	35	44	45	38		SS
Marketing and media	15	18	15	15	17	34	24	10	19	25	18	18	17	24	20	13	29	14	17	27	22	28	Engagement skills	Skills, knowledge and abilities
Service orientation and customer service	42	42	41	36	28	36	40	31	51	57	47	39	58	43	25	38	53	58	48	54	51	55	Engag sk	ge anc
Quality control	40	40	44	46	38	30	24	33	31	25	25	44	19	32	50	34	48	42	39	28	40	31		Iowled
Resource management and operations	25	49	41	51	41	24	32	47	33	59	29	41	33	24	50	53	51	42	30	44	56	34	Management skills	Aills, kr
Talent management	38	44	37	59	35	42	36	37	54	46	49	46	61	46	25	53	57	30	39	59	49	55	Man	<i>ज</i>
Manual dexterity, endurance and precision	15	25	26	15	10	2	12	12	8	18	9	11	8	11	25	3	24	12	0	15	17	14	Physical abilities	
Sensory-processing abilities	4	9	0	10	7	2	8	8	3	5	7	8	11	5	5	6	17	0	4	7	7	7	Phy abil	
Al and big data	26	35	33	54	34	56	44	31	61	50	66	39	58	51	25	31	42	37	43	41	44	66		
Design and user experience	11	22	15	31	21	36	16	22	32	27	39	27	33	16	5	16	26	16	26	28	27	48	skills	
Networks and cybersecurity	19	13	19	26	24	22	24	20	38	39	37	30	31	16	0	22	18	30	13	19	34	48	Technology skills	
Programming	9	9	7	10	10	12	16	20	22	11	36	12	19	14	5	19	20	7	9	12	19	38	Tech	
Technological literacy	38	51	41	59	38	54	48	61	65	52	50	42	67	32	55	44	61	37	30	47	52	55		
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### TABLE 5.8 Skill evolution, 2025-2030

Net difference between the share of employers which consider skills to be increasing and decreasing in importance to their workers from 2025 to 2030 (%). The share of employers predicting skill stability is not used in the calculation.

Environmental stewardship	43	54	71	70	71	37	40	60	43	50	39	65	49	56	68	80	64	63	50	49	64	32		
Global citizenship	15	33	8	21	27	34	29	35	24	15	24	16	29	25	16	4	21	23	30	8	17	21	Ethics	
Curiosity and lifelong learning	48	53	63	68	54	79	48	67	56	34	68	58	74	58	42	60	59	60	68	63	57	71		
Dependability and attention to detail	2	12	16	22	-11	13	12	0	11	8	16	7	6	0	5	-8	6	20	23	14	13	0	Self-efficacy	
Motivation and self-awareness	41	49	46	57	56	54	16	44	46	24	49	47	54	36	47	46	46	49	62	42	51	54	Self-e	Attitudes
Resilience, flexibility and agility	49	69	83	71	59	64	64	58	67	51	78	65	72	65	47	48	69	63	62	69	60	79		Att
Empathy and active listening	33	47	25	54	50	47	36	40	41	21	53	43	44	42	37	42	46	48	50	45	41	48	0	
Leadership and social influence	56	56	48	68	59	64	60	62	56	33	65	52	50	66	32	52	57	49	52	54	49	69	Working with others	
Teaching and mentoring	24	39	9	50	23	42	8	30	14	18	37	24	28	24	37	55	25	41	27	27	37	29	with	
Analytical thinking	28	55	44	66	50	70	40	46	59	44	54	58	61	58	37	42	59	46	59	53	68	67		
Creative thinking	50	69	65	66	54	79	48	59	67	53	73	59	86	76	53	62	63	69	73	62	69	75	m	
Multi-lingualism	18	29	16	19	36	41	-8	18	12	3	11	10	19	17	16	19	18	13	-14	6	12	7	Cognitive skills	
Reading, writing and mathematics	-13	15	-4	-6	11	-7	-12	-17	-8	-5	-14	-4	6	-8	6	-20	-12	-26	9	-6	-4	0	õ	
Systems thinking	34	60	42	54	41	54	54	43	46	38	56	47	60	51	63	52	56	41	43	46	56	57		S.
Marketing and media	40	23	0	31	38	48	0	8	24	32	15	3	20	6	26	11	29	3	41	36	25	22	ement IIs	abilitie
Service orientation and customer service	39	41	43	46	15	38	29	26	39	40	38	34	39	49	47	14	39	30	38	50	51	46	Engagement skills	je and
Quality control	24	26	35	19	11	17	12	9	17	15	4	22	6	25	26	14	28	33	9	17	25	21		Skills, knowledge and abilities
Resource management and operations	15	36	39	16	14	17	17	18	14	29	8	34	3	22	37	24	30	14	32	26	35	14	Management skills	kills, kn
Talent management	40	57	50	68	67	57	36	59	55	50	53	67	58	42	68	55	60	49	59	54	64	64	Man	<u>ت</u>
Manual dexterity, endurance and precision	-13	-18	-22	-14	-40	-27	-36	-39	-27	-18	-46	-23	-31	-24	-22	0	-17	-35	-20	-37	-21	-33	Physical abilities	
Sensory-processing abilities	7	26	-5	41	19	9	16	18	10	12	17	7	17	17	39	15	16	25	29	7	21	0	Phys	
Al and big data	60	80	65	100	82	85	83	91	95	90	97	79	97	92	79	85	86	98	82	86	94	100		
Design and user experience	40	54	24	51	50	50	40	48	48	42	39	40	63	39	28	35	38	36	55	46	42	59	skills	
Networks and cybersecurity	65	74	52	78	65	57	68	79	81	73	74	69	75	78	65	65	70	66	60	65	76	75	Technology skills	
Programming	27	25	4	33	27	20	20	35	41	36	15	29	32	19	25	30	24	26	10	26	33	29	Tech	
Technological literacy	52	71	67	81	48	74	48	67	84	70	62	63	81	81	55	72	66	70	45	68	77	46		
PCO <sup>DINCOMICS</sup> POINTS				Pace ed mate fue ation fue ation	and trainant and traina ta and trainant an	tlectro theory shices	and sand utility and utility a	tanator tanator nandr	upic sector	Stor Realist	Restructions in the second sec	aragent aragent	prob	and me	Petall <sup>2</sup>	Jas go	alse ale contraction of the cont	Kealest Loonsur	ate goo	econn	Unication	1 <sup>10</sup>		
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# Conclusions

The transformation of the jobs and skills landscape anticipated by this year's Future of Jobs Survey respondents will have significant impacts on businesses, industries, governments and workers worldwide. It is crucial to develop nuanced forecasts, identify appropriate workforce and talent strategies, and make informed decisions on managing disruptions to jobs and skills for employers and workers alike.

This edition of the Future of Jobs Report presents a mixed picture with regard to the 2025-2030 outlook for the global labour market. On the one hand, amid newly emerging drivers such as increasing geoeconomic fragmentation, rising cost of living and the widespread adoption of AI tools in the workforce, global macrotrends create an evermore complex environment for policy-makers, employers and workers to navigate, and uncertainty remains high. On the other hand, the report finds a strongly net-positive global employment outlook, with a continuing decrease in the rate of skills obsolescence, as reskilling, upskilling and redeployment initiatives implemented in recent years begin to register in the data and materialize their global workforce impact.

Employers across all industries and geographies demonstrate greater awareness and willingness than in previous editions of the report to proactively engage in addressing workforce and talent challenges, and to do so by pragmatically leveraging innovative approaches such as skillsbased hiring policies and a more strategic focus on diversity, equity and inclusion. However, skills gaps remain the predominant barrier to transformation across most industries and economies, and this year's edition of the *Future of Jobs Report* captures some early signals of likely future priority areas for constructive multistakeholder engagement, including a need for proactive and dynamic job transitions across a wider and growing range of job roles and questions concerning the appropriate future balance between deeper automation and broader augmentation.

This last point reflects a core tenet of the *Future of Jobs Report* since its inception: that the future of work can be shaped for better outcomes and that it is the policy, business and investment decisions made by leaders today that will determine these outcomes and the future space for action. The World Economic Forum is actively supporting the building of a future-ready, inclusive workforce through its two human capital flagship initiatives: <u>The Reskilling Revolution</u> and <u>The Jobs Initiative</u>. We hope that this report will contribute to an ambitious multistakeholder agenda to better prepare workers, businesses, governments, educators and civil society, empowering them to build a better future of jobs for all.

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# Appendix: Report Methodology

This report is based on an analysis of the results of the edition of an extensive survey of Chief People, Chief Learning Officers, Chief Strategy Offices and Chief Executive Officers of leading global employers. Established in 2015, the Future of Jobs Survey has been instrumental in providing insights into the evolution of jobs and skills and the future labour market. It is a pioneering measurement tool that enables companies and governments to map their workforce planning for the next five years. Survey data is collected across economies and industries, providing a compass for private- and public-sector leaders who strive to ensure a better future of work for all.

# Survey design

The Future of Jobs Survey 2024 builds on the methodology from the previous survey editions. Following survey best practices and informed by literature review, several questions were refined and new questions were added.

The survey consists of five interrelated parts. Business Trends 2024-2030 focuses on the macrotrends and technology adoption. It also examines the organizations' transformation barriers. Occupation Trends 2024-2030 identifies the roles and how these are expected to evolve up until 2030. It also studies how the macrotrends and technology trends contribute to the job growth and decline. Skill Trends 2024-2030 analyses the skills in demand and collects information on training programmes and employee reskilling needs and efforts. Workforce Practices 2024-2030 explores the talent strategies and talent-management practices in organizations. People and Technology assesses the automation and augmentation level at the job and task level, as well as companies' approach to enabling people and technology working together.

The survey is comprised of 38 questions and was made available in 12 languages: Arabic, Bahasa Indonesia, Chinese (simplified), French, Hebrew, Japanese, Portuguese, Russian, Serbian, Spanish, Turkish and Vietnamese. The survey collection process was conducted via Qualtrics, with data collection spanning a four-month period from May to September 2024.

### Representativeness

The survey set out to represent the current strategies, projections and estimates of global businesses, with a focus on large multinational companies and more localized companies which are of significance due to their employee or revenue size. As such, there are two areas of the future of jobs that remain out of scope for this report: the future of jobs as it relates to the activities of small enterprises and as it relates to the informal sector.

The Future of Jobs Survey was distributed through collaboration between the World Economic Forum and its regional survey partners, amplified by the World Economic Forum's extensive network and its constituents. The survey is also the result of cross-departmental coordination within the World Economic Forum. The Forum's Global Industries Team supported the report team's efforts to collect relevant samples. For key partners in the survey distribution process, please refer to both the Survey Partners and Acknowledgements sections.

Detailed sample design specifications were shared with survey partners, requesting that the sample of companies targeted for participation in the survey should be drawn from a cross-section of leading companies that make up an economy or region's economy. The target companies were specified as the largest multinational and national companies, significant in terms of revenue or employee size. The threshold was set at companies with 500 employees or more as questions concerning job and skill outlook are most relevant for larger companies with a significant share of employment.

The final sub-selection of economies with data of sufficient quality to be featured in the report was based on the overall number of responses from companies with a presence in each economy. The survey has arrived at a sample in which more than half of the companies surveyed operate in more than one economy, and a reasonable range of companies maintained a focused local or regional presence. The final sub-selection of industries was included based on the overall number of responses by industry, in addition to a qualitative review of the pool of named companies represented in the survey data. The final sub-selection of regions and income groups was included based on the headquarter locations of the companies. After relevant criteria were applied, the sample was found to be composed of 22 industry clusters and 55 economies. Industry clusters include: Accommodation, Food, and Leisure; Advanced Manufacturing; Agriculture, Forestry, and Fishing; Automotive and Aerospace; Chemical and Advanced Materials; Education and Training; Electronics; Energy Technology and Utilities; Financial Services and Capital Markets; Government and Public Sector; Information and Technology Services; Infrastructure; Insurance and Pensions Management; Medical and Healthcare Services; Mining and Metals; Oil and Gas; Production of Consumer Goods; Professional Services; Real Estate; Retail and Wholesale of Consumer Goods; Supply Chain and Transportation; and Telecommunications. Refer to Table A1 for the list of industry clusters. Economies include Argentina, Australia, Austria, Bahrain, Belgium, Brazil, Canada, China, Colombia, Czechia, Denmark, Egypt, Estonia, France, Germany, Greece, Hong Kong SAR, China, Hungary, India, Indonesia, Ireland, Israel, Italy, Japan, Kazakhstan, Republic of Korea, Latvia, Lithuania, Malaysia, Mexico, Morocco, Netherlands, Nigeria, Norway, Philippines, Poland, Portugal, Romania, Saudi Arabia, Serbia, Singapore, Slovenia, South Africa, Spain, Sweden, Switzerland, Thailand, Tunisia, Türkiye, United Arab Emirates, United Kingdom, United States of America, Uzbekistan, Viet Nam and Zimbabwe. Collectively, these economies represent 88% of global GDP.

In total, the report's dataset contains 1,043 unique responses by global companies, collectively representing more than 14.1 million employees worldwide.

# Classification frameworks for jobs and skills

This year's report employed the Occupational Information Network (O\*NET) framework, crosswalked with the International Standard Classification of Occupations (ISCO). O\*NET was developed by the US Department of Labour in collaboration with its Bureau of Labour Statistics' Standard Classification of Occupations (SOC) and remains the most extensive and respected classification of its kind. ISCO is a classification system developed by the International Labour Organization (ILO) to organize information on jobs and labour. It is a part of the UN's classification system for social and economic purposes. The list of roles used in the report has been enhanced with roles which were consistently added to previous editions of the report and refer to the emerging roles from data partner collaborations.

Both the Future of Jobs survey and the Future of Jobs report use the World Economic Forum's Global Skills Taxonomy to categorize skills (Table A2). Built on a foundation of data insights and ongoing inputs from our network of partners, the taxonomy focuses on the skills that are needed by workers across sectors and regions in a fastchanging labour market. It is designed to serve as a "universal adapter" between data presented in the language of the many region and industry specific skills taxonomies in use. You may view the Global Skills Taxonomy on the <u>Reskilling Revolution</u>. webpage. New data from the Future of Jobs Survey is presented in Chapter 3.

#### TABLE A1 Taxonomy of industry categories

Industry cluster	Industry
Accommodation, Food and Leisure	Accommodation, Food and Leisure Services
	Rental, Reservation and Leasing Services
Agriculture and Natural Resources	Agriculture, Forestry and Fishing
Automotive and Aerospace	Automotive and Aerospace
Care, Personal Services and Wellbeing	Care and Social Work Services
	Personal Care, Wellbeing and Repair Services
Education and Training	Education and Training
Energy and Materials	Chemical and Advanced Materials
	Energy Technology and Utilities
	Mining and Metals
	Oil and Gas
Financial Services	Financial Services and Capital Markets
	Insurance and Pensions Management

TABLE A1

Taxonomy of industry categories

dustry
overnment and Public Sector
edical and Healthcare Services
formation and Technology Services
lecommunications
ngineering and Construction
ater and Waste Management
dvanced Manufacturing
ectronics
roduction of Consumer Goods
ts, Entertainment and Recreation
edia and Publishing
traterritorial Organizations and Bodies
on-Profit Organizations, Professional Bodies and Unions
usiness Support and Premises Maintenance Services
nployment Services
esearch, Design and Business Management Services
esearch, Design and Business Management Services

# **Metrics**

Statistical samples presented in this report correspond to organizations' self-reported economies and industries of operation. Each organization which responded to the Future of Jobs Survey was permitted to associate itself with up to 10 economies and up to three industries of operation. Most metrics presented in this report are shares of respondents identifying their organization with a business strategy/impact or the mean value of a metric relating to business operations which was directly estimated by respondents. A small number of metrics relating to labour markets and skills are derived from information provided in different formats. These are described below.

# Net growth in employment and labour-market churn

This edition of the Future of Jobs Report continues to estimate growth and labour-market churn in the next five years. Net growth represents the forecast increase or decrease in the size of a workforce, either as a fraction of its current size, or in millions of employees. Labour-market churn represents the sum of job losses and created jobs in a workforce as a fraction of its initial size. In this report both concepts are applied to roles in the jobs taxonomy (see Table A3) and industries in the industry taxonomy (see Table A1). The figures correspond to changes forecast by survey respondents for a five-year period between 2025 and 2030, with the survey being administered from May to August 2024. Metrics relating to both concepts reflect forecast structural changes in employment across companies, economies, industries and roles. Turnover induced by employees moving between jobs for personal reasons is not included.

# **Fractional metrics**

Respondents aggregated roles included in the jobs taxonomy to six groups:

- Main roles in the organization with a growing employment outlook for the next five years
- Main roles in the organization with a declining employment outlook for the next five years
- Main roles in the organization with a stable employment outlook for the next five years
- Roles that are relatively small presently but strategically important and with a growing employment outlook for the next five years

Respondents allocated up to five roles from the jobs taxonomy to each of the four groups. One of the five roles in the presently relatively small but strategically important and with a growing employment outlook could be specified by a free-text field. Free-text fields were subsequently allocated to jobs in the jobs taxonomy where possible. Metrics on roles are only published in the report when they meet statistical criteria in a given sample.

Respondents subsequently allocated workforce fractions to each of the above groups of jobs at present, and estimated the growth and decline of the main roles with growing outlook, main roles with declining outlook, and relatively small roles presently with growing outlook. These workforce fractions were used to calculate two metrics: estimated net growth between 2025 and 2030 and estimated structural labour-market churn from 2025 to 2030, for the labour forces pertaining to roles in the jobs taxonomy. In the calculation of net growth, for a specific role, a simple mean of the growth and decline was first calculated based on projection from the respondents who have selected this role, while the growth of the roles identified as stable outlook is zero. The net growth draws on weighted averages of the growth and decline weighted on the number of respondents who consider this role as growing and stable, with the numerator reflecting the weighted shares of anticipated workforce increases and decreases and the denominator aggregating total workforce shares across all anticipated states (growing, declining and stable). The churn metric, similarly, adopts absolute values for workforce decreases. These methodologies aim to present an objective, scalable perspective on workforce transformations at the role and industry level.

# **Reweighted metrics**

International Labour Organization (ILO) data were then used to translate the forecast fractional net growth for each role into estimates of the number of jobs that will be created or displaced between 2025 and 2030. ILO estimates of the number of employees in each occupational category of ISCO08 level 2 were used as a basis for the number of employees working at the time of publication. To account for the absence of China-specific data in the ILO's employment-by-occupation dataset, a China employment multiplier was calculated based on the share of China's employment figure in global employment figure and applied under the assumption that China's labour market structure aligns with global patterns. To approximate the number of employees in each occupation of the jobs taxonomy used in the Future of Jobs Survey, the jobs taxonomy (a modified and extended version of the O\*NET SOC occupational classification) was mapped to the ISCO08 occupational taxonomy used in the ILO data by modifying and extending the map developed by the U.S. Bureau of Labor Statistics, which connects SOC level 4 and ISCO08 level 4. Estimates of present employment were then multiplied by the fractional net growth estimates obtained from the survey, to estimate net growth worldwide in units of millions of employees.

Using this method, the Future of Jobs dataset described in Chapter 2 corresponds to 1.18 billion employees. By comparison, the ILO dataset used in the analysis accounts for 2.18 billion employees, and 2.76 billion employees upon applying the China multiplier. The remaining 1.58 billion employees correspond to roles for which the Future of Jobs Survey did not collect sufficient data to reliably estimate net growth. Data on employees rather than general employment was used as organizations responding to the Future of Jobs Survey maintain workers in formal rather than informal employment.

The estimates of the number of employees per sector which can be found in the Industry Profiles are based on the full dataset of 2.18 billion employees worldwide. This calculation is described in the user guide to the profiles.

# Attribution to jobs

To analyze the impact of specific trends on job growth and decline, survey respondents attributed the growth and decline of roles to macrotrends and technology trends. Respondent's weighted attribution was used to allocate a fraction of job changes to specific trends. These were then mapped to ILO occupation data to calculate the absolute number of jobs created and destroyed per occupation in the next five years. To limit the potential impact of randomisation inherent in survey data, two techniques were employed: capping the maximum impact of a particular trend-job combination and removing attributions with an insufficient number of respondents. Specifically, the total impact of a single trend on a job was capped at the 99th percentile of all trend-job combinations, 1.61 million for job increase, and 1st percentile, minus 872 thousand for job loss, and attribution pairs with fewer than three votes were excluded, with their impact categorized as unexplained.

### TABLE A2

#### Skill taxonomy

Skills were selected from levels 3 and 4 of the Global Skills Taxonomy to represent skills of interest to organizations across sectors and economies.

Skill family (level 1)	Skill cluster (level 2)	Skill
Attitudes	Ethics	Environmental stewardship
		Global citizenship
	Self-efficacy	Curiosity and lifelong learning
		Dependability and attention to detail
		Motivation and self-awareness
		Resilience, flexibility and agility
	Working with others	Empathy and active listening
		Leadership and social influence
		Teaching and mentoring
Skills, knowledge and abilities	Cognitive skills	Analytical thinking
		Creative thinking
		Multi-lingualism
		Reading, writing and mathematics
		Systems thinking
	Engagement skills	Marketing and media
		Service orientation and customer service
	Management skills	Quality control
		Resource management and operations
		Talent management
	Physical abilities	Manual dexterity, endurance and precision
		Sensory-processing abilities
	Technology skills	Al and big data
		Design and user experience
		Networks and cybersecurity
		Programming
		Technological literacy

The occupational taxonomy was modified and extended from O\*NET SOC.

Job family	Occupation
Achitecture and Engineering	Architects and Surveyors
	Biochemical and Biomedical Engineers
	Chemical Engineers
	Civil Engineers
	Drafters, Engineering Technicians, and Mapping Technicians
	Electrotechnology Engineers
	Energy Engineers
	Environmental Engineers
	Industrial and Production Engineers
	Materials Engineers
	Mechanical Engineers
	Mining Engineers, Metallurgists and Related Professionals
	Nuclear Engineers
	Renewable Energy Engineers
	Robotics Engineers
Arts, Design, Entertainment, Sports and Media	Advertising and Public Relations Professionals
	Broadcasting Technicians
	Commercial and Industrial Designers
	Entertainers and Performers, Sports and Related Workers
	Fashion Designers
	Graphic Designers
	Handicraft Workers
	Interior Designers
	Media and Communication Workers
	Photographers
	Video Game Designers
	Writers and Authors
Business and Financial Operations	Accountants and Auditors
	Business Intelligence Analysts
	Claims Adjusters, Examiners, and Investigators
	Compliance Officers
	Credit and Loans Officers
	Digital Marketing and Strategy Specialists
	Digital Transformation Specialists

The occupational taxonomy was modified and extended from O\*NET SOC.

Business and Financial Operations       E-commerce Specialists         Financial Analysts       Financial and Investment Advisers         Human Resources Specialists       Insurance Underwriters, Valuers, and Loss Assessors         Investment Fund Managers       Management and Organisation Analysts         Recruiters and Technical Recruiters       Regulatory and Government Associate Professionals         Risk Management Specialists       Sales and Marketing Professionals         Social Media Strategist       Training and Development Specialists         Social Service and Protective Services       Firefighting and Prevention Workers
Financial and Investment Advisers Human Resources Specialists Insurance Underwriters, Valuers, and Loss Assessors Investment Fund Managers Management and Organisation Analysts Recruiters and Technical Recruiters Regulatory and Government Associate Professionals Regulatory and Government Associate Professionals Risk Management Specialists Social Media Strategist Training and Development Specialists Firefighting and Prevention Workers
Human Resources Specialists Insurance Underwriters, Valuers, and Loss Assessors Investment Fund Managers Management and Organisation Analysts Recruiters and Technical Recruiters Regulatory and Government Associate Professionals Risk Management Specialists Sales and Marketing Professionals Social Media Strategist Training and Development Specialists Refunction Workers
Insurance Underwriters, Valuers, and Loss Assessors Investment Fund Managers Management and Organisation Analysts Recruiters and Technical Recruiters Regulatory and Government Associate Professionals Risk Management Specialists Sales and Marketing Professionals Social Media Strategist Training and Development Specialists Frefighting and Prevention Workers
Investment Fund Managers Management and Organisation Analysts Recruiters and Technical Recruiters Regulatory and Government Associate Professionals Risk Management Specialists Sales and Marketing Professionals Social Media Strategist Training and Development Specialists Formunity, Social Service and Protective Services
Management and Organisation AnalystsRecruiters and Technical RecruitersRegulatory and Government Associate ProfessionalsRisk Management SpecialistsSales and Marketing ProfessionalsSocial Media StrategistTraining and Development SpecialistsSocial Service and Protective ServicesFirefighting and Prevention Workers
Recruiters and Technical Recruiters Regulatory and Government Associate Professionals Risk Management Specialists Sales and Marketing Professionals Social Media Strategist Training and Development Specialists Social Service and Protective Services Firefighting and Prevention Workers
Regulatory and Government Associate Professionals         Risk Management Specialists         Sales and Marketing Professionals         Social Media Strategist         Training and Development Specialists         Sommunity, Social Service and Protective Services
Risk Management Specialists         Sales and Marketing Professionals         Social Media Strategist         Training and Development Specialists         Community, Social Service and Protective Services
Sales and Marketing Professionals Social Media Strategist Training and Development Specialists Community, Social Service and Protective Services Firefighting and Prevention Workers
Social Media Strategist Training and Development Specialists Community, Social Service and Protective Services Firefighting and Prevention Workers
Training and Development Specialists         Community, Social Service and Protective Services         Firefighting and Prevention Workers
Community, Social Service and Protective Services Firefighting and Prevention Workers
Law Enforcement Workers, including Police Officers and Immigration Inspectors
Religious Professionals
Security Guards
Social Work and Counselling Professionals
Computer and Mathematical     Al and Machine Learning Specialists
Big Data Specialists
Blockchain Developers
Data Analysts and Scientists
Data Engineers
Data Warehousing Specialists
Database and Network Professionals
Database Architects
Devops Engineers
FinTech Engineers
Full Stack Engineers
ICT Operations and User Support Technicians
Information Security Analysts
Internet of Things Specialists
Mathematicians, Actuaries and Statisticians
Online Learning Managers

 TABLE A3
 Job taxonomy

 The occupational taxonomy was modified and extended from O\*NET SOC.

Computer and Mathematical Process Automation Specialists Security Management Specialists Education and Training Primery School and Early Childhood Teachers Special Education Teachers University and Higher Education Teachers Special Education Teachers Special Education Teachers University and Higher Education Teachers Special Education Teachers Special Education Teachers Special Education Teachers Special Education Teachers Construction and Forestry Farming, Fishing, and Teachingians Audiologists and Special Processions Detitation and Austory Workers Healthcare Practitioners and Technicians University and Nutrent Hist Bardwares Education Protessional Education Protessional Education Teachers Special Education Teachers Education Education Teachers Special Education Teachers Education Education Teachers Education Education Teachers Education Educ	Job family	Occupation
Software and Applications Developers         Software Testers         Software Testers         System Engineers         UI and UX Designers         Web Developers         Construction and Extraction         Building Framers, Finishers, and Rolated Trades Workers         Construction Laborers         Education and Training         Primary School and Early Ohithhood Twachers         Socondary Education Teachers         Special Education Teachers         Teaming, Fishing, and Forestry         Farmion, Fishing, and Forestry         Farmorers, Labourers, and Other Agricutural Workers         Ferming, Fishing, and Forestry         Farmorers, Labourers, and Nutritionites         Condenses, Horitoulural and Nursery Workers         Constructioners and Technicians         Audiologists and Special Professione         Detected and Special Professione         Detected and Autritionize         Generalist Medical Practitioners         Healthcare Practitioners         Audiologists and Public Health S	Computer and Mathematical	Process Automation Specialists
Software Testers         System Engineers         Ut and UX Designers         Wab Dovelopers         Construction and Extraction         Building Framers, Enishers, and Peleted Trackes Workers         Construction and Extraction         Building Framers, Enishers, and Peleted Trackes Workers         Education and Training         Primary School and Early Childhood Toachers         Social Education Teachers         Social Education Teachers         Vocational Education Teachers         Vocational Education Teachers         Vocational Education Teachers         Parmorkers, Labourers, and Other Agricultural Workers         Farming, Fishing, and Forestry         Farmorkers, Labourers, and Other Agricultural Workers         Parmorkers         Cardeners, Horticultural and Nursery Workers         Parmorkers         Deristist and Associated Pelefosione         Deatilants and Public Health Specialists         Deriversionals         Education Teachers         Riding Professionals         Derivers and Technicians         Audrospiste and Special Education         Derivers         Gardeners, Horticultural and Nursery Workers         Education Facehers         Derivers         D		Security Management Specialists
System Engineers       Ul and UX Designers         Web Developers       Building Frances, Finishers, and Related Trades Workers         Construction and Extraction       Building Frances, Finishers, and Related Trades Workers         Construction Laborers       Electrical Equipment Installers and Repairers         Education and Training       Primary School and Early Childhood Teachers         Education Teachers       Social Education Teachers         Education Teachers       Electrical Education Teachers         Education Teachers       Vocational Education Teachers         Education Teachers       Electrical Education Teachers         Farming, Fishing, and Forestry       Farmworkers, Labourers, and Other Agricultural Workers         Forestry Workers       Eactorers, Horticultural and Nursery Workers         Easthcare Practitioners and Technicians       Audiclogists and Speech Therapists         Dentists and Associated Professions       Dentists and Associated Professions         Dialitans and Nursery Frances       Epidemiologists and Speech Therapists         Equipoint Technicians       Epidemiologists and Speech Therapists         Epidemiologists and Associated Professionals       Epidemiologists and Public Heath Specialists         Epidemiologists and Public Heath Specialists       Concerlist Medical Practitioners         Heath Technologists and Public Heath Specialists       Contervi		Software and Applications Developers
Ul and UX Designers         Web Developers         Construction and Extraction         Building Framers, Finishers, and Related Trades Workers         Construction and Extraction         Education Laborers         Electrical Equipment Installers and Repairers         Mining, Petroleum and Other Extraction Workers         Education and Training         Primary School and Early Childhood Teachers         Special Education Teachers         Special Education Teachers         University and Higher Education Teachers         Vocational Education Teachers         Vocational Education Teachers         Early Contracters, and Other Agricultural Workers         Farming, Fishing, and Forestry         Farming, Fishing and Forestry         Farmorkers, Labourers, and Other Agricultural Workers         Forestry Workers         Gardeners, Horticultural and Nursery Workers         Education Technicians         Audiologists and Speech Therapists         Developers and Vorticities         Educational Associated Professions         Detects and Associated Professionals         Epidemiologists and Public Health Specialists         Generatist Medical Practitioners         Health Technologists and Public Health Specialists         Gordennicitis and Opticians		Software Testers
Web Developers           Construction and Extraction         Building Frameurs, Furshens, and Related Trades Workers           Construction Laborers         Electrical Equipment Installers and Repairers           Mining, Petroleum and Other Extraction Workers         Secondary Education Teachers           Education and Training         Primary School and Early Childhood Teachers           Special Education Teachers         Special Education Teachers           University and Higher Education Teachers         Vocational Education Teachers           Farming, Fishing, and Forestry         Farmworkers, Labourers, and Other Agricultural Workers           Forestry Workers         Cardeners, Hortburkinal and Nursery Workers           Relationer Practitioners and Technicians         Audiologists and Speech Therapiets           Delitises and Nutrilionists         Environmential and Occupational Health and Hygiere Professionals           Epidemiologists and Public Health Specialists         Generalist Medical Practitioners           Health Technologists and Technicians         Midwilery Professionalis           Kidwilery Professionalis         Optionalistianal Corpolicians		System Engineers
Construction and Extraction       Building Framers, Finishers, and Pelaled Trades Workers         Construction Laborers       Construction Laborers         Electrical Equipment Installers and Repairers       Mining, Petroleum and Other Extraction Workers         Education and Training       Primary School and Early Childhood Teachers         Secondary Education Taachers       Secondary Education Teachers         University and Higher Education Teachers       Vocational Education Teachers         Farming, Fishing, and Forestry       Farmworkers, Labourers, and Other Agricultural Workers         Forestry Workers       Cardeners, Horticultural and Nursery Workers         Healthcare Practitioners and Technicians       Audiologists and Speech Therapists         Dentists and Associated Professions       Detists and Associated Professions         Epidemiologists and Public Health and Hygiere Professionals       Epidemiologists and Technicians         Mixviery Professionals       Mixviery Professionals         Mixviery Professionals       Optometrists and Technicians         Mixviery Professionals       Optometrists and Technicians		UI and UX Designers
Construction Laborers Electrical Equipment Installers and Repairers Mining, Petroleum and Other Extraction Workers Education and Training Primary School and Early Childhood Teachers Secondary Education Teachers Secondary Education Teachers University and Higher Education Teachers Vocational Education Teachers Vocational Education Teachers Farming, Fishing, and Forestry Farmworkers, Labourers, and Other Agricultural Workers Farming, Fishing and Forestry Farmworkers, Horticultural and Nursery Workers Education Teachers Vocational Education Teachers Education Teachers Forestry Workers Cardeners, Horticultural and Nursery Workers Education Education Teachers University and Audiologists and Speech Therapiets Dentists and Associated Professions Dietitans and Nutritionists Epidemiologists and Public Health and Hygiene Professionals Epidemiologists and Public Health and Hygiene Professionals Epidemiologists and Public Health and Hygiene Professionals Correntists and Opticians Mudvifery Professionals Mudvifery Professionals Mudvifery Professionals Diretitians and Opticians Mudvifery Professionals Epidemiologists and Opticians Epidemiologists and Public Health Services		Web Developers
Electrical Equipment Installers and Repairers         Mining, Petroleum and Other Extraction Workers         Education and Training         Primary School and Early Childhood Teachers         Secondary Education Teachers         Special Education Teachers         University and Higher Education Teachers         Vocational Education Teachers         Vocational Education Teachers         Vocational Education Teachers         Farming, Fishing, and Forestry         Farmory, Fishing and Hortestry         Farmory, Horticultural Morkers         Education Teachers         Forestry Workers         Gardeners, Horticultural and Nursary Workers         Education Teachers         Primary School and Education Teachers         Forestry Workers         Gardeners, Horticultural and Nursary Workers         Education Teachers         Primary School and Speech Therapists         Dentists and Associated Professions         Dettians and Nutritionists         Elpidemiologiets and Public Health Specialists         Generalist Medical Protestioners         Health Technologiets and Public Health Specialists         Generalist Medical Protestionals         Midwifery Professionals         Nursing Professionals         Optometrists and Opticians	Construction and Extraction	Building Framers, Finishers, and Related Trades Workers
Education and Training       Primary School and Early Childhood Teachers         Secondary Education Teachers       Secondary Education Teachers         Special Education Teachers       University and Higher Education Teachers         Vocational Education Teachers       Vocational Education Teachers         Farming, Fishing, and Forestry       Farmworkers, Labourers, and Other Agricultural Workers         Failing and Hunting Workers       Forestry Workers         Reading and Hunting Workers       Forestry Workers         Dentists and Associated Professions       Dentists and Associated Professions         Dentists and Associated Professions       Dentists and Nutritionists         Epidemiologists and Speech Therapists       Generalist Medical Practitioners         Mediting Professionals       Midwifery Professionals         Midwifery Professionals       Midwifery Professionals         Midwifery Professionals       Optometrists and Opticians         Midwifery Professionals       Optometrists and Opticians         Paramedical and Emergency Medical Technicians       Paramedical and Emergency Medical Technicians		Construction Laborers
Education and Training       Primary School and Early Childhood Teachers         Secondary Education Teachers       Special Education Teachers         Special Education Teachers       University and Higher Education Teachers         Vocational Education Teachers       Vocational Education Teachers         Farming, Fishing, and Forestry       Farmworkers, Labourers, and Other Agricultural Workers         Fishing and Hunting Workers       Fishing and Hunting Workers         Forestry Workers       Gardeners, Horticultural and Nursery Workers         Healthcare Practitioners and Technicians       Audiologists and Speech Therapists         Dentists and Associated Professions       Dietitians and Nurtitionists         Environmental and Occupational Health and Hygiene Professionals       Epidemiologists and Public Health Specialists         Generalist Medical Practitioners       Health Technologists and Technicians         Midwifery Professionals       Nursing Professionals         Nursing Professionals       Optometrists and Opticians         Paramedical and Emergency Medical Technicians       Paramedical and Emergency Medical Technicians		Electrical Equipment Installers and Repairers
Secondary Education Teachers Special Education Teachers Special Education Teachers University and Higher Education Teachers Vocational Education Teachers Vocational Education Teachers Farming, Fishing, and Forestry Farmworkers, Labourers, and Other Agricultural Workers Fishing and Hunting Workers Gardeners, Horticultural and Nursery Workers Gardeners, Horticultural and Nursery Workers Dentists and Associated Professions Dietitians and Nutritionists Environmental and Occupational Health and Hygiene Professionals Epidemiologists and Public Health Specialists Generalist Medical Practitioners Health Technologists and Technicians Nursing Professionals Nursing Professionals Optometrists and Opticians Paramedical and Opticians Paramedical and Emergency Medical Technicians Paramedical and Emergency Medical Technicians Paramedical and Emergency Medical Technicians		Mining, Petroleum and Other Extraction Workers
Special Education Teachers University and Higher Education Teachers Vocational Education Teachers Vocational Education Teachers Farming, Fishing, and Forestry Farming, Fishing, Farming, Farm	Education and Training	Primary School and Early Childhood Teachers
University and Higher Education Teachers         Vocational Education Teachers         Farming, Fishing, and Forestry       Farmworkers, Labourers, and Other Agricultural Workers         Fishing and Hunting Workers       Fishing and Hunting Workers         Forestry Workers       Gardeners, Horticultural and Nursery Workers         Healthcare Practitioners and Technicians       Audiologists and Speech Therapists         Dentists and Associated Professions       Dentists and Associated Professions         Dietitians and Nutritionists       Epidemiologists and Public Health and Hygiene Professionals         Epidemiologists and Public Health Specialists       Generalist Medical Practitioners         Health Technologists and Technicians       Midwifery Professionals         Nursing Professionals       Nursing Professionals         Potometrists and Opticians       Optometrists and Opticians         Paramedical and Emergency Medical Technicians       Paramedical and Emergency Medical Technicians		Secondary Education Teachers
Vocational Education Teachers         Farming, Fishing, and Forestry       Farmworkers, Labourers, and Other Agricultural Workers         Fishing and Hunting Workers       Fishing and Hunting Workers         Forestry Workers       Gardeners, Horticultural and Nursery Workers         Healthcare Practitioners and Technicians       Audiologists and Speech Therapists         Dentists and Associated Professions       Dietitians and Nutritionists         Environmental and Occupational Health and Hygiene Professionals       Epidemiologists and Public Health Specialists         Generalist Medical Practitioners       Midwifery Professionals         Nursing Professionals       Nursing Professionals         Nursing Professionals       Optometrists and Opticians         Paramedical and Emergency Medical Technicians       Paramedical and Emergency Medical Technicians		Special Education Teachers
Farming, Fishing, and Forestry       Farmworkers, Labourers, and Other Agricultural Workers         Fishing and Hunting Workers       Forestry Workers         Gardeners, Horticultural and Nursery Workers       Gardeners, Horticultural and Nursery Workers         Healthcare Practitioners and Technicians       Audiologists and Speech Therapists         Dentists and Associated Professions       Dietitians and Nutritionists         Epidemiologists and Public Health and Hygiene Professionals       Epidemiologists and Public Health Specialists         Generalist Medical Practitioners       Health Technologists and Technicians         Midwifery Professionals       Nursing Professionals         Nursing Professionals       Optometrists and Opticians         Paramedical and Emergency Medical Technicians       Paramedical and Emergency Medical Technicians         Paramedical and Emergency Medical Technicians       Paramedical and Emergency Medical Technicians		University and Higher Education Teachers
Fishing and Hunting Workers         Forestry Workers         Gardeners, Horticultural and Nursery Workers         Healthcare Practitioners and Technicians       Audiologists and Speech Therapists         Dentists and Associated Professions       Dentists and Nutritionists         Dietitians and Nutritionists       Environmental and Occupational Health and Hygiene Professionals         Epidemiologists and Public Health Specialists       Generalist Medical Practitioners         Health Technologists and Technicians       Midwifery Professionals         Nursing Professionals       Nursing Professionals         Optometrists and Opticians       Paramedical and Emergency Medical Technicians         Paramedical and Emergency Medical Technicians       Paramedical and Emergency Medical Technicians		Vocational Education Teachers
Forestry Workers         Gardeners, Horticultural and Nursery Workers         Healthcare Practitioners and Technicians       Audiologists and Speech Therapists         Dentists and Associated Professions       Dietitians and Nutritionists         Dietitians and Nutritionists       Environmental and Occupational Health and Hygiene Professionals         Epidemiologists and Public Health Specialists       Generalist Medical Practitioners         Health Technologists and Technicians       Midwifery Professionals         Midwifery Professionals       Optometrists and Opticians         Optometrists and Opticians       Paramedical and Opticians         Paramedical and Emergency Medical Technicians       Paramedical and Emergency Medical Technicians	Farming, Fishing, and Forestry	Farmworkers, Labourers, and Other Agricultural Workers
Gardeners, Horticultural and Nursery WorkersHealthcare Practitioners and TechniciansAudiologists and Speech TherapistsDentists and Associated ProfessionsDietitians and NutritionistsEnvironmental and Occupational Health and Hygiene ProfessionalsEpidemiologists and Public Health SpecialistsGeneralist Medical PractitionersHealth Technologists and TechniciansMidwifery ProfessionalsNursing ProfessionalsOptometrists and OpticiansOptometrists and OpticiansParamedical and Emergency Medical TechniciansParamedical and Emergency Medical Technicians		Fishing and Hunting Workers
Healthcare Practitioners and TechniciansAudiologists and Speech TherapistsDentists and Associated ProfessionsDietitians and NutritionistsEnvironmental and Occupational Health and Hygiene ProfessionalsEpidemiologists and Public Health SpecialistsGeneralist Medical PractitionersHealth Technologists and TechniciansMidwifery ProfessionalsNursing ProfessionalsOptometrists and OpticiansParamedical and Emergency Medical TechniciansParamedical and Emergency Medical TechniciansPersonal Care Workers in Health Services		Forestry Workers
Dentists and Associated Professions Dietitians and Nutritionists Environmental and Occupational Health and Hygiene Professionals Epidemiologists and Public Health Specialists Generalist Medical Practitioners Health Technologists and Technicians Midwifery Professionals Nursing Professionals Optometrists and Opticians Paramedical and Emergency Medical Technicians Personal Care Workers in Health Services		Gardeners, Horticultural and Nursery Workers
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Environmental and Occupational Health and Hygiene Professionals Epidemiologists and Public Health Specialists Generalist Medical Practitioners Health Technologists and Technicians Midwifery Professionals Nursing Professionals Optometrists and Opticians Paramedical and Emergency Medical Technicians Personal Care Workers in Health Services		Dentists and Associated Professions
Epidemiologists and Public Health SpecialistsGeneralist Medical PractitionersHealth Technologists and TechniciansMidwifery ProfessionalsNursing ProfessionalsOptometrists and OpticiansParamedical and Emergency Medical TechniciansPersonal Care Workers in Health Services		Dietitians and Nutritionists
Generalist Medical Practitioners Health Technologists and Technicians Midwifery Professionals Nursing Professionals Optometrists and Opticians Paramedical and Emergency Medical Technicians Personal Care Workers in Health Services		Environmental and Occupational Health and Hygiene Professionals
Health Technologists and Technicians Midwifery Professionals Nursing Professionals Optometrists and Opticians Paramedical and Emergency Medical Technicians Personal Care Workers in Health Services		Epidemiologists and Public Health Specialists
Midwifery Professionals Nursing Professionals Optometrists and Opticians Paramedical and Emergency Medical Technicians Personal Care Workers in Health Services		Generalist Medical Practitioners
Nursing Professionals Optometrists and Opticians Paramedical and Emergency Medical Technicians Personal Care Workers in Health Services		Health Technologists and Technicians
Optometrists and Opticians Paramedical and Emergency Medical Technicians Personal Care Workers in Health Services		Midwifery Professionals
Paramedical and Emergency Medical Technicians Personal Care Workers in Health Services		Nursing Professionals
Personal Care Workers in Health Services		Optometrists and Opticians
		Paramedical and Emergency Medical Technicians
Pharmacists and Associated Professions		Personal Care Workers in Health Services
		Pharmacists and Associated Professions
Physical Therapists		Physical Therapists

Job family	Occupation	
Healthcare Practitioners and Technicians	Psychologists and Psychiatrists	
	Specialist Medical Practitioners	
	Traditional and Complementary Medicine Professionals	
	Veterinarians	
Hospitality and Food Related	Baristas	
	Chefs and Cooks	
	Concierges and Hotel Desk Clerks	
	Event Managers	
	Food and Beverage Serving Workers	
	Food Service Counter Attendants	
	Hotel and Restaurant Managers	
Legal	Arbitrators, Mediators, and Conciliators	
	Court Reporters	
	Judges	
	Judicial Law Clerks	
	Lawyers	
	Legal Secretaries	
	Paralegals and Legal Assistants	
	Title Examiners, Abstractors, and Searchers	
Management	Business Services and Administration Managers	
	General and Operations Managers	
	Health and Education Services Managers	
	Legislators and Officials	
	Managing Directors and Chief Executives	
	Manufacturing, Mining, Construction, and Distribution Managers	
	Organisational Development Specialists	
	Product Managers	
	Production Managers in Agriculture, Forestry and Fisheries	
	Project Managers	
	Relationship Managers	
	Strategic Advisors	
Manufacturing and Production	Assembly and Factory Workers	
	Chemical Processing Plant Operators	
	Food Processing and Related Trades Workers	

Job family	Occupation
Manufacturing and Production	Garment and Related Trades Workers
	Petroleum and Natural Gas Refining Plant Operators
	Power Production Plant Operators
	Printing and Related Trades Workers
	Renewable Energy Technicians
	Sheet and Structural Metal Workers, Moulders and Welders
	Solar Energy Installation and System Engineers
Natural Science and Sustainability	Chemists and Chemical Laboratory Scientists
	Environmental Protection Professionals
	Food Scientists and Technologists
	Life Scientists
	Physical Scientists
	Sustainability Specialists
Office and Administrative	Accounting, Bookkeeping and Payroll Clerks
	Administrative Assistants and Executive Secretaries
	Bank Tellers and Related Clerks
	Client Information and Customer Service Workers
	Data Entry Clerks
	Material-Recording and Stock-Keeping Clerks
	Postal Service Clerks
	Statistical, Finance and Insurance Clerks
Personal Care, Maintenance and Installation	Building Caretakers, Cleaners and Housekeepers
Personal Care, Maintenance and Installation	Building Caretakers, Cleaners and Housekeepers Childcare Workers
Personal Care, Maintenance and Installation	
Personal Care, Maintenance and Installation	Childcare Workers
Personal Care, Maintenance and Installation	Childcare Workers Electronics and Telecommunications Installers and Repairers
Personal Care, Maintenance and Installation	Childcare Workers Electronics and Telecommunications Installers and Repairers Hairdressers, Beauticians and Related Workers
Personal Care, Maintenance and Installation	Childcare Workers Electronics and Telecommunications Installers and Repairers Hairdressers, Beauticians and Related Workers Home Appliance Installers and Repairers
Personal Care, Maintenance and Installation	Childcare Workers Electronics and Telecommunications Installers and Repairers Hairdressers, Beauticians and Related Workers Home Appliance Installers and Repairers Mechanics and Machinery Repairers
Personal Care, Maintenance and Installation	Childcare Workers Electronics and Telecommunications Installers and Repairers Hairdressers, Beauticians and Related Workers Home Appliance Installers and Repairers Mechanics and Machinery Repairers Personal Care Aides
	Childcare Workers Electronics and Telecommunications Installers and Repairers Hairdressers, Beauticians and Related Workers Home Appliance Installers and Repairers Mechanics and Machinery Repairers Personal Care Aides Sports and Fitness Workers
	Childcare Workers Electronics and Telecommunications Installers and Repairers Hairdressers, Beauticians and Related Workers Home Appliance Installers and Repairers Mechanics and Machinery Repairers Personal Care Aides Sports and Fitness Workers Business Development Professionals

 TABLE A3
 Job taxonomy

 The occupational taxonomy was modified and extended from O\*NET SOC.

Job family	Occupation
Sales	Sales and Purchasing Agents and Brokers
	Sales Representatives, Wholesale and Manufacturing, Technical and Scientific Products
	Securities and Finance Dealers and Brokers
	Shop Salespersons
	Telemarketers
Social Science	Economists
	Social Science Research Assistants
	Social Scientists and Related Workers
	Survey Researchers
Transportation and Logistics	Autonomous and Electric Vehicle Specialists
	Car, Van and Motorcycle Drivers
	Commercial Pilots
	Flight Attendants
	Heavy Truck and Bus Drivers
	Light Truck or Delivery Services Drivers
	Locomotive Engine Drivers and Related Workers
	Postal Service Mail Carriers
	Refuse Workers
	Supply Chain and Logistics Specialists
	Transportation Attendants and Conductors
	Transportation Inspectors
	Water Transportation Workers, including Ship and Marine Cargo Workers, Controllers, and Technicians

# User Guide Economy, Region, and Industry Profiles

Economy, Region, and Industry Profiles present data findings from the Future of Jobs Survey through these respective lenses, with the aim of providing specific practical information to decisionmakers and experts in academia, business, government and civil society. Complementing the cross-industry and cross-economy analysis of results in the Future of Jobs Report, this section provides deeper granularity for given industries, regions and economies through dedicated profiles. Additionally, the profiles are intended to enable interested companies and policy-makers with the opportunity to benchmark their organization or economy against the range of expectations prevalent in their industry or region. This User's Guide provides an overview of the information contained in the various profiles and their appropriate interpretation.

#### 1. Hard data contextual indicators:

This section aims to provide the reader with the latest available data from contextual indicators on an economy's labour market.

#### Working age population

The total working age population is displayed in the top right corner of the page for the economy profile. The working-age population is the number of people aged 25 and over. In addition to using a minimum age threshold, certain countries also apply a maximum age limit.

Period: 2020 or latest available data (accessed November 2024) Source: ILOSTAT, International Labour Organization

#### Labour force participation

The labour force participation rate is the labour force as a percentage of the working-age population of people aged 25 and over. The labour force is the sum of all persons of working age who are employed and those who are unemployed.

Period: 2020 or latest available data (accessed November 2024) Source: ILOSTAT, International Labour Organization

# Share of youth not in employment, education, or training, ILO modelled estimates (NEET)

This indicator refers to the proportion of youth who are not in employment and not in education or

training. Youth not in education are those who were neither enrolled in school nor in a formal training program (e.g. vocational training).

Period: 2019 or latest available data (accessed November 2024) Source: ILOSTAT, International Labour Organization

#### Unemployment rate

The unemployment rate conveys the number of persons who are unemployed as a percentage of the labour force (i.e., the employed plus the unemployed).

Period: 2020 or latest available data (accessed November 2024) Source: ILOSTAT, International Labour Organization

# Unemployment rate among workers with basic and advanced education

The unemployment rate conveys the number of persons who are unemployed as a percentage of the labour force (i.e., the employed plus the unemployed). Data disaggregated by level of education are provided on the highest level of education completed, classified according to the International Standard Classification of Education (ISCED).

Period: 2023 (accessed November 2024) Source: ILOSTAT, International Labour Organization

# Vulnerable employment, total (% of total employment), ILO modelled estimates

Vulnerable employment is contributing family workers and own-account workers as a percentage of total employment.

**Period**: 2022 (accessed November 2024) **Source**: World Bank, World Development Indicators database. Estimates are based on data obtained from International Labour Organization, ILOSTAT

#### Secondary education attainment

The percentage of population aged 25 and over that attained or completed upper secondary education.

Period: 2019 or latest available data (accessed November 2024) Source: World Bank, World Development Indicators database. UNESCO Institute for Statistics (UIS).

# Tertiary education attainment

The percentage of population aged 25 and over that attained or completed tertiary education.

Period: 2020 or latest available data (accessed November 2024) Source: World Bank, World Development Indicators database. UNESCO Institute for Statistics (UIS)

# Ease of finding skilled employees in local labour market

Score computed based on the average response of companies operating in this country to the Executive Opinion Survey question "In your country, to what extent can companies find people with the skills required to fill their vacancies in the local labour market?" [1 = Not at all; 7 = To a great extent].

Period: 2023-2024 weighted average Source: World Economic Forum, Executive Opinion Survey

# Fill vacancies by hiring foreign labour

Score computed based on the average response of companies operating in this country to the Executive Opinion Survey question "In your country, to what extent can companies find people with the skills required to fill their vacancies by hiring foreign labour?" [1 = Not at all; 7 = To a great extent].

Period: 2023-2024 weighted average Source: World Economic Forum, Executive Opinion Survey

# Country investment in mid-career training

Score computed based on the average response of companies operating in this country to the Executive Opinion Survey question "In your country, to what extent does government invest in midcareer reskilling and upskilling opportunities?" [1 = Not at all; 7 = To a great extent].

Period: 2023-2024 weighted average Source: World Economic Forum, Executive Opinion Survey

# 2. Labour-market churn

This figure is the five-year structural labour-market churn of surveyed employers that operate in the respective economy, region or industry, compared with the global average. Labour-market churn refers to the pace of reallocation of workers and jobs. The Future of Jobs Survey provides insight into structural labour-market churn, namely, the number of expected new jobs, plus the number of roles expected to be displaced during the period, divided by the size of the labour force in question. Structural churn disregards the 'natural' churn of workers moving between jobs for business or personal reasons. For more information, please refer to Appendix A.

# Period: 2024

**Source**: World Economic Forum, Future of Jobs Survey

# 3. Disruption to skills

This figure shows the average of estimates of surveyed employers that operate in the respective economy, region or industry, compared with the global average, for the question "what proportion of the core skills required by your workforce will remain the same?", compared to the global average.

# **Period**: 2024

**Source**: World Economic Forum, Future of Jobs Survey

# 4. Organizations with DEI priorities

This figure shows the share of surveyed employers with diversity, equity and inclusion priorities that operate in the respective economy, region or industry, compared with the global average. The figure is calculated based on the share of respondents who select "My organization doesn't have DEI priorities" for the question "What are likely to be the key components your workforce diversity, equity and inclusion (DEI) priorities by 2030?".

# Period: 2024

**Source**: World Economic Forum, Future of Jobs Survey

# 5. Exposure to AI disruption

This figure shows the share of surveyed employers with high exposure to AI that operate in the respective economy, region or industry, compared to the global average. The figure is calculated based on the share of respondents who do not select "My organization has low exposure to AI" for the question "Which strategies is your organization likely to implement by 2030, in response AI's increasing capability and prevalence?".

# Period: 2024

**Source**: World Economic Forum, Future of Jobs Survey

### 6. Macrotrends driving business transformation

This bar chart shows the share of employers surveyed that identify the macrotrends as likely to drive transformation in the respective economy, region or industry, compared to the global average. It is based on the response to the question "By 2030, which of the following trends are likely to drive transformation in your organization?".

# Period: 2024

**Source**: World Economic Forum, Future of Jobs Survey

# 7. Technology trends driving business transformation

This bar chart shows the share of employers surveyed that identify the corresponding technology trends as likely to drive transformation in the respective economy, region or industry, compared to the global average. It is based on the response to the question "By 2030, which of the following trends are likely to drive transformation in your organization?".

# **Period**: 2024

**Source**: World Economic Forum, Future of Jobs Survey

# 8. Key roles for business transformation

This table provides an overview of the top roles for industry transformation from 2025 until 2030. The list cites the most frequently selected roles of surveyed employers that operate in the respective economy, region or industry. Net growth represents the forecast increase or decrease in the size of a workforce. Churn represents the sum of job losses and created jobs in a workforce as a fraction of its initial size.

# **Period**: 2024

**Source**: World Economic Forum, Future of Jobs Survey

# 9. Core skills in 2025 and skills on the rise by 2030

This bar chart and table shows the top core skills in 2025 and skills with the most increase in use by 2030 in the respective economy, region or industry. The data is based on the question "Currently, what are the core skills workers need to perform well in the key roles of your organisation?" and "For your organisation's key roles, would you expect an increase or decrease in the use of the following skills by 2030?", compared to the global average.

# Period: 2024

**Source**: World Economic Forum, Future of Jobs Survey

# 10. Upskilling and reskilling outlook

The data shows the breakdown of the typical training outlook for a representative group of 100 workers, calculated based on averages of the training strategies reported by employers surveyed in the respective economy, region and industry, compared to the global average.

# Period: 2024

**Source**: World Economic Forum, Future of Jobs Survey

# 11. Shifting human-machine frontier

The bar chart shows share of total work tasks expected to be delivered predominantly by human

workers, by technology (machines and algorithms), or by a combination of both, in the respective economy, region or industry, based on the question "What proportion of time spent, on average across all tasks in your organization, is currently performed predominantly by technology (machines, algorithms etc.), predominantly by humans, or by a combination of the two?", compared to the global average.

# Period: 2024

**Source**: World Economic Forum, Future of Jobs Survey

# 12. Public policies to increase talent availability

This table shows top public policies, ranked by the share of employers identifying the stated public policies as promising to increase talent availability in the respective economy or region, compared to global averages. This is the result of the question "Which public-policy measures are likely to significantly increase the availability of talent to your organization by 2030?".

# Period: 2024

**Source**: World Economic Forum, Future of Jobs Survey

# 13. Business practices to improve talent availability

This table shows top business practices, ranked by the share of employers identifying the stated business practices as promising to increase talent availability in the respective industry, compared to global averages. This is the result of the question "Which business practices have the greatest potential to increase the availability of talent to your organization by 2030?".

# Period: 2024

**Source**: World Economic Forum, Future of Jobs Survey

# 14. Barriers to organisational transformation

The bar chart shows top barriers ranked by the share of employers surveyed expecting that the stated barrier will hinder their organisational transformation in the respective economy, region or industry, compared to global averages. This is the result of the question "What are the major barriers to achieving your organization's goals by 2030?".

# Period: 2024

**Source**: World Economic Forum, Future of Jobs Survey

# 15. Wage outlook

The bar chart shows the share of employers projecting the share of wages and other forms of workers' compensation as a percentage of the company's total revenues, based on the question "By 2030, as percentage of the company's total revenues, wages and other forms of workers' compensation will represent a growing share compared to today, a similar share as today, or a declining share compared to today", compared to the global average.

# **Period**: 2024

**Source**: World Economic Forum, Future of Jobs Survey

# 16. Talent trends

This bar chart shows the share of employers surveyed expecting a positive, neutral and negative outlook for talent availability, talent development and talent retention over the next five years in the respective economy, region or industry. It is based on the response to the question "How would you rate talent availability, development and retention in your organization by 2030?". Net effect is calculated by the share of employers who expect their talent availability to improve or improve significantly minus the share of employers who expect their talent availability to worsen or worsen significantly.

# **Period**: 2024

**Source**: World Economic Forum, Future of Jobs Survey

# 17. Planned implementation of diversity, equity and inclusion measures

This table shows the top diversity, equity and inclusion actions ranked by the share of employers surveyed which plan to implement the stated measure in the respective economy, region or industry, compared with global averages. This is the result of the question "What are likely to be the key components your workforce diversity, equity and inclusion (DEI) priorities by 2030?".

# Period: 2024

**Source**: World Economic Forum, Future of Jobs Survey

# 18. Workforce strategy in response to AI

This table shows the top workforce strategies in response to AI ranked by the share of employers surveyed planning to implement the stated strategy in response to AI's increasing capability and prevalence in respective economy, region or industry, compared with global averages. This is the result of the question "Which strategies is your organization likely to implement by 2030, in response AI's increasing capability and prevalence?".

# **Period**: 2024

**Source**: World Economic Forum, Future of Jobs Survey

# 18.2

#### Contextual indicators

Argentina

Regional average Income Group	average						
INDICATORS				INDICATORS			
Labour force participation	(2023)		68%	Secondary Education Attainment	-	N	A
Vulnerable employment	(2022)		24%	Tertiary Education Attainment	-	D.	JA
Share of youth not in employment, education, or training (NEET)	(2023)		15%	Ease of finding skilled employees in local labour market	(2024)		4
Unemployment rate	(2023)		4%	Fill vacancies by hiring foreign			
Unemployment rate among workers with basic edu.	(2023)		6%	labour	(2024)		4
Unemployment rate among workers with advanced edu.	(2023)	II	2%	Country investment in mid-career training	(2022)		2

# Jobs and Skills outlook

19%   Global 22%	42%   Giobal 39%	86%   Giobal 83%	100%   Global 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	Al exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running Al programmes

#### Trend outlook

#### Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

Economy Global		
Increased efforts and investments to reduce carbon	70%         Increased government subsidies           47%         and industrial policy	<mark>26%</mark> 21%
Broadening digital access	70%         Increased restrictions to global           60%         trade and investment	26% 23%
Increased efforts and investments to adapt to climate	44%     Growing working-age       41%     populations	26% 24%
Rising cost of living, higher prices or inflation	44% Stricter anti-trust and competition 50% regulations	17% 17%
Slower economic growth	44%     Increased geopolitical division       42%     and conflicts	17% 34%
Increased focus on labour and social issues	35%         Ageing and declining working-           46%         age populations	17% 40%

96% 86%

57% 58% 48% 41% 39% 30% 30% 20%

#### Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy Global		
Al and information processing technologies (big data, VR, AR		
Robots and autonomous systems		
Energy generation, storage and distribution		
New materials and composites		
Semiconductors and computing technologies		

Sensing, laser and optical technologies	26% 18%
Quantum and encryption	<mark>22%</mark> 12%
Satellites and space technologies	<mark>9%</mark> 9%
Biotechnology and gene technologies	<b>4%</b> 11%

#### Key roles for business transformation

Jobs outlook

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth Job Growth Job	ob displacement	Net Growth				
1. Net growth 2. Global net gro	wth <b>3.</b> Chur	n				
		NET GROWTH		1.	2.	3.
	-100%	0	100%			
Data Analysts and Scientists			1	85	41	85
		<b>▲</b>				
AI and Machine Learning				81	82	81
Specialists			-	0.	02	
Business Development						
Professionals				11	19	11
General and Operations						
Managers				8	4	19
Accountants and Auditors				-5	-8	5
Accountaints and Additors		, <b>!</b>		-5	-0	3
Data Entry Clerks				-24	-26	24
Butta Entry Olorito				24	20	24

# Skill outlook

Analytical thinking

Creative thinking

Skills of increasing use by 2030

Skills of the most increase in use by 2030

#### Economy A Global CORE SKILLS OF 2025 SKILLS OF INCREASING USE BY 2030 AI and big data 88% 100% Creative thinking Leadership and social influence 94% 88% Empathy and active listening Technological literacy 81% 88% Design and user experience Resilience, flexibility and agility

75%

69% 

Curiosity and lifelong learning

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.

81%

81%

Argentina

	g outlook						
41   Global 41	29   Global 29	18   Global 19	12   Global 11				
Would not need training by 2030	Would be upskilled in their current role	Would be upskilled and redeployed	Would be unlikely to upskill				
Human-machine frontie	ər			Public policy			
Human-machine fronti	er y predominantly people, pre	edominantly technology	r a combination of both	Public policies to improve talen Share of respondents who agree	•	has the greatest potential to inc	crease
	Combination Global			the talent availability	that the particular public policy i	las the greatest potential to me	510430
ALL TASKS				Economy A Global		ECONOMY G	JLOBAL
Now				Improvements to public education	n systems		
			48% 26% 26%	Flexibility on hiring and firing prac	tiono	64%	47%
2030			4070 0070 2270	Flexibility on hinnig and hinnig prac	lices	50%	44%
			29% 26% 45%	Funding for reskilling and upskillir	ng		
			33% 33% 34%		A	50%	55%
				Provision of reskilling and upskillir	ng	50%	52%
				Changes to labour laws related to	remote work	0070	0270
						36%	36%
Key barriers for busine	ss transformation			Wage outlook			
Skills gaps in the labour Dutdated or inflexible re Organization culture and nability to attract talent Shortage of investment	egulatory framework d resistance to change to the industry		ECONOMY         GLOBAL           65%         63%           57%         39%           48%         46%           44%         37%	Growing Global Similar	Global Declining Glob	21% <b>79</b> % 52% 419	
A			30% 26%				
Talent availability outlo	эк 			DEI Actions			
<b>Talent trend</b> Share of respondents w	ho expect their talent availa	ability to improve or worse	n in five years	Share of employers surveyed plan	nning to implement the diversity,	equity and inclusion measure	
Improving A Global ave	erage Worsening A Glob	al average		86   Global 51	71 I Global 39	57   Global 33	
Talent availability when h	niring		+100% 21%	Run comprehensive DEI training for managers and staff	Pay equity reviews and salary audits	Anti-harrasment protocols	
-100%		_		AI Strategy			
Talent development of e	xisting workforce						
Talent development of e			+100% <b>57%</b>	Share of employers surveyed plan	nning to implement the stated st	rategy in response to AI's incre	easing
Talent development of e			+100% 57%	Share of employers surveyed plan capability and prevalence	nning to implement the stated st	rategy in response to AI's incre	easing

Hiring new people with skills to design AI tools and enhancements appropriate for the organization-specific skills

Hiring new people with skills to better work alongside Al Re-orienting your organization to target new business opportunities created by AI

18.5

# Australia

Contextual indicators					
Regional average Income Group	o average				
INDICATORS			INDICATORS		
Labour force participation	(2023)	67%	Secondary Education Attainment	(2023)	79%
Vulnerable employment	(2022)	10%	Tertiary Education Attainment	(2023)	47%
Share of youth not in employment, education, or training (NEET)	(2023)	8%	Ease of finding skilled employees in local labour market	· · · ·	5
Unemployment rate	(2023)	3%	Fill vacancies by hiring foreign		
Unemployment rate among workers with basic edu.	(2023)	5%	labour	(2024)	5
Unemployment rate among workers with advanced edu.	(2023)	2%	Country investment in mid-career training	(2022)	4

### Jobs and Skills outlook

24%   Giobal 22%	35%   Giobal 39%	88%   Giobal 83%	88%   Global 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	Al exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running Al programmes

#### Trend outlook

### Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

#### Economy Global

Broadening digital access	68 60	Bising cost of living, higher       prices or inflation	46% 50%
Increased efforts and investments to reduce carbon	61	social issues	44% 46%
Increased efforts and investments to adapt to climate	56 41		27% 21%
Slower economic growth	53 42	Growing working-age	21% 24%
Increased geopolitical division and conflicts	53		18% 23%
Ageing and declining working- age populations	53	Stricter anti-trust and competition     regulations	16% 17%

#### Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

#### Economy Global

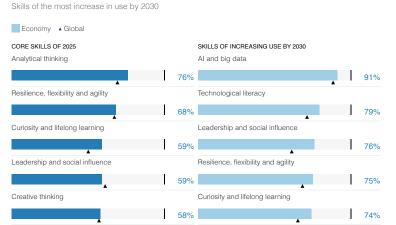
Al and information processing technologies (big data, VR, AR 94%	New materials and composites
Robots and autonomous systems 55% 58%	Quantum and encryption 23%
Energy generation, storage and 46% 41%	Satellites and space 10% 9%
Sensing, laser and optical 27% 18%	Biotechnology and gene 9% technologies 11%
Semiconductors and computing 27% 27% 20%	
Jobs outlook	Skill outlook

Skills of increasing use by 2030

#### Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth Job Growth	ob displacement	Net Growth				
1. Net growth 2. Global net gro	owth <b>3.</b> Churr					
	-100%	NET GROWTH	100%	1.	2.	З.
AI and Machine Learning Specialists	-10076	0	100 %	361	82	361
Data Analysts and Scientists			-	34	41	36
Sustainability Specialists				24	33	24
Managing Directors and Chief Executives		ų		4	5	7
Human Resources Specialists		<b>I</b>		3	5	12
Accounting, Bookkeeping and Payroll Clerks				-18	-18	30



Australia

Upskilling and reskilling	outlook					
32   Global 41 Would not need training by 2030	33 Global 29 Would be upskilled in their current role	21 Global 19 Would be upskilled and redeployed	<b>14</b>   Global 11 Would be unlikely to upskill			
Human-machine frontier				Public policy		
	r predominantly people, pre Combination Global		a combination of both 46% 29% 25%	Public policies to improve talen Share of respondents who agree t the talent availability Economy   Global Flexibility on hiring and firing prac	hat the particular public policy ha	s the greatest potential to increase ECONOMY GLOBAL 49% 44%
2030	_		48% 30% 22%	Funding for reskilling and upskillin Provision of reskilling and upskillin		49% 55%
				Changes to immigration laws	remote work	49% 52% 45% 26%
Key barriers for busines	s transformation			▲ Wage outlook		
Economy Global Skills gaps in the labour r Inability to attract talent to	narket	ers will hinder their organi	ECONOMY GLOBAL 65% 63%	Wage trends Share of organizations projecting i percentage of the company's tota Growing Global Similar	revenues	45% 47% 8%
Organization culture and Lack of adequate data an Inability to attract talent to	nd technical infrastructure		43% 46% 41% 32% 33% 27%			
Talent availability outloo	k			DEI Actions		
Improving & Global aver Talent availability when hi 35% -100% Talent development of ex 4% -100% Talent retention of existing	isting workforce		+100% 29%	Share of employers surveyed plan 65 I Global 42 Set DEI goals, targets or quotas AI Strategy Share of employers surveyed plan capability and prevalence	63   Global 51 Run comprehensive DEI training for managers and staff	auity and inclusion measure 61   Global 48 Targeted recruitment, retention and progression initiatives tegy in response to AI's increasing
-100%	٨	A	+100% 31%	92   Global 77	86   Global 69	68   Global 62

Reskilling and upskilling your existing workforce to better work alongside Al

Hiring new people with skills to design AI tools and enhancements appropriate for the organization-specific skills

Hiring new people with skills to better work alongside AI

Regional average Income Grou	p average					
INDICATORS				INDICATORS		
Labour force participation	(2023)		62%	Secondary Education Attainment	(2023)	83%
Vulnerable employment	(2022)		8%	Tertiary Education Attainment	(2023)	21%
Share of youth not in employment, education, or training (NEET)	(2023)		13%	Ease of finding skilled employees in local labour market	(2024)	 4
Unemployment rate	(2023)		5%	Fill vacancies by hiring foreign		
Unemployment rate among workers with basic edu.	(2023)		11%	labour	(2024)	4
Unemployment rate among workers with advanced edu.	(2023)		3%	Country investment in mid-career training	(2022)	5

# Jobs and Skills outlook

10%   Giobal 22%	38%   Giobal 39%	100%   Global 83%	100%   Giobal 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	Al exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running Al programmes

#### Trend outlook

#### Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

#### Economy Global

Broadening digital access		Ageing and declining working- age populations	39% 40%
Rising cost of living, higher prices or inflation	57% 50%	Increased focus on labour and social issues	36% 46%
Increased efforts and investments to adapt to climate		Growing working-age populations	25% 24%
Increased efforts and investments to reduce carbon		Stricter anti-trust and competition regulations	21% 17%
Slower economic growth	43% 42%	Increased government subsidies and industrial policy	18% 21%
Increased geopolitical division and conflicts	39% 34%	Increased restrictions to global trade and investment	18% 23%

#### Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy	/	Global

Al and information processing 14% Sensing, laser and optical 89% technologies (big data, VR, AR... 86% 54% 58% Robots and autonomous systems 46% 41% Energy generation, storage and distribution Semiconductors and computing 25% technologies 20% 14% 12% Quantum and encryption

#### Jobs outlook

#### Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth Job Growth Job	b displacement	Net Growth				
1. Net growth 2. Global net gro	wth <b>3.</b> Churr	1				
		NET GROWTH		1.	2.	3.
	-100%	0	100%			
AI and Machine Learning				37	82	37
Specialists				07	02	07
Data Analysts and Scientists				26	41	26
				20		20
Business Intelligence Analysts				22	18	22
Business intelligence Analysis				~~~	10	~~~
Managing Directors and Chief		•		4	5	5
Executives		<u>I</u>		4	5	5
Administrative Assistants and				-13	-20	13
Executive Secretaries				-13	-20	13
Assembly and Eastery Workers					0	00
Assembly and Factory Workers				-22	0	23

technologies		18%
New materials and composites		11% 30%
Satellites and space technologies		7% 9%
Biotechnology and gene technologies	-	<b>7%</b> 11%

#### Skill outlook

# Skills of increasing use by 2030

Skills of the most increase in use by 2030

#### Economy 🔺 Global CORE SKILLS OF 2025 SKILLS OF INCREASING USE BY 2030 Analytical thinking AI and big data 96% 86% Resilience, flexibility and agility Creative thinking 82% 73% Curiosity and lifelong learning Networks and cybersecurity 77% 68% Leadership and social influence Resilience, flexibility and agility 64% 73% Technological literacy Technological literacy 73% 64%

29   Global 41	32   Global 29	27   Global 19	12   Global 11				
Would not need training by 2030	Would be upskilled in their current role	Would be upskilled and redeployed	Would be unlikely to upskill				
Human-machine frontie	r			Public policy			
	er / predominantly people, pre Combination Global		or a combination of both	Public policies to improve talen Share of respondents who agree to the talent availability Economy A Global			tial to increas
wo		_	36% <b>43% 21%</b> 48% 30% 22%	Improvements to public education	A	58	% 47%
030			40% 30% 22%	Changes to labour laws related to	remote work	53	% 36%
			26%         42%         32%           33%         33%         34%	Funding for reskilling and upskillin	g	53	% 55%
				Flexibility on hiring and firing prac	tices	47	% 44%
				Wage subsidies	*	42	
Key barriers for busines	ss transformation			▲ Wage outlook		42	.70 207
ransformation barriers	s			Wage trends			
hare of organisations su	urveyed expecting the barr	iers will hinder their organ	isation transformation	Share of organizations projecting		ns of workers' compe	ensation as
Economy   Global			ECONOMY GLOBAL	Growing Global Similar			
kills gaps in the labour	market		64% 63%			3	5% 65%
rganization culture and	resistance to change		0470 0070			5	2% 41%
	A		57% 46%				
nsufficient understandin	ig of opportunities		39% 25%				
▲ nability to attract talent to	to the industry		0076 2076				
	<b>A</b>		29% 37%				
Dutdated or inflexible reg	gulatory framework						
	*		29% 39%				
Talent availability outloo	ok			DEI Actions			
alent trend		L 114	- in financia	Share of employers surveyed plar	nning to implement the diversity, e	quity and inclusion n	neasure
	no expect their talent availa erage Worsening A Glob		n in five years	50   Global 51	50   Global 48	45   Global 2	7
alent availability when h	iiring		+100% 26%	Run comprehensive DEI training for managers and staff	Targeted recruitment, retention and progression initiatives	Embed DEI goals an the supply chain	d solutions acros
alent development of ex	kisting workforce	<b>A</b>		AI Strategy			
-100%			+100% <b>58%</b>	Share of employers surveyed plar capability and prevalence	nning to implement the stated stra	tegy in response to A	Al's increasini
alent retention of existin	ig workforce		+100% 37%				
-100%	A	A	+100% 37%	0.4	74	74	

84 | Global 69 Hiring new people with skills to design Al tools and enhancements appropriate for the organization-specific skills 74 Global 77 Reskilling and upskilling your existing workforce to better work alongside Al 74 | Global 49

Re-orienting your organization to target new business opportunities created by Al

**Bahrain** 

Regional average Income Group a	average						
INDICATORS			INDICATORS				
Labour force participation	-	NA	Secondary Education Attainment	(2023)		67%	ò
Vulnerable employment	(2022)	1%	Tertiary Education Attainment	(2023)		40%	6
Share of youth not in employment, education, or training (NEET)		NA	Ease of finding skilled employees in local labour market	(2024)		5	5
Unemployment rate	-	NA	Fill vacancies by hiring foreign	(22.2.4)			
Unemployment rate among workers with basic edu.	-	NA	labour	(2024)		6	3
Unemployment rate among workers with advanced edu.	-	NA	Country investment in mid-career training	(2022)		5	5

# Jobs and Skills outlook

33%   Global 22%	42%   Giobal 39%	62%   Giobal 83%	92%   Global 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	AI exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running AI programmes

#### Trend outlook

#### Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

#### Economy Global

Broadening digital access		% Increased geopolitical division 32 % and conflicts 34	2% 34%
Increased efforts and investments to reduce carbon		% Increased government subsidies 27% and industrial policy 21	<b>7%</b> 21%
Rising cost of living, higher prices or inflation	46		3% 23%
Increased efforts and investments to adapt to climate			<b>3%</b> 24%
Slower economic growth			<b>9%</b> 17%
Increased focus on labour and social issues			5% 10%

#### Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy Global

distribution

Jobs outlook

Al and information processing technologies (big data, VR, AR... Robots and autonomous systems Energy generation, storage and

New materials and composites Sensing, laser and optical technologies

	Semiconductors and computing technologies		18% 20%
	Satellites and space technologies	-	14% 9%
<b>41%</b> 41%	Quantum and encryption		9% 12%
	Biotechnology and gene technologies		9% 11%
18% 18%			

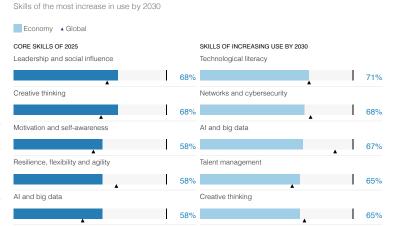
Skill outlook

Skills of increasing use by 2030

#### Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

structural churn (percent)						
Net growth Job Growth Jo	b displacemer	t Net Growth A Global net growth				
1. Net growth 2. Global net grow	wth 3. Chu	ım				
	-100%	NET GROWTH 0	100%	1.	2.	3.
Business Intelligence Analysts				30	18	30
Business Development Professionals				16	19	16
Compliance Officers		II,		5	11	13
Accountants and Auditors				3	-8	16
Data Entry Clerks				-45	-26	51
Administrative Assistants and Executive Secretaries				-54	-20	59



Bahrain

48 Global 41	0.4		10		
	24   Global 29	14   Global 19	13   Global 11		
ould not need training by	Would be upskilled in their current role	Would be upskilled and redeployed	Would be unlikely to upskill		
uman-machine frontier	r			Public policy	
uman-machine frontie				Public policies to improve talent availability	
	/ predominantly people, pre		r a combination of both	Share of respondents who agree that the particular publi the talent availability	c policy has the greatest potential to increa
	Combination Global	Technology Global		Economy A Global	
LTASKS				Funding for reskilling and upskilling	ECONOMY GLOE
W			52% 27% 219		62% 55%
			48% 30% 229	Changes to pension schemes and retirement ages	
30			31% 31% 37%		54% 25%
			33% 33% 34%	g and g process	54% 449
				Improvements to public education systems	
				<b>A</b>	54% 47%
				Wage subsidies	
				A	54% 26%
ey barriers for busines	ss transformation			Wage outlook	
ansformation barriers				Wage trends	
economy A Global	urveyed expecting the barr	riers will hinder their organ	isation transformation	Share of organizations projecting the share of wages and percentage of the company's total revenues	l other forms of workers' compensation as
			ECONOMY GLOBAL	Growing Global Similar Global Declining	Global
tills gaps in the labour r	market		67% 63%		77% 23%
rganization culture and	I resistance to change	<b>A</b>	0770 0070		52% 41%
	<b>A</b>		57% 46%		
ability to attract talent to	to the industry				
	A		43% 37%		
	ig of opportunities		38% 25%		
sufficient understandin			00/0 20/0		
	nd technical infrastructure				
	nd technical infrastructure		38% 32%		
sufficient understandin ack of adequate data a falent availability outloo	*		38% 32%	DEI Actions	
Auck of adequate data au	*		38% 32%	DEI Actions Share of employers surveyed planning to implement the	diversity, equity and inclusion measure
Ack of adequate data an all all all all all all all all all	*			Share of employers surveyed planning to implement the	
ack of adequate data an alent availability outloo alent trend nare of respondents wh	<b>k</b>	ability to improve or worser			diversity, equity and inclusion measure
ack of adequate data an alent availability outloo alent trend nare of respondents wh	k no expect their talent availa trage ∎Worsening ▲ Glob	ability to improve or worser		Share of employers surveyed planning to implement the 39 I Global 51 Run comprehensive DEI training for Set DEI goals, targets or q	uotas 31   Global 48
A ck of adequate data at alent availability outloo lent trend are of respondents wh Improving A Global ave lent availability when h	k no expect their talent availa trage ∎Worsening ▲ Glob	ability to improve or worser		Share of employers surveyed planning to implement the <b>39</b> I Global 51 Run comprehensive DEI training for recommendent of the second state of t	<b>31</b>   Global 48
ck of adequate data at         alent availability outloo         lent trend         are of respondents wh         Improving & Global ave         lent availability when h         6         -100%	A no expect their talent availa erage Worsening & Glob iiring	ability to improve or worser	in five years	Share of employers surveyed planning to implement the 39 I Global 51 Run comprehensive DEI training for managers and staff Set DEI goals, targets or q	uotas 31   Global 48
ck of adequate data at alent availability outloo lent trend are of respondents wh Improving & Global ave ent availability when h b -100% lent development of ex	A no expect their talent availa erage Worsening & Glob iiring	ability to improve or worser	in five years	Share of employers surveyed planning to implement the 39 I Global 51 Run comprehensive DEl training for managers and staff Al Strategy	uotas 31   Global 48 Targeted recruitment, retention and progression initiatives
A alent availability outloo lent trend lare of respondents wh Improving A Global ave lent availability when h 6 -100%	A constraints and their talent availated and their talent availated arage Worsening & Globatiring & Kathering workforce	ability to improve or worser	in five years +100% 38°	Share of employers surveyed planning to implement the 39 I Global 51 Run comprehensive DEI training for managers and staff AI Strategy	uotas Targeted recruitment, retention and progression initiatives

69 I Global 77 Reskilling and upskilling your existing workforce to better work alongside Al 62 | Global 47 Transitioning people from jobs that Al will cause to decline, to other roles within your organization 54 | Global 69

Hiring new people with skills to design AI tools and enhancements appropriate for the organization-specific skills

Belgium

INDICATORS			INDICATORS		
Labour force participation	(2023)	59%	Secondary Education Attainment	(2022)	75%
Vulnerable employment	(2022)	11%	Tertiary Education Attainment	(2022)	40%
Share of youth not in employment, education, or training (NEET)	(2023)	7%	Ease of finding skilled employees in local labour market	6 (2024)	4
Unemployment rate	(2023)	5%	Fill vacancies by hiring foreign	(000.4)	
Unemployment rate among workers with basic edu.	(2023)	10%	leheur	(2024)	5
Unemployment rate among workers with advanced edu.	(2023)	3%	Country investment in mid-career training	(2022)	5

# Jobs and Skills outlook

22%   Giobal 22%	35%   Giobal 39%	86%   Giobal 83%	93%   Global 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	Al exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running Al programmes

#### Trend outlook

#### Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

investments to reduce carbon       47% investments to adapt to climate       44         Ageing and declining working- age populations       58% increased geopolitical division and conflicts       44         Rising cost of living, higher prices or inflation       56% increased government subsidies and industrial policy       24         Broadening digital access       53% Growing working-age populations       67% investments and competition       24         Increased focus on labour and       47% Stricter anti-trust and competition       20	Economy Global				
age populations     40% and conflicts     3       Rising cost of living, higher prices or inflation     56%     Increased government subsidies       Broadening digital access     53%     Growing working-age populations     24       Increased focus on labour and     47%     Stricter anti-trust and competition     20					44% 41%
prices or inflation     50% and industrial policy     2       Broadening digital access     53%     Growing working-age populations     24       Increased focus on labour and     47%     Stricter anti-trust and competition     20					44% 34%
Increased focus on labour and 47% Stricter anti-trust and competition 20					24% 21%
	Broadening digital access				24% 24%
	Increased focus on labour and social issues		Stricter anti-trust and competition regulations		20% 17%
Slower economic drowin	Slower economic growth				16% 23%

20%

Skill outlook

Skills of increasing use by 2030

#### Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy Global	
Al and information processing technologies (big data, VR, AR	
Robots and autonomous systems	
Energy generation, storage and distribution	
New materials and composites	
Semiconductors and computing technologies	

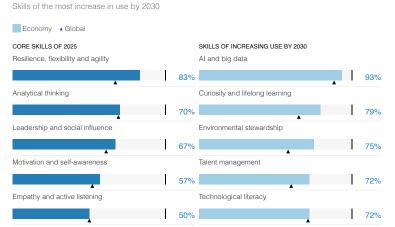
89% 86%	Quantum and encryption	18% 12%
64% 58%	Sensing, laser and optical technologies	13% 18%
53% 41%	Satellites and space technologies	11% 9%
36% 30%	Biotechnology and gene technologies	9% 11%
24%		

#### Key roles for business transformation

Jobs outlook

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

• _	lob displacement owth <b>3.</b> Chur	Net Growth				
1. Net growth 2. Global het gr	-100%	NET GROWTH	100%	1.	2.	З.
AI and Machine Learning Specialists				69	82	69
Data Analysts and Scientists				24	41	24
Business Intelligence Analysts				10	18	20
Business Development Professionals				8	19	8
General and Operations Managers				-7	4	17
Data Entry Clerks				-31	-26	31



Belgium

	29   Global 29	20   Global 19	12   Global 11		
Would not need training by 2030	Would be upskilled in their current role	Would be upskilled and redeployed	Would be unlikely to upskill		
Human-machine frontie	r			Public policy	
Human Global		edominantly technology, o Technology 📕 Global	r a combination of both	Public policies to improve talent availability Share of respondents who agree that the particular public policy the talent availability Economy  Global Provision of reskilling and upskilling	has the greatest potential to increase ECONOMY GLOBA
low	_		51% <b>27% 22%</b> 48% 30% 22%		59% 52%
030			33%         30%         37%           33%         33%         34%		56% 55% 52% 47%
				Changes to labour laws related to remote work	44% 36%
Key barriers for busines	as transformation			▲ Wage outlook	44% 38%
ransformation barriers				Wage trends	
hare of organisations su	urveyed expecting the bar	riers will hinder their organ	isation transformation	Share of organizations projecting the share of wages and other for	orms of workers' compensation as
Economy A Global			ECONOMY GLOBAL	percentage of the company's total revenues	
kills gaps in the labour	market			Growing Global Similar Global Declining Glob	
		A	58% 63%		49%         44%         52%         41%         52%
Organization culture and	resistance to change		49% 46%		
nability to attract talent to	to the industry				
			44% 37%		
	g of opportunities				
nsufficient understandin			38% 25%		
nsufficient understandin A Dutdated or inflexible rec	gulatory framework				
	gulatory framework		38% 39%		
A Dutdated or inflexible rec			38% 39%	DEI Actions	
A Dutdated or inflexible reg Talent availability outloo			38% 39%	DEI Actions Share of employers surveyed planning to implement the diversity,	equity and inclusion measure
A Dutdated or inflexible reg Talent availability outloo alent trend	<b>▲</b> bk	ability to improve or worser		Share of employers surveyed planning to implement the diversity,	
Dutdated or inflexible reg Talent availability outloo Talent trend Share of respondents wh	<b>▲</b> bk				equity and inclusion measure
Dutdated or inflexible reg Talent availability outloo alent trend hare of respondents wh Improving A Global ave alent availability when h	Ano expect their talent availa arage Worsening A Glob			Share of employers surveyed planning to implement the diversity, 64   Global 48 Targeted recruitment, retention and propression initiatives	
Dutdated or inflexible reg Talent availability outloo Talent trend Share of respondents wh Improving A Global ave alent availability when h	k no expect their talent availa erage Worsening & Glob iiring		in five years	Share of employers surveyed planning to implement the diversity, 64   Global 48 Targeted recruitment, retention and propression initiatives	57   Global 42
Dutdated or inflexible reg Talent availability outloo Talent trend thare of respondents wh Improving & Global ave Talent availability when h 0% -100%	A A A A A A A A A A A A A A A A A A A		in five years	Share of employers surveyed planning to implement the diversity, 64 I Giobal 48 Targeted recruitment, retention and progression initiatives Al Strategy	57   Global 42 Set DEI goals, targets or quotas

89 Global 77 Reskilling and upskilling your existing workforce to better work alongside Al TO I Global 69 Hiring new people with skills to design AI tools and enhancements appropriate for the organization-specific skills 70 | Global 62

Hiring new people with skills to better work alongside Al

Regional average Income Grou	p average					
INDICATORS			INDICATORS			
Labour force participation	(2023)	65%	Secondary Education Attainment	(2023)		60%
Vulnerable employment	(2022)	28%	Tertiary Education Attainment	(2023)		22%
Share of youth not in employment, education, or training (NEET)	(2023)	21%	Ease of finding skilled employees in local labour market	(2024)		4
Unemployment rate	(2023)	6%	Fill vacancies by hiring foreign	(000 0)		
Unemployment rate among workers with basic edu.	(2023)	7%	labour	(2024)		3
Unemployment rate among workers with advanced edu.	(2023)	4%	Country investment in mid-career training	(2022)		3

# Jobs and Skills outlook

24%   Giobal 22%	37%   Giobal 39%	92%   Giobal 83%	96%   Global 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	Al exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running Al programmes

#### Trend outlook

#### Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

#### Economy Global

Broadening digital access		Ageing and declining working- age populations 41%	
Increased efforts and investments to reduce carbon		Increased geopolitical division and conflicts 337%	
Increased efforts and investments to adapt to climate		Growing working-age 28% populations 24%	
Rising cost of living, higher prices or inflation		Increased government subsidies 23% and industrial policy 21%	
Slower economic growth		Stricter anti-trust and competition 23% regulations 17%	
Increased focus on labour and social issues	47% 46%	Increased restrictions to global trade and investment 21%	

Skill outlook

Skills of increasing use by 2030

Skills of the most increase in use by 2030

#### Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy Global

distribution

technologies

Jobs outlook

AI and information processing

technologies (big data, VR, AR...

Robots and autonomous systems

Energy generation, storage and

New materials and composites

Sensing, laser and optical

#### Semiconductors and computing 92% 86% 26% 20% technologies Biotechnology and gene 64% 58% 19% 11% technologies Satellites and space 14% 9% 42% 41% technologies 37% 14% Quantum and encryption 30% 12% 27% 18%

#### Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth Job Growth J	ob displacement	Net Growth				
1. Net growth 2. Global net gro	-100%	n NET GROWTH O	100%	1.	2.	3.
AI and Machine Learning Specialists			•	64	82	64
Data Analysts and Scientists				46	41	46
Business Development Professionals				16	19	16
General and Operations Managers		II.		-2	4	12
Assembly and Factory Workers	5			-4	0	17
Administrative Assistants and Executive Secretaries		<u> </u>		-22	-20	23

Economy A Global		
CORE SKILLS OF 2025	SKILLS OF INCREASING USE BY 2030	
Resilience, flexibility and agility	Al and big data	
	80%	93%
Analytical thinking	Creative thinking	
	70%	71%
Leadership and social influence	Technological literacy	
	67%	69%
Creative thinking	Curiosity and lifelong learning	
	64%	65%
Curiosity and lifelong learning	Networks and cybersecurity	
	63%	64%

Upskilling and reskilling	outlook					
<b>33</b> Global 41 Would not need training by 2030	31 Global 29 Would be upskilled in their current role	24 Global 19 Would be upskilled and redeployed	12   Global 11 Would be unlikely to upskill		_	
Human-machine frontier	r			Public policy		
	r predominantly people, pre Combination Global		a combination of both 47% 34% 19%	Public policies to improve talen Share of respondents who agree to the talent availability Economy   Global Flexibility on hiring and firing prace	hat the particular public policy ha	s the greatest potential to increase ECONOMY GLOBAL 57% 44%
030			48% 30% 22%	Improvements to public education	systems	52% 47%
			33%         35%         32%           33%         33%         34%	Funding for reskilling and upskillin		49% 55%
				Provision of reskilling and upskillin Flexibility on setting wages	g	49% 52%
						31% 38%
Key barriers for busines				Wage outlook Wage trends		
Economy Global kills gaps in the labour r Organization culture and Dutdated or inflexible reg ack of adequate data an hability to attract talent to	resistance to change gulatory framework and technical infrastructure o the industry	ers will hinder their organi	Sation transformation           ECONOMY         GLOBAL           59%         63%           45%         46%           38%         39%           32%         32%           31%         37%	Share of organizations projecting i percentage of the company's total Growing Global Similar	revenues	15 of workers' compensation as
Talent availability outloo	k			DEI Actions		
	o expect their talent availat		in five years	Share of employers surveyed plan 68   Global 51	ning to implement the diversity, ec 59   Global 48	quity and inclusion measure
alent availability when hi 8% -100%	iring		+100% 23%	Run comprehensive DEI training for managers and staff	Targeted recruitment, retention and progression initiatives	Set DEI goals, targets or quotas
alent development of ex			+100% <b>75%</b>	Al Strategy Share of employers surveyed plar capability and prevalence	ning to implement the stated strat	tegy in response to AI's increasing
alent retention of existing	g worktorce	Å	+100% 45%	91 I Global 77	73 I Giobal 69	71   Global 62

Reskilling and upskilling your existing workforce to better work alongside Al

Hiring new people with skills to better work alongside Al

Hiring new people with skills to design Al tools and enhancements appropriate for the organization-specific skills

# 27.9

#### Contextual indicators

Canada

INDICATORS			INDICATORS			
Labour force participation	(2023)	66%	Secondary Education Attainment	(2023)		90%
Vulnerable employment	(2022)	10%	Tertiary Education Attainment	(2023)		68%
Share of youth not in employment, education, or training (NEET)	(2023)	12%		<sup>s</sup> (2024)		5
Unemployment rate	(2023)	5%	Fill vacancies by hiring foreign	(222.4)		
Unemployment rate among workers with basic edu.	(2023)	8%	labour	(2024)		5
Unemployment rate among workers with advanced edu.	(2023)	4%	Country investment in mid-career training	r (2022)		5

### Jobs and Skills outlook

22%   Global 22%	37%   Global 39%	96%   Giobal 83%	94%   Global 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	Al exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running Al programmes

#### Trend outlook

#### Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

#### Economy Global

Broadening digital access		Ageing and declining working- age populations	42% 40%
Increased geopolitical division and conflicts	58% 34%	Increased focus on labour and social issues	41% 46%
Increased efforts and investments to reduce carbon	54% 47%	Growing working-age populations	30% 24%
Increased efforts and investments to adapt to climate	52% 41%	Increased restrictions to global trade and investment	27% 23%
Slower economic growth		Increased government subsidies and industrial policy	16% 21%
Rising cost of living, higher prices or inflation	47% 50%	Stricter anti-trust and competition regulations	16% 17%

20%

Skill outlook

Skills of increasing use by 2030

#### Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

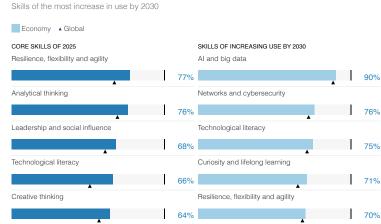
Economy Global		
AI and information processing technologies (big data, VR, AR		
Robots and autonomous systems		
Energy generation, storage and distribution		
New materials and composites		
Semiconductors and computing technologies		
Jobs outlook		

97% 86%	Sensing, laser and optical technologies	17% 18%
54% 58%	Quantum and encryption	14% 12%
40% 41%	Biotechnology and gene technologies	11% 11%
24% 30%	Satellites and space technologies	6% 9%
21%		

#### Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

• _		Net Growth				
1. Net growth 2. Global net gro	-100%	NET GROWTH	100%	1.	2.	3.
AI and Machine Learning Specialists			•	103	82	103
Data Analysts and Scientists			-	36	41	37
Lawyers		Ņ		3	2	10
Managing Directors and Chief Executives		II,		-2	5	3
Business Services and Administration Managers		, I		-4	-7	15
Accountants and Auditors		Д		-6	-8	10



Canada

Upskilling and reskilling	outlook					
32   Global 41	31 Global 29	25   Global 19	12   Global 11			
Would not need training by 2030	Would be upskilled in their current role	Would be upskilled and redeployed	Would be unlikely to upskill			
Human-machine frontier	r			Public policy		
Human Global	r predominantly people, pre Combination Global		a combination of both	Public policies to improve talent Share of respondents who agree the the talent availability Economy  Global	availability nat the particular public policy has	
LL TASKS				Provision of reskilling and upskilling	g	ECONOMY GLOBAI
			48%         33%         20%           48%         30%         22%	Funding for reskilling and upskilling	3	54% 52%
030			29% <b>38% 33%</b> 33% <b>33%</b> 34%	Flexibility on hiring and firing pract	ices	48% 55%
				Improvements to public education	systems	42% 47%
				Changes to immigration laws	A	40% 26%
Key barriers for busines	s transformation			Wage outlook		
Economy A Global kills gaps in the labour in organization culture and hability to attract talent to ack of adequate data an sufficient understanding	resistance to change o the industry nd technical infrastructure		ECONOMY         GLOBAL           63%         63%           41%         46%           37%         37%           34%         32%           27%         25%	Growing Global Similar	Global Declining Global	46% 42% 12 52% 41% 8
Talent availability outloo	k			DEI Actions		
	no expect their talent availal rage 📕 Worsening 🔺 Globa		in five years	Share of employers surveyed plan	ning to implement the diversity, equ 62   Global 48	uity and inclusion measure
alent availability when h	iring		+100% 26%	Run comprehensive DEI training for managers and staff	Targeted recruitment, retention and progression initiatives	Set DEI goals, targets or quotas
alent development of ex % -100%			+100% <b>64%</b>		ning to implement the stated strate	gy in response to AI's increasing
alent retention of existing	g workforce		+100% 32%	90   Global 77	<b>78</b>   Global 69	71   Global 62

Reskilling and upskilling your existing workforce to better work alongside Al

Hiring new people with skills to better work alongside Al

Hiring new people with skills to design Al tools and enhancements appropriate for the organization-specific skills

INDICATORS				INDICATORS				
Labour force participation	-		NA	Secondary Education Attainment	(2020)			32%
Vulnerable employment	(2022)		42%	Tertiary Education Attainment	(2020)			16%
Share of youth not in employment, education, or training (NEET)	-		NA	Ease of finding skilled employees in local labour market	(2022)			5
Unemployment rate	-		NA	Fill vacancies by hiring foreign	(0000)			
Unemployment rate among workers with basic edu.	-		NA	labour	(2022)			4
Unemployment rate among workers with advanced edu.	-		NA	Country investment in mid-career training	(2022)			5

18%   Giobal 22%	33%   Global 39%	92%   Giobal 83%	94%   Global 88%			
Labour-market churn	Skill disruption	Organizations with DEI priorities	AI exposure			
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running AI programmes			

#### Trend outlook

#### Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

Economy Global		
Increased efforts and investments to reduce carbon	64% Ageing and declining working- 47% age populations	47% 40%
Broadening digital access	62% Increased focus on labour and 60% social issues	<b>33%</b> 46%
Increased efforts and investments to adapt to climate	56%         Increased restrictions to global           41%         trade and investment	<b>32%</b> 23%
Increased geopolitical division and conflicts	56%     Increased government subsidies       34%     and industrial policy	23% 21%
Rising cost of living, higher prices or inflation	50% Growing working-age 50% populations	<mark>22%</mark> 24%
Slower economic growth	47% Stricter anti-trust and competition 42% regulations	16% 17%

Skill outlook

Skills of increasing use by 2030

#### Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy Global		
AI and information processing technologies (big data, VR, AR	0070	Sensi techn
Robots and autonomous systems	0070	Biote techr
Energy generation, storage and distribution	47%	Quan
New materials and composites	1070	Satell techr
Semiconductors and computing technologies	32% 20%	

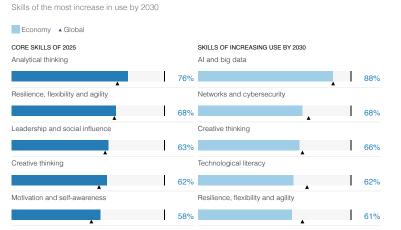
Sensing, laser and optical technologies	23% 18%
Biotechnology and gene technologies	19% 11%
Quantum and encryption	17% 12%
Satellites and space technologies	7% 9%

#### Key roles for business transformation

Jobs outlook

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth Job Growth	Job displacement	Net Growth   Global net growth				
1. Net growth 2. Global net gr	owth 3. Churr	n				
	-100%	NET GROWTH	100%	1.	2.	з.
AI and Machine Learning Specialists			•	208	82	208
Data Analysts and Scientists				46	41	46
Business Development Professionals				15	19	15
General and Operations Managers		II,		-3	4	8
Assembly and Factory Worker	S			-4	0	18
Administrative Assistants and Executive Secretaries				-18	-20	19



# 1008.8

Upskilling and reskilling	outlook						
40 Global 41 Would not need training by 2030	28 Global 29 Would be upskilled in their current role	21   Global 19 Would be upskilled and redeployed	11   Global 11 Would be unlikely to upskill				
Human-machine frontier	r			Public policy			
	r predominantly people, pro Combination Global		a combination of both	Public policies to improve Share of respondents who a the talent availability Economy   Global	e talent availability agree that the particular public		ential to increase
Now	_	_	44% <b>33% 23%</b> 48% <b>30%</b> 22%	Funding for reskilling and u Flexibility on hiring and firin			53% 55%
2030				Provision of reskilling and u	<b>A</b>		52% 44%
			<u> </u>	Changes to immigration law	/S		44% 52% 37% 26%
				Improvements to public edu	ucation systems	:	37% 47%
Key barriers for busines	s transformation			Wage outlook			
Economy A Global Skills gaps in the labour r Organization culture and			ECONOMY GLOBAL	percentage of the company	ecting the share of wages and r's total revenues imilar Global Declining		47% <b>46% 8</b> % 52% 41% 8%
Inability to attract talent to Outdated or inflexible reg			49%         46%           38%         37%				
Lack of adequate data a	nd technical infrastructure		32% 39% 31% 32%				
Talent availability outloo	k			DEI Actions			
Talent trend Share of respondents wh	o expect their talent availa	bility to improve or worsen	in five years	Share of employers surveye	ed planning to implement the d	diversity, equity and inclusion	measure
Improving A Global aver	rage Worsening 🔺 Glob	al average		55   Global 51	50 I Global 42	47 Global	48
Talent availability when hi     45%     -100%	iring		+100% 26%	Run comprehensive DEI training for managers and staff	or Set DEI goals, targets or qu	uotas Targeted recruitme progression initiati	
Talent development of ex     3%     -100%	isting workforce		+100% <b>68%</b>	Al Strategy Share of employers surveye	ed planning to implement the s	stated strategy in response to	Al's increasing
Talent retention of existing     19%     -100%	g workforce		+100% 34%	capability and prevalence	65   Giobal 69	65   Global	49

Hiring new people with skills to design Al tools and enhancements appropriate for the organization-specific skills Reskilling and upskilling your existing workforce to better work alongside AI

Re-orienting your organization to target new business opportunities created by AI

Colombia

Regional average Income Group	average							
INDICATORS				INDICATORS				
Labour force participation	(2023)		69%	Secondary Education Attainment	(2023)			57%
Vulnerable employment	(2022)		44%	Tertiary Education Attainment	(2023)			27%
Share of youth not in employment, education, or training (NEET)	(2023)		23%	····, ····				5
Unemployment rate	(2023)		8%		(000.0)			
Unemployment rate among workers with basic edu.	(2023)		8%	labour	(2024)			4
Unemployment rate among workers with advanced edu.	(2023)		8%	Country investment in mid-career training	(2022)			3

# Jobs and Skills outlook

14%   Global 22%	44%   Giobal 39%	100%   Global 83%	100%   Global 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	Al exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running Al programmes

#### Trend outlook

#### Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

#### Economy Global

Broadening digital access		<ul><li>Ageing and declining working-</li><li>age populations</li></ul>	35% 40%
Increased efforts and investments to reduce carbon	48	<ul><li>Increased restrictions to global</li><li>trade and investment</li></ul>	26% 23%
Increased focus on labour and social issues		<ul><li>Rising cost of living, higher</li><li>prices or inflation</li></ul>	26% 50%
Increased efforts and investments to adapt to climate		<ul><li>Increased government subsidies</li><li>and industrial policy</li></ul>	22% 21%
Slower economic growth		<ul><li>Growing working-age</li><li>populations</li></ul>	17% 24%
Increased geopolitical division and conflicts	<b>35</b> 34	<ul> <li>Stricter anti-trust and competition</li> <li>regulations</li> </ul>	17% 17%

26% 30% 13% 20%

#### Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy Global	
Al and information processing technologies (big data, VR, AR	
Energy generation, storage and distribution	
Robots and autonomous systems	
New materials and composites	
Semiconductors and computing technologies	

91% 86%	Satellites and space technologies	9% 9%
52% 41%	Quantum and encryption	9% 12%
48% 58%	Sensing, laser and optical technologies	9% 18%
26% 30%	Biotechnology and gene technologies	4% 11%

#### Key roles for business transformation

Jobs outlook

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

on dotardi onann (porconty)						
Net growth Job Growth Job	ob displacement	Net Growth				
1. Net growth 2. Global net gro	wth 3. Chur	n				
		NET GROWTH		1.	2.	3.
	-100%	0	100%			0.
AI and Machine Learning						
Specialists				27	82	27
			-			
Renewable Energy Engineers				22	38	22
		-				
Sustainability Specialists				21	33	21
		<b>A</b>				
Data Analysts and Scientists				15	41	15
	•	· ·				
Lawyers				-1	2	7
		1				
Administrative Assistants and				-24	-20	24
Executive Secretaries		•		I		

Skill outlook	
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#### Skills of increasing use by 2030

Skills of the most increase in use by  $2030\,$ 



Colombia

4 -	00	04	0									
45   Global 41	26   Global 29	21   Global 19	8 Global 11									
Would not need training by 2030	Would be upskilled in their current role	Would be upskilled and redeployed	Would be unlikely to upskill									
Human-machine frontie	r			Public po	licy							
luman-machine frontie					icies to improv							
	predominantly people, pr		r a combination of both	the talent a	spondents who vailability	agree tha	it the parti	icular publi	c policy ha	s the grea	itest potential i	o increase
Human Global	Combination Global	Technology Global		Economy	Global							
low				Funding fo	r reskilling and ι	upskilling					ECONOM	Y GLOBA
low			48% 29% 23%								60%	55%
			48% 30% 22%	Provision c	f reskilling and u	upskilling	-				_	
2030											60%	52%
			34% <b>29% 37%</b> 33% <b>33%</b> 34%	Changes t	o labour laws rel	lated to re	mote wor	k			500/	
				Elevibility (	n setting wages	<b>A</b>					53%	36%
				T loxionity c	an setting wages	,					40%	38%
				Flexibility of	on hiring and firir	ng practic	es					
											40%	44%
Key barriers for busines	s transformation			Wage out	look							
ransformation barrier	3			Wage tren	ds							
	urveyed expecting the bar	iers will hinder their organ	isation transformation	Ũ	ganizations proj	jecting the	e share of	wages and	d other form	s of work	ers' compensa	ation as
Economy A Global			ECONOMY GLOBAL	percentag	e of the compan	iy's total re	evenues					
Skills gaps in the labour	market		LOONOMIT GLOBAL	Growing	Global	Similar	Global	Declining	Global			
		•	65% 63%									57% 7 41% 8
Outdated or inflexible reg	gulatory framework										52%	41% 8
nabilitu ta attraat talaat t			61% 39%									
nability to attract talent t	o trie industry		35% 37%									
nsufficient understandin	g of opportunities											
			26% 25%									
Organization culture and	resistance to change		_									
	<b>A</b>		22% 46%									
Talent availability outloo	k			DEI Actio	ns							
<b>Falent trend</b>	no expect their talent availa	bility to improve or worser	n in five vears	Share of e	mployers survey	ed planni	ng to impl	ement the	diversity, eo	quity and	inclusion mea	sure
	rage Worsening & Glob			<b>60</b> I			<b>47</b> L			47	7 Global 39	
te la cata de cata de 116 con de com de	1.1											
alent availability when h     100%	iring	<b>A</b>	+100% 47%	Run compre managers a	hensive DEI training f nd staff	for	Set DEI goa	ls, targets or c	luotas	Pay ec	uity reviews and sa	alary audits
alent development of e	kisting workforce			AI Strateg	IV							
-100%	A		+100% 67%	Share of e	mployers survey	ed planni	ng to impl	ement the	stated strat	egy in res	sponse to Al's	increasing
				capability	and prevalence							
alent retention of existin	g workforce											
alent retention of existin 7% -100%	g workforce	A	+100% 47%	<b>71</b>			<b>71</b> .			_	Global 49	

Hiring new people with skills to design AI tools and enhancements appropriate for the organization-specific skills

Reskilling and upskilling your existing workforce to better work alongside Al

Re-orienting your organization to target new business opportunities created by AI

Regional average Income Grou	ip average					
INDICATORS			INDICATORS			
Labour force participation	(2023)	64%	Secondary Education Attainment	(2022)		91%
Vulnerable employment	(2022)	14%	Tertiary Education Attainment	(2022)		23%
Share of youth not in employment, education, or training (NEET)	(2023)	6%		(2024)		3
Unemployment rate	(2023)	2%		()		
Unemployment rate among workers with basic edu.	(2023)	4%	leheur	(2024)		3
Unemployment rate among workers with advanced edu.	(2023)	1%	Country investment in mid-career training	(2022)		4

1/2

# Jobs and Skills outlook

13%   Giobal 22%	30%   Giobal 39%	94%   Giobal 83%	82%   Global 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	AI exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running AI programmes

#### Trend outlook

#### Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

· ,	-	°		
Economy Global				
Increased efforts and investments to reduce carbon		65% 47%	Increased efforts and investments to adapt to climate	<b>44%</b> 41%
Broadening digital access		61% 60%	Increased focus on labour and social issues	39% 46%
Ageing and declining working- age populations		61% 40%	Growing working-age populations	<b>30%</b> 24%
Rising cost of living, higher prices or inflation		48% 50%	Increased government subsidies and industrial policy	<b>17%</b> 21%
Slower economic growth		48% 42%	Increased restrictions to global trade and investment	17% 23%
Increased geopolitical division and conflicts		48% 34%		

#### Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy Global

Al and information processing technologies (big data, VR, AR		nsing, laser and optical 17% hnologies 18%
Robots and autonomous systems		ellites and space 4% hnologies 9%
Energy generation, storage and distribution	65% 41% Quar	antum and encryption 4%
New materials and composites		technology and gene 4% hnologies 11%
Semiconductors and computing technologies	26% 20%	

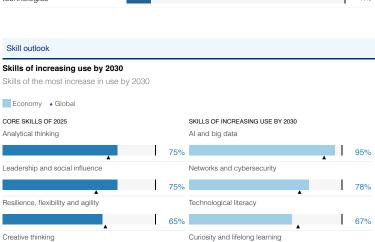
Curiosity and lifelong learning

#### Jobs outlook

#### Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

•		Net Growth  A Global net growth				
1. Net growth 2. Global net grow	vth <b>3.</b> Churn	NET GROWTH	100%	1.	2.	3.
AI and Machine Learning Specialists		I	•	63	82	63
Data Engineers				43	36	43
Business Intelligence Analysts				16	18	29
Human Resources Specialists		Ņ		4	5	4
Assembly and Factory Workers				-13	0	17
Administrative Assistants and Executive Secretaries		<u></u>		-20	-20	20



60%

50%

Systems thinking

Future of Jobs Report 2025 130

.

67%

61%

Czech Republic

Upskilling and reskilling	outlook							
42 Global 41 Would not need training by 2030	32   Global 29 Would be upskilled in their current role	17   Global 19 Would be upskilled and redeployed	9 Global 11 Would be unlikely to upskill					
Human-machine frontier				Public policy				
	r predominantly people, pre Combination Global		a combination of both	Public policies to improve tale Share of respondents who agree the talent availability Economy A Global		policy has the	greatest potential to	
Now			45% <b>35% 20%</b> 48% <b>30%</b> 22%	Funding for reskilling and upskil Flexibility on hiring and firing pra			59%	55%
2030			32%         36%         31%           33%         33%         34%	Wage subsidies	•		47%	44% 26%
				Flexibility on setting wages			41%	38%
				Improvements to public educati	on systems		35%	47%
Key barriers for busines	s transformation			Wage outlook				
Economy Global Skills gaps in the labour of Organization culture and Inability to attract talent to Outdated or inflexible reg Lack of adequate data at	resistance to change		ECONOMY         GLOBAL           61%         63%           44%         46%           39%         37%           30%         39%	percentage of the company's to		Global	35% 52%	
Talent availability outloo	▲ k		30% 32%	DEI Actions				
	a isting workforce		in five years +100% 6% +100% 65%	Share of employers surveyed pl 47   Global 42 Set DEI goals, targets or quotas Al Strategy Share of employers surveyed pl capability and prevalence	35   Global 51 Run comprehensive DEI train managers and staff	ining for A	29   Global 33	
-100%	Å		+100% <b>41%</b>	71 I Giobal 69	71 I Global 77	-	71   Global 47	

Hiring new people with skills to design AI tools and enhancements appropriate for the organization-specific skills

71 | Global 77 Reskilling and upskilling your existing workforce to better work alongside AI

Transitioning people from jobs that AI will cause to decline, to other roles within your organization

Denmark

INDICATORS			INDICATORS		
Labour force participation	(2023)	64%	Secondary Education Attainment	(2022)	77%
Vulnerable employment	(2022)	6%	Tertiary Education Attainment	(2022)	37%
Share of youth not in employment, education, or training (NEET)	(2023)	7%	Ease of finding skilled employees in local labour market	6 (2024)	 5
Unemployment rate	(2023)	4%	Fill vacancies by hiring foreign	(222.4)	
Unemployment rate among workers with basic edu.	(2023)	6%	leheur.	(2024)	5
Unemployment rate among workers with advanced edu.	(2023)	4%	Country investment in mid-career training	(2022)	5

# Jobs and Skills outlook

10%   Giobal 22%	28%   Global 39%	95%   Giobal 83%	100%   Global 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	Al exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running Al programmes

#### Trend outlook

#### Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

Economy Global			
Increased efforts and investments to adapt to climate		Rising cost of living, higher prices or inflation	<b>33%</b> 50%
Increased focus on labour and social issues	52% 46%	Slower economic growth	30% 42%
Increased efforts and investments to reduce carbon		Stricter anti-trust and competition regulations	26% 17%
Increased geopolitical division and conflicts		Increased government subsidies and industrial policy	22% 21%
Broadening digital access		Growing working-age populations	<b>15%</b> 24%
Ageing and declining working- age populations		Increased restrictions to global trade and investment	11% 23%

#### Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy Global

#### AI and information processing 96% 86% technologies (big data, VR, AR... 63% Robots and autonomous systems 58% 30% New materials and composites 30% Energy generation, storage and 30% distribution 41% Semiconductors and computing 22% technologies 20% Jobs outlook Skill outlook

	Satellites and space technologies		11% 9%
6	Quantum and encryption		<b>7%</b> 12%
	Sensing, laser and optical technologies		7% 18%
	Biotechnology and gene technologies	-	<b>7%</b> 11%

#### Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth Job Growth Jo	b displacement	Net Growth   Global net growth	ſ			
1. Net growth 2. Global net gro	wth <b>3.</b> Churn	NET GROWTH	100%	1.	2.	3.
AI and Machine Learning Specialists				55	82	55
Data Analysts and Scientists		ļ		40	41	40
Financial Analysts				8	3	16
Accountants and Auditors		<b>,</b> I		-1	-8	8
Administrative Assistants and Executive Secretaries		, <b>I</b>		-9	-20	9
Accounting, Bookkeeping and Payroll Clerks		, <b>–</b>		-10	-18	10

#### Skill Outlook

#### Skills of increasing use by 2030

Skills of the most increase in use by 2030

#### Economy 🔺 Global CORE SKILLS OF 2025 SKILLS OF INCREASING USE BY 2030 Analytical thinking AI and big data 95% 95% Leadership and social influence Networks and cybersecurity 79% 75% Resilience, flexibility and agility Curiosity and lifelong learning 75% 75% Motivation and self-awareness Creative thinking 70% 65% Technological literacy Creative thinking 63% 60%

Denmark

Upskilling and reskilling	outlook						
37   Global 41 Would not need training by 2030	32 Global 29 Would be upskilled in their current role	22   Global 19 Would be upskilled and redeployed	9   Giobal 11 Would be unlikely to upskill			-	
Human-machine frontie	r			Public policy			
, ,	r predominantly people, pre Combination Global	, 0,,	a combination of both	Public policies to improve talent Share of respondents who agree to the talent availability Economy A Global	t availability hat the particular public policy has		o increase
Now				Funding for reskilling and upskillin	g		
			54%         30%         16%           48%         30%         22%	Provision of reskilling and upskillin	g	63%	55%
2030			36% <b>37% 27%</b> 33% <b>33%</b> 34%	Flexibility on hiring and firing pract	tices	53%	52% 44%
				Changes to labour laws related to	remote work	42%	36%
				Improvements to public education	systems	42%	47%
Key barriers for busines	s transformation			Wage outlook	-		
Economy Global Skills gaps in the labour of Organization culture and Insufficient understandin	g of opportunities	iers will hinder their organi	ECONOMY         GLOBAL           56%         63%           52%         46%           30%         25%           30%         32%	Share of organizations projecting I percentage of the company's total Growing Global Similar		32%	47% 21% 41% 8%
Inability to attract talent to	o the industry ▲		26% 37%				
Talent availability outloo	k			DEI Actions			
Improving     * Global ave       Talent availability when h       63%     -100%       Talent development of ex       0%     -100%	La isting workforce		in five years +100% 16% +100% 79%	74 I Giobal 51 Run comprehensive DEI training for managers and staff Al Strategy Share of employers surveyed plan	ning to implement the diversity, equination of the diversity of the divers	<b>47</b>   Global 39 Pay equity reviews and sale	lary audits
Talent retention of existin     21%     -100%	g workforce		+100% 26%	90   Global 77	84   Giobal 69	68   Global 62	

Reskilling and upskilling your existing workforce to better work alongside Al

Hiring new people with skills to design AI tools and enhancements appropriate for the organization-specific skills

Hiring new people with skills to better work alongside AI

INDICATORS				INDICATORS			
Labour force participation	(2022)		50%	Secondary Education Attainment	(2022)		54%
Vulnerable employment	(2022)		24%	Tertiary Education Attainment	(2022)		17%
Share of youth not in employment, education, or training (NEET)	(2022)		27%	Ease of finding skilled employees in local labour market	<sup>3</sup> (2024)		5
Unemployment rate	(2022)		5%		(000 0)		
Unemployment rate among workers with basic edu.	(2023)		3%	labour	(2024)		4
Unemployment rate among workers with advanced edu.	(2022)		11%	Country investment in mid-career training	(2022)		4

Jobs	and	Skills	out	look

17%   Global 22%	48%   Giobal 39%	70%   Giobal 83%	78%   Global 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	Al exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running Al programmes

#### Trend outlook

#### Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

	-			
Economy Global				
Rising cost of living, higher prices or inflation		Increased government subsidies and industrial policy	35 21	5% :1%
Slower economic growth		Increased restrictions to global trade and investment	26 23	<b>3%</b> 3%
Broadening digital access		 Increased focus on labour and social issues	26 46	<b>6%</b>
Increased efforts and investments to adapt to climate		Ageing and declining working- age populations	26 40	<b>6%</b> 0%
Increased geopolitical division and conflicts		 Stricter anti-trust and competition regulations	18 17	<mark>3%</mark> 7%
Increased efforts and investments to reduce carbon		Growing working-age populations		<b>7%</b> 4%

29%

27% 30%

-1 5 5

-16

-18 24 Skill outlook

Skills of increasing use by 2030

Skills of the most increase in use by 2030

#### Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy	Global
	mation processing s (big data, VR, AR.

Robots and autonomous systems

Energy generation, storage and

Semiconductors and computing

New materials and composites

Managing Directors and Chief

Accounting, Bookkeeping and

Executives

Payroll Clerks

distribution

technologies

Jobs outlook

**79%** 86% Sensing, laser and optical 13% 18% technologies Biotechnology and gene 51% 58% <mark>6%</mark> 11% technologies Satellites and space 5% 9% 35% 41% technologies 5% Quantum and encryption 20% 12%

#### Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

ou dotarai onann (poroont)						
Net growth Job Growth Jo	b displacement	Net Growth				
1. Net growth 2. Global net grow	wth 3. Churn					
		NET GROWTH		1.	2.	3.
	-100%	0	100%		<b>b</b>	0.
Industrial and Production						_
Engineers				9	15	9
•		<b>^</b>		-		
Assembly and Factory Workers		1		5	0	20
Electrotechnology Engineers		1		4	15	4
		▲				
Accountants and Auditors				-1	-8	10

Economy A Global			
CORE SKILLS OF 2025		SKILLS OF INCREASING USE BY 2030	
Creative thinking		AI and big data	
6	3%		73%
Analytical thinking		Technological literacy	
4	8%		72%
Leadership and social influence		Networks and cybersecurity	
4	6%		69%
Technological literacy		Resilience, flexibility and agility	
4	6%	<b>A</b>	62%
AI and big data		Leadership and social influence	
	59/		62%

49   Global 41	28   Global 29	16   Global 19	7   Global 11		
Would not need training by 2030	Would be upskilled in their current role	Would be upskilled and redeployed	Would be unlikely to upskill		
Human-machine frontie	r			Public policy	
	er r predominantly people, pro- (Combination Global		42%       22%       35%         48%       30%       22%         30%       25%       45%         33%       33%       34%	Public policies to improve talent availability Share of respondents who agree that the particular public policy h the talent availability  Economy  Global Funding for reskilling and upskilling  Provision of reskilling and upskilling  Improvements to public education systems  Wage subsidies  Flexibility on setting wages	ECONOMY GLOB 54% 55% 54% 52% 52% 47% 46% 26%
Key barriers for busines		iers will hinder their organ	isation transformation	Wage outlook Wage trends Share of organizations projecting the share of wages and other for	40% 389
Economy A Global	arveyed expecting the bar		ECONOMY GLOBAL	percentage of the company's total revenues	
Skills gaps in the labour	market		73% 63%	Growing Global Similar Global Declining Globa	58% 28% 1
nability to attract talent to Organization culture and		A	33% 37%		52% 41%
ack of adequate data a	nd technical infrastructure		1		
Dutdated or inflexible reg	gulatory framework		33% 32%		
Talent availability outloo	vk			DEI Actions	
	no expect their talent availa rage Worsening & Glob irring		n in five years	Share of employers surveyed planning to implement the diversity, 33   Global 42 Set DEl goals, targets or quotas 33   Global 26 Support workers with caregiving	equity and inclusion measure 32   Global 48 Targeted recruitment, retention and
<b>6%</b> -100%	A	<b>A</b>	+100% 55%	responsibilities	progression initiatives
Falent development of example.       -100%	kisting workforce		+100% <b>77%</b>	Al Strategy Share of employers surveyed planning to implement the stated str	ategy in response to AI's increasir
Talent retention of existin       6%     -100%	g workforce		+100% 59%	capability and prevalence	

65 I Global 77

50 I Global 69

50 | Global 62

Reskilling and upskilling your existing workforce to better work alongside AI tools and enhancements appropriate for the organization-specific skills

to design AI Hiring new people with skills to better bropriate for work alongside AI

Estonia

Regional average Income Group	average				
INDICATORS			INDICATORS		
Labour force participation	(2023)	70%	Secondary Education Attainment	(2022)	86%
Vulnerable employment	(2022)	6%	Tertiary Education Attainment	(2022)	40%
Share of youth not in employment, education, or training (NEET)	(2023)	10%	Ease of finding skilled employees in local labour market	. ,	4
Unemployment rate	(2023)	5%	Fill vacancies by hiring foreign		
Unemployment rate among workers with basic edu.	(2023)	9%	labour	(2024)	4
Unemployment rate among workers with advanced edu.	(2023)	4%	Country investment in mid-career training	(2022)	4

# Jobs and Skills outlook

13%   Giobal 22%	37%   Giobal 39%	95%   Giobal 83%	95%   Global 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	AI exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running AI programmes

#### Trend outlook

#### Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

Economy Global			
Ageing and declining working- age populations	00/0	Increased efforts and investments to reduce carbon	<b>29%</b> 47%
Slower economic growth	<b>50%</b> 42%	Broadening digital access	29% 60%
Increased focus on labour and social issues	1070	Increased efforts and investments to adapt to climate	21% 41%
Rising cost of living, higher prices or inflation		Stricter anti-trust and competition regulations	17% 17%
Increased geopolitical division and conflicts	<b>42%</b> 34%	Increased government subsidies and industrial policy	<b>13%</b> 21%
Growing working-age populations	38% 24%		

#### Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy Global

AI and information processing technologies (big data, VR, AR	83% 86%
Robots and autonomous systems	58% 58%
Energy generation, storage and distribution	38% 41%
New materials and composites	17% 30%

% %	Semiconductors and computing technologies		<mark>8%</mark> 20%
<mark>%</mark> %	Biotechnology and gene technologies		<mark>8%</mark> 11%
% %	Satellites and space technologies		4% 9%
%			

# Jobs outlook

Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

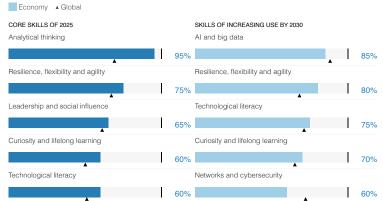
Net growth	Job Growth	Job displacement	Net Growth	▲ Global net growth
1. Net arowth	2. Global ne	et arowth <b>3.</b> Chur	n	

1. Net growth 2. Global net gro	wth <b>3.</b> Churn					
		NET GROWTH		1.	2.	3
	-100%	0	100%			
AI and Machine Learning				40	00	40
Specialists				49	82	49
			-			
Data Analysts and Scientists				30	41	30
		▲				
Business Intelligence Analysts				16	18	16
Managina Disastana and Obiat		<b>A</b>				
Managing Directors and Chief				14	5	14
Executives		<b>A</b>		l		
General and Operations				7	4	10
Managers		, I		'	4	10
Accounting, Bookkeeping and		_				
Payroll Clerks				-13	-18	13

# Skills of increasing use by 2030

Skill outlook

Skills of the most increase in use by 2030



Estonia

<b>32</b>   Global 41	35   Global 29	23   Global 19	9 Global 11						
Would not need training by 2030	Would be upskilled in their current role	Would be upskilled and redeployed	Would be unlikely to upskill						
Human-machine frontie	r			Public policy					
	er v predominantly people, pr Combination 📄 Global 📕		or a combination of both	Public policies to Share of responder the talent availabilit Economy • Glob	nts who agree	t availability that the particular publi	c policy has the g	reatest potential to	increase
L TASKS				Flexibility on hiring		tices		ECONOMY	GLOBA
220			42%         40%         18%           48%         30%         22%	Funding for reskillin	g and upskillir	ng		50%	44% 55%
030			29%         40%         31%           33%         33%         34%	Provision of reskillin	g and upskillir	ng		50%	52%
				Improvements to p	ublic educatior	n systems		50%	47%
				Changes to labour	laws related to	o remote work		45%	36%
Key barriers for busines	ss transformation			Wage outlook	•				
ills gaps in the labour rganization culture and ability to attract talent t utdated or inflexible re	o the industry	A	79%       63%         42%       46%         33%       37%         29%       39%					45% 52%	<b>45% 10</b> 41% ε
ick of adequate data a	nd technical infrastructure	3	21% 32%						
Falent availability outloc	k			DEI Actions					
ilent trend hare of respondents wh	no expect their talent availa	ability to improve or worse	n in five years	Share of employers	surveyed plar	nning to implement the	diversity, equity ar	nd inclusion measu	ire
Improving A Global ave	erage Worsening A Glob	bal average		60 I Global 39		55 I Global 48	5	50   Global 42	
lent availability when h	iring	*	+100% <b>0%</b>	Pay equity reviews and	salary audits	Targeted recruitment, rete progression initiatives	ntion and Set	IDEI goals, targets or qu	otas
lent development of ex	kisting workforce		+100% 55%	Al Strategy					
-100%	A		A	capability and prev		nning to implement the	stated strategy in	response to Al's in	creasing

Transitioning people from jobs that AI will cause to decline, to other roles within your organization Reskilling and upskilling your existing workforce to better work alongside AI

Hiring new people with skills to design Al tools and enhancements appropriate for the organization-specific skills

INDICATORS			INDICATORS		
Labour force participation	(2023)	59%	Secondary Education Attainment	(2023)	78%
Vulnerable employment	(2022)	8%	Tertiary Education Attainment	(2023)	37%
Share of youth not in employment, education, or training (NEET)	(2023)	12%	Ease of finding skilled employees in local labour market	<sup>6</sup> (2024)	 4
Unemployment rate	(2023)	6%	Fill vacancies by hiring foreign	(000.0)	
Unemployment rate among workers with basic edu.	(2023)	11%	labour	(2024)	4
Unemployment rate among workers with advanced edu.	(2023)	5%	Country investment in mid-career training	(2022)	4

# Jobs and Skills outlook

19%   Giobal 22%	33%   Global 39%	93%   Giobal 83%	95%   Global 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	Al exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running Al programmes

### Trend outlook

#### Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

Economy Global

Broadening digital access	57% Increas 60% and co	sed geopolitical division Inflicts	47% 34%
Increased efforts and investments to reduce carbon	55% 47% Slower	economic growth	<b>40%</b> 42%
Rising cost of living, higher prices or inflation		sed restrictions to global and investment	<b>26%</b> 23%
Increased efforts and investments to adapt to climate	49% Growing 41% populat	g working-age	24% 24%
Ageing and declining working- age populations	49% Stricter 40% regulati	r anti-trust and competition	24% 17%
Increased focus on labour and social issues		sed government subsidies	22% 21%

Skill outlook

Skills of increasing use by 2030

Skills of the most increase in use by 2030

#### Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy Global	
Al and information processing technologies (big data, VR, AR	
Robots and autonomous systems	
Energy generation, storage and distribution	
New materials and composites	
Semiconductors and computing technologies	
Jobs outlook	

92% 86%	Sensing, laser and optical technologies		20% 18%
63% 58%	Quantum and encryption		19% 12%
42% 41%	Biotechnology and gene technologies		17% 11%
34% 30%	Satellites and space technologies	-	11% 9%
31% 20%			

#### Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

•		Net Growth   Global net growth				
1. Net growth 2. Global net gro	owth <b>3.</b> Churr	n NET GROWTH 0	100%	1.	2.	з.
AI and Machine Learning Specialists			1	72	82	72
Data Analysts and Scientists			-	26	41	27
Business Development Professionals				14	19	14
Managing Directors and Chief Executives		I,		0	5	4
General and Operations Managers		I.		-4	4	11
Assembly and Factory Workers	5	L		-8	0	19

Economy A Global	
CORE SKILLS OF 2025	SKILLS OF INCREASING USE BY 2030
Resilience, flexibility and agility	AI and big data
75	73%
Analytical thinking	Networks and cybersecurity
72	72% 71%
Motivation and self-awareness	Curiosity and lifelong learning
55	59% 70%
Leadership and social influence	Technological literacy
56	56% 68%
Curiosity and lifelong learning	Environmental stewardship
53	53% 65%

Upskilling and reskilling	outlook						
<b>38</b> Global 41 Would not need training by 2030	<b>31</b> Global 29 Would be upskilled in their current role	20 Global 19 Would be upskilled and redeployed	11 Global 11 Would be unlikely to upskill		_	_	
Human-machine frontier	r			Public policy			
	r predominantly people, pre Combination Global		a combination of both	Public policies to improve talent Share of respondents who agree the the talent availability Economy  Global		the greatest potential to ir	
Vow			46%         32%         22%           48%         30%         22%	Provision of reskilling and upskilling Funding for reskilling and upskilling	- -	54%	52%
2030	_		32% <b>33%</b> 35% 33% <b>33%</b> 34%	Improvements to public education	systems	52%	55%
				Changes to labour laws related to	remote work	41%	36%
				Flexibility on hiring and firing pract	▲	38%	44%
Key barriers for busines	s transformation			Wage outlook			
Economy A Global Skills gaps in the labour of Organization culture and nability to attract talent to Dutdated or inflexible reg Lack of adequate data an	resistance to change o the industry		ECONOMY         GLOBAL           55%         63%           43%         46%           41%         37%           36%         39%	percentage of the company's total		49% 44 52% 41	
Talent availability outloo	k			DEI Actions			
	o expect their talent availa rage 📕 Worsening 🔺 Glob		in five years	Share of employers surveyed plan	ning to implement the diversity, eq	uity and inclusion measure	e
Talent availability when h	iring	A	+100% 31%	Targeted recruitment, retention and progression initiatives	Run comprehensive DEI training for managers and staff	Pay equity reviews and salary	audits
Falent development of ex       5%     -100%       Falent retention of existing	Å		+100% 63%	Al Strategy Share of employers surveyed plan capability and prevalence	ning to implement the stated strate	egy in response to AI's incr	reasing
23% -100%		A	+100% 27%	82   Global 77	76 I Global 69	70   Global 62	

Reskilling and upskilling your existing workforce to better work alongside Al

Hiring new people with skills to better work alongside AI

Hiring new people with skills to design Al tools and enhancements appropriate for the organization-specific skills

# 63.8

Context		

Germany

Pagianal average Upagma Grav					
Regional average Income Grou	ip average				
INDICATORS			INDICATORS		
Labour force participation	(2023)	62%	Secondary Education Attainment	(2022)	81%
Vulnerable employment	(2022)	5%	Tertiary Education Attainment	(2022)	30%
Share of youth not in employment, education, or training (NEET)	(2023)	7%	Ease of finding skilled employees in local labour market		4
Unemployment rate	(2023)	3%	Fill vacancies by hiring foreign	(000.0)	
Unemployment rate among workers with basic edu.	(2023)	6%	labour	(2024)	4
Unemployment rate among workers with advanced edu.	(2023)	2%	Country investment in mid-career training	(2022)	4

### Jobs and Skills outlook

21%   Giobal 22%	34%   Global 39%	93%   Global 83%	92%   Global 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	Al exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running Al programmes

#### Trend outlook

#### Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

#### Economy Global

Broadening digital access	63% 60%	Slower economic growth	47% 42%
Increased efforts and investments to reduce carbon	00/0	Increased focus on labour and social issues	<b>39%</b> 46%
Increased geopolitical division and conflicts		Increased restrictions to global trade and investment	28% 23%
Increased efforts and investments to adapt to climate		Increased government subsidies and industrial policy	25% 21%
Ageing and declining working- age populations		Stricter anti-trust and competition regulations	23% 17%
Rising cost of living, higher prices or inflation		Growing working-age populations	21% 24%

20%

Skill outlook

Skills of increasing use by 2030

#### Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

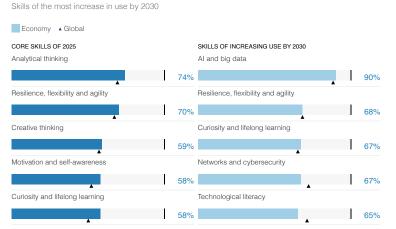
Economy Global	
AI and information processing technologies (big data, VR, AR	
Robots and autonomous systems	
Energy generation, storage and distribution	
New materials and composites	
Semiconductors and computing technologies	
Jobs outlook	

93% 86%	Sensing, laser and optical technologies	24% 18%
67% 58%	Quantum and encryption	18% 12%
42% 41%	Biotechnology and gene technologies	15% 11%
31% 30%	Satellites and space technologies	13% 9%
31%		

#### Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth Job Growth	ob displacement	Net Growth	ı			
1. Net growth 2. Global net gro	with <b>3.</b> Churn					
		NET GROWTH		1.	2.	3.
	-100%	0	100%			
AI and Machine Learning				71	82	71
Specialists				<i>``</i>	02	
Data Applyints and Colontists				~ 4		35
Data Analysts and Scientists				34	41	35
Managing Directors and Chief						
Executives		l,		0	5	3
General and Operations						
Managers		l l		0	4	7
Assembly and Factory Workers	6			-5	0	18
Administrative Assistants and						
Executive Secretaries				-18	-20	19



Germany

Upskilling and reskilling	outlook					
40 Global 41 Would not need training by 2030	29 Global 29 Would be upskilled in their current role	20   Global 19 Would be upskilled and redeployed	H1 Global 11 Would be unlikely to upskill			
Human-machine frontier	r			Public policy		
	r predominantly people, pre Combination Global		a combination of both 44% 33% 23% 48% 30% 22% 31% 35% 34% 33% 33% 34%	the talent availability Economy A Global Funding for reskilling and up Flexibility on hiring and firing Improvements to public edu Provision of reskilling and up	gree that the particular public polic skilling practices	y has the greatest potential to increase ECONOMY GLOBAL 54% 55% 50% 44% 45% 47% 44% 52%
Key barriers for busines	s transformation			Flexibility on setting wages	*	36% 38%
Economy Global Skills gaps in the labour of Organization culture and Inability to attract talent to	resistance to change o the industry nd technical infrastructure	ers wiir funder their organi	ECONOMY         GLOBAL           57%         63%           50%         46%           37%         37%           36%         32%           35%         39%	Share of organizations proje- percentage of the company' Growing Global Sir	s total revenues	forms of workers' compensation as obal 49% 45% 7 52% 41% 8
Talent availability outloo	- k			DEI Actions		
'	a disting workforce	al average	in five years +100% 25% +100% 67%	56 I Global 48 Targeted recruitment, retention and progression initiatives AI Strategy	d planning to implement the diversion of	50   Global 42
21%   -100%	g wurktorce	*	+100% 37%		<b>73</b>   Giobal 69	65   Global 62

Reskilling and upskilling your existing workforce to better work alongside Al

73 I Global 69 Hiring new people with skills to design Al tools and enhancements appropriate for the organization-specific skills

Hiring new people with skills to better work alongside Al

8.0

# Greece

# Contextual indicators

Regional average Income Grou	p average				
INDICATORS			INDICATORS		
Labour force participation	(2023)	56%	Secondary Education Attainment	(2022)	69%
Vulnerable employment	(2022)	30%	Tertiary Education Attainment	(2022)	30%
Share of youth not in employment, education, or training (NEET)					0070
	(2023)	13%	<ul> <li>Ease of finding skilled employees ( in local labour market</li> </ul>	(2024)	4
Unemployment rate	(2023)	10%	The second		
Unemployment rate among workers with basic edu.	(2023)	12%	Fill vacancies by hiring foreign labour	(2024)	3
Unemployment rate among workers with advanced edu.	(2023)	8%	Country investment in mid-career training	(2022)	3

### Jobs and Skills outlook

7%   Global 22%	<b>39%</b>   Global 39%	83%   Giobal 83%	83%   Global 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	Al exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running Al programmes

#### Trend outlook

#### Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

Economy Global

Broadening digital access		Ageing and declining working- age populations	32% 40%
Increased focus on labour and social issues	6 <mark>3%</mark> 46%	Increased restrictions to global trade and investment	21% 23%
Rising cost of living, higher prices or inflation		Growing working-age populations	21% 24%
Increased efforts and investments to reduce carbon		Stricter anti-trust and competition regulations	21% 17%
Slower economic growth		Increased geopolitical division and conflicts	21% 34%
Increased efforts and investments to adapt to climate	3 <b>7%</b> 41%	Increased government subsidies and industrial policy	16% 21%

7

3

#### Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy Global		
AI and information processing technologies (big data, VR, AR	90% 86%	New materials and composites
Robots and autonomous systems	68%	Sensing, laser and optical technologies
Energy generation, storage and distribution	37% 41%	Biotechnology and gene technologies
Quantum and encryption	21%	Satellites and space technologies
Semiconductors and computing technologies	21% 20%	
Jobs outlook		Skill outlook

6 %	New materials and composites	16% 30%
	Sensing, laser and optical technologies	16% 18%
	Biotechnology and gene technologies	11% 11%
	Satellites and space technologies	5% 9%

#### Key roles for business transformation

Managers

Financial Analysts

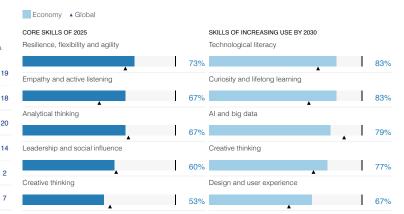
Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

structural churn (percent)						
Net growth Job Growth Job	ob displacement	Net Growth				
1. Net growth 2. Global net gro	owth 3. Chur	n				
		NET GROWTH		1.	2.	3.
	-100%	0	100%			
AI and Machine Learning				19	82	19
Specialists				19	02	19
Drain at Managara				1.40	47	40
Project Managers				18	17	18
					-	
Human Resources Specialists				15	5	20
Ducine of Intelligence Analysis						
Business Intelligence Analysts				14	18	14
General and Operations						•

ĺ

# Skills of increasing use by 2030

Skills of the most increase in use by 2030



Greece

Upskilling and reskilling	outlook					
35   Global 41 Would not need training by 2030	35   Global 29 Would be upskilled in their current role	23   Global 19 Would be upskilled and redeployed	8   Global 11 Would be unlikely to upskill			
Human-machine frontie	r			Public policy		
Human Global	er predominantly people, pre Combination Global	, 0,,	r a combination of both	Public policies to improve talent Share of respondents who agree t the talent availability Economy  Global	t <b>availability</b> hat the particular public policy has	
all tasks Now			45% 29% 26%	Funding for reskilling and upskillin	g	ECONOMY GLG 82% 55
2030			48% 30% 22%	Provision of reskilling and upskillin	g	64% 5
			28%         35%         36%           33%         33%         34%	Wage subsidies Changes to labour laws related to	remote work	64% 20
				Improvements to public education		55% 3
Key barriers for busines	s transformation			Wage outlook	<b>A</b>	46% 4
Economy Global Economy Global Skills gaps in the labour Inability to attract talent t Insufficient understandin Organization culture and Inability to attract talent t	o the industry g of opportunities resistance to change		ECONOMY         GLOBAL           58%         63%           53%         37%           32%         25%           26%         46%           21%         27%	Growing Global Similar		42% 58% 52% 41%
Talent availability outloo	k			DEI Actions		
Improving Colobal ave Talent availability when h 25% -100% Talent development of ex 8% -100%	kisting workforce		+100% 33% +100% 58%	67 I Global 48 Targeted recruitment, retention and progression initiatives AI Strategy Share of employers surveyed plan	ning to implement the diversity, equation of the supply chain and solutions across the supply chain are supply chain and solutions across the supply chain are suppl	58 Global 33 Anti-harrasment protocols
Talent retention of existin     17%     -100%	g workforce	Å	+100% 25%	Capability and prevalence	67 I Giobal 69	67   Giobal 62

Reskilling and upskilling your existing workforce to better work alongside Al

Hiring new people with skills to design Al tools and enhancements appropriate for the organization-specific skills

Hiring new people with skills to better work alongside AI

# Hong Kong SAR, China

#### Contextual indicators

Regional average Income Group	average					
INDICATORS			INDICATORS		ma	
Labour force participation	(2023)	60%	Secondary Education Attainment	(2023)		66%
Vulnerable employment	(2022)	6%	Tertiary Education Attainment	(2023)		25%
Share of youth not in employment, education, or training (NEET)	(2023)	6%	Ease of finding skilled employees in local labour market	(2023)		5
Unemployment rate	(2023)	3%	Fill vacancies by hiring foreign	(2023)		
Unemployment rate among workers with basic edu.		NA	labour			4
Unemployment rate among workers with advanced edu.	(2023)	2%	Country investment in mid-career training	(2022)		4

1/2

### Jobs and Skills outlook

15%   Global 22%	35%   Global 39%	94%   Global 83%	94%   Global 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	Al exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running Al programmes

#### Trend outlook

#### Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

#### Economy Global

Broadening digital access	60 <sup>0</sup>	
Increased focus on labour and social issues	60 <sup>0</sup> 46	
Increased efforts and investments to reduce carbon	56	
Slower economic growth	52 42	Rising cost of living, higher     32%       prices or inflation     50%
Increased efforts and investments to adapt to climate	48	Stricter anti-trust and competition     16%       regulations     17%
Increased geopolitical division and conflicts	44'	

#### Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy Global	
AI and information processing technologies (big data, VR, AR	92% 86%
Robots and autonomous systems	60% 58%
New materials and composites	40% 30%
Energy generation, storage and distribution	32% 41%
Quantum and encryption	 16% 12%

<ul><li>Sensing, laser and optical</li><li>technologies</li></ul>	16% 18%
<ul><li>Semiconductors and computing</li><li>technologies</li></ul>	12% 20%
<ul><li>Biotechnology and gene</li><li>technologies</li></ul>	12% 11%
<ul><li>Satellites and space</li><li>technologies</li></ul>	8%

#### Key roles for business transformation

Jobs outlook

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

ou doual al offaith (poroonit)						
Net growth Job Growth Job	b displacemer	t Net Growth A Global net growth				
1. Net growth 2. Global net gro	wth <b>3.</b> Chu	ım				
		NET GROWTH		1.	2.	3.
	-100%	0	100%			
Data Analysts and Scientists				26	41	26
Al and Machine Learning Specialists				26	82	26
Digital Transformation Specialis	ts		•	21	35	21
Lawyers		, i		8	2	15
Compliance Officers		, L		7	11	9
Accountants and Auditors				-3	-8	7

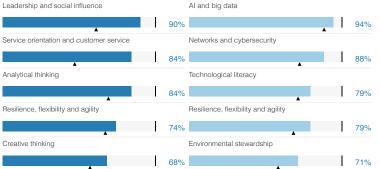
# Skill outlook

Economy A Global

#### Skills of increasing use by 2030

Skills of the most increase in use by 2030

# SKILLS OF INCREASING USE BY 2030 Al and big data



Hong Kong SAR, China

Upskilling and reskilling	outlook					
34 Global 41 Would not need training by 2030	35 Global 29 Would be upskilled in their current role	20   Global 19 Would be upskilled and redeployed	U Giobal 11 Would be unlikely to upskill		_	
Human-machine frontie	r			Public policy		
	r predominantly people, pre Combination Global	, ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	44% 31% 25%	the talent availability Economy  Global Funding for reskilling and upskil Provision of reskilling and upskil Flexibility on hiring and firing pra	e that the particular public policy h	ECONOMY GLOBAL 53% 55% 53% 52% 41% 44%
Key barriers for busines				Wage outlook	٨	29% 47%
Chare of organisations su	urveyed expecting the barri	ers will hinder their organi	sation transformation	-	g the share of wages and other for tal revenues	rms of workers' compensation as
Skills gaps in the labour i	market		ECONOMY GLOBAL	Growing Global Similar	Global Declining Globa	18% 65% 179
nability to attract talent to Organization culture and Lack of adequate data a	▲		44% 37% 40% 46%	-		52% 41% 8
nability to attract talent to	o my firm		36% 32%			
Talent availability outloo	k		32% 27%	DELActions		
Talent trend					anning to implement the diversity,	equity and inclusion measure
	no expect their talent availat rage Worsening & Globa		in five years	82 I Giobal 48	59   Giobal 51	53   Global 42
Talent availability when h	iring	A	+100% 419	Targeted recruitment, retention and progression initiatives	Run comprehensive DEI training for managers and staff	Set DEI goals, targets or quotas
Falent development of ex	kisting workforce		+100% 719	AI Strategy		
falent retention of existin	g workforce		A	Share of employers surveyed pl capability and prevalence	anning to implement the stated str	ategy in response to AI's increasing
-100%	A	<b>A</b>	+100% 47%	04	05	50

94 | Global 77 Reskilling and upskilling your existing 65 I Global 69 Hiring new people with skills to design AI tools and enhancements appropriate for the organization-specific skills 59 | Global 47

Transitioning people from jobs that AI will cause to decline, to other roles within your organization

7.1

# Hungary

# Contextual indicators

Regional average Income Group a	average					
INDICATORS				INDICATORS		
Labour force participation	(2023)		65%	Secondary Education Attainment	(2022)	83%
Vulnerable employment	(2022)		8%	Tertiary Education Attainment	(2022)	27%
Share of youth not in employment, education, or training (NEET)	(2023)		10%		(2024)	3
Unemployment rate	(2023)		4%	Fill vacancies by hiring foreign	/	
Unemployment rate among workers with basic edu.	(2023)		11%	labour	(2024)	3
Unemployment rate among workers with advanced edu.	(2023)	11	1%	Country investment in mid-career training	(2022)	3

# Jobs and Skills outlook

17%   Giobal 22%	36%   Giobal 39%	100%   Giobal 83%	92%   Global 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	Al exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running Al programmes

#### Trend outlook

# Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

#### Economy Global

Broadening digital access		Increased geopolitical division and conflicts	50% 34%
Rising cost of living, higher prices or inflation		Growing working-age populations	40% 24%
Increased efforts and investments to reduce carbon	0,0	Increased efforts and investments to adapt to climate	35% 41%
Ageing and declining working- age populations		Increased government subsidies and industrial policy	15% 21%
Increased focus on labour and social issues		Stricter anti-trust and competition regulations	15% 17%
Slower economic growth		Increased restrictions to global trade and investment	5% 23%

# Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy Global		
Al and information processing technologies (big data, VR, AR	85% 86%	Semiconductors and contechnologies
Robots and autonomous systems	75% 58%	Satellites and space technologies
Energy generation, storage and distribution	40% 41%	Quantum and encryption
New materials and composites	20% 30%	Sensing, laser and optic technologies

#### Jobs outlook

#### Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

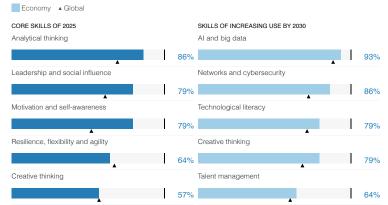
Net growth	Job Growth	Job displacement	Net Growth	<ul> <li>Global net growth</li> </ul>
------------	------------	------------------	------------	---------------------------------------

1. Net growth 2	. Global net grov	vth 3. Churn					
		-100%	NET GROWTH	100%	1.	2.	3.
AI and Machine L Specialists	earning			I	94	82	94
Business Intellige	nce Analysts				11	18	20
Human Resource	s Specialists		I,		-5	5	8
General and Ope Managers	rations				-11	4	14
Assembly and Fa	ctory Workers		1		-18	0	27
Accounting, Book Payroll Clerks	keeping and				-31	-18	31

Semiconductors and computing technologies	15% 20%
Satellites and space technologies	5% 9%
Quantum and encryption	5% 12%
Sensing, laser and optical technologies	5% 18%
Skill outlook	

# Skills of increasing use by 2030

Skills of the most increase in use by 2030



Hungary

200 zere te Pedra policy     Human-machine frontier   So that basic completed by predominantly benchegy or a combination of both   So that basic completed by predominantly benchegy or a combination of both   So that basic completed by predominantly benchegy or a combination of both   So that basic completed by predominantly benchegy or a combination of both   So that basic completed by predominantly benchegy or a combination of both   So that basic completed by predominantly benchegy or a combination of both   So that basic completed by predominantly benchegy or a combination of both   So that basic completed by predominantly benchegy or a combination of both   So that basic completed by predominantly benchegy or a combination of both   So that basic completed by predominantly benchegy or a combination of both   So that basic completed by predominantly benchegy or a combination of both   So that both <th></th> <th></th>		
Auman-machine frontier   is of tasks completed by predominantly people, predominantly technology, or a combination of born   is main   Gated   Contraction   Cont		
a d tasks completed by predominantly people, predominantly beohology, or a combination of both turne		
Li bads control de la control	test potential to	increas
Ability 45% 39% 12%   300 32% 32% 32%   320 32% 32% 32%   320 32% 32% 32%   320 32% 32% 32%   320 32% 32% 32%   320 32% 32% 32%   320 32% 32% 32%   120 12% 32% 32%   480 52% 40%   480 90% 40%   481 60% 60%   120 12% 12%   481 60% 60%   120 12% 12%   481 60% 60%   120 12% 12%   481 60% 32%   120 12% 40%   120 12% 12%   120 12% 12%   120 12% 12%   120 12% 12%   120 12% 12%   120 12% 12%   120 12% 12%   120 12% 12%   120 12% 12%   120 12% 12%   120 12% 12%   120 12% 12%   120 12% 12%   120 12% 12%   120 12% 12%   120 12% 12%   120 12% 12%   120 12% 12%   120 12% 12%   120 1	ECONOMY	GLOBA
30   32%	69%	36%
S3% S3% S3%   Gev barriers for business transformation     Wage subsidies     anaformation barriers     nare of organisations surveyed expecting the barriers will hinder their organisation transformation   Economy Global   Economy Global   Barlier and resistance to change   Gowing Global   Gowing Global   Barlier and resistance to change   Gowing Global   Gowing Global   Barlier and resistance to change   Gowing Global   Grademation barriers   Share of organizations projecting the share of works performs of works performance to change   Gowing Global   Grademation Global   Grademati	62%	55%
Key barriers for business transformation     Key barriers for business transformation     ransformation barriers   hare of organisations surveyed expecting the barriers will hinder their organisation transformation   Economy & Global   Economy & Global average   Baher of eneptoyeers surveyed planning to implement the diversity, equity and family the infigure   Improving & Global average   Baher availability when hiring   Prove finance of eneptoyeers and surveyed planning to implement the diversity, equity and family the infigure   Prove finance of eneptoyeers and surveyed planning to implement the diversity, equity and family the infigure   Prove finance of eneptoyeers and surveyed planning to implement the diversity, equity and family the infigure   Prov	46%	38%
Key barriers for business transformation Wage outlook     ransformation barriers   hare of organisations surveyed expecting the barriers will hinder their organisation transformation   Economy • Global   Economy • Global   ganization culture and resistance to change   ability to attract talent to the industry   45%   40%   25%   26   26   26   26   26   26   26   26   26   26   26   26   26   26   26   26   27%   26 </td <td>46%</td> <td>47%</td>	46%	47%
Transformation barriers hare of organisations surveyed expecting the barriers will hinder their organisation transformation Economy & Global Economy & Global average Worsening & Global average Electromy & Global		
arasformation barriers   hare of organisations surveyed expecting the barriers will hinder their organisation transformation   Economy Global   Economy Global   Barrier of organizations projecting the share of wages and other forms of work percentage of the company's total revenues   Growing Global Similar Global Declining Globa	39%	26%
hare of organizations surveyed expecting the barriers will hinder their organisation transformation [conomy clobal alls gaps in the labour market apprized to culture and resistance to change apprized to culture and resistance to change apprized to the industry apprized to adequate data and technical infrastructure accord adequate data and technical infrastructure		
ECONOMY GLOBAL      ECONOMY GLOBAL Growing Global Similar Global Declining Declining Global Declining Global Declining Declining Global Declining Declining Global Declining <p< th=""><th>ers' compensatio</th><th>on as</th></p<>	ers' compensatio	on as
kills gaps in the labour market inganization culture and resistance to change 55% 46% abbility to attract talent to the industry 45% 37% isufficient understanding of opportunities 40% 25% ack of adequate data and technical infrastructure 30% 32% Talent availability outlook alent trend hare of respondents who expect their talent availability to improve or worsen in five years Improving & Global average Worsening & Global average alent tavailability when hiring 7% -100% 40% 10% 10%		
reganization culture and resistance to change inability to attract talent to the industry inability to attract talent to the industry inability to attract talent to the industry induced ata and technical infrastructure induced ata and	46% 3	39% 15
ability to attract talent to the industry ability to attract talent availability outlook ability outlook ability ability outlook ability ability outlook ability ability outlook ability ability outlook ability ability to improve or worsen in five years ability ability when hiring 7% ability when hiring 7% ability ability when hiring 7% ability to improve ability ability to improve or worsen in five years ability ability when hiring 7% ability to ability when hiring 7% ability ability when hiring 7% ability ability ability to improve or worsen in five years ability ability when hiring 7% ability ability when hiring 7% ability abili	52% 4	41% 8
A dow 25% ack of adequate data and technical infrastructure ack of adequate data and technical infrastructure alent trend alent availability when hiring 7% -100% (1) (1) (1) (1) (1) (1) (1) (1) (1) (1)		
40% 25%   ack of adequate data and technical infrastructure   30% 32%   Talent availability outlook   DEI Actions   Share of employers surveyed planning to implement the diversity, equity and hare of respondents who expect their talent availability to improve or worsen in five years   Improving & Global average Worsening & Global average   Alent availability when hiring   7%   -100%   A state of the planning to implement the diversity, equity and hare of respondents who expect their talent availability to improve or worsen in five years   Improving & Global average Worsening & Global average   A state of employers surveyed planning to implement the diversity, equity and the supply chain   46 1 Global 27   Embed DEI goals and solutions across   Nun comprehensive DEI training for managers and staff   A state of the planning to implement the diversity, equity and the supply chain   40%		
30%       32%         Talent availability outlook       DEl Actions         alent trend       Share of employers surveyed planning to implement the diversity, equity and hare of respondents who expect their talent availability to improve or worsen in five years       Share of employers surveyed planning to implement the diversity, equity and hare of respondents who expect their talent availability to improve or worsen in five years       Add 1 Global 27       Add 1 Global 51       Add 2 Global 51 <td></td> <td></td>		
Talent availability outlook alent trend thare of respondents who expect their talent availability to improve or worsen in five years Improving & Global average Worsening & Global average alent availability when hiring 7%100%		
Allent trend       Share of employers surveyed planning to implement the diversity, equity and the supply chain         Improving & Global average Worsening & Global average       Worsening & Global average         Ident availability when hiring       Allent availability to improve or worsen in five years         7%       -100%         100%       Allent availability when hiring		
thare of respondents who expect their talent availability to improve or worsen in five years Improving & Global average Worsening & Global average alent availability when hiring 7%		
alent availability when hiring     Embed DEI goals and solutions across     Run comprehensive DEI training for managers and staff     Page 0	nclusion measur	re
7% -100% description of the supply chain managers and staff	Global 39	
alent development of existing workforce AI Strategy	uity reviews and salar	ry audits
5% -100% 54% Share of employers surveyed planning to implement the stated strategy in res capability and prevalence	ponse to Al's inc	creasing
alent retention of existing workforce     capability and prevalence       1%     -100%		

83 I Global 69 58 I Global 62 Hiring new people with skills to design AI tools and enhancements appropriate for the organization-specific skills

Hiring new people with skills to better work alongside Al



Re-orienting your organization to target new business opportunities created by Al

INDICATORS				INDICATORS		
Labour force participation	(2023)		639	Secondary Education Attainmen	t (2023)	34%
Vulnerable employment	(2022)		749	<sup>6</sup> Tertiary Education Attainment	(2021)	12%
Share of youth not in employment, education, or training (NEET)	(2023)		239			3
Unemployment rate	(2023)		29	Fill vacancies by hiring foreign	(222.1)	
Unemployment rate among workers with basic edu.	(2023)		19	labour	(2024)	3
Unemployment rate among workers with advanced edu.	(2023)		89	Country investment in mid-caree training	er (2022)	4

# Jobs and Skills outlook

20%   Giobal 22%	38%   Global 39%	95%   Giobal 83%	96%   Global 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	Al exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running Al programmes

#### Trend outlook

### Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

#### Economy Global

Broadening digital access		Ageing and declining working- age populations	42% 40%
Increased geopolitical division and conflicts	00/0	Increased focus on labour and social issues	41% 46%
Increased efforts and investments to reduce carbon		Increased government subsidies and industrial policy	29% 21%
Increased efforts and investments to adapt to climate	52% 41%	Increased restrictions to global trade and investment	29% 23%
Rising cost of living, higher prices or inflation		Growing working-age populations	29% 24%
Slower economic growth		Stricter anti-trust and competition regulations	23% 17%

30%

# Technology trends

Jobs outlook

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy Global		
AI and information processing technologies (big data, VR, AR		
Robots and autonomous systems		
Energy generation, storage and distribution		
Semiconductors and computing technologies		
New materials and composites		

88% 86%	Sensing, laser and optical technologies	24% 18%
60% 58%	Quantum and encryption	21% 12%
36% 41%	Biotechnology and gene technologies	16% 11%
35% 20%	Satellites and space technologies	13% 9%
33%		

#### Key roles for business transformation

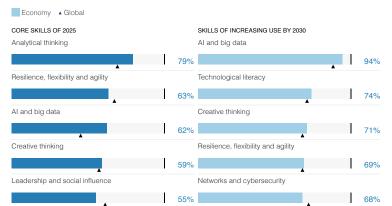
Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth	b displacement	Net Growth				
1. Net growth 2. Global net gro	wth 3. Churn	NET GROWTH				
	-100%	0	100%	1.	2.	3.
AI and Machine Learning Specialists			•	176	82	176
Data Analysts and Scientists				54	41	55
Business Intelligence Analysts				17	18	19
Business Development Professionals				14	19	16
Assembly and Factory Workers				2	0	28
Administrative Assistants and Executive Secretaries				-20	-20	24

# Skill outlook

#### Skills of increasing use by 2030

Skills of the most increase in use by 2030



Upskilling and reskilling	outlook															
<b>37</b>   Global 41 Would not need training by 2030	29 Global 29 Would be upskilled in their current role	22   Global 19 Would be upskilled and redeployed	12   Global 11 Would be unlikely to upskill													
Human-machine frontie	r			Public po	licy											
	er / predominantly people, pre Combination Clobal		r a combination of both		esponder availabilit	-			-	public	policy h	as the	greates	t potentia ECONO		
Now	_		48% 29% 22% 48% 30% 22%			ng and upsi	-		*					53%		55%
2030			31% 34% 34%			ublic educa	-	stems						53%		52%
	_		33% 33% 34%	Flexibility of	on hiring	and firing p	oractice	s						47%		47%
				Changes t	.o immigra	ation laws	•							34%		44% 26%
Key barriers for busines	ss transformation			Wage out	tlook	•										
Economy A Global	urveyed expecting the barr market	iers will hinder their organi	ECONOMY GLOBAL	percentag	rganizatione of the c	ons project company's bal Simi	total rev	venues					vorkers	439	sation 6 <b>46</b> 6 41	<mark>% 1</mark> 1%
Organization culture and Inability to attract talent to			47% 46%													
	nd technical infrastructure		36% 32%													
Insufficient understandin			32% 25%	DEI Actio	ins											
Talent trend						s surveyed	plannin	g to im	plement	the d	iversity, e	equity a	and incl	usion me	asure	
Improving A Global ave	no expect their talent availa erage Worsening & Globa		in five years	<u>67</u> 1					Global 4					Global 48		
Talent availability when h     38%     -100%	iiring	*	+100% 27%	Run compre managers a		El training for		Set DEI g	oals, targe	ts or qu	otas			cruitment, re n initiatives	tention	and
Talent development of ex 3% -100% Talent retention of existin			+100% 75%	Al Strates Share of e capability	mployers	s surveyed valence	plannin	ig to im	plement	the st	ated stra	ategy ir	n respo	nse to Al'	s incre	easing
19% -100%		*	+100% <b>36%</b>	861	Global 77			72	Global 6	69		(	56 I	Global <b>49</b>		

Reskilling and upskilling your existing workforce to better work alongside Al

Re-orienting your organization to target new business opportunities created by Al

Hiring new people with skills to design Al tools and enhancements appropriate for the organization-specific skills

# 167.6

# Contextual indicators

Indonesia

Regional average Income Group	average							
NDICATORS				INDICATORS				
Labour force participation	(2023)		74%	Secondary Education Attainment	(2023)		0	39%
Vulnerable employment	(2022)		50%	Tertiary Education Attainment	(2023)			12%
Share of youth not in employment, education, or	(2023)			Ease of finding skilled employees				270
training (NEET)				in local labour market	(2024)			5
Unemployment rate	(2023)		2%	Fill vacancies by hiring foreign	(000.4)			
Unemployment rate among workers with basic edu.	(2023)		1%	labour	(2024)			5
Unemployment rate among workers with advanced edu.	(2023)		2%	Country investment in mid-career training	(2022)			5

# Jobs and Skills outlook

14%   Giobal 22%	36%   Giobal 39%	94%   Giobal 83%	90%   Global 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	Al exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running Al programmes

# Trend outlook

## Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

Economy Global

Broadening digital access	83% 60% Slower econor	mic growth	50% 42%
Increased efforts and investments to reduce carbon	67% Increased foc 47% social issues	cus on labour and	44% 46%
Rising cost of living, higher prices or inflation	63% Increased res 50% trade and inve		41% 23%
Increased efforts and investments to adapt to climate	61% Growing work 41% populations	king-age	<b>39%</b> 24%
Increased geopolitical division and conflicts	57% Increased gov 34% and industrial		28% 21%
Ageing and declining working- age populations	54% Stricter anti-tru 40% regulations	ust and competition	17% 17%

Skills of increasing use by 2030

# Technology trends

# Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy Global		
AI and information processing technologies (big data, VR, AR	 83% 86%	
Robots and autonomous systems	65% 58%	Biotechnology and gene technologies
Energy generation, storage and distribution	54% 41%	Satellites and space technologies
New materials and composites	52% 30%	Quantum and encryption
Sensing, laser and optical technologies	39% 18%	
Jobs outlook		Skill outlook

Semiconductors and computing technologies		33% 20%
Biotechnology and gene technologies		24% 11%
Satellites and space technologies		13% 9%
Quantum and encryption	-	13% 12%

#### Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

of dotardi offann (porcont)						
Net growth Job Growth J	ob displacement	Net Growth   Global net growth				
1. Net growth 2. Global net gr	owth 3. Chu	m				
		NET GROWTH				3.
	-100%	0	100%	1.	2.	з.
AI and Machine Learning						
Specialists				52	82	52
			•			
Big Data Specialists				26	113	28
		-				
Business Development				15	19	19
Professionals				I		
Managing Directors and Chief				7	5	7
Executives		ļ.		ŕ	0	1
Assembly and Eastery Markey					~	45
Assembly and Factory Workers	5	•		-9	0	15
Data Entry Clerks				-29	-26	29
	-	A				

Skills of the most increase in use by 2030	
Economy A Global	
CORE SKILLS OF 2025	SKILLS OF INCREASING USE BY 2030
Resilience, flexibility and agility	Al and big data
6	5% 100%
Analytical thinking	Creative thinking
6	5% 77%
Creative thinking	Technological literacy
6	2% 71%
Talent management	Networks and cybersecurity
5	4% 71%
AI and big data	Analytical thinking
54	4% 64%

Indonesia

Upskilling and reskilling	outlook					
36   Global 41 Would not need training by 2030	<b>30</b> Global 29 Would be upskilled in their current role	22   Global 19 Would be upskilled and redeployed	<b>13</b> Global 11 Would be unlikely to upskill			
Human-machine frontier	r			Public policy		
		edominantly technology, or TechnologyGlobal	a combination of both	Public policies to improve talen Share of respondents who agree the talent availability Economy A Global	•	as the greatest potential to increase ECONOMY GLOBA
low	_	_	46% <b>31% 23%</b> 48% <b>30%</b> 22%	Provision of reskilling and upskilli Funding for reskilling and upskilli		62% 52%
2030	_		32% 35% 33%	Flexibility on hiring and firing practice		56% 55%
			33% 33% 34%	Improvements to public educatio	n systems	47% 44%
				Flexibility on setting wages	•	41% 38%
Key barriers for busines	s transformation			Wage outlook		
Economy Global Skills gaps in the labour in nability to attract talent to Dutdated or inflexible reg Lack of adequate data an Organization culture and	o the industry gulatory framework nd technical infrastructure	•	ECONOMY         GLOBAL           54%         63%           48%         37%           48%         39%           44%         32%	ercentage of the company's tota Growing Global Similar	al revenues	<b>38% 53% 9</b> 52% 41% 8
Talent availability outloo	<b>▲</b> Jk		37% 46%	DEI Actions		
Falent trend				Share of employers surveyed pla	nning to implement the diversity, e	equity and inclusion measure
	no expect their talent availa arage Worsening & Glob	bility to improve or worsen al average	in five years	62 I Global 48	56 I Global 42	53   Global 51
alent availability when h     -100%	iring		+100% 26%	Targeted recruitment, retention and progression initiatives	Set DEI goals, targets or quotas	Run comprehensive DEI training for managers and staff
alent development of ex       %       -100%	- -		+100% <b>74%</b>	Al Strategy Share of employers surveyed pla capability and prevalence	nning to implement the stated stra	ategy in response to AI's increasing
alent retention of existing     -100%	g workforce	Å	+100% 44%	94   Giobal 77	74   Global 69	65   Giobal 62

Reskilling and upskilling your existing workforce to better work alongside AI Hiring new people with skills to better work alongside AI

INDICATORS			INDICATORS		
Labour force participation	(2023)	68%	Secondary Education Attainment	(2022)	80%
Vulnerable employment	(2022)	10%	Tertiary Education Attainment	(2022)	47%
Share of youth not in employment, education, or training (NEET)	(2023)	6%	Ease of finding skilled employees in local labour market	6 (2024)	 4
Unemployment rate	(2023)	3%	Fill vacancies by hiring foreign	(000.4)	
Unemployment rate among workers with basic edu.	(2023)	6%	labour	(2024)	5
Unemployment rate among workers with advanced edu.	(2023)	3%	Country investment in mid-career training	(2022)	4

# Jobs and Skills outlook

10%   Global 22%	37%   Global 39%	87%   Global 83%	93%   Global 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	Al exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running Al programmes

#### Trend outlook

## Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

	° .		
Economy Global			
Increased efforts and investments to adapt to climate		Increased geopolitical division and conflicts	<b>33%</b> 34%
Increased focus on labour and social issues		Increased restrictions to global trade and investment	<b>29%</b> 23%
Broadening digital access		Growing working-age populations	29% 24%
Increased efforts and investments to reduce carbon		Rising cost of living, higher prices or inflation	29% 50%
Ageing and declining working- age populations		Stricter anti-trust and competition regulations	24% 17%
Slower economic growth		Increased government subsidies and industrial policy	19% 21%

# Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy Global

Al and information processing technologies (big data, VR, AR	81% 86%	Quantum and encryption	<mark>29%</mark> 12%
Robots and autonomous systems	52% 58%	New materials and composites	29% 30%
Energy generation, storage and distribution		Satellites and space lechnologies	14% 9%
Sensing, laser and optical technologies	43% 18%	Biotechnology and gene	<b>10%</b> 11%
Semiconductors and computing technologies	43% 20%		
Jobs outlook		Skill outlook	

20

15

11 41 15

7

19 20

9 15

> 17 13

Skills of increasing use by 2030

# Key roles for business transformation

Specialists Business Development

Professionals

Specialists

Vocational Education Teachers

Data Analysts and Scientists

Supply Chain and Logistics

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth Job Growth Job displacement Net Growth A Global net growth 1. Net growth 2. Global net growth 3. Churn NET GROWTH **1**. **2**. **3**. -100% 24 33 24 Sustainability Specialists AI and Machine Learning 23 82 23

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Skills of the most increase in use by 2030			
Economy A Global			
CORE SKILLS OF 2025		SKILLS OF INCREASING USE BY 2030	
Analytical thinking		Resilience, flexibility and agility	
<b>▲</b>	82%	<b>▲</b>	88%
Resilience, flexibility and agility		Curiosity and lifelong learning	
<b>▲</b>	82%	<b>▲</b>	88%
Service orientation and customer service		Technological literacy	
<b>▲</b>	77%	<b>▲</b>	86%
Empathy and active listening		AI and big data	
<b>▲</b>	71%		80%
Leadership and social influence		Talent management	
	71%		69%

Upskilling and reskilling	outlook						
<b>33</b> Global 41 Would not need training by 2030	31 Global 29 Would be upskilled in their current role	25   Global 19 Would be upskilled and redeployed	10   Global 11 Would be unlikely to upskill				
Human-machine frontie	r			Public policy			
Human Global	er v predominantly people, pre Combination Global		a combination of both	Public policies to improve talent Share of respondents who agree t the talent availability Economy A Global		the greatest potential to	increase
all tasks Now				Improvements to public education	systems	ECONOMY	GLOBAL
			42%         35%         23%           48%         30%         22%	Flexibility on hiring and firing pract	ices	60%	47%
2030			30%         38%         32%           33%         33%         34%	Funding for reskilling and upskillin	<b>9</b>	47%	44% 55%
				Provision of reskilling and upskillin	g	47%	52%
				Changes to labour laws related to	remote work	40%	36%
Key barriers for busines	ss transformation			▲ Wage outlook			
Economy Global Skills gaps in the labour Inability to attract talent t Inability to attract talent t Organization culture and Shortage of investment c	o my firm o the industry resistance to change		ECONOMY         GLOBAL           76%         63%           43%         27%           38%         37%           33%         46%           29%         26%	Share of organizations projecting I percentage of the company's total Growing Global Similar	revenues	47% 4 52% 4	47% 7
Talent availability outloo	k			DEI Actions			
Improving A Global ave Talent availability when h 43% -100% Talent development of ex 0% -100%	kisting workforce		+100% 21%	Share of employers surveyed plan 73 I Global 39 Pay equity reviews and salary audits AI Strategy Share of employers surveyed plan capability and prevalence	60 I Global 51 Run comprehensive DEI training for managers and staff	53   Global 33 Anti-harrasment protocols	
Talent retention of existin     38%     -100%	g workforce	*	+100% 23%	86   Global 77	71   Giobal 69	71   Giobal 49	

Reskilling and upskilling your existing workforce to better work alongside Al Re-orienting your organization to target new business opportunities created by AI

Hiring new people with skills to design Al tools and enhancements appropriate for the organization-specific skills

Regional average Income Group	average				
INDICATORS			INDICATORS		
Labour force participation	(2023)	69%	Secondary Education Attainment	(2022)	85%
Vulnerable employment	(2022)	8%	Tertiary Education Attainment	(2022)	38%
Share of youth not in employment, education, or training (NEET)	(2023)	15%		(2024)	6
Unemployment rate	(2023)	3%	Fill vacancies by hiring foreign	(000.4)	
Unemployment rate among workers with basic edu.	(2023)	5%	labour	(2024)	4
Unemployment rate among workers with advanced edu.	(2023)	2%	Country investment in mid-career training	(2022)	4

# Jobs and Skills outlook

20%   Giobal 22%	43%   Global 39%	86%   Giobal 83%	96%   Global 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	Al exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running Al programmes

#### Trend outlook

## Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

#### Economy Global

Broadening digital access	68% 60%	Increased efforts and investments to reduce carbon	<b>32%</b> 47%
Rising cost of living, higher prices or inflation		Ageing and declining working- age populations	29% 40%
Stricter anti-trust and competition regulations	1070	Increased efforts and investments to adapt to climate	24% 41%
Increased focus on labour and social issues		Growing working-age populations	24% 24%
Slower economic growth		Increased restrictions to global trade and investment	22% 23%
Increased geopolitical division and conflicts		Increased government subsidies and industrial policy	20% 21%

Skill outlook

Skills of increasing use by 2030

# Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy Global

Al and information processing

technologies (big data, VR, AR...

Robots and autonomous systems

New materials and composites

Energy generation, storage and

Sensing, laser and optical

distribution

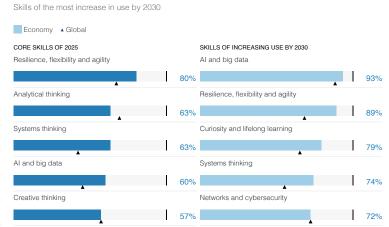
technologies Jobs outlook

#### Semiconductors and computing 91% 17% technologies 20% 86% 57% 12% Quantum and encryption 58% 12% 12% 11% 29% Biotechnology and gene technologies 30% 29% Satellites and space 5% technologies 41% 24% 18%

#### Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth	ob displacement	Net Growth				
1. Net growth 2. Global net gro	wth <b>3.</b> Churn	I				
		NET GROWTH		1.	2.	3.
	-100%	0	100%			
AI and Machine Learning				65	82	65
Specialists		ļ		05	02	05
Data Applyate and Calentista						00
Data Analysts and Scientists				60	41	68
Ducine of Intelligence Another						
Business Intelligence Analysts				25	18	30
Business Development		-				
Professionals		, i j		22	19	22
		-				
Assembly and Factory Workers	6			-11	0	22
Administrative Assistants and						
Executive Secretaries				-20	-20	20



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Upskilling and reskilling	outlook					
44 Global 41 Would not need training by 2030	26   Global 29 Would be upskilled in their current role	17 Global 19 Would be upskilled and redeployed	12   Giobal 11 Would be unlikely to upskill		_	
Human-machine frontier	r			Public policy		
	r r predominantly people, pre Combination Global		a combination of both 38% 40% 22% 48% 30% 22% 26% 37% 37% 33% 33% 34%	the talent availability Economy A Global Funding for reskilling and upskillin Provision of reskilling and upskillin	hat the particular public policy ha	s the greatest potential to increase ECONOMY GLOBAL 71% 55% 54% 52% 50% 47% 32% 36%
Key barriers for busines Transformation barriers Share of organisations su		ers will hinder their organis	sation transformation	Wage outlook Wage trends Share of organizations projecting		32% 22%
Economy A Global Skills gaps in the labour r Organization culture and			ECONOMY GLOBAL 48% 63%	percentage of the company's tota		47% <b>47% 7</b> 9 52% 41% 89
Outdated or inflexible reg Lack of adequate data a	gulatory framework		41% 39%			
Shortage of investment c			29% 26%	DEI Actions		
	io expect their talent availal rage Worsening & Globa iring		+100% <b>17%</b>	Share of employers surveyed plan 66   Global 48 Targeted recruitment, retention and progression initiatives	ning to implement the diversity, end of the second	quity and inclusion measure 48   Giobal 42 Set DEI goals, targets or quotas
Talent development of ex 3% -100% Talent retention of existing		Δ.	+100% <b>52%</b>	AI Strategy Share of employers surveyed plar capability and prevalence	nning to implement the stated strat	egy in response to AI's increasing
17% -100%	A	*	+100% 38%	96   Global 77	80 I Global 69	80   Global 49

Reskilling and upskilling your existing workforce to better work alongside Al Hiring new people with skills to design AI tools and enhancements appropriate for the organization-specific skills

Re-orienting your organization to target new business opportunities created by Al

Regional average Income Grou	p average					
INDICATORS			INDICATORS		ma	
Labour force participation	(2023)	53%	Secondary Education Attainment	(2022)		53%
Vulnerable employment	(2022)	15%	Tertiary Education Attainment	(2022)		17%
Share of youth not in employment, education, or training (NEET)	(2023)	13%	Ease of finding skilled employees in local labour market	(2024)		4
Unemployment rate	(2023)	7%	Fill vacancies by hiring foreign	(		
Unemployment rate among workers with basic edu.	(2023)	10%	labour	(2024)		4
Unemployment rate among workers with advanced edu.	(2023)	4%	Country investment in mid-career training	(2022)		4

# Jobs and Skills outlook

18%   Giobal 22%	38%   Global 39%	88%   Global 83%	96%   Global 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	AI exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running AI programmes

#### Trend outlook

### Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

Economy Global		
Increased efforts and investments to reduce carbon	70% 47%	Increased efforts and 42% investments to adapt to climate 41%
Broadening digital access	65%	Increased geopolitical division 42% 34%
Rising cost of living, higher prices or inflation	58%	
Increased focus on labour and social issues		Growing working-age 26% 24%
Ageing and declining working- age populations	48%	Stricter anti-trust and competition 22% regulations 17%
Slower economic growth	46%	

28%

20%

Skill outlook

Skills of increasing use by 2030

Skills of the most increase in use by 2030

# Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy Global AI and information processing technologies (big data, VR, AR... Robots and autonomous systems Energy generation, storage and distribution New materials and composites Semiconductors and computing technologies Jobs outlook

86% 86%	Sensing, laser and optical technologies	22% 18%
65% 58%	Quantum and encryption	18% 12%
49% 41%	Satellites and space technologies	11% 9%
38% 30%	Biotechnology and gene technologies	10% 11%

#### Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and

structural churn (percent) Net growth Job Growth Job displacement I Net Growth A Global net growth 1. Net growth 2. Global net growth 3. Churn NET GROWTH 2. З. AI and Machine Learning 37 82 37 Specialists **Business Development** 19 19 19 Professionals General and Operations 4 9 Managers Business Intelligence Analysts 18 16 3 Assembly and Factory Workers -5 0 20 I Accountants and Auditors -8 14 -14

Economy A Global	
CORE SKILLS OF 2025	SKILLS OF INCREASING USE BY 2030
Analytical thinking	Al and big data
6	7% 94%
Resilience, flexibility and agility	Networks and cybersecurity
6	7% 85%
Empathy and active listening	Curiosity and lifelong learning
6	3% 75%
Motivation and self-awareness	Resilience, flexibility and agility
6	1% 71%
Curiosity and lifelong learning	Environmental stewardship
5	4% 68%

Italy

<b>39</b>   Global 41	27   Global 29	22   Global 19	11   Global 11				
Would not need training by 2030	Would be upskilled in their current role	Would be upskilled and redeployed	Would be unlikely to upskill				
luman-machine frontie	r			Public policy			
uman-machine frontie	r predominantly people, pre	adominantly toobhology o	r a combination of both	Public policies to improve tal	ent availability e that the particular public policy has	a the greatest potential	to inorodo
, ,	Combination Global	, 0,,	ra compination or both	the talent availability	e that the particular public policy has	s the greatest potential	to increas
LTASKS		Clobal		Economy A Global		ECONOM	IY GLOB
ow				Funding for reskilling and upski	lling		
			46% 35% 18% 48% 30% 22%		<b>▲</b>	65%	55%
030			40% 30% 22%	Provision of reskilling and upski	lling	61%	52%
			34% 35% 31%		ion systems		/-
			33% 33% 34%		<b>A</b>	49%	47%
				Changes to labour laws related	to remote work	47%	36%
				Flexibility on setting wages		4770	50 /6
						37%	38%
(ey barriers for busines	s transformation			Wage outlook			
				percentage of the company's to			
ills gaps in the labour	market		ECONOMY GLOBAL		r Global Declining Global	30%	50%
			ECONOMY GLOBAL			39% 52%	
ability to attract talent to	o the industry						
ability to attract talent to		Δ.	59%         63%           44%         37%				
ability to attract talent to	o the industry		59% 63%				
ability to attract talent to ack of adequate data a rganization culture and	o the industry and technical infrastructure resistance to change	Δ	59%         63%           44%         37%				
ability to attract talent to ack of adequate data a rganization culture and	o the industry and technical infrastructure resistance to change		59%         63%           44%         37%           39%         32%           35%         46%				
ability to attract talent to ack of adequate data a rganization culture and ability to attract talent to	o the industry nd technical infrastructure resistance to change o my firm	<b>.</b>	59%         63%           44%         37%           39%         32%				
ability to attract talent to ack of adequate data a rganization culture and ability to attract talent to falent availability outloo	o the industry nd technical infrastructure resistance to change o my firm		59%         63%           44%         37%           39%         32%           35%         46%	Growing Global Similar		52%	41%
ability to attract talent to ack of adequate data a rganization culture and ability to attract talent to falent availability outloo alent trend	o the industry nd technical infrastructure resistance to change o my firm	bility to improve or worsen	59%       63%         44%       37%         39%       32%         35%       46%         34%       27%	Growing Global Similar	r Global Declining Global	quity and inclusion mea	41%
ability to attract talent to ack of adequate data a rganization culture and ability to attract talent to ability to attract talent to ability outloo lent trend nare of respondents wh	o the industry and technical infrastructure resistance to change o my firm		59%       63%         44%       37%         39%       32%         35%       46%         34%       27%	Growing Global Similar	Global Declining Global	52%	41%
ability to attract talent to ack of adequate data a rganization culture and ability to attract talent to ability to attract talent to alent availability outloo lent trend hare of respondents wh Improving & Global ave lent availability when h	o the industry		59%       63%         44%       37%         39%       32%         35%       46%         34%       27%	Growing Global Similar	r Global Declining Global	quity and inclusion mea	41% sure
ability to attract talent to ck of adequate data a ganization culture and ability to attract talent to alent availability outloo lent trend lare of respondents who improving & Global ave lent availability when h %	o the industry  a technical infrastructure  resistance to change  o my firm  k  o expect their talent availa rage Worsening & Globa iring		<ul> <li>59%</li> <li>63%</li> <li>44%</li> <li>37%</li> <li>39%</li> <li>32%</li> <li>35%</li> <li>46%</li> <li>34%</li> <li>27%</li> </ul>	Growing Global Similar	anning to implement the diversity, ec	quity and inclusion mea	41% sure
ability to attract talent to ck of adequate data a ganization culture and ability to attract talent to ability to attract talent to alent availability outloo lent trend are of respondents wh Improving & Global ave ent availability when h %100% ent development of ex	o the industry  a technical infrastructure  resistance to change  o my firm  k  o expect their talent availa rage Worsening & Globa iring	al average	<ul> <li>59%</li> <li>63%</li> <li>44%</li> <li>37%</li> <li>39%</li> <li>32%</li> <li>35%</li> <li>46%</li> <li>34%</li> <li>27%</li> </ul>	Growing Global Similar	anning to implement the diversity, ec	quity and inclusion mea	41% sure
Angenization culture and Anability to attract talent to anability to attract talent to anability outloo alent trend hare of respondents wh Improving & Global ave alent availability when h 2%100% alent development of ex	o the industry  the industry  resistance to change  o my firm  k  o expect their talent availa rage  Worsening & Globa iring isting workforce	al average	<ul> <li>59%</li> <li>63%</li> <li>44%</li> <li>37%</li> <li>39%</li> <li>32%</li> <li>35%</li> <li>46%</li> <li>34%</li> <li>27%</li> </ul>	Growing Global Similar	anning to implement the diversity, equivalent of the second secon	quity and inclusion mea	41% sure

Reskilling and upskilling your existing workforce to better work alongside Al

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Hiring new people with skills to better work alongside AI

Hiring new people with skills to design AI tools and enhancements appropriate for the organization-specific skills

Labour force participation (2023) Vulnerable employment (2022) Share of youth not in employment, education, or training (NEET) Unemployment rate (2023)	649 89 39	Tertiary Education Attainment	-		85%
Share of youth not in employment, education, or (2019)		<ul> <li>Tertiary Education Attainment</li> <li>Ease of finding skilled employee</li> </ul>			
employment, education, or (2019)	3%	Ease of finding skilled employee	<sup>es</sup> (2024)	_	
Unemployment rate (2023)		in local labour market	()		4
	2%	% Fill vacancies by hiring foreign	(222.4)		
Unemployment rate among	N	A labour	(2024)		3
Unemployment rate among (2020) (2020)	2%	Country investment in mid-caree training	er (2022)		4

22%   Giobal 22%	34%   Giobal 39%	96%   Giobal 83%	90%   Global 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	Al exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running Al programmes

#### Trend outlook

#### Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

Economy Global			
Ageing and declining working- age populations	69% 40%	Increased focus on labour and social issues	48% 46%
Broadening digital access		Increased geopolitical division and conflicts	46% 34%
Slower economic growth	64% 42%	Increased restrictions to global trade and investment	25% 23%
Increased efforts and investments to reduce carbon	60% 47%	Increased government subsidies and industrial policy	22% 21%
Rising cost of living, higher prices or inflation		Growing working-age populations	20% 24%
Increased efforts and investments to adapt to climate		Stricter anti-trust and competition regulations	14% 17%

# Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy	Global
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#### Al and information processing 94% 86% 27% Quantum and encryption technologies (big data, VR, AR... 64% Ś Robots and autonomous systems 58% t Semiconductors and computing 39% F technologies 20% t Energy generation, storage and 35% ç distribution 41% t 31% New materials and composites 30%

#### Jobs outlook

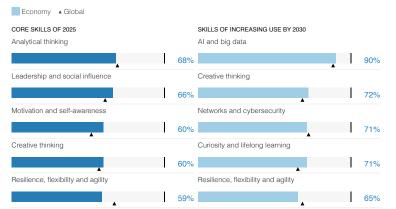
#### Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and

structural churn (percent)						
Net growth	b displacement	Net Growth				
1. Net growth 2. Global net gro	wth <b>3.</b> Churr	1				
		NET GROWTH		1.	2.	3.
	-100%	0	100%			
AI and Machine Learning				51	82	51
Specialists				01	02	01
Business Development				20	19	20
Professionals				20	19	20
General and Operations						
Managers				17	4	29
Managing Directors and Chief		_			_	
Executives				13	5	13
Administrative Assistants and		_				
Executive Secretaries				-16	-20	17
Accounting, Bookkeeping and						
Payroll Clerks				-19	-18	19
		-				

Skills of increasing use by 20	30	
Skill outlook		
Satellites and space technologies		15% 9%
Biotechnology and gene technologies		21% 11%
Sensing, laser and optical technologies		26% 18%

Skills of the most increase in use by 2030



Upskilling and reskilling	outlook					
<b>39</b>   Global 41	27   Global 29	21   Global 19	13   Global 11			
Would not need training by 2030	Would be upskilled in their current role	Would be upskilled and redeployed	Would be unlikely to upskill			
Human-machine frontier			•	Public policy		
Human-machine frontie % of tasks completed by Human Global ALL TASKS	predominantly people, pr	edominantly technology, c Technology 📕 Global	r a combination of both	Public policies to improve ta Share of respondents who agree the talent availability Economy  Global	•	as the greatest potential to increase
Now	_	_	48% <b>33%</b> 20% 48% 30% 22%			58% 52%
2030			33% 38% 29%	· · · · · · · · · · · · · · · · · · ·		53% 55%
			33% 33% 34%		<b>A</b>	51% 44%
				Improvements to public educa	ion systems	43% 38%
Key barriers for business	s transformation			Wage outlook	<b>A</b>	30% 41%
Economy A Global	rveyed expecting the barr resistance to change		ECONOMY GLOBAL	percentage of the company's t	ng the share of wages and other for stal revenues r Global Declining Globa	al 46% 50% 4
nability to attract talent to Skills gaps in the labour r	A		49% 37%			52% 41% 8
nsufficient understanding			41% 63%			
_ack of adequate data ar	nd technical infrastructure		38% 25%			
Talent availability outlool	▲ k		36% 32%	DEI Actions		
<b>Talent trend</b> Share of respondents who	o expect their talent availa	bility to improve or worser	n in five years	Share of employers surveyed p	lanning to implement the diversity,	equity and inclusion measure
	age Worsening A Glob	al average		65 I Global 51	45 I Global 42	45   Global 48
Talent availability when hi     47%     -100%	ring A	A	+100% 23%	Run comprehensive DEI training for managers and staff	Set DEI goals, targets or quotas	Targeted recruitment, retention and progression initiatives
Talent development of exit       0%       -100%	isting workforce		+100% <b>80%</b>	Al Strategy Share of employers surveyed p	lanning to implement the stated str	ategy in response to AI's increasing
Talent retention of existing	g workforce		+100% 30%	capability and prevalence		



68 I Global 69

68 | Global 62

Reskilling and upskilling your existing workforce to better work alongside Al Hiring new people with skills to design AI tools and enhancements appropriate for the organization-specific skills

Hiring new people with skills to better work alongside AI

# N/A

Kazakhstan

DICATORS			INDICATORS		
abour force participation	-	NA	Secondary Education Attainment	(2019)	94%
ulnerable employment	(2022)	24%	Tertiary Education Attainment	-	NA
hare of youth not in mployment, education, or aining (NEET)		NA		<sup>s</sup> (2024)	4
Inemployment rate	(2022)	5%	Fill vacancies by hiring foreign	(000.0)	
Inemployment rate among vorkers with basic edu.	-	NA	labour	(2024)	4
Inemployment rate among vorkers with advanced edu.	•	NA	Country investment in mid-career training	r (2022)	3

19%   Giobal 22%	40%   Global 39%	69%   Giobal 83%	63%   Global 88%		
Labour-market churn	Skill disruption	Organizations with DEI priorities	Al exposure		
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running Al programmes		

## Trend outlook

# Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

Economy	Global
---------	--------

Broadening digital access	58% 60%	<b>.</b> .	29% 34%
Rising cost of living, higher prices or inflation	49% 50%	8	25% 23%
Slower economic growth	35% 42%	Growing working-age populations	25% 24%
Increased focus on labour and social issues	31% 46%		21% 41%
Increased government subsidies and industrial policy	<b>30%</b> 21%	•	21% 17%
Increased efforts and investments to reduce carbon	29% 47%	Ageing and declining working- age populations	20% 40%

# Technology trends

# Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy Global			
AI and information processing technologies (big data, VR, AR	 65% 86%	Sensing, laser and optical technologies	
Energy generation, storage and distribution	54% 41%	Satellites and space technologies	
Robots and autonomous systems	44% 58%	Quantum and encryption	
New materials and composites	<b>37%</b> 30%	Biotechnology and gene technologies	
Semiconductors and computing technologies	15% 20%		
Jobs outlook		Skill outlook	

#### Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth Job Growth Jo	b displacement	Net Growth   Global net growth				
1. Net growth 2. Global net gro	wth <b>3.</b> Churn -100%	NET GROWTH	100%	1.	2.	3.
AI and Machine Learning Specialists			•	39	82	39
Energy Engineers				9	18	10
Accountants and Auditors				6	-8	21
Lawyers		Ц		-5	2	11
Accounting, Bookkeeping and Payroll Clerks				-14	-18	15
Administrative Assistants and Executive Secretaries				-14	-20	15

Sensing, laser and optical technologies		11% 18%
Satellites and space technologies		10% 9%
Quantum and encryption		8% 12%
Biotechnology and gene technologies	-	8% 11%

# Skill outlook

# Skills of increasing use by 2030

Skills of the most increase in use by 2030

Economy A Global		SKILLS OF INCREASING USE BY 2030		
Analytical thinking		Al and big data		
	71%			83%
Resilience, flexibility and agility		Networks and cybersecurity		
	70%			74%
Leadership and social influence		Multi-lingualism		
A	64%			64%
Creative thinking		Environmental stewardship		
<b>▲</b>	64%			59%
Motivation and self-awareness		Technological literacy		
	59%		1	58%

Kazakhstan

Upskilling and reskilling	outlook					
54 Global 41 Would not need training by 2030	24 Global 29 Would be upskilled in their current role	13 Global 19 Would be upskilled and redeployed	9 Global 11 Would be unlikely to upskill			
Human-machine frontier	r			Public policy		
	r predominantly people, pre Combination Global	, 0,,	a combination of both 43% 31% 269 48% 30% 229 29% 32% 399 33% 33% 349	the talent availability Economy  Global Funding for reskilling and upskil Improvements to public education Provision of reskilling and upskil	e that the particular public policy	ECONOMY GLOBA         ECONOMY GLOBA         54%       55%         51%       47%         48%       52%         46%       38%
Key barriers for busines	s transformation			▲ Wage outlook		39% 36%
Economy Global Skills gaps in the labour r Shortage of investment c	urveyed expecting the barri	ers will hinder their organi	ECONOMY GLOBAL 70% 63% 40% 26%	percentage of the company's to		orms of workers' compensation as bal 55% 37% 8 52% 41% 8
nability to attract talent to	o my firm		31%         46%           26%         27%			
Talent availability outloo	k			DEI Actions		
	A	II average	+100% 239	AI Strategy	40   Global 39 Pay equity reviews and salary audits	39 Global 51 Run comprehensive DEI training for managers and staff
Talent retention of existing	*		+100% 589	Share of employers surveyed pl capability and prevalence	anning to implement the stated s	strategy in response to AI's increasing

57 I Global 69 Hiring new people with skills to design Al tools and enhancements appropriate for the organization-specific skills 55 I Global 77 Reskilling and upskilling your existing workforce to better work alongside Al 49 | Global 41

Downsizing workforce where AI can replicate people's work

# Korea, Republic of

Con	textual	indica	tors

Regional average Income Grou	p average						
INDICATORS			INDICATORS				
Labour force participation	(2023)	69%	Secondary Education Attainment	(2023)		8	31%
Vulnerable employment	(2022)	19%	Tertiary Education Attainment	(2023)		4	49%
Share of youth not in employment, education, or training (NEET)		NA	Ease of finding skilled employees in local labour market	(2024)	1		5
Unemployment rate	(2023)	3%	Fill vacancies by hiring foreign	(000 0)			
Unemployment rate among workers with basic edu.	(2023)	3%	labour	(2024)			4
Unemployment rate among workers with advanced edu.	(2023)	3%	Country investment in mid-career training	(2022)			4

Jobs	and	Skills	out	look

17%   Giobal 22%	38%   Global 39%	100%   Giobal 83%	100%   Giobal 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	AI exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running AI programmes

#### Trend outlook

# Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

Economy Global

Broadening digital access		Rising cost of living, higher 47% prices or inflation 50%
Increased geopolitical division and conflicts	<b>71%</b> 34%	Increased efforts and 41% 41% 41%
Increased efforts and investments to reduce carbon	65% 47%	Increased focus on labour and 35% 46%
Slower economic growth	59% 42%	Growing working-age 24% 24% 24%
Ageing and declining working- age populations	59% 40%	Increased government subsidies 18% and industrial policy 21%
Increased restrictions to global trade and investment	53% 23%	

Skill outlook

Skills of increasing use by 2030

Skills of the most increase in use by 2030

# Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy Global	
Al and information processing	
technologies (big data, VR, AR	
Robots and autonomous systems	
New materials and composites	

88% 86%	Energy generation, storage and distribution	35	<b>%</b> 1%
65% 58%	Quantum and encryption	29	<b>%</b> 2%
53% 30%	Biotechnology and gene technologies	24	<b>!%</b> 1%
53% 20%	Satellites and space technologies	18	<mark>8%</mark> 9%
47% 18%			

#### Key roles for business transformation

Semiconductors and computing

Sensing, laser and optical

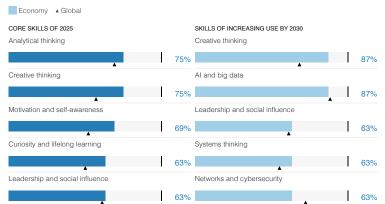
technologies

technologies

Jobs outlook

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and ictural ch

structural churn (percent)						
Net growth Job Growth	ob displacemen	t Net Growth ▲ Global net growth				
1. Net growth 2. Global net gro	owth 3. Chu	Irn				
		NET GROWTH		1.	2.	3.
	-100%	0	100%			
System Engineers				41	33	41
		<b>^</b>				
AI and Machine Learning				22	82	22
Specialists						
Managing Directors and Chief	1			10	5	10
Executives					-	
Data Engineers				10	36	16
0						
General and Operations				-12	4	14
Managers				12	4	.4
Accounting, Bookkeeping and				-14	-18	14
Payroll Clerks				-14	-10	14



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Korea, Republic of

Upskilling and reskilling	outlook								
52   Global 41	23   Global 29	14   Global 19	11   Global 11						
ould not need training by	Would be upskilled in their current role	Would be upskilled and redeployed	Would be unlikely to upskill						
uman-machine frontier				Public policy					
iman-machine frontie of tasks completed by		edominantly technology, o	r a combination of both	Public policies to impro	ove talent availability o agree that the particular	public policy has	s the greatest i	potential to	increa
	Combination Global			the talent availability	o agroo that the particular		s the groateer	/otorniar to	
	Clobal	Global		Economy A Global				ECONOMY	GLOF
) W				Flexibility on hiring and fi	ring practices			LOONOMIT	GLOL
			48% 33% 19%		<b>A</b>			67%	449
			48% 30% 22%	Funding for reskilling and	l upskilling				
30			070/ 440/ 000/		*			58%	55%
			37%         41%         22%           33%         33%         34%	Provision of reskilling and	l upskilling		ĺ	58%	52%
				Changes to immigration I	aws			08%	527
				Changes to ininigration				42%	26%
				Flexibility on setting wage	es				
								33%	389
ey barriers for busines	ss transformation			Wage outlook					
ansformation barriers	\$			Wage trends					
		riers will hinder their organ	isation transformation	•	ojecting the share of wage	s and other form	is of workers' o	ompensati	ion as
Economy A Global		0		percentage of the compa					
ability to attract talent to	o the industry		ECONOMY GLOBAL	Growing Global	Similar Global Dec	lining Global			
ability to attract talent to	o the model y		47% 37%					58%	42%
ck of adequate data a	nd technical infrastructure							52%	41%
			47% 32%						
ganization culture and	resistance to change								
			41% 46%						
ability to attract talent to	o my firm								
			35% 27%						
ills gaps in the labour r	market		35% 63%						
		<b>A</b>	33% 03%						
alent availability outloo	k			DEI Actions					
lent trend	a overaget their talant availe	ability to improve or worser	a in fivo vooro	Share of employers surve	eyed planning to implemen	it the diversity, ec	quity and inclu	ion measu	ıre
	arage Worsening & Glob		Till live years	75	50		50		
		a average		75 I Global 51	50 I Global	42	<b>50</b>   G	obal 48	
lent availability when hi	iring		· · ·	Run comprehensive DEI trainin managers and staff	g for Set DEI goals, targe	ets or quotas	Targeted recr progression in	uitment, retent nitiatives	ion and
<b>%</b> -100%	*	A	+100% <b>17%</b>				P		
ent development of ex	kisting workforce			AI Strategy					
-100%			+100% 73%	Share of employers surve	eyed planning to implemen	it the stated strat	egy in respons	e to Al's in	Icreasir
lent retention of existing	g workforce			capability and prevalenc			J, 1000		
-100%	-		+100% 27%						
	A	<b>A</b>		100   Global 69	89 I Global	77	<b>78</b> 1g	obal 49	
				Hiring new people with skills to			Re-orienting	our organizati	ion to tarc
				tools and enhancements appro the organization-specific skills				opportunities	

Hiring new people with skills to design Al tools and enhancements appropriate for the organization-specific skills



INDICATORS			INDICATORS		
Labour force participation	(2023)		Secondary Education Attainment		69%
Vulnerable employment	(2022)	9%	Tertiary Education Attainment	(2023)	37%
Share of youth not in employment, education, or training (NEET)	(2023)	7%	Ease of finding skilled employees in local labour market	<sup>s</sup> (2024)	4
Unemployment rate	(2023)	6%	Fill vacancies by hiring foreign	(000.1)	
Unemployment rate among workers with basic edu.	(2023)	12%	labour	(2024)	4
Unemployment rate among workers with advanced edu.	(2023)	3%	Country investment in mid-career training	(2022)	4

# Jobs and Skills outlook

13%   Global 22%	37%   Global 39%	87%   Giobal 83%	92%   Global 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	Al exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running Al programmes

#### Trend outlook

# Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

Economy Global				
Ageing and declining working- age populations		Growing working-age populations		39% 24%
Rising cost of living, higher prices or inflation		Increased efforts and investments to reduce carbon		30% 47%
Increased focus on labour and social issues	0070	Increased efforts and investments to adapt to climate		24% 41%
Broadening digital access		Stricter anti-trust and competition regulations		24% 17%
Slower economic growth		Increased government subsidies and industrial policy		9% 21%
Increased geopolitical division and conflicts		Increased restrictions to global trade and investment		7% 23%

18%

Skill outlook

Skills of increasing use by 2030

# Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy Global

distribution

technologies

Jobs outlook

AI and information processing

technologies (big data, VR, AR...

Robots and autonomous systems

Energy generation, storage and

New materials and composites

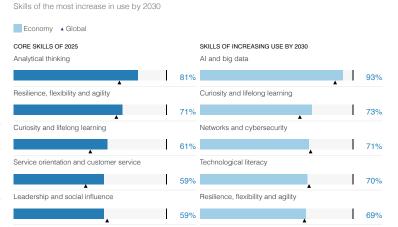
Sensing, laser and optical

#### Biotechnology and gene 87% 11% technologies 11% 86% Semiconductors and computing 59% 7% 58% technologies 20% 41% Satellites and space 4% technologies 41% 9% 28% 2% Quantum and encryption 30% 12% 11%

#### Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

structural churn (percent)						
Net growth Job Growth Job	b displacement	let Growth				
1. Net growth 2. Global net grow	vth 3. Churn					
		NET GROWTH		1.	2.	3.
	-100%	0	100%			
AI and Machine Learning				30	82	30
Specialists				30	02	30
During and Intelligence of Arrely at						
Business Intelligence Analysts				23	18	23
Data Analysts and Scientists				20	41	20
	-	-				
Assembly and Factory Workers				13	0	17
General and Operations		•				
Managers				4	4	6
	-	-				
Accountants and Auditors				-21	-8	23



Upskilling and reskilling	outlook					
30 Global 41 Would not need training by 2030	37   Global 29 Would be upskilled in their current role	21   Global 19 Would be upskilled and redeployed	12   Global 11 Would be unlikely to upskill		_	
Human-machine frontier			Public policy			
	r predominantly people, pre Combination 📕 Global 📕		or a combination of both	Public policies to improve talent Share of respondents who agree to the talent availability Economy A Global		s the greatest potential to increase
Now			47% <b>35% 17%</b> 48% 30% 22%	Funding for reskilling and upskillin Flexibility on hiring and firing pract	<u> </u>	61% 55%
2030			30%         40%         30%           33%         33%         34%	Provision of reskilling and upskillin	*	42% 44%
				Improvements to public education	systems	42% 47%
Key barriers for busines				Changes to immigration laws		40% 26%
Skills gaps in the labour of Organization culture and Inability to attract talent to	resistance to change		ECONOMY GLOBAL 76% 63% 52% 46%	Growing Global Similar	Global Declining Global	55% <b>40%</b> 5 52% 41% 8
Outdated or inflexible reg Lack of adequate data a	gulatory framework		41% 39%			
Talent availability outloo	▲ k			DEI Actions		
	A sisting workforce		+100% 8% +100% 53%	Share of employers surveyed plan 53 I Global 51 Run comprehensive DEI training for managers and staff AI Strategy Share of employers surveyed plan capability and prevalence	53   Global 39 Pay equity reviews and salary audits	<b>37</b>   Global 42 Set DEI goals, targets or quotas
32% -100%			+100% 34%	74   Giobal 77	53   Global 69	53   Global 47

Reskilling and upskilling your existing workforce to better work alongside Al

Hiring new people with skills to design AI tools and enhancements appropriate for the organization-specific skills

Transitioning people from jobs that AI will cause to decline, to other roles within your organization

Lithuania

INDICATORS			INDICATORS		
Labour force participation	(2023)	67%	Secondary Education Attainment	(2022)	92%
Vulnerable employment	(2022)	11%	Tertiary Education Attainment	(2022)	41%
Share of youth not in employment, education, or training (NEET)	(2023)	14%	Ease of finding skilled employees in local labour market	. ,	3
Unemployment rate	(2023)	6%	Fill vacancies by hiring foreign	(0000)	
Unemployment rate among workers with basic edu.	(2023)	17%	labour	(2023)	3
Unemployment rate among workers with advanced edu.	(2023)	4%	Country investment in mid-career training	(2022)	5

# Jobs and Skills outlook

14%   Giobal 22%	35%   Global 39%	79%   Global 83%	95%   Global 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	AI exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running AI programmes

# Trend outlook

# Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

Rising cost of living, higher       55%       Growing working-age       40%         Ageing and declining working-age populations       51%       Slower economic growth       36%         Broadening digital access       40%       Increased efforts and investments to adapt to climate       28%         Increased efforts and       47%       Stricter anti-trust and competition       17%	Economy Global		
age populations     40%     Sower economic growth     42%       Broadening digital access     49%     Increased efforts and 60%     Increased efforts and investments to adapt to climate     28%       Increased efforts and     47%     Stricter anti-trust and competition     17%			
Broadening digital access     60%     investments to adapt to climate     41%       Increased efforts and     47%     Stricter anti-trust and competition     17%		51'	
	Broadening digital access		207
4/% regulations	Increased efforts and investments to reduce carbon		% Stricter anti-trust and competition     179       % regulations     177
Increased geopolitical division and conflicts     45%     Increased restrictions to global     13%       34%     trade and investment     23%			
Increased focus on labour and social issues 43% Increased government subsidies 9% and industrial policy 21%			

89% 86%

66% 58%

34% 41%

1<mark>9%</mark> 30%

15% 20%

Skill outlook

Skills of increasing use by 2030

# Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy	Global

Al and information processing technologies (big data, VR, AR... Robots and autonomous systems Energy generation, storage and distribution New materials and composites Semiconductors and computing technologies

Sensing, laser and optical technologies	11% 18%
Satellites and space technologies	4% 9%
Biotechnology and gene technologies	<b>4%</b> 11%
Quantum and encryption	2% 12%

#### Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

• _	ob displacement	Net Growth				
L. Hergiowin 2. diobarnergi	-100%	NET GROWTH	100%	1.	2.	3.
AI and Machine Learning Specialists			•	57	82	57
Data Analysts and Scientists				35	41	35
Business Development Professionals				8	19	8
Lawyers		ų,		-3	2	4
Client Information and Custom Service Workers	er	Ļ		-11	-2	15
Accountants and Auditors				-15	-8	18

Skills of the most increase in use by 2030			
Economy A Global			
CORE SKILLS OF 2025		SKILLS OF INCREASING USE BY 2030	
Analytical thinking		Al and big data	
	89%	, <b>_</b>	95%
Resilience, flexibility and agility		Networks and cybersecurity	
	80%		83%
Leadership and social influence		Technological literacy	
<b>A</b>	64%	, <b>▲</b>	79%
Curiosity and lifelong learning		Resilience, flexibility and agility	
<b>▲</b>	64%	<b>▲</b>	77%
Technological literacy		Curiosity and lifelong learning	
	59%		76%

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Lithuania

36 Global 41	00	10	10					
	36   Global 29	18   Global 19	10   Global 11					
Would not need training by 2030	Would be upskilled in their current role	Would be upskilled and redeployed	Would be unlikely to upskill					
Human-machine fronti	er			Public policy				
luman-machine front				Public policies to impr		P P I I		
	y predominantly people, pr		r a combination of both	the talent availability	no agree that the particular pub	blic policy has the grea	atest potential to	o increas
Human Global	Combination Global	Technology Global		Economy A Global			FCONOM	
low				Funding for reskilling an	d upskilling		ECONOMY	GLUBA
			46% 35% 19%				61%	55%
			48% 30% 22%	Provision of reskilling an	d upskilling			
030							54%	52%
			32%         36%         32%           33%         33%         34%	Improvements to public	education systems		54%	47%
				Flexibility on hiring and f			54%	4770
							40%	44%
				Changes to immigration	laws			
							33%	26%
Key barriers for busine	ess transformation			Wage outlook				
Economy A Global			ECONOMY GLOBAL	Share of organizations p percentage of the comp			oro componica	uonas
	r market		ECONOMY GLOBAL	percentage of the comp			61%	37% 2
kills gaps in the labou	r market d resistance to change	A	ECONOMY GLOBAL	percentage of the comp	any's total revenues			37% 2
kills gaps in the labou	d resistance to change		ECONOMY GLOBAL 83% 63% 40% 46%	percentage of the comp	any's total revenues		61%	37% 2
kills gaps in the labou Organization culture an nability to attract talent	d resistance to change		ECONOMY GLOBAL	percentage of the comp	any's total revenues		61%	37% 2
Economy A Global Skills gaps in the labour Organization culture an nability to attract talent Dutdated or inflexible re	d resistance to change		ECONOMY GLOBAL 83% 63% 40% 46% 36% 37%	percentage of the comp	any's total revenues		61%	37% 2
ikills gaps in the labou Organization culture an nability to attract talent Outdated or inflexible re	d resistance to change		ECONOMY GLOBAL 83% 63% 40% 46%	percentage of the comp	any's total revenues		61%	37% 2
kills gaps in the labou Organization culture an nability to attract talent Outdated or inflexible re	d resistance to change to the industry		ECONOMY GLOBAL 83% 63% 40% 46% 36% 37%	percentage of the comp	any's total revenues		61%	37% 2
kills gaps in the labou Organization culture an nability to attract talent Outdated or inflexible re ack of adequate data	d resistance to change to the industry egulatory framework and technical infrastructure		ECONOMY GLOBAL 83% 63% 40% 46% 36% 37% 36% 39%	percentage of the comp	any's total revenues		61%	37% 2
kills gaps in the labou organization culture an nability to attract talent outdated or inflexible re ack of adequate data Talent availability outlo alent trend	d resistance to change to the industry egulatory framework and technical infrastructure	bility to improve or worser	ECONOMY       GLOBAL         83%       63%         40%       46%         36%       37%         36%       39%         36%       32%	DEI Actions	any's total revenues	g Global	61% 52%	<b>37% 2</b> 41% {
kills gaps in the labou Organization culture an nability to attract talent Outdated or inflexible re ack of adequate data Talent availability outlo alent trend ihare of respondents w	d resistance to change to the industry egulatory framework and technical infrastructure ok		ECONOMY       GLOBAL         83%       63%         40%       46%         36%       37%         36%       39%         36%       32%	DEI Actions	any's total revenues	g Global	61% 52%	<b>37% 2</b> 41% 8
kills gaps in the labou Organization culture an nability to attract talent Outdated or inflexible re ack of adequate data Talent availability outlo alent trend ihare of respondents w Improving & Global av alent availability when	d resistance to change to the industry egulatory framework and technical infrastructure ok who expect their talent availa erage Worsening & Glob		ECONOMY         GLOBAL           83%         63%           40%         46%           36%         37%           36%         39%           36%         32%	DEI Actions Share of employers surv	eyed planning to implement the	g Global	61% 52%	37% 2 41% 8
kills gaps in the labou organization culture an ability to attract talent butdated or inflexible re ack of adequate data Talent availability outlo alent trend hare of respondents w Improving & Global av alent availability when 0%100%	d resistance to change to the industry egulatory framework and technical infrastructure ok tho expect their talent availa erage Worsening & Glob		ECONOMY       GLOBAL         83%       63%         40%       46%         36%       37%         36%       39%         36%       32%	DEI Actions         Share of employers surv         54   Global 39         Pay equity reviews and salary	any's total revenues Similar Global Declinin eved planning to implement the audits Targeted recruitment, re	g Global	inclusion measure I Global 51	37% 2 41% 8
kills gaps in the labour rganization culture an ability to attract talent utdated or inflexible re ack of adequate data falent availability outlo alent trend hare of respondents w Improving & Global av alent availability when 0% _100%	d resistance to change to the industry egulatory framework and technical infrastructure ok tho expect their talent availa erage Worsening & Glob		ECONOMY         GLOBAL           83%         63%           40%         46%           36%         37%           36%         39%           36%         32%	DEI Actions         Share of employers surv         54   Global 39         Pay equity reviews and salary         Al Strategy	any's total revenues Similar Global Declinin eyed planning to implement the audits 47 I Global 48 Targeted recruitment, re progression initiatives	g Global e diversity, equity and tention and	61% 52%	37% 2 41% 8 ure
kills gaps in the labou rganization culture an ability to attract talent utdated or inflexible re- ack of adequate data Talent availability outlo alent trend hare of respondents w Improving * Global av alent availability when 0% -100% alent development of a % -100%	d resistance to change to the industry agulatory framework and technical infrastructure ok tho expect their talent availa erage Worsening & Glob hiring		ECONOMY       GLOBAL         83%       63%         40%       46%         36%       37%         36%       39%         36%       32%         nin five years       21%	DEI Actions         Share of employers surv         54   Global 39         Pay equity reviews and salary         Al Strategy	eyed planning to implement the audits 47 I Global 48 Targeted recruitment, re progression initiatives	g Global e diversity, equity and tention and	61% 52%	37% 41% ure
kills gaps in the labou organization culture an nability to attract talent outdated or inflexible re ack of adequate data Talent availability outlo alent trend hare of respondents w Improving & Global av alent availability when 0%100% alent development of e	d resistance to change to the industry agulatory framework and technical infrastructure ok tho expect their talent availa erage Worsening & Glob hiring		ECONOMY       GLOBAL         83%       63%         40%       46%         36%       37%         36%       39%         36%       32%         nin five years       21%	DEI Actions         Share of employers surv         54   Global 39         Pay equity reviews and salary         Al Strategy         Share of employers surv	eyed planning to implement the audits 47 I Global 48 Targeted recruitment, re progression initiatives	g Global e diversity, equity and tention and	61% 52%	37% 41% ure

Reskilling and upskilling your existing workforce to better work alongside Al

Hiring new people with skills to design AI tools and enhancements appropriate for the organization-specific skills

Hiring new people with skills to better work alongside AI

17.2

# Malaysia

# Contextual indicators

INDICATORS     min     max     INDICATORS     min       Labour force participation     (2022)     77%     Secondary Education Attainment     (2022)       Vulnerable employment     (2022)     22%     Tertiary Education Attainment     (2022)       Share of youth not in employment, education, or it raining (NEET)     (2022)     10%     Ease of finding skilled employees (2024)     10%	
Vulnerable employment     (2022)     22%       Share of youth not in employment, education, or training (NEET)     (2022)     10%   Ease of finding skilled employees (2024) in local labour market	
Share of youth not in employment, education, or training (NEET)     10%     Ease of finding skilled employees (2024) in local labour market	70%
employment, education, or (2022) 10% Ease of finding skilled employees (2024) in local labour market	23%
	5
Unemployment rate among workers with basic edu.	4
Unemployment rate among workers with advanced edu. (2022)	5

# Jobs and Skills outlook

11%   Giobal 22%	41%   Giobal 39%	95%   Giobal 83%	94%   Giobal 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	Al exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running Al programmes

#### Trend outlook

# Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

Economy Global

Broadening digital access	79 60	6 Increased efforts and     41%       6 investments to adapt to climate     41%
Increased geopolitical division and conflicts	59	Slower economic growth 38%
Increased efforts and investments to reduce carbon	48	
Rising cost of living, higher prices or inflation	48	6 Increased focus on labour and     35%       6 social issues     46%
Ageing and declining working- age populations	48	6 Stricter anti-trust and competition 31% 6 regulations 17%
Increased restrictions to global trade and investment	45	

43% 20% 29% 30%

10 5

> -17 -20

-28 -26 Skill outlook

Skills of increasing use by 2030

# Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Al and information processing technologies (big data, VR, AR) Robots and autonomous systems Energy generation, storage and distribution Semiconductors and computing technologies New materials and composites	Economy Global	
Energy generation, storage and distribution Semiconductors and computing technologies		
distribution Semiconductors and computing technologies	Robots and autonomous systems	
technologies		
New materials and composites		
	New materials and composites	

82% 86%	Sensing, laser and optical technologies	25% 18%
71% 58%	Quantum and encryption	21% 12%
54% 41%	Biotechnology and gene technologies	21% 11%
43% 20%	Satellites and space technologies	18% 9%

#### Key roles for business transformation

Managing Directors and Chief

Administrative Assistants and

Executive Secretaries

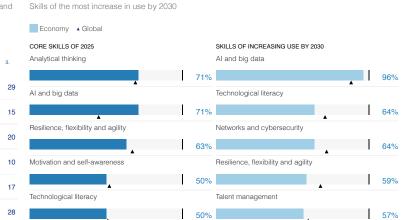
Data Entry Clerks

Executives

Jobs outlook

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth         Job Gro		Net Growth    Global net growth				
	-100%	NET GROWTH	100%	1.	2.	3.
AI and Machine Learning Specialists			•	29	82	29
Supply Chain and Logistics Specialists			-	12	17	15
Assembly and Factory Workers				11	0	20



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Malaysia

Upskilling and reskilling	outlook					
44 Global 41 Would not need training by 2030	25 Global 29 Would be upskilled in their current role	20   Global 19 Would be upskilled and redeployed	11 Global 11 Would be unlikely to upskill			
Human-machine frontie	r			Public policy		
	Pr predominantly people, pre Combination Global		a combination of both	Public policies to improve talent Share of respondents who agree the the talent availability Economy A Global Funding for reskilling and upskilling	hat the particular public policy ha	s the greatest potential to increase ECONOMY GLOBAL
2030			47%         28%         25%           48%         30%         22%	Provision of reskilling and upskilling	g	70% 55% 55% 52%
			33%         34%         33%           33%         33%         34%	Flexibility on setting wages	ices	35% 38%
				Improvements to public education	*	35% 44%
Key barriers for busines	s transformation			Wage outlook	<b>A</b>	
Economy Global Skills gaps in the labour of Organization culture and Outdated or inflexible reg Inability to attract talent to	resistance to change	ers win minder üter organi	ECONOMY         GLOBAL           59%         63%           45%         46%           41%         39%           35%         37%	Share of organizations projecting t percentage of the company's total Growing Global Similar	revenues	60% 35% 59 52% 41% 89
Talent availability outloo	k		35% 32%	DEI Actions		
Improving     • Global ave       Talent availability when h       45%     -100%       Talent development of ex       0%     -100%	aisting workforce		in five years +100% 35% +100% 75%	Share of employers surveyed plan           75 I Global 48           Targeted recruitment, retention and progression initiatives           AI Strategy           Share of employers surveyed plan capability and prevalence	55 I Global 39 Pay equity reviews and salary audits	55 Global 26 Support workers with caregiving responsibilities
Talent retention of existin     10%     -100%	g workforce	*	+100% 40%	72 I Global 77	67   Global 69	67   Giobal 49

Reskilling and upskilling your existing workforce to better work alongside AI

Hiring new people with skills to design Al tools and enhancements appropriate for the organization-specific skills

Re-orienting your organization to target new business opportunities created by Al

Regional average Income Group	average								
INDICATORS					INDICATORS				
Labour force participation	(2023)			65%	Secondary Education Attainment	(2023)		419	6
Vulnerable employment	(2022)			27%	Tertiary Education Attainment	(2023)		199	%
Share of youth not in employment, education, or training (NEET)	(2023)			16%	Ease of finding skilled employees in local labour market	(2024)			5
Unemployment rate	(2023)			2%	Fill vacancies by hiring foreign	(000.4)			
Unemployment rate among workers with basic edu.	(2023)	11		2%	labour	(2024)			4
Unemployment rate among workers with advanced edu.	(2023)			3%	Country investment in mid-career training	(2022)			2

# Jobs and Skills outlook

16%   Giobal 22%	40%   Giobal 39%	94%   Giobal 83%	97%   Giobal 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	Al exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running Al programmes

#### Trend outlook

### Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

Economy Global

Broadening digital access		% Ageing and declining working-     41%       % age populations     40%
Increased efforts and investments to reduce carbon	55	%         Increased geopolitical division         30%           %         and conflicts         34%
Increased efforts and investments to adapt to climate	45	%         Increased restrictions to global         26%           %         trade and investment         23%
Increased focus on labour and social issues	45	% Growing working-age 23% 23% 24%
Slower economic growth	44	% Stricter anti-trust and competition 15% regulations 17%
Rising cost of living, higher prices or inflation	42	%     Increased government subsidies     13%       %     and industrial policy     21%

35% 30% 29% 20%

# Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

95% 86%	Sensing, laser and optical technologies	20% 18%
63% 58%	Quantum and encryption	19% 12%
45% 41%	Biotechnology and gene technologies	19% 11%
35% 30%	Satellites and space technologies	12% 9%

#### Key roles for business transformation

Jobs outlook

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth	b displacement	Net Growth    Global net growth				
1. Net growth 2. Global net grov	wth <b>3.</b> Churn	NET GROWTH	100%	1.	2.	3.
Data Analysts and Scientists				47	41	47
AI and Machine Learning Specialists				46	82	46
General and Operations Managers		l,		2	4	2
Assembly and Factory Workers				-5	0	17
Accounting, Bookkeeping and Payroll Clerks				-20	-18	20
Administrative Assistants and Executive Secretaries				-25	-20	26

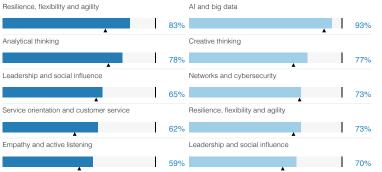
# Skill outlook

Economy A Global CORE SKILLS OF 2025

#### Skills of increasing use by 2030

Skills of the most increase in use by 2030

# SKILLS OF INCREASING USE BY 2030 AI and big data



Mexico

Upskilling and reskilling	outlook					
35   Giobal 41	31   Global 29	23   Global 19	<b>11</b>   Global 11			
Would not need training by 2030	Would be upskilled in their current role	Would be upskilled and redeployed	Would be unlikely to upskill			
Human-machine frontie	r			Public policy		
	predominantly people, pre		r a combination of both	Public policies to improve talent Share of respondents who agree the the talent availability	•	s the greatest potential to increase
Human Global	Combination Global	Technology Global		Economy A Global		ECONOMY GLOBAL
Now			46% 31% 22%	Funding for reskilling and upskilling	▲	51% 55%
2030			48% 30% 22%		ices	49% 44%
			31%         34%         35%           33%         33%         34%			48% 47%
				Provision of reskilling and upskilling	g ▲	40% 52%
				Flexibility on setting wages		39% 38%
Key barriers for busines	s transformation			Wage outlook		
Skills gaps in the labour Organization culture and Outdated or inflexible reg Lack of adequate data a	resistance to change gulatory framework nd technical infrastructure		ECONOMY GLOBAL 63% 63% 50% 46% 39% 34% 32% 31% 37%	Global Similar	Global Declining Global	45% 45% 9% 52% 41% 8%
Talent availability outloo	k		51% 57%	DEI Actions		
Talent trend	no expect their talent availa	bility to improve or worsen	in five years	Share of employers surveyed plan	ning to implement the diversity, eq	uity and inclusion measure
	rage Worsening 🔺 Glob			61   Global 51	56   Global 48	52   Global 39
Talent availability when h     42%	iring		+100% 38%	Run comprehensive DEI training for managers and staff	Targeted recruitment, retention and progression initiatives	Pay equity reviews and salary audits
Talent development of ex     6%     -100%	kisting workforce		+100% 68%	Al Strategy Share of employers surveyed plan	ning to implement the stated strate	env in response to Alle increasing
Talent retention of existin       18%	g workforce		+100% <b>53%</b>	capability and prevalence		
	A			83   Global 77	79   Global 69	75   Global 62

Reskilling and upskilling your existing workforce to better work alongside AI

/9 Global 69 Hiring new people with skills to design Al tools and enhancements appropriate for the organization-specific skills

Hiring new people with skills to better work alongside AI

21.6

# Morocco

Contextual indicators

Regional average	Norogo			
negional average income Group a	average			
INDICATORS			INDICATORS min max	
Labour force participation	-	NA	Secondary Education Attainment -	JA
Vulnerable employment	(2022)	46%	Tertiary Education Attainment	JA
Share of youth not in employment, education, or training (NEET)		NA	Ease of finding skilled employees (2024) in local labour market	4
Unemployment rate	(2022)	9%		
Unemployment rate among workers with basic edu.	(2022)	10%	labour	4
Unemployment rate among workers with advanced edu.	(2022)	21%	Country investment in mid-career (2022)	3

# Jobs and Skills outlook

27%   Global 22%	37%   Global 39%	81%   Giobal 83%	94%   Giobal 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	Al exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running Al programmes

#### Trend outlook

## Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

Economy Global			
Increased efforts and investments to reduce carbon	45% 47%	Increased government subsidies and industrial policy	25% 21%
Increased efforts and investments to adapt to climate	45% 41%	Increased restrictions to global trade and investment	25% 23%
Slower economic growth	45% 42%	Increased focus on labour and social issues	20% 46%
Broadening digital access	40% 60%	Ageing and declining working- age populations	20% 40%
Rising cost of living, higher prices or inflation	40% 50%	Growing working-age populations	5% 24%
Increased geopolitical division and conflicts	30% 34%		

# Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy	Global

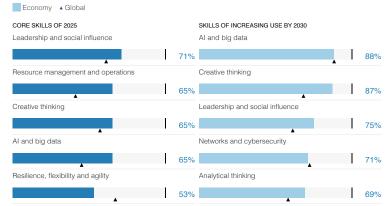
Al and information processing technologies (big data, VR, AR	90%     Sensing, laser and optical       86%     technologies	20% 18%
Energy generation, storage and distribution	45%     Biotechnology and gene       41%     technologies	10% 11%
Robots and autonomous systems	40%     Satellites and space       58%     technologies	5% 9%
New materials and composites	35% 30% Quantum and encryption	5% 12%
Semiconductors and computing technologies	25% 20%	
Jobs outlook	Skill outlook	

# Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and ictural ch n (ne

structural churn (percent)						
Net growth	b displacement	Net Growth				
1. Net growth 2. Global net gro	wth 3. Churn					
		NET GROWTH		1.	2.	3.
	-100%	0	100%			
AI and Machine Learning				32	82	32
Specialists				32	02	32
Digital Marketing and Strategy	1					07
Specialists				29	29	37
		_				
Assembly and Factory Workers				9	0	13
Accountants and Auditors				1	-8	21
	_	<b>A</b>				
Human Resources Specialists				-8	5	8
Administrative Assistants and		<b>A</b>				
Executive Secretaries				-40	-20	40

Satellites and space technologies		<b>5%</b> 9%
Quantum and encryption		5% 12%
Skill outlook		
Skills of increasing use by 20		
Skills of the most increase in us	e by 2030	



Morocco

		17   Giobal 19 Would be upskilled and redeployed	8   Global 11 Would be unlikely to upskill					
Human-machine frontier uman-machine frontie o of tasks completed by Human Global LITASKS	current role		Would be unlikely to upskill					
uman-machine frontie of tasks completed by Human Global L L TASKS	r							
of tasks completed by Human Global I				Public policy				
Human Global	predominantly people, pre			Public policies to i	•	•		
LL TASKS		_	r a combination of both	Share of respondent the talent availability		that the particular public policy	has the greatest potential to	) increase
	Combination Global	Technology Global		Economy 🔺 Globa	al			
OW				Funding for reskillin	ig and upskillir	ng	ECONOMY	GLOBA
			51% 24% 25%				53%	55%
			48% 30% 22%	Wage subsidies		-		
030							53%	26%
			35%         26%         39%           33%         33%         34%	Flexibility on setting	wages		41%	000/
				Provision of reskillin	and upskillir	na	41%	38%
					ig and operand	.9	41%	52%
				Improved transport	infrastructure	and services		
							35%	22%
Key barriers for business	s transformation			Wage outlook				
ills gaps in the labour r	narket		ECONOMY GLOBAL	Growing Glob	al Similar	Global Declining Glob		29% 12
Organization culture and	resistance to change	•	02 /0 03 /0				52%	
			43% 46%					
hortage of investment ca	apital							
A start and a start and start and start			33% 26%					
nsufficient understanding	g of opportunities		24% 25%					
ack of adequate data ar	nd technical infrastructure							
	<b>A</b>		24% 32%					
Talent availability outlool	<			DEI Actions				
alent trend hare of respondents who	o expect their talent availal	pility to improve or worse	n in five vears	Share of employers	surveyed pla	nning to implement the diversity,	, equity and inclusion measu	Jre
	age Worsening 🔺 Globa			56   Global 51		50   Global 48	44   Global 39	
alent availability when hi	ring			Run comprehensive DE	I training for	Targeted recruitment, retention and	Pay equity reviews and sala	ary audits
-100%	A	*	+100% 56%	managers and staff		progression initiatives		
alent development of ex	isting workforce			AI Strategy				
-100%	*		+100% 75%	Share of employers	surveyed pla	nning to implement the stated st	trategy in response to AI's in	ncreasing
10070							2 C C C C C C C C C C C C C C C C C C C	0
alent retention of existing	g workforce			capability and prev	alence			

Re-orienting your organization to target new business opportunities created by Al

Reskilling and upskilling your existing workforce to better work alongside Al

Transitioning people from jobs that AI will cause to decline, to other roles within your organization

# 12.6

#### Contextual indicators

**Netherlands** 

Regional average Income Group a	average				
INDICATORS			INDICATORS		
Labour force participation	(2023)	66%	Secondary Education Attainment	(2022)	74%
Vulnerable employment	(2022)	13%	Tertiary Education Attainment	(2022)	39%
Share of youth not in employment, education, or training (NEET)	(2023)	3%	Ease of finding skilled employees in local labour market	(2024)	4
Unemployment rate	(2023)	3%	Fill vacancies by hiring foreign	(000.0)	
Unemployment rate among workers with basic edu.	(2023)	3%	labour	(2024)	5
Unemployment rate among workers with advanced edu.	(2023)	2%	Country investment in mid-career training	(2022)	4

# Jobs and Skills outlook

19%   Giobal 22%	30%   Giobal 39%	93%   Giobal 83%	95%   Global 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	Al exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running Al programmes

#### Trend outlook

# Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

#### Economy Global

Broadening digital access	64% 60%	Increased focus on labour and 42% 46%
Ageing and declining working- age populations	57% 40%	Slower economic growth 42%
Increased efforts and investments to reduce carbon	56% 47%	
Increased geopolitical division and conflicts	51% 34%	Increased government subsidies 22% 21%
Rising cost of living, higher prices or inflation	50% 50%	Increased restrictions to global trade and investment 22%
Increased efforts and investments to adapt to climate	47% 41%	Stricter anti-trust and competition regulations 16%

27% 20% 23%

30%

Skill outlook

Skills of increasing use by 2030

# Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy Global	
AI and information processing technologies (big data, VR, AR	
Robots and autonomous systems	
Energy generation, storage and distribution	
Semiconductors and computing technologies	

94% 86%	Sensing, laser and optical technologies	19% 18%
66% 58%	Quantum and encryption	14% 12%
<b>47%</b> 41%	Biotechnology and gene technologies	13% 11%
27% 20%	Satellites and space technologies	<mark>6%</mark> 9%

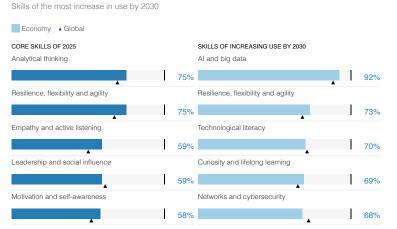
#### Key roles for business transformation

New materials and composites

Jobs outlook

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth Job Growth	Job displacement	Net Growth				
1. Net growth 2. Global net g	rowth 3. Chur	n				
		NET GROWTH		1.	2.	3.
	-100%	0	100%			
AI and Machine Learning				288	82	288
Specialists				200	02	200
Data Analysts and Scientists				59	41	59
Business Intelligence Analysts	5			15	18	16
General and Operations		-				
Managers		<b>I</b>		-2	4	8
Administrative Assistants and						
Executive Secretaries				-23	-20	23
Accounting, Bookkeeping and	1					
Payroll Clerks				-26	-18	26



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Netherlands

Upskilling and reskilling	outlook					
<b>35</b>   Global 41	<b>33</b>   Global 29	20   Global 19	12   Giobal 11			
Would not need training by 2030	Would be upskilled in their current role	Would be upskilled and redeployed	Would be unlikely to upskill			
Human-machine frontie	r			Public policy		
	er predominantly people, pre Combination Global		r a combination of both	Public policies to improve ta Share of respondents who ag the talent availability Economy  Global	alent availability ree that the particular public policy ha	as the greatest potential to increase
Now	_		45% 32% 23%	Funding for reskilling and ups		53% 55%
2030	_		48% 30% 22% 30% 35% 34%	Provision of reskilling and ups Improvements to public education	A	48% 52%
			33% 33% 34%	Flexibility on hiring and firing p		43% 47%
				Changes to immigration laws	*	38% 26%
Key barriers for busines	s transformation			▲ Wage outlook		
Skills gaps in the labour of Drganization culture and Dutdated or inflexible reg nability to attract talent to Lack of adequate data a	resistance to change		ECONOMY GLOBAL 69% 63% 41% 46% 39% 39% 38% 37% 38% 32%	Growing Global Simi	lar Global Declining Global	45% 53% 2% 52% 41% 8%
Talent availability outloo	▲ k		0070 0270	DEI Actions		
Improving <ul> <li>Global ave</li> </ul> Talent availability when h           56%           -100%   Talent development of examples <ul> <li>-100%</li> <li>-100%</li> </ul>	A sisting workforce		+100% 15% +100% 56%	64 I Giobal 42 Set DEI goals, targets or quotas Al Strategy	planning to implement the diversity, e 63 I Global 48 Targeted recruitment, retention and progression initiatives planning to implement the stated stra	54 Global 51 Run comprehensive DEI training for managers and staff
Talent retention of existin     24%     -100%	g workforce	*	+100% 27%	90 I Global 77	78   Global 69	75   Global 62

Reskilling and upskilling your existing workforce to better work alongside Al

Future of Jobs Report 2025 175

Hiring new people with skills to design Al tools and enhancements appropriate for the organization-specific skills Hiring new people with skills to better work alongside AI

Regional average Income Group	average					
INDICATORS			INDICATORS			
Labour force participation	(2023)	91%	Secondary Education Attainment	(2022)		66%
Vulnerable employment	(2022)	84%	Tertiary Education Attainment	(2022)		8%
Share of youth not in employment, education, or training (NEET)	(2023)	12%	-	<sup>6</sup> (2024)	1	4
Unemployment rate	(2023)	2%	Fill vacancies by hiring foreign	()		
Unemployment rate among workers with basic edu.	(2023)	2%	labour	(2024)		4
Unemployment rate among workers with advanced edu.	(2023)	6%	Country investment in mid-career training	(2022)		3

# Jobs and Skills outlook

12%   Giobal 22%	41%   Global 39%	100%   Global 83%	86%   Global 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	Al exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running Al programmes

### Trend outlook

## Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

Economy Global

Broadening digital access	70% 60%		5% 46%
Increased efforts and investments to adapt to climate			5% 24%
Rising cost of living, higher prices or inflation	55% 50%	Slower economic drowin	5% 42%
Increased geopolitical division and conflicts			<mark>0%</mark> 40%
Increased efforts and investments to reduce carbon	50% 47%		5% 23%
Increased government subsidies and industrial policy			5% 17%

# Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy Global		
Al and information processing technologies (big data, VR, AR	0% Satellites and space	16% 9%
Robots and autonomous systems	3% Quantum and encryption	5% 12%
Energy generation, storage and distribution	7%     Sensing, laser and optical       41%     technologies	5% 18%
New materials and composites	2%     Biotechnology and gene       30%     technologies	5% 11%

#### Jobs outlook

#### Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

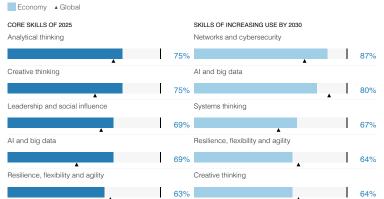
Net growth	Job Growth	Job displacement	Net Growth	▲ Global net	growth
1 Net growth	2 Global net	growth 3 Churr	1		

1. Net growth 2. Global net gr	owth <b>3.</b> Churn					
		NET GROWTH	1	I.	2.	3.
	-100%	0	100%			
AI and Machine Learning						
Specialists				34	82	34
opoolalioto	-		A .			
Data Analysts and Scientists				23	41	23
Sustainability Specialists				23	33	23
Financial Analysts				9	3	24
				34     82       23     41       23     33		
				_		
Lawyers		1		5	2	11
		×	-			
Accountants and Auditors				1	-8	9

#### Skills of increasing use by 2030

Skill outlook

Skills of the most increase in use by 2030



	g outlook			
40   Global 41	29   Global 29	22   Global 19	10   Global 11	
Would not need training by 2030	Would be upskilled in their current role	Would be upskilled and redeployed	Would be unlikely to upskill	
Human-machine frontie	ər			Public policy
	er y predominantly people, pr Combination 🗾 Global 📗		or a combination of both	Public policies to improve talent availability Share of respondents who agree that the particular public policy has the greatest potential to incre the talent availability Economy  GLU ECONOMY GLU
low			44% 29% 28%	Funding for reskilling and upskilling 73% 5
030			48% 30% 22%	Provision of reskilling and upskilling 73% 5
			28%         39%         33%           33%         33%         34%	Changes to labour laws related to remote work 60% 3
				Improvements to public education systems 53% 4
				Flexibility on hiring and firing practices
Key barriers for busines	ss transformation			Wage outlook
Economy Global kills gaps in the labour nability to attract talent f			ECONOMY GLOBAL	percentage of the company's total revenues Growing Global Similar Global Declining Global 53% 40% 52% 41%
Organization culture and	d resistance to change		50% 37%	
Dutdated or inflexible re	gulatory framework		<u> </u>	
Shortage of investment of	capital		35% 26%	
Talent availability outloo	ok			DEI Actions
Taleni availability butiot				Share of employers surveyed planning to implement the diversity, equity and inclusion measure
alent trend		a la 1946 esta a desenverse de la conserva de	n in five vears	
alent trend hare of respondents wi	ho expect their talent availater			53, 17, 17,
alent trend ihare of respondents wi Improving & Global ave alent availability when h	erage Worsening 🔺 Glot			53 I Global 42 Set DEI goals, targets or quotas 47 I Global 48 A7 I Global 48 Gupport workers with caregiving responsibilities
alent trend hare of respondents wi Improving & Global ave	erage Worsening & Glob niring		+100% 33%	Set DEI goals, targets or quotas Targeted recruitment, retention and progression initiatives Support workers with caregiving responsibilities
alent trend hare of respondents wi Improving & Global ave alent availability when h 7%				

Reskilling and upskilling your existing workforce to better work alongside Al

Hiring new people with skills to better work alongside Al

Re-orienting your organization to target new business opportunities created by Al

Norway

INDICATORS			INDICATORS		
Labour force participation	(2023)	66%	Secondary Education Attainment	(2022)	79%
Vulnerable employment	(2022)	4%	Tertiary Education Attainment	(2022)	42%
Share of youth not in employment, education, or training (NEET)	(2023)	5%		<sup>6</sup> (2024)	5
Unemployment rate	(2023)	2%	Fill vacancies by hiring foreign	(000.4)	
Unemployment rate among workers with basic edu.	(2023)	5%	labour	(2024)	5
Unemployment rate among workers with advanced edu.	(2023)	2%	Country investment in mid-career training	-	NA

# Jobs and Skills outlook

14%   Giobal 22%	37%   Giobal 39%	96%   Giobal 83%	83%   Global 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	Al exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running Al programmes

#### Trend outlook

## Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

· ·	° .			
Economy Global				
Increased efforts and investments to reduce carbon		Increased focus on labour and social issues		39% 46%
Increased efforts and investments to adapt to climate		Growing working-age populations		32% 24%
Broadening digital access		Stricter anti-trust and competition regulations		26% 17%
Rising cost of living, higher prices or inflation		Increased geopolitical division and conflicts		26% 34%
Slower economic growth		Increased government subsidies and industrial policy		10% 21%
Ageing and declining working- age populations		Increased restrictions to global trade and investment		10% 23%

100% 86%

71% 58% 45% 41% 1<mark>9%</mark> 30%

# Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy Global	
AI and information processing technologies (big data, VR, AR	
Robots and autonomous systems	
Energy generation, storage and distribution	
New materials and composites	

Semiconductors and computing technologies	13% 20%
Sensing, laser and optical technologies	10% 18%
Quantum and encryption	<b>7%</b> 12%

Jobs outlook

Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth	Job Growth	Job displacement	Net Growth	<ul> <li>Global net growth</li> </ul>
------------	------------	------------------	------------	---------------------------------------

<ol> <li>Net growth</li> <li>Global net gro</li> </ol>	owth 3. Churn					
	-100%	NET GROWTH	100%	1.	2.	3.
Business Development Professionals		ļ		20	19	20
AI and Machine Learning Specialists				18	82	18
Financial Analysts				17	3	17
Business Intelligence Analysts				11	18	11
Assembly and Factory Workers	6	ļ		0	0	14
Accounting, Bookkeeping and Payroll Clerks		ļ		-20	-18	20

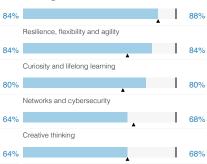
# Skills of increasing use by 2030

Skill outlook

Skills of the most increase in use by 2030

# Economy A Global CORE SKILLS OF 2025 Leadership and social influence AI and big data 84% Resilience, flexibility and agility 84% L. Analytical thinking 80% Motivation and self-awareness 64% Curiosity and lifelong learning Creative thinking

SKILLS OF INCREASING USE BY 2030



Norway

41   Global 41	28   Global 29	19   Global 19	12   Global 11			
Would not need training by 2030	Would be upskilled in their current role	Would be upskilled and redeployed	Would be unlikely to upskill			
Human-machine frontie	ər			Public policy		
	y predominantly people, pre	edominantly technology, c Technology Global	r a combination of both	the talent availability Economy  Global	that the particular public policy has	s the greatest potential to increase ECONOMY GLOBA
low	_		50% <b>34%</b> 16%	Funding for reskilling and upskillin Provision of reskilling and upskillin		74% 55%
2030			35% 37% 28%			52% 52%
			33% 33% 34%	Flexibility on hiring and firing prac	tices	48% 36%
				Changes to pension schemes and	A d retirement ages	48% 44%
Key barriers for busines	ss transformation			▲ Wage outlook		30% 23%
kills gaps in the labour	d resistance to change		48%         63%           42%         46%           36%         26%	Growing Global Similar	Global Declining Global	26% <b>52%</b> 22 52% 41% 8
nability to attract talent t			32% 37%			
Talent availability outloo	ok		· · · · · · · · · · · · · · · · · · ·	DEI Actions		
	ho expect their talent availa		n in five years	Share of employers surveyed plar	nning to implement the diversity, ec 65   <sub>Global</sub> 48	quity and inclusion measure
hare of respondents wh	erage Worsening A Glob			UJ   Global 51	UJ I Global 48	TO Global 33
hare of respondents when the matrix of respondents when the matrix of th	erage Worsening & Glob. hiring		+100% 9%	Run comprehensive DEI training for managers and staff	Targeted recruitment, retention and progression initiatives	Anti-harrasment protocols
Improving A Global ave	hiring		+100% 9%	managers and staff AI Strategy		Anti-harrasment protocols

Transitioning people from jobs that AI will cause to decline, to other roles within your organization

Hiring new people with skills to design Al tools and enhancements appropriate for the organization-specific skills

Reskilling and upskilling your existing workforce to better work alongside Al

Philippines

Regional average Income Group	average							
NDICATORS				INDICATORS				
Labour force participation	(2022)		72%	Secondary Education Attainment	(2022)		34	%
Vulnerable employment	(2022)		33%	Tertiary Education Attainment	(2022)		25	%
Share of youth not in employment, education, or training (NEET)	(2022)		13%	Ease of finding skilled employees in local labour market				5
Unemployment rate	(2022)		2%	Fill vacancies by hiring foreign	(222.1)			
Unemployment rate among workers with basic edu.	(2022)		2%	labour	(2024)			4
Unemployment rate among workers with advanced edu.	(2022)		3%	Country investment in mid-career training	(2022)			4

# Jobs and Skills outlook

16%   Giobal 22%	38%   Giobal 39%	96%   Giobal 83%	91%   Giobal 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	Al exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running Al programmes

#### Trend outlook

### Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

Economy Global

Broadening digital access	79% 80%	
Increased efforts and investments to reduce carbon	67% 47%	
Increased efforts and investments to adapt to climate	58%	Growing working-age 33% 24%
Increased focus on labour and social issues	46% 46%	
Slower economic growth	46% 42%	
Increased geopolitical division and conflicts	46%	Increased restrictions to global trade and investment 23%

Skill outlook

Skills of increasing use by 2030

# Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy	Global
AI and inforr	nation processing

distribution

technologies

Jobs outlook

technologies (big data, VR, AR... Robots and autonomous systems Energy generation, storage and

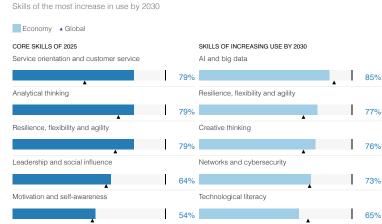
New materials and composites Semiconductors and computing

88% 86%	Quantum and encryption	21% 12%
58%	0. 0	21% 11%
58% 41%		18% 18%
49% 30%		 15% 9%
30% 20%		

#### Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth	b displacement	Net Growth			
1. Net growth 2. Global net gro	wth 3. Chur	n			
		NET GROWTH	1.	2.	3.
	-100%	0	100%		
Data Analysts and Scientists			95	41	95
AI and Machine Learning			1		
Specialists			60	82	60
Die Date Or estatististe			-		
Big Data Specialists			25	113	35
Business Development		_	1.10		
Professionals			12	19	16
Assembly and Eastery Markers	1	-		0	
Assembly and Factory Workers			2	0	20
Accounting, Bookkeeping and				10	
Payroll Clerks			-26	-18	26



Philippines

Upskilling and reskilling	outlook													
32 Global 41 Would not need training by 2030	28 Global 29 Would be upskilled in their current role	27   Global 19 Would be upskilled and redeployed	13   Global 11 Would be unlikely to upskill											
Human-machine frontier				Public poli	су									
	r predominantly people, pre Combination 🔤 Global 📕		a combination of both	Public polic Share of res the talent av Economy	spondent: vailability	s who agr				lic policy f	has the			o increase
Now	_	_	43% <b>32%</b> 25% 48% <b>30%</b> 22%	Flexibility or Provision of				s				ĺ	57%	44%
2030			26% 36% 38%	Funding for			Ű						52%	52%
			33% 33% 34%	Improveme	nts to pul	blic educa	ation sy	stems					48%	55% 47%
				Changes to	immigrat	tion laws		*					44%	26%
Key barriers for busines	s transformation			Wage outlo	ook									
Economy A Global Skills gaps in the labour r	and technical infrastructure	ers will hinder their organis	ECONOMY         GLOBAL           67%         63%           49%         32%           39%         37%           39%         46%	Share of org percentage Growing	of the co	ompany's f	total rev	venues				workers' c	48%	39% 13%
Insufficient understanding			36% 25%											
Talent availability outlool	k			DEI Action										
Improving & Global aver Talent availability when hi 50% -100%	Å		+100% <b>33%</b>	Share of em	ilobal 51 hensive DEI I hd staff			58 I				5 <b>8</b> I G	lobal <b>48</b> uitment, reter	
Talent development of ex 4% -100% Talent retention of existing			+100% <b>65%</b>	Al Strategy Share of em capability a	nployers s		plannin	g to impl	ement the	e stated str	rategy i	n respons	e to Al's ir	ncreasing
-100%		*	+100% 22%	<b>96</b> 1g	lobal <b>77</b>		,	7 <b>3</b> I	Global <b>69</b>		(	6 <b>8</b> I G	lobal <b>49</b>	

Reskilling and upskilling your existing workforce to better work alongside Al

Re-orienting your organization to target new business opportunities created by Al

Hiring new people with skills to design Al tools and enhancements appropriate for the organization-specific skills

INDICATORS			INDICATORS		
Labour force participation	(2023)	62%	Secondary Education Attainment	(2023)	67%
Vulnerable employment	(2022)	16%	Tertiary Education Attainment	(2023)	32%
Share of youth not in employment, education, or training (NEET)	(2023)	10%	Ease of finding skilled employees in local labour market	<sup>6</sup> (2024)	 4
Unemployment rate	(2023)	2%	Fill vacancies by hiring foreign	(000.0)	
Unemployment rate among workers with basic edu.	(2023)	4%	labour	(2024)	4
Unemployment rate among workers with advanced edu.	(2023)	1%	Country investment in mid-career training	(2022)	3

# Jobs and Skills outlook

16%   Giobal 22%	31%   Global 39%	95%   Giobal 83%	93%   Global 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	AI exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running AI programmes

#### Trend outlook

# Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

#### Economy Global

Broadening digital access		Increased geopolitical division and conflicts 44	<b>1%</b> 14%
Rising cost of living, higher prices or inflation		Increased efforts and 400 investments to adapt to climate 41	<b>)%</b> 1%
Increased focus on labour and social issues		Growing working-age 311 populations 24	<b>1%</b> 24%
Ageing and declining working- age populations	52% 40%	Increased restrictions to global 210 trade and investment 23	<b>1%</b> !3%
Increased efforts and investments to reduce carbon		Stricter anti-trust and competition 15' regulations 15'	5% 7%
Slower economic growth	45% 42%	Increased government subsidies 111 and industrial policy 21	<b>1%</b> !1%

87% 86%

64% 58% 34% 41% 31% 30% 28% 20%

Skill outlook

Skills of increasing use by 2030

# Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy Global	
Al and information processing technologies (big data, VR, AR	
Robots and autonomous systems	
Energy generation, storage and distribution	
New materials and composites	
Semiconductors and computing technologies	

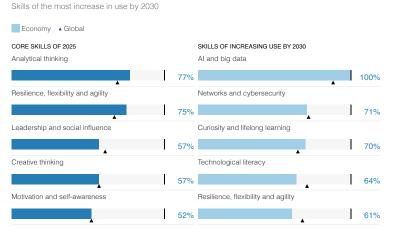
Sensing, laser and optical technologies		16% 18%
Quantum and encryption		<mark>8%</mark> 12%
Biotechnology and gene technologies		7% 11%
Satellites and space technologies	-	5% 9%

#### Key roles for business transformation

Jobs outlook

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

structural onann (percent)						
Net growth Job Growth Jo	b displacement	Net Growth				
1. Net growth 2. Global net gro	wth 3. Chur	n				
		NET GROWTH		1.	2.	3.
	-100%	0	100%			
AI and Machine Learning Specialists				39	82	39
Big Data Specialists				29	113	29
Data Analysts and Scientists				24	41	24
General and Operations Managers		II,		0	4	10
Assembly and Factory Workers				-5	0	19
Administrative Assistants and Executive Secretaries		, E		-14	-20	15



Upskilling and reskilling	outlook					
42 Global 41 Would not need training by 2030	<b>31</b> Global 29 Would be upskilled in their current role	17   Global 19 Would be upskilled and redeployed	10 Global 11 Would be unlikely to upskill	_		
Human-machine frontier				Public policy		
	r predominantly people, pre Combination Global		45% <b>39% 16%</b> 48% 30% 22%	Public policies to improve talent Share of respondents who agree t the talent availability Economy  Global Flexibility on hiring and firing pract Improvements to public education Funding for reskilling and upskilling Changes to labour laws related to	hat the particular public policy hat ites	s the greatest potential to increase ECONOMY GLOBAL 60% 44% 55% 47% 52% 55%
				Provision of reskilling and upskillin	g	38% 36%
Key barriers for business	stransformation			Wage outlook	<b>A</b>	
Transformation barriers Share of organisations su Economy A Global Skills gaps in the labour m Outdated or inflexible reg Inability to attract talent to Organization culture and Shortage of investment co	narket	ers will hinder their organis	ECONOMY         GLOBAL           65%         63%           42%         39%           40%         37%           40%         46%           27%         26%	Wage trends Share of organizations projecting t percentage of the company's total Growing Global Similar	revenues	38% 52% 10% 52% 41% 8%
Talent availability outlool	ĸ			DEI Actions		
Improving & Global aver Talent availability when hi 65% -100% Talent development of ext 9% -100%	isting workforce		+100% 16% +100% 51%		42   Global 51 Run comprehensive DEI training for managers and staff	quity and inclusion measure <b>37</b>   Global 39         Pay equity reviews and salary audits         tegy in response to Al's increasing
Talent retention of existing     30%   -100%	g workforce	*	+100% <b>30%</b>	Capability and prevalence	66 I Global 69	56   Global 49

Reskilling and upskilling your existing workforce to better work alongside Al

Re-orienting your organization to target new business opportunities created by Al

Hiring new people with skills to design AI tools and enhancements appropriate for the organization-specific skills

# 7.9

Contextual indicators

Portugal

Regional average Income Grou	p average				
INDICATORS			INDICATORS		
Labour force participation	(2023)	63%	Secondary Education Attainment	(2023)	47%
Vulnerable employment	(2022)	10%	Tertiary Education Attainment	(2023)	24%
Share of youth not in employment, education, or training (NEET)	(2023)	8%	Ease of finding skilled employees in local labour market	(2024)	4
Unemployment rate	(2023)	5%	Fill vacancies by hiring foreign		
Unemployment rate among workers with basic edu.	(2023)	6%	labour	(2024)	5
Unemployment rate among workers with advanced edu.	(2023)	4%	Country investment in mid-career training	(2022)	4

# Jobs and Skills outlook

<b>9%</b>   Giobal 22%	44%   Global 39%	87%   Global 83%	93%   Global 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	Al exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running Al programmes

#### Trend outlook

# Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

Economy Global				
Rising cost of living, higher prices or inflation	67% 50%	Increased focus on labour and social issues		41% 46%
Increased efforts and investments to reduce carbon		Ageing and declining working- age populations		41% 40%
Broadening digital access	56% 60%	Growing working-age populations		30% 24%
Increased geopolitical division and conflicts	52% 34%	Increased restrictions to global trade and investment		22% 23%
Slower economic growth	44% 42%	Stricter anti-trust and competition regulations		11% 17%
Increased efforts and investments to adapt to climate	41% 41%	Increased government subsidies and industrial policy		7% 21%

# Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy		Global
---------	--	--------

Al and information processing technologies (big data, VR, AR	% Semiconductors and computing     21       % technologies     22
Robots and autonomous systems	% Sensing, laser and optical 19 % technologies
Energy generation, storage and distribution	% Quantum and encryption
New materials and composites	%     Satellites and space       %     technologies

Skill outlook

#### Jobs outlook

#### Key roles for business transformation

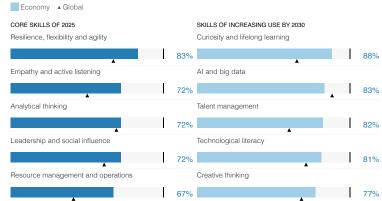
Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth Job Growth Job d	cement Net Growth A Global net growth
-----------------------------	---------------------------------------

<ol> <li>Net growth</li> <li>Global net growth</li> </ol>	wth 3. Churn					
	-100%	NET GROWTH	100%	1.	2.	З.
AI and Machine Learning Specialists			•	25	82	25
Business Development Professionals				13	19	13
General and Operations Managers		Ņ		7	4	7
Financial Analysts				-8	3	22
Administrative Assistants and Executive Secretaries		, <b>I</b>		-10	-20	10
Assembly and Factory Workers				-11	0	31

# Skills of increasing use by 2030

Skills of the most increase in use by 2030



Portugal

29   Global 41					
Global 41	38   Global 29	23   Global 19	10   Global 11		
Would not need training by 2030	Would be upskilled in their current role	Would be upskilled and redeployed	Would be unlikely to upskill		
Human-machine frontie	ır			Public policy	
luman-machine frontie		redominantly technology, o	r a combination of both	Public policies to improve talent availability Share of respondents who agree that the particular public policy has the	e greatest potential to increa
Human Global	Combination Global	Technology Global		the talent availability Economy  Global	
LL TASKS Iow				Funding for reskilling and upskilling	ECONOMY GLO
			46% <b>36% 18%</b> 48% <b>30%</b> 22%	▲ Provision of reskilling and upskilling	60% 55%
030					53% 529
			33%         38%         29%           33%         33%         34%	Changes to labour laws related to remote work	47% 36
				Flexibility on hiring and firing practices	
				Improvements to public education systems	47% 44
					40% 47
Key barriers for busines	ss transformation			Wage outlook	
Economy A Global	urveyed expecting the bar	rriers will hinder their organ	isation transformation ECONOMY GLOBAL	Wage trends         Share of organizations projecting the share of wages and other forms of percentage of the company's total revenues         Growing       Global         Similar       Global	workers' compensation as
kills gaps in the labour	market	<b>A</b>	69% 63%		0% 53%
nability to attract talent to	to the industry		65% 37%		52% 41%
outdated or inflexible req	gulatory framework		46% 39%		
Organization culture and	resistance to change		46% 39%		
		8	39% 46%		
ack of adequate data a	and technical intrastructure				
ack of adequate data a			39% 32%		
ack of adequate data a	A		39% 32%	DEI Actions	
Talent availability outloo	sk			DEI Actions Share of employers surveyed planning to implement the diversity, equity	r and inclusion measure
Talent availability outloo alent trend share of respondents wh	sk	lability to improve or worser bal average		Share of employers surveyed planning to implement the diversity, equity	
Talent availability outloo Talent trend Share of respondents who Improving A Global ave	Aho expect their talent availar			Share of employers surveyed planning to implement the diversity, equity 53   Global 51 Run comprehensive DEl training for Targeted recruitment, retention and	and inclusion measure
Talent availability outloo Talent trend Share of respondents wh Improving A Global ave Alent availability when h	Aho expect their talent availar			Share of employers surveyed planning to implement the diversity, equity 53   Global 51 53   Global 48	53   Global 33
Talent availability outloo         Falent trend         Share of respondents where the proving and the second secon	Aho expect their talent avail erage Worsening A Glot niring		n in five years +100% 13%	Share of employers surveyed planning to implement the diversity, equity 53   Global 51 Run comprehensive DEl training for Targeted recruitment, retention and	53   Global 33
Talent availability outloo         alent trend         share of respondents where         Improving       Global ave         alent availability when h         3%       -100%	A clot		n in five years	Share of employers surveyed planning to implement the diversity, equity         53 I Global 51         Run comprehensive DEI training for managers and staff             Targeted recruitment, retention and progression initiatives	53   Global 33 Anti-harrasment protocols

93 I Global 69 Hiring new people with skills to design AI tools and enhancements appropriate for the organization-specific skills Hiring new people with skills to better work alongside Al

79 I Global 62

79 | Global 77

Reskilling and upskilling your existing workforce to better work alongside Al

13.8

# Romania

Cont	extual	ind	ica	tors

									_
Regional average Income Grou	p average								
INDICATORS					INDICATORS				
Labour force participation	(2023)			55%	Secondary Education Attainment	(2022)		73%	6
Vulnerable employment	(2022)		:	22%	Tertiary Education Attainment	(2022)		16%	6
Share of youth not in employment, education, or training (NEET)	(2023)			17%	Ease of finding skilled employees in local labour market	. ,	11		4
Unemployment rate	(2023)			5%	Fill vacancies by hiring foreign	(			
Unemployment rate among workers with basic edu.	(2023)			12%	labour	(2024)		4	4
Unemployment rate among workers with advanced edu.	(2023)	П		1%	Country investment in mid-career training	(2022)		(	3

# Jobs and Skills outlook

19%   Giobal 22%	37%   Giobal 39%	82%   Giobal 83%	91%   Global 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	AI exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running AI programmes

#### Trend outlook

# Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

#### Economy Global

Broadening digital access	65 60	
Rising cost of living, higher prices or inflation	50 50	6 Increased focus on labour and     35%       % social issues     46%
Increased efforts and investments to reduce carbon	48	
Increased geopolitical division and conflicts	48	6 Stricter anti-trust and competition 33% 17%
Ageing and declining working- age populations	41	6 Growing working-age 24% 24%
Increased restrictions to global trade and investment	37	

30%

Skill outlook

Skills of increasing use by 2030

Leadership and social influence

Motivation and self-awareness

Al and big data

# Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy Global	
Al and information processing technologies (big data, VR, AR	
Robots and autonomous systems	
Energy generation, storage and distribution	
Semiconductors and computing technologies	
New materials and composites	

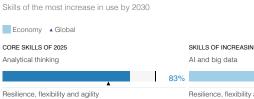
85% 86%	Sensing, laser and optical technologies	17% 18%
61% 58%	Quantum and encryption	11% 12%
<b>37%</b> 41%	Satellites and space technologies	7% 9%
35% 20%	Biotechnology and gene technologies	2% 11%
33%		

#### Key roles for business transformation

Jobs outlook

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth Job Growth Jo	b displacement	Net Growth				
1. Net growth 2. Global net grow	wth <b>3.</b> Churn					
		NET GROWTH		1.	2.	3.
	-100%	0	100%			
AI and Machine Learning				47	82	47
Specialists				47	62	47
			-			
Project Managers				18	17	19
General and Operations						
Managers				-7	4	19
0		*				
Accountants and Auditors				-9	-8	12
		<b>A</b>		•		
Assembly and Factory Workers				-17	0	21
Assounting Dealthooning and						
° . °				-18	-18	18
Accounting, Bookkeeping and Pavroll Clerks				-18	-18	18



# SKILLS OF INCREASING USE BY 2030



Romania

Upskilling and reskilling	outlook					
40 Global 41 Would not need training by 2030	29 Global 29 Would be upskilled in their current role	18 Global 19 Would be upskilled and redeployed	<b>14</b> Global 11 Would be unlikely to upskill			
Human-machine frontier	r			Public policy		
	r predominantly people, pre Combination Global			Public policies to improve talen Share of respondents who agree t the talent availability Economy A Global Funding for reskilling and upskillin	that the particular public policy has	ECONOMY GLOBAL
2030			44%         35%         21%           48%         30%         22%	Improvements to public education	a systems	53% 47%
	_		32%         37%         31%           33%         33%         34%	Provision of reskilling and upskillin		44% 52%
				Changes to labour laws related to Wage subsidies	remote work	41% 36% 41% 26%
Key barriers for busines	s transformation			Wage outlook		
Economy Global Skills gaps in the labour r Organization culture and Inability to attract talent to Inability to attract talent to	urveyed expecting the barri market resistance to change	ers will hinder their organi	ECONOMY         GLOBAL           76%         63%           52%         46%           44%         37%           28%         27%           26%         32%	Wage trends Share of organizations projecting percentage of the company's total Growing Global Similar		s of workers' compensation as
Talent availability outloo	k			DEI Actions		
	atisting workforce		+100% 15% +100% 59%	47 I Global 51 Run comprehensive DEI training for managers and staff AI Strategy	Aning to implement the diversity, equivalent of the diversity of the diver	35   Global 42 Set DEI goals, targets or quotas
18% -100%		*	+100% 38%	82   Global 77	67 I Global 69	61   Global 49

Re-orienting your organization to target new business opportunities created by AI

Hiring new people with skills to design Al tools and enhancements appropriate for the organization-specific skills

Reskilling and upskilling your existing workforce to better work alongside Al

Saudi Arabia

Regional average Income Group a	average								
INDICATORS			max		INDICATORS				
Labour force participation	(2023)			75%	Secondary Education Attainment	(2023)			65%
Vulnerable employment	(2022)			2%	Tertiary Education Attainment	(2023)		1	36%
Share of youth not in employment, education, or training (NEET)	(2023)			17%		(2024)	,		5
Unemployment rate	(2023)			3%		(000 ()			
Unemployment rate among workers with basic edu.	(2023)	11		1%	labour	(2024)			5
Unemployment rate among workers with advanced edu.	(2023)			5%	Country investment in mid-career training	(2022)			5

# Jobs and Skills outlook

16%   Giobal 22%	40%   Giobal 39%	85%   Giobal 83%	73%   Global 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	Al exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running Al programmes

### Trend outlook

# Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

	-	•		
Economy Global				
Rising cost of living, higher prices or inflation		0070	Increased focus on labour and social issues	<b>44%</b> 46%
Increased geopolitical division and conflicts		59% 34%	Increased restrictions to global trade and investment	<b>29%</b> 23%
Increased efforts and investments to reduce carbon			Ageing and declining working- age populations	29% 40%
Broadening digital access		56% 60%	Increased government subsidies and industrial policy	27% 21%
Increased efforts and investments to adapt to climate			Growing working-age populations	18% 24%
Slower economic growth			Stricter anti-trust and competition regulations	18% 17%

# Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy Global

#### Al and information processing technologies (big data, VR, AR... 84% 86% 13% 12% Quantum and encryption Semiconductors and computing technologies 61% 58% 13% 20% Robots and autonomous systems Energy generation, storage and 58% 41% Satellites and space 7% 23% New materials and composites 30% Sensing, laser and optical 19% 18%

# technologies Jobs outlook

distribution

#### Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and ictural ch n (n

structural churn (percent)						
Net growth Job Growth Job	o displacement	Net Growth				
1. Net growth 2. Global net grow	vth 3. Churr	1				
	-100%	NET GROWTH	100%	1.	2.	3.
AI and Machine Learning Specialists			•	35	82	35
Human Resources Specialists		l,		6	5	6
Industrial and Production Engineers		D,		6	15	6
Electrotechnology Engineers		l ,		4	15	4
Accountants and Auditors		,II		-4	-8	11
Data Entry Clerks				-21	-26	26

technologies	9%
Biotechnology and gene technologies	<b>3%</b> 11%
Skill outlook	
Skills of increasing use by 2030	
Skills of the most increase in use by 2030	)
Economy A Global	
CORE SKILLS OF 2025	SKILLS OF INCREASING USE BY 2030

CORE SKILLS OF 2025		SKILLS OF INCREASING USE BY 2030	
Technological literacy		Technological literacy	
<b>A</b>	63%	<b>A</b>	75%
Leadership and social influence		AI and big data	
	60%	A	70%
Quality control		Networks and cybersecurity	
▲	50%	<b>▲</b>	68%
Analytical thinking		Talent management	
A	50%	A	56%
Resilience, flexibility and agility		Leadership and social influence	
	50%		54%

Saudi Arabia

Upskilling and reskilling	outlook					
50 Global 41 Would not need training by 2030	27   Global 29 Would be upskilled in their current role	18   Global 19 Would be upskilled and redeployed	5   Global 11 Would be unlikely to upskill			
Human-machine frontie	r			Public policy		
Human Global	er v predominantly people, pro Combination Global		r a combination of both	Public policies to improve talent Share of respondents who agree t the talent availability Economy   Global Funding for reskilling and upskilling	hat the particular public policy ha	s the greatest potential to increase ECONOMY GLOBAL
Now			45%         21%         35%           48%         30%         22%	Provision of reskilling and upskillin	<u> </u>	72% 55%
2030			31%         25%         45%           33%         33%         34%	Wage subsidies		52% 52%
				Flexibility on setting wages		41% 38%
Key barriers for busines				Flexibility on hiring and firing pract	▲	31% 44%
Economy Global Skills gaps in the labour Inability to attract talent t Outdated or inflexible reg Organization culture and	o the industry gulatory framework		ECONOMY         GLOBAL           79%         63%           42%         37%           42%         39%           36%         46%           30%         32%	Share of organizations projecting t percentage of the company's total Growing Global Similar	revenues	50% <b>39%</b> 119 52% 41% 89
Talent availability outloo	lk ∎			DEI Actions		
	kisting workforce	al average	+100% 45%	Share of employers surveyed plan           52         I Global         42           Set DEI goals, targets or quotas         Al Strategy           Share of employers surveyed plan         capability and prevalence	<b>44</b>   Global 51 Run comprehensive DEI training for managers and staff	quity and inclusion measure          41       Global 48         Targeted recruitment, retention and progression initiatives         tegy in response to Al's increasing
3% -100%	g workiorce	Å	+100% 55%	73 I Global 77	58   Giobal 69	50   Giobal 47

Reskilling and upskilling your existing workforce to better work alongside Al

Transitioning people from jobs that AI will cause to decline, to other roles within your organization

Hiring new people with skills to design AI tools and enhancements appropriate for the organization-specific skills

	INDICATORS		
62%	Secondary Education Attainment	(2023)	76%
24%	Tertiary Education Attainment	(2023)	24%
12%	Ease of finding skilled employees in local labour market	(2024)	4
7%	Fill vacancies by biring foreign		
8%	labour		4
6%	Country investment in mid-career training	(2022)	4
	62% 24% 12% 7% 8%	62%       Secondary Education Attainment         24%       Tertiary Education Attainment         12%       Ease of finding skilled employees in local labour market         7%       Fill vacancies by hiring foreign labour         8%       Country investment in mid-career	62%       Secondary Education Attainment (2023)         24%       Tertiary Education Attainment (2023)         12%       Ease of finding skilled employees (2024)         in local labour market       in local labour market         7%       Fill vacancies by hiring foreign labour         8%       Country investment in mid-career (2022)

# Jobs and Skills outlook

18%   Giobal 22%	<b>39%  </b> Giobal 39%	74%   Giobal 83%	83%   Global 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	Al exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running Al programmes

#### Trend outlook

# Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

#### Economy Global

Broadening digital access 55% 60%	Increased efforts and 33% investments to reduce carbon 47%
Rising cost of living, higher     55%       prices or inflation     50%	Slower economic growth 33%
	Increased geopolitical division 33% and conflicts 34%
Increased focus on labour and 46% 46% 46%	5 E E E E E E E E E E E E E E E E E E E
Increased efforts and 42% investments to adapt to climate 41%	Increased government subsidies 18% 21%
Growing working-age 39% 24%	Stricter anti-trust and competition regulations 12%

# Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy Global

Al and information processing technologies (big data, VR, AR		Semiconductors and computing technologies	15% 20%
Robots and autonomous systems	<b>52%</b> 58%	Quantum and encryption	<mark>6%</mark> 12%
Energy generation, storage and distribution		Satellites and space technologies	3% 9%
New materials and composites		Biotechnology and gene technologies	3% 11%
Sensing, laser and optical technologies	21% 18%		

Resilience, flexibility and agility

Talent management

# technologies Jobs outlook

#### Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and

structural churn (percent)						
Net growth Job Growth	lob displacement	Net Growth   Global net growth				
1. Net growth 2. Global net gr	owth <b>3.</b> Churn					
	-100%	NET GROWTH	100%	1.	2.	3.
AI and Machine Learning Specialists				33	82	33
General and Operations Managers		Ļ	-	18	4	23
Supply Chain and Logistics Specialists				15	17	15
Business Intelligence Analysts				14	18	14
Assembly and Factory Worker	S			0	0	13
Administrative Assistants and Executive Secretaries				-22	-20	22

Skills of increasing use by 2030				
Skills of the most increase in use by	2030			
Economy A Global				
CORE SKILLS OF 2025			SKILLS OF INCREASING USE BY 2030	
Analytical thinking			Al and big data	
		65%		84%
Technological literacy			Technological literacy	
		58%		80%
Motivation and self-awareness			Talent management	
		54%		75%

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.

75%

72%

Curiosity and lifelong learning

Resilience, flexibility and agility

54%

54%

Upskilling and reskilling	outlook												
43 Global 41 Would not need training by 2030	30   Global 29 Would be upskilled in their current role	16   Global 19 Would be upskilled and redeployed	11 I Global 11 Would be unlikely to upskill										
Human-machine frontie	r			Public p	olicy								
	er / predominantly people, pre Combination Clobal		r a combination of both	Share of the talent					c policy h	as the gre		ential to	
Now			54% <b>30% 16%</b> 48% <b>30%</b> 22%			nd firing praction						67%	44%
2030	_		46%         28%         26%           33%         33%         34%	Improven	nents to pul	blic education s	systems					58% 54%	55% 47%
				Changes Wage sul		aws related to r	emote work	<				50%	36%
Key barriers for busines	ss transformation			Wage of	utlook	*					1	50%	26%
Economy Global Skills gaps in the labour of Organization culture and Inability to attract talent to Inability to attract talent to	I resistance to change		ECONOMY GLOBAL 67% 63% 49% 46% 36% 27% 36% 37%			mpany's total r		Declining	Globa	d.		<b>54%</b> 4 52% 4	
Outdated or inflexible reg	▲		33% 39%	DEI Acti	ons								
Talent trend Share of respondents wh Improving A Global ave	no expect their talent availa erage Worsening & Globa		in five years	44	Global 51	surveyed plann	<b>39</b> I	Global <b>39</b>		35	<b>D</b>   Globa	al 27	
Talent availability when h       42%       -100%       Talent development of ex       4%       -100%		Å	+100% 33%	managers Al Strate Share of	employers	surveyed plann		eviews and sal		the su	d DEI goals apply chain sponse t		
Talent retention of existin     25%     -100%	g workforce	Å	+100% <b>50%</b>		Global 69	IEIICE	<b>58</b> 1	Global <b>62</b>		58	3   Globa	al 77	

Hiring new people with skills to better work alongside Al

Hiring new people with skills to design AI tools and enhancements appropriate for the organization-specific skills

Reskilling and upskilling your existing workforce to better work alongside Al

Singapore

INDICATORS				II	NDICATORS			
Labour force participation	(2023)		7	73% S	Secondary Education Attainment	(2023)		63%
Vulnerable employment	(2022)		1	10% T	ertiary Education Attainment	(2023)		53%
Share of youth not in employment, education, or training (NEET)	(2023)			7% E	Ease of finding skilled employees n local labour market	(2024)		4
Unemployment rate	(2023)			3% F	ill vacancies by hiring foreign	(000 ()		
Unemployment rate among workers with basic edu.	(2023)			3% <sup>la</sup>	abour	(2024)		5
Unemployment rate among workers with advanced edu.	(2023)			3% C	Country investment in mid-career raining	(2022)		6

# Jobs and Skills outlook

28%   Giobal 22%	36%   Giobal 39%	94%   Giobal 83%	97%   Global 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	Al exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running Al programmes

### Trend outlook

# Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

#### Economy Global

Broadening digital access	71%	Increased restrictions to global 38% 23%
Increased geopolitical division and conflicts	64% 34%	Rising cost of living, higher 38% 50%
Increased efforts and investments to reduce carbon	58%	
Increased efforts and investments to adapt to climate		Growing working-age 29% 24%
Slower economic growth	47%	Increased focus on labour and 29% 46%
Ageing and declining working- age populations	44% 40%	

33% 30%

Skill outlook

Skills of increasing use by 2030

# Technology trends

# Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy Global	
AI and information processing technologies (big data, VR, AR	
Robots and autonomous systems	
Energy generation, storage and distribution	
Semiconductors and computing technologies	
New materials and composites	

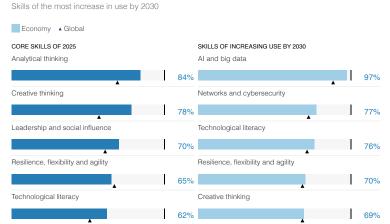
94% 86%	Sensing, laser and optical technologies		22% 18%
57% 58%	Quantum and encryption		17% 12%
50% 41%	Satellites and space technologies	_	11% 9%
35% 20%	Biotechnology and gene technologies		<b>7%</b> 11%

#### Key roles for business transformation

Jobs outlook

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth         Job Gro		Net Growth				
1. Net glowin 2. Global het glo	-100%	NET GROWTH	100%	1.	2.	3.
AI and Machine Learning Specialists			▲	128	82	128
Data Analysts and Scientists				27	41	30
Business Intelligence Analysts				8	18	16
Managing Directors and Chief Executives		li,		5	5	8
Administrative Assistants and Executive Secretaries				-17	-20	18
Data Entry Clerks				-27	-26	27



Singapore

Numerical control of the particular o	<b>30</b>   Global 41	32   Global 29	24   Global 19	14 Global	11			
Auma-machine frontier   of tasks completed by predominantly people, predominantly	Would not need training by	Would be upskilled in their	Would be upskilled and					
Set of reproduction who agrees that the particular public policy has the greatest polaritie of the set of organization of the set of the set of organization of the set of th	Human-machine frontie	r				Public policy		
the teef variable by the teer value by the teer								
Lu badie				r a combination of	both	1	e that the particular public policy ha	as the greatest potential to increas
Bit with the labour market   Convert    Convert    Convert   Convert <td></td> <td>Combination Global</td> <td>lechnology Global</td> <td></td> <td></td> <td>Economy A Global</td> <td></td> <td></td>		Combination Global	lechnology Global			Economy A Global		
Code Code Code Code Code Code   Code<						Flexibility on hiring and firing pr	actices	ECONOMY GLOB
B30 00% 33% 3%   Available 00% 00%   Available 00% 63%   Av	1000			44% 30	% 26%			50% 44%
30% 30% 30% 30% 30% 30%   20% 30% 30% 30%   20% 30% 30%   20% 30% 30%   Packbilly on setting wages 39%   Charges to labour laws related to remote work 39%   20% 40% 40%   Base of organizations surveyed expecting the barriers will hinder their organisation transformation Mage outlook   Economy Global Stare of organizations provemose of the company's total wages and other forms of worken' compensation provemose of the company's total wages and other forms of worken' compensation provemose of the company's total wages and their forms of worken' compensation provemose of the company's total wages and other forms of worken' compensation provemose of the company's total wages and their forms of worken' compensation provemose of the company's total wages and other forms of worken' compensation provemose of the company's total wages and their forms of worken' compensation provemose of the company's total wages and their forms of worken' compensation provemose of the company's total wages and their forms of worken' compensation provemose of the company's total wages and their forms of worken' compensation provemose of the company's total wages and their forms of worken' compensation provemose of the company's total water of wages and their forms of worken' compensation in the worken' comp				48% 30	% 22%	Funding for reskilling and upski	lling	
Aution Aution   Aution <t< td=""><td>.030</td><td></td><td></td><td></td><td></td><td></td><td>*</td><td>47% 55%</td></t<>	.030						*	47% 55%
Rey barriers for business transformation   Rey barriers for business transformation   Tansformation barriers   Bare of organizations surveyed expecting the barriers will hinder their organisation transformation   Economy - Global   Conomy - Global   Angenization culture and resistance to change   Angenization culture and re						Provision of reskilling and upski	lling	44% 52%
Key barriers for business transformation Wage outlock   Transformation barriers Mage outlock   Transformation barriers Mage outlock   Comparisations surveyed expecting the barriers will hinder their organisation transformation Stare of organizations projecting the share of wages and other forms of workers' compensation   Comparisations outlours and resistance to change 60% 63%   Audaded or inflexible regulatory framework 38% 38%   ask of adequate data and technical infrastructure 31% 32%   Transformation 56   Transformation 00% 63%   Audaded or inflexible regulatory framework 38% 38%   ask of adequate data and technical infrastructure 31% 32%   Transformation 00% 00%   Audaded or inflexible regulatory framework 38% 38%   ask of adequate data and technical infrastructure 31% 32%   Transformation 00% 00%   ability to attract takent to the industry 33% 37%   ability to attract takent on the industry 33% 37%   ability to attract takent on the industry 33% 37%   ability to attract takent on the industry 33% 37%   ability to attract takent on the industry 33% 37%   ability to attract takent on the industry 33% 37%   ability to attract takent on the industry 33% 37%   ability to attract takent on the industry 33% 37%   ability to attract takent on the industry 33% 37%   ability to attract takent on the industry 33% 37%   ability to attract taken						Flexibility on setting wages	A	44 /0 52 /0
Key barriers for business transformation     Transformation barriers   hare of organisations surveyed expecting the barriers will hinder their organisation transformation   iconomy								38% 38%
Key barriers for business transformation       Wage outlook         Random barriers       Mage transformation barriers         Random barriers       Barrier of organizations projecting the share of wages and other forms of workers' compensation protecting of the share of wages and other forms of workers' compensation protecting of the share of wages and other forms of workers' compensation protecting of the company's total revenues         Wage transformation       ECONOMY GLOBA         Wage transformation       Economy is allower and resistance to change         Wage transformation       Barrier (Insponted and technical Infrastructure         Barrier of anability to uthook       Economy is allower and explore surveyed planning to implement the diversity, equily and inclusion measure         Marrier of depoletions who expect their talent availability to improve or worsen in five years       Explore transformation and programment the sitaled stratety in response to All since apability and provalence<						Changes to labour laws related	to remote work	
ransformation barriers   hare of organisations surveyed expecting the barriers will hinder their organisation transformation   Economy & Global   Economy & Global   Economy & Global   Economy & Global   Age transformation culture and resistance to change   44%   46%   44%   46%   44%   46%   44%   46%   44%   46%   44%   46%   44%   46%   46%   44%   46%   44%   46%   44%   46%								32% 36%
hare of organisations surveyed expecting the barriers will hinder their organisation transformation Economy 4 Global Kills gaps in the labour market reganization culture and resistance to change reganization file your survey of planning to implement the diversity, equity and inclusion measure reganization your dorce reganization your dorce	Key barriers for busines	s transformation				Wage outlook		
<pre>eccentage of the company's total revenues account of allohal</pre>	ransformation barriers	S				Wage trends		
ECONOMY GLOBAL     Balling as in the labour market     Converse      Converse     Converse     Converse     Converse     Converse     Converse     Converse     Converse     Converse	Share of organisations su	urveyed expecting the barr	iers will hinder their organ	isation transformati	ion			ns of workers' compensation as
Skills gaps in the labour market     A      A     A     A     A     A     A     A     A     A     A     A </td <td>Economy 🔺 Global</td> <td></td> <td></td> <td>ECONOMY G</td> <td>GLOBAL</td> <td></td> <td></td> <td></td>	Economy 🔺 Global			ECONOMY G	GLOBAL			
Tradent availability unlook  Calculated or inflexible regulatory framework  A 44% 46%  Dutdated or inflexible regulatory framework  A 38% 39% Aack of adequate data and technical infrastructure  A 33% 37% A 34% A 45% A 45	Skills gaps in the labour	market				Growing Global Simila	r Global Declining Global	
Jrganization culture and resistance to change   44%   44%   44%   44%   44%   46%   38%   3			•	60%	63%			54% <b>34%</b> 1 <sup>-1</sup> 52% 41% 8
Judated or inflexible regulatory famework     38%     anability to attract talent to the industry     a.ack of adequate data and technical infrastructure     31%     32%     Talent availability outlook     Talent availability outlook     Del Actions     Talent availability outlook     Talent availability outlook     Del Actions     Talent availability outlook     Talent availability	)rganization culture and	I resistance to change		119/	46%			
38% 39%   nability to attract talent to the industry   33% 37%   a.ack of adequate data and technical infrastructure   31% 32%   Talent availability outlook   DEI Actions   Stare of erspondents who expect their talent availability to improve or worsen in five years   Improving Global average   Worsening Global average   Worsening Global average   Italent availability when hiring   26% -100%   26% -100%   26% -100%   26% -100%   26% -100%   26% -100%   26% -100%   26% -100%   26% -100%   26% -100%   26% -100%   26% -100%   26% -100%   26% -100%   26% -100%   26% -100%   26% -100%   27% At Strategy   26% -100%   26% -100%   26% -100%   27% At Strategy   28% -100%   28% -100%   28% -100%   28% -100%   28% -100%   28% -100%   28% -100%   28% -100%   28% -100%   28% -100%   28% -100%   28% -100%   28% -100%   28%	Dutdated or inflexible rea	aulatory framework		44 /0	40 /8			
33% 37%   a.ack of adequate data and technical infrastructure   31% 32%   Talent availability outlook   Talent rend   Share of respondents who expect their talent availability to improve or worsen in five years   Improving Global average   Worsening Global average   Worsening   Global average Worsening   Global average Worsening   Global average Worsening   Global average Worsening   Global average Worsening   Global average Worsening   Global average Worsening   Global average Worsening   Global average Worsening   Global average Worsening   Global average Worsening   All trategy   Talent trend   Difference   Talent trend   All trategy   Talent trending or implement the stated strategy in response to Al's increating and prevalence   Talent trending or implement the stated strategy in response to Al's increating and prevalence		_		38%	39%			
A construction     A construction     Talent availability outlook     Talent availability outlook     Talent availability outlook     Talent availability outlook     Talent availability when hiring   26%   -100%   -100%     -100% <td>nability to attract talent t</td> <td>o the industry</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>	nability to attract talent t	o the industry						
31% 32%     Talent availability outlook     Talent availability outlook     Talent trend        Share of respondents who expect their talent availability to improve or worsen in five years     Improving & Global average   Worsening & Global average   Ratent availability when hiring   26%   -100%   26%   -100%   27%   Talent development of existing workforce   2%   -100%   2   2   2   2   2   3   4   3   3   3   3   3   3   3   3   3   3   3   3   3   3   3   3   3   3   3   4   3   4   3   4   5   5		<b>A</b>		33%	37%			
Talent availability outlook     Talent availability outlook     Talent trend     Share of respondents who expect their talent availability to improve or worsen in five years     Improving * Global average Worsening * Global average     Automs     Share of employers surveyed planning to implement the diversity, equity and inclusion measure   71 I Global 48   72 I Global 48   73 I Global 48   74 I Global 48   75 I Global 42   8et DEI goals, targets or quotas   96 - 100%   100%	ack of adequate data a	nd technical infrastructure						
Talent trend       Share of respondents who expect their talent availability to improve or worsen in five years       Share of employers surveyed planning to implement the diversity, equity and inclusion measure         Improving & Global average       Worsening & Global average       Share of employers surveyed planning to implement the diversity, equity and inclusion measure         Italent availability when hiring       26%       -100%       1       1       Global 48       56       1       Global 42       53       Global 51         Run comprehensive DEI training managers and staff       Italent development of existing workforce       A       1       Strategy         Marce of employers surveyed planning to implement the stated strategy in response to Al's increation and progression initiality and prevalence       Share of employers surveyed planning to implement the stated strategy in response to Al's increation and prevalence		•		31%	32%			
Share of respondents who expect their talent availability to improve or worsen in five years Improving * Global average Worsening * Global average Talent availability when hiring 26% -100% * 100% * 100% 29% Talent development of existing workforce 1% -100% * 100% * 100% 77% Talent retention of existing workforce 1% -100% * 100% * 100% 77% Talent retention of existing workforce 1% -100% * 100% * 100% 77% Talent retention of existing workforce 1% -100% * 100% * 100% 77% Talent development of existing workforce 1% -100% * 100% * 100% 77% Talent development of existing workforce 1% -100% * 100% * 100% 77% Talent development of existing workforce 1% -100% * 100% * 100% 77% Talent development of existing workforce 1% -100% * 100% * 100% 77% Talent development of existing workforce 1% -100% * 100% * 100% 77% Talent development of existing workforce	Talent availability outloo	k				DEI Actions		
Improving * Global average Worsening * Global average     Talent availability when hiring   26%   -100%   * 100%   * 100%     <						Share of employers surveyed p	lanning to implement the diversity, e	quity and inclusion measure
alent availability when hiring     Targeted recruitment, retention and progression initiatives     Set DEI goals, targets or quotas     Run comprehensive DEI training managers and staff       26%     -100%     +100%     29%     Al Strategy       3lent development of existing workforce     Al Strategy     Stare of employers surveyed plant by intresponse to Al's increase and bility and prevalence	Share of respondents wh	no expect their talent availa	bility to improve or worser	n in five years				
6%     -100%     +100%     29%     progression initiatives     managers and staff       alent development of existing workforce     A     AI Strategy       %     -100%     77%       alent retention of existing workforce     Ai Strategy	Improving A Global ave	erage Worsening A Glob	al average			71   Global 48	56   Global 42	53   Global 51
And Construction     And Construction     And Construction       Provide     -100%     And Construction       Provide     -100%     And Construction       Provide     -100%     And Construction       Provide     Provide	alent availability when h	iring					Set DEI goals, targets or quotas	Run comprehensive DEI training for
%     -100%     +100%     77%       alent retention of existing workforce     A     A	-100%	A		+100%	29%	progression initiatives		managers and staff
%     -100%     77%       A     A       Share of employers surveyed planning to implement the stated strategy in response to Al's increase in the stated strategy in response to Al's increase in the stated strategy in response to Al's increase in the stated strategy in response to Al's increase in the stated strategy in response to Al's increase in the stated strategy in response to Al's increase in the stated strategy in the stated stra	alent development of e>	kisting workforce				AI Strategy		
alent retention of existing workforce capability and prevalence	<b>%</b> -100%			+100%	77%		anning to implement the stated stre	terry in response to All's increasio
	alent retention of existin	a workforce		-			anning to implement the stated stild	logy in response to Ars moledsin
	7% -100%			+100%	40%			

82 I Global 77 Reskilling and upskilling your existing workforce to better work alongside Al 79 I Global 69 Hiring new people with skills to design AI tools and enhancements appropriate for the organization-specific skills 62 | Global 49

Re-orienting your organization to target new business opportunities created by Al

Slovenia

INDICATORS			INDICATORS		
Labour force participation	(2023)	61%	Secondary Education Attainment	(2022)	86%
Vulnerable employment	(2022)	11%	Tertiary Education Attainment	(2022)	35%
Share of youth not in employment, education, or training (NEET)	(2023)	7%	Ease of finding skilled employees in local labour market	(2024)	3
Unemployment rate	(2023)	3%	Fill vacancies by hiring foreign	()	
Unemployment rate among workers with basic edu.	(2023)	7%	labour	(2024)	4
Unemployment rate among workers with advanced edu.	(2023)	2%	Country investment in mid-career training	(2022)	4

# Jobs and Skills outlook

12%   Giobal 22%	37%   Global 39%	79%   Giobal 83%	75%   Global 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	Al exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running Al programmes

# Trend outlook

# Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

	-			
Economy Global				
Ageing and declining working- age populations		68% 40%	Increased efforts and investments to adapt to climate	<b>36%</b> 41%
Increased focus on labour and social issues		55% 46%	Slower economic growth	29% 42%
Broadening digital access			Increased geopolitical division and conflicts	26% 34%
Increased efforts and investments to reduce carbon		45% 47%	Increased government subsidies and industrial policy	10% 21%
Growing working-age populations		45% 24%	Increased restrictions to global trade and investment	10% 23%
Rising cost of living, higher prices or inflation		45% 50%	Stricter anti-trust and competition regulations	10% 17%

Skill outlook

Skills of increasing use by 2030

Skills of the most increase in use by 2030

# Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy Global	
----------------	--

distribution

technologies

Jobs outlook

Al and information processing technologies (big data, VR, AR...

Robots and autonomous systems Energy generation, storage and

New materials and composites Sensing, laser and optical

84% 86%	Semiconductors and computing technologies	1 <b>3%</b> 20%
61% 58%	0. 0	10% 11%
48% 41%	Satellites and space technologies	7% 9%
45% 30%	Quantum and encryption	<b>7%</b> 12%
13% 18%		

#### Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth Job Growth Job	b displacement	Net Growth   Global net growth				
1. Net growth 2. Global net gro	wth <b>3.</b> Churr	1				
		NET GROWTH		1.	2.	3.
	-100%	0	100%			
Al and Machine Learning Specialists				59	82	59
Business Development Professionals				21	19	21
Accountants and Auditors				5	-8	15
Assembly and Factory Workers				-10	0	15
Accounting, Bookkeeping and Payroll Clerks		, E		-16	-18	16
Administrative Assistants and Executive Secretaries				-18	-20	18

Economy A Global				
CORE SKILLS OF 2025 Analytical thinking		SKILLS OF INCREASING USE BY 2030 Al and big data		
<b>▲</b>	58%		88%	%
Motivation and self-awareness		Resilience, flexibility and agility		
A	54%	▲	75%	%
Technological literacy		Networks and cybersecurity		
A	54%	<b>_</b>	68%	%
Resilience, flexibility and agility		Talent management		
A	54%	<b></b>	65%	%
Quality control		Design and user experience		
	50%		64%	%

Slovenia

Upskilling and reskilling	outlook					
48 Global 41 Would not need training by 2030	27   Global 29 Would be upskilled in their current role	16 Global 19 Would be upskilled and redeployed	10   Global 11 Would be unlikely to upskill		_	
Human-machine frontie	r			Public policy		
	er predominantly people, pre Combination Clobal		r a combination of both	Public policies to improve talent Share of respondents who agree to the talent availability Economy A Global		as the greatest potential to increase ECONOMY GLOBAL
Now	_	_	52% <b>31%</b> 17% 48% 30% 22%	Flexibility on hiring and firing pract	tices	71% 44%
2030			37% 33% 30%	Changes to immigration laws	g	50% 26%
	_		33% 33% 34%	Improvements to public education	systems	50% 55%
				Provision of reskilling and upskillin	g	42% 52%
Key barriers for busines	s transformation			Wage outlook		
Share of organisations su Economy A Global Skills gaps in the labour of Organization culture and Inability to attract talent to	resistance to change	ers will hinder their organi	ECONOMY GLOBAL 68% 63% 58% 46%	Share of organizations projecting t percentage of the company's total Growing Global Similar	revenues	
Outdated or inflexible rec Inability to attract talent to	<u> </u>		45% 39%			
Talent availability outloo	k		32% 27%	DEI Actions		
Talent trend Share of respondents wh	o expect their talent availat		in five years	Share of employers surveyed plan		
Improving     Global ave       Talent availability when h       54%	rage Worsening A Globa	ai average	+100% 21%	38   Global 51 Run comprehensive DEI training for managers and staff	<b>38</b> I Global 39 Pay equity reviews and salary audits	38   Global 26 Support workers with caregiving responsibilities
Talent development of ex 8% -100%	A	-	+100% <b>50%</b>	Al Strategy Share of employers surveyed plan capability and prevalence	ning to implement the stated stra	ategy in response to AI's increasing
Talent retention of existin       29%       -100%	g workforce		+100% 33%	63 I Global 62	63   Giobal 77	58   Giobal 69

Hiring new people with skills to better work alongside Al

Reskilling and upskilling your existing workforce to better work alongside Al

Hiring new people with skills to design Al tools and enhancements appropriate for the organization-specific skills

South Africa

Regional average Income Group	average									
	average									
INDICATORS					INDICATORS					
Labour force participation	(2023)			63%	Secondary Education Attainment	(2023)				44%
Vulnerable employment	(2022)			24%	Tertiary Education Attainment	(2023)				14%
Share of youth not in	(									
employment, education, or	(2023)			34%	Ease of finding skilled employees	(2024)				4
training (NEET)					in local labour market	(====)				
Unemployment rate	(2023)			29%	Fill vacancies by hiring foreign	(000 ()				
Unemployment rate among	(2023)	_		35%	labour	(2024)				4
workers with basic edu.	(2020)									
Unemployment rate among	(2023)			4.40/	Country investment in mid-career	(2022)				3
workers with advanced edu.			training							

# Jobs and Skills outlook

36%   Global 22%	36%   Giobal 39%	88%   Giobal 83%	93%   Global 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	Al exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running Al programmes

# Trend outlook

# Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

#### Economy Global

Broadening digital access	63% 60%	Increased geopolitical division and conflicts		45% 34%
Rising cost of living, higher prices or inflation	<b>57%</b> 50%	Increased government subsidies and industrial policy		26% 21%
Increased focus on labour and social issues	51% 46%	Increased restrictions to global trade and investment		26% 23%
Increased efforts and investments to reduce carbon		Ageing and declining working- age populations		26% 40%
Increased efforts and investments to adapt to climate	45% 41%	Growing working-age populations		18% 24%
Slower economic growth	45% 42%	Stricter anti-trust and competition regulations		10% 17%

83% 86% 60% 58%

54% 41% 29% 30% 23% 12%

Skill outlook

Skills of increasing use by 2030

# Technology trends

# Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy Global	
Al and information processing technologies (big data, VR, AR	
Robots and autonomous systems	
Energy generation, storage and distribution	
New materials and composites	
Quantum and encryption	

Sensing, laser and optical technologies	19% 18%
Semiconductors and computing technologies	17% 20%
Satellites and space technologies	4% 9%
Biotechnology and gene technologies	<b>4%</b> 11%

#### Key roles for business transformation

Jobs outlook

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

		Net Growth				
1. Net growth 2. Global net gro	-100%	NET GROWTH	100%	1.	2.	з.
AI and Machine Learning Specialists				49	82	49
Data Analysts and Scientists				37	41	37
Sustainability Specialists				33	33	33
Business Intelligence Analysts		ļ		18	18	18
Accountants and Auditors		<b>,</b> II		-3	-8	10
Administrative Assistants and Executive Secretaries		, 🗖		-15	-20	15

Skills of the most increase in use by 2030			
Economy A Global			
CORE SKILLS OF 2025		SKILLS OF INCREASING USE BY 2030	
Analytical thinking		Al and big data	
	66%		82%
Leadership and social influence		Technological literacy	
	61%	▲	82%
Resilience, flexibility and agility		Resilience, flexibility and agility	
	61%		75%
AI and big data		Networks and cybersecurity	
	55%	<b>▲</b>	74%
Talent management		Creative thinking	
	53%		71%

South Africa

Upskilling and reskilling	outlook					
40 Global 41 Would not need training by 2030	29 Global 29 Would be upskilled in their current role	22   Global 19 Would be upskilled and redeployed	10   Global 11 Would be unlikely to upskill			
Human-machine frontier				Public policy		
	r predominantly people, pre Combination Global		a combination of both	Public policies to improve talem Share of respondents who agree the talent availability Economy A Global		has the greatest potential to increa
Now			39% 30% 31%	Funding for reskilling and upskillir	ng	63% 55
2030			48% 30% 22%	Improvements to public education	n systems	63% 47
			26%         35%         39%           33%         33%         34%	Provision of reskilling and upskillir	ng	59% 52
				Changes to labour laws related to	remote work	
				Flexibility on hiring and firing prac	tices	50% 36
					•	41% 44
Key barriers for business	s transformation			Wage outlook		
Economy Global Skills gaps in the labour n		ers win ninder their organis	ECONOMY GLOBAL	percentage of the company's tota Growing Global Similar	revenues	orms of workers' compensation as
Organization culture and Inability to attract talent to	٠ •		43% 46%			
Lack of adequate data ar	And technical infrastructure		29% 32%			
Shortage of investment ca	apital		27% 26%			
▲ Talent availability outlook	k		2778 2078	DEI Actions		
Talent trend				Share of employers surveyed plan	nning to implement the diversity,	, equity and inclusion measure
	o expect their talent availal rage Worsening & Globa		in five years	63   Global 48	56   Giobal 42	47   Global 51
Talent availability when hi		in average		Targeted recruitment, retention and	Set DEI goals, targets or quotas	Global 51
33% -100%	A	A	+100% 33%	progression initiatives		managers and staff
Talent development of exit     3%	isting workforce		+100% 78%	AI Strategy		
Talent retention of existing	g workforce		A	Share of employers surveyed plan capability and prevalence	ining to implement the stated st	trategy in response to AI's increasi
-100%	*	A	+100% 53%	83   Global 77	76 I Global 69	62   Global 62

Reskilling and upskilling your existing workforce to better work alongside Al

Hiring new people with skills to better work alongside AI

Hiring new people with skills to design Al tools and enhancements appropriate for the organization-specific skills

INDICATORS			INDICATORS		
Labour force participation	(2023)	62%	Secondary Education Attainment	(2023)	55%
Vulnerable employment	(2022)	11%	Tertiary Education Attainment	(2023)	35%
Share of youth not in employment, education, or training (NEET)	(2023)	10%	Ease of finding skilled employees in local labour market	6 (2024)	 4
Unemployment rate	(2023)	11%	Fill vacancies by hiring foreign	(	
Unemployment rate among workers with basic edu.	(2023)	16%	labour	(2024)	4
Unemployment rate among workers with advanced edu.	(2023)	7%	Country investment in mid-career training	(2022)	3

# Jobs and Skills outlook

19%   Global 22%	37%   Giobal 39%	86%   Giobal 83%	95%   Giobal 88%		
Labour-market churn	Skill disruption	Organizations with DEI priorities	Al exposure		
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running Al programmes		

#### Trend outlook

# Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

Economy Global				
Increased efforts and investments to reduce carbon	64% 47%	Increased efforts and investments to adapt to climate		43% 41%
Broadening digital access	62% 60%	Increased geopolitical division and conflicts		36% 34%
Rising cost of living, higher prices or inflation	53% 50%	Increased restrictions to global trade and investment		26% 23%
Increased focus on labour and social issues		Growing working-age populations		22% 24%
Ageing and declining working- age populations	<b>46%</b> 40%	Increased government subsidies and industrial policy		18% 21%
Slower economic growth		Stricter anti-trust and competition regulations		16% 17%

# Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy Global		
Al and information processing technologies (big data, VR, AR	88% 86%	Sensing, lase technologies
Robots and autonomous systems	63% 58%	Quantum and
Energy generation, storage and distribution	50% 41%	Biotechnology technologies
New materials and composites	30% 30%	Satellites and technologies
Semiconductors and computing technologies	22% 20%	
Jobs outlook		Skill outlook

<ul><li>Sensing, laser and optical</li><li>technologies</li></ul>	16% 18%
Quantum and encryption	13% 12%
<ul><li>Biotechnology and gene</li><li>technologies</li></ul>	12% 11%
<ul><li>Satellites and space</li><li>technologies</li></ul>	6% 9%

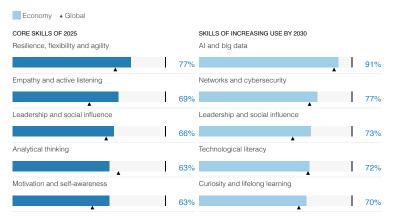
#### Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth Job Growth	Job displacement	Net Growth				
1. Net growth 2. Global net g	rowth <b>3.</b> Churn	NET GROWTH	100%	1.	2.	3.
AI and Machine Learning Specialists				57	82	57
Data Analysts and Scientists				47	41	47
Business Development Professionals				18	19	18
General and Operations Managers				0	4	13
Data Entry Clerks				-16	-26	19
Administrative Assistants and Executive Secretaries		Ç.		-24	-20	24

Skills of increasing use by 2030

Skills of the most increase in use by 2030



Spain

Upskilling and reskilling	outlook						
<b>37</b>   Global 41 Would not need training by 2030	<b>31</b> Global 29 Would be upskilled in their current role	21 Global 19 Would be upskilled and redeployed	11 Global 11 Would be unlikely to upskill				
Human-machine frontier				Public policy			
	r predominantly people, pre Combination Global		a combination of both	Public policies to improve talent Share of respondents who agree t the talent availability Economy A Global		nas the greatest potential to	
Now			46% 33% 20%	Funding for reskilling and upskillin	<u> </u>	64%	55%
2030	_	_	48% 30% 22%	Flexibility on hiring and firing pract Provision of reskilling and upskillin	<b>A</b>	60%	44%
			33% 33% 34%	Changes to labour laws related to	<b>A</b>	56%	52%
				Flexibility on setting wages		49%	36%
				*		49%	38%
Key barriers for business	s transformation			Wage outlook			
Economy Global Skills gaps in the labour r Outdated or inflexible reg Organization culture and Inability to attract talent to	julatory framework resistance to change		ECONOMY         GLOBAL           66%         63%           51%         39%           44%         46%           42%         37%           32%         32%	Share of organizations projecting I percentage of the company's total Growing Global Similar	revenues	al 54% 4	
Talent availability outlool	k			DEI Actions			
	Å	al average	+100% 31%	Share of employers surveyed plan 55 I Global 51 Run comprehensive DEI training for managers and staff AI Strategy	55 I Global 42 Set DEI goals, targets or quotas	50 Global 48 Targeted recruitment, retenti progression initiatives	ion and
Talent retention of existing     20%   -100%	•	Δ.	+100% 36%	Share of employers surveyed plan capability and prevalence	ning to implement the stated str	68   Global 62	creasing

Hiring new people with skills to better work alongside AI

Hiring new people with skills to design Al tools and enhancements appropriate for the organization-specific skills

Reskilling and upskilling your existing workforce to better work alongside AI

Sweden

Regional average Income Group a	average				
INDICATORS			INDICATORS		
Labour force participation	(2023)	69%	Secondary Education Attainment	(2022)	84%
Vulnerable employment	(2022)	7%	Tertiary Education Attainment	(2022)	44%
Share of youth not in employment, education, or training (NEET)	(2023)	5%	Ease of finding skilled employees in local labour market	(2024)	5
Unemployment rate	(2023)	6%	Fill vacancies by hiring foreign	(000.1)	
Unemployment rate among workers with basic edu.	(2023)	18%	labour	(2024)	5
Unemployment rate among workers with advanced edu.	(2023)	4%	Country investment in mid-career training	(2022)	5

# Jobs and Skills outlook

10%   Giobal 22%	34%   Giobal 39%	95%   Giobal 83%	91%   Global 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	Al exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running Al programmes

#### Trend outlook

# Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

#### Economy Global

47% and connects	38% 34%
	21% 23%
	21% 17%
	17% 46%
	14% 21%

# Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy Global			
AI and information processing technologies (big data, VR, AR		Sensing, laser and optical technologies	21% 18%
Robots and autonomous systems	66% 58%	New materials and composites	17% 30%
Energy generation, storage and distribution	35% 41%	Quantum and encryption	7% 12%
Semiconductors and computing technologies	28% 20%	Satellites and space technologies	3% 9%
Jobs outlook		Skill outlook	

#### Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth	Job Growth	Job displacement	Net Growth	▲ Global net growth
1 Not growth	2 Global n	et growth 3 Churr		

1. Net growth 2. Global net gro	wth <b>3.</b> Churn					
		NET GROWTH		1.	2.	3.
	-100%	0	10	0%	<b>L</b>	0.
AI and Machine Learning						
Specialists			i i	67	82	67
opecialists			-			
Business Intelligence Analysts				6	18	6
,,,,,						
	i i					
Assembly and Factory Workers		1		-6	0	14
		<b>A</b>				
Accountants and Auditors				-12	-8	15
		<b>•</b>				
Accounting, Bookkeeping and				24	-18	24
Payroll Clerks				-24	-10	24
		-				
Data Entry Clerks				-27	-26	27
		1				

Skills of increasing use by 2030	
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Skills of the most increase in use by 2030

#### Economy A Global CORE SKILLS OF 2025 SKILLS OF INCREASING USE BY 2030 Resilience, flexibility and agility AI and big data 83% 87% Resilience, flexibility and agility Analytical thinking 78% 77% . Leadership and social influence Curiosity and lifelong learning 70% 77% Service orientation and customer service Networks and cybersecurity 68% 61% Technological literacy Creative thinking 57% 61%

Sweden

42   Global 41	32   Global 29	17   Global 19	10   Giobal 11				
Would not need training by 2030	Would be upskilled in their current role	Would be upskilled and redeployed	Would be unlikely to upskill				
Human-machine frontier				Public policy			
luman-machine front	<b>ier</b> ly predominantly people, pr		r a combination of both	Public policies to improve talent Share of respondents who agree t	•	and the erected potential to	inoroooc
	Combination Global			the talent availability	nat the particular public policy h	ias the greatest potential to	lilliciease
LL TASKS	Combination	Clobal		Economy A Global		ECONOMY	
low				Funding for reskilling and upskillin	g	Loonom	GLODA
			49% 37% 14%		A	62%	55%
			48% 30% 22%	Provision of reskilling and upskillin	g		
030			33% 41% 26%	Changes to labour laws related to	A remote work	48%	52%
			33% 33% 34%	Changes to labour laws related to	Terriole work	33%	36%
				Improvements to public education	systems		
					A	33%	47%
				Flexibility on hiring and firing pract	ices		
					*	29%	44%
Key barriers for busine	ess transformation			Wage outlook			
nare of organisations s	surveyed expecting the bar	iers will hinder their orgar	isation transformation ECONOMY GLOBAL	Wage trends Share of organizations projecting t percentage of the company's total	revenues		on as
hare of organisations s Economy A Global kills gaps in the labour nability to attract talent	surveyed expecting the barr market to the industry	iers will hinder their orgar		Share of organizations projecting t	revenues	al	<b>43% 2</b> 4
hare of organisations a Economy A Global kills gaps in the labour nability to attract talent Dutdated or inflexible re	r market to the industry egulatory framework	iers will hinder their organ	ECONOMY GLOBAL	Share of organizations projecting t percentage of the company's total	revenues	al 33% «	<b>43%</b> 24
Economy Global kills gaps in the labour nability to attract talent Dutdated or inflexible re	surveyed expecting the barr market to the industry	iers will hinder their organ	ECONOMY GLOBAL 666% 63% 38% 37% 35% 39%	Share of organizations projecting t percentage of the company's total	revenues	al 33% «	43% 24
hare of organisations s Economy Global kills gaps in the labour nability to attract talent butdated or inflexible re ack of adequate data	r market	iers will hinder their organ	ECONOMY GLOBAL 666% 63% 38% 37%	Share of organizations projecting t percentage of the company's total	revenues	al 33% «	<b>43%</b> 24
hare of organisations s Economy Global kills gaps in the labour hability to attract talent rutdated or inflexible re ack of adequate data	r market to the industry egulatory framework	iers will hinder their organ	ECONOMY GLOBAL 666% 63% 38% 37% 35% 39%	Share of organizations projecting t percentage of the company's total	revenues	al 33% «	<b>43%</b> 24
hare of organisations s Economy A Global kills gaps in the labour hability to attract talent rutdated or inflexible re ack of adequate data irganization culture an	surveyed expecting the barr r market to the industry egulatory framework and technical infrastructure d resistance to change	iers will hinder their organ	ECONOMY GLOBAL 66% 63% 38% 37% 35% 39% 35% 32%	Share of organizations projecting t percentage of the company's total	revenues	al 33% «	<b>43%</b> 24
hare of organisations a Economy A Global kills gaps in the labour nability to attract talent butdated or inflexible re ack of adequate data organization culture an Talent availability outlo	surveyed expecting the barr r market to the industry egulatory framework and technical infrastructure d resistance to change	iers will hinder their organ	ECONOMY GLOBAL 66% 63% 38% 37% 35% 39% 35% 32%	Share of organizations projecting t percentage of the company's total Growing Global Similar	revenues Global Declining Globa	al 33% 4 52% 4	<b>43% 24</b> 41% 8
hare of organisations s Economy Allobal kills gaps in the labour hability to attract talent butdated or inflexible re ack of adequate data Drganization culture an Talent availability outlo alent trend	surveyed expecting the barr r market to the industry egulatory framework and technical infrastructure d resistance to change		ECONOMY       GLOBAL         66%       63%         38%       37%         35%       39%         35%       32%         31%       46%	Share of organizations projecting t percentage of the company's total Growing Global Similar	revenues Global Declining Globa	al 33% 4 52% 4	<b>43% 24</b> 41% 8
hare of organisations a Economy A Global kills gaps in the labour hability to attract talent butdated or inflexible re ack of adequate data Organization culture an Talent availability outlo alent trend hare of respondents w	surveyed expecting the barr r market to the industry egulatory framework and technical infrastructure d resistance to change	bility to improve or worset	ECONOMY       GLOBAL         66%       63%         38%       37%         35%       39%         35%       32%         31%       46%	Share of organizations projecting t percentage of the company's total Growing Global Similar	revenues Global Declining Globa	al 33% 4 52% 4	<b>43% 24</b> 41% 8
hare of organisations a Economy A Global kills gaps in the labour nability to attract talent Dutdated or inflexible re ack of adequate data Organization culture an Talent availability outlo alent trend ihare of respondents w	surveyed expecting the barr r market to the industry egulatory framework and technical infrastructure d resistance to change ok tho expect their talent availa erage Worsening & Glob	bility to improve or worset	ECONOMY         GLOBAL           66%         63%           38%         37%           35%         39%           35%         32%           31%         46%	Share of organizations projecting t percentage of the company's total Growing Global Similar	revenues Global Declining Globa	al 33% 4 52% 4	43% 24 41% 8 re
hare of organisations a Economy A Global kills gaps in the labour hability to attract talent butdated or inflexible re ack of adequate data organization culture an <b>Talent availability outlo</b> <b>alent trend</b> hare of respondents w Improving A Global av alent availability when	surveyed expecting the barr r market to the industry egulatory framework and technical infrastructure d resistance to change d resistance to change who expect their talent availater range Worsening & Glob hiring	bility to improve or worset	ECONOMY       GLOBAL         66%       63%         38%       37%         35%       39%         35%       32%         31%       46%	Share of organizations projecting the company's total Growing Global Similar Growing Global Similar Company's total DEI Actions Share of employers surveyed plant G2 I Global 51 Run comprehensive DEI training for	revenues Global Declining Globa ning to implement the diversity, 57 I Global 42	al 33% 4 52% 4 equity and inclusion measu 57   Global 48 Targeted recruitment, retent	43% 24 41% 8 re
hare of organisations s Economy A Global kills gaps in the labour hability to attract talent intdated or inflexible re- ack of adequate data irganization culture an Falent availability outlot alent trend hare of respondents w Improving A Global av alent availability when 7% -100% alent development of e % -100%	surveyed expecting the barr r market to the industry egulatory framework and technical infrastructure d resistance to change d resistance to change ok tho expect their talent availater is a chart the chart availater is a cha	bility to improve or worset	ECONOMY       GLOBAL         66%       63%         38%       37%         35%       39%         35%       32%         31%       46%	Share of organizations projecting the percentage of the company's total Growing Global Similar Growing Global Similar Company's total Company'	revenues Global Declining Globa ning to implement the diversity, 57   Global 42 Set DEI goals, targets or quotas	equity and inclusion measu	143% 24 41% E re
hare of organisations s Economy Global kills gaps in the labour hability to attract talent utdated or inflexible re ack of adequate data rganization culture an <b>Talent availability outlo</b> <b>alent trend</b> hare of respondents w Improving & Global av alent availability when 7%100%	surveyed expecting the barr r market to the industry egulatory framework and technical infrastructure d resistance to change d resistance to change ok tho expect their talent availater is a chart the chart availater is a cha	bility to improve or worset	ECONOMY       GLOBAL         66%       63%         38%       37%         35%       39%         35%       32%         31%       46%	Share of organizations projecting t percentage of the company's total Growing Global Similar DEI Actions Share of employers surveyed plan 62   Global 51 Run comprehensive DEI training for managers and staff Al Strategy Share of employers surveyed plan	revenues Global Declining Globa ning to implement the diversity, 57   Global 42 Set DEI goals, targets or quotas	equity and inclusion measu	13% 24 11% 1 re

Hiring new people with skills to better work alongside AI

Transitioning people from jobs that Al will cause to decline, to other roles within your organization

Reskilling and upskilling your existing workforce to better work alongside AI

Switzerland

INDICATORS			INDICATORS		
Labour force participation	(2023)	68%	Secondary Education Attainment	(2023)	84%
Vulnerable employment	(2022)	10%	Tertiary Education Attainment	(2022)	40%
Share of youth not in employment, education, or training (NEET)	(2023)	7%	Ease of finding skilled employees in local labour market	<sup>3</sup> (2024)	4
Unemployment rate	(2023)	4%	Fill vacancies by hiring foreign	( ))	
Unemployment rate among workers with basic edu.	(2023)	7%	labour	(2024)	5
Unemployment rate among workers with advanced edu.	(2023)	3%	Country investment in mid-career training	(2022)	5

# Jobs and Skills outlook

14%   Giobal 22%	41%   Giobal 39%	97% I Global 83%	95%   Global 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	Al exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running Al programmes

#### Trend outlook

# Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

#### Economy Global

Broadening digital access		Increased geopolitical division and conflicts	38% 34%
Increased efforts and investments to reduce carbon	59% 47%	Slower economic growth	36% 42%
Increased efforts and investments to adapt to climate		Growing working-age populations	32% 24%
Increased focus on labour and social issues		Stricter anti-trust and competition regulations	21% 17%
Ageing and declining working- age populations		Increased restrictions to global trade and investment	19% 23%
Rising cost of living, higher prices or inflation		Increased government subsidies and industrial policy	13% 21%

# Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy Global AI and information processing 96% 86% technologies (big data, VR, AR... 60% Robots and autonomous systems 58% 36% 41% Energy generation, storage and distribution 32% New materials and composites 30% Semiconductors and computing 23% technologies 20% Jobs outlook

# Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth	b displacement	Net Growth				
1. Net growth 2. Global net gro	wth <b>3.</b> Churn -100%	NET GROWTH	100%	1.	2.	3.
Data Analysts and Scientists				36	41	36
AI and Machine Learning Specialists		-	•	31	82	31
Business Intelligence Analysts				13	18	30
Managing Directors and Chief Executives		ļ.		6	5	6
General and Operations Managers		I,		0	4	1
Administrative Assistants and Executive Secretaries		, <b>-</b>		-16	-20	25

Biotechnology and gene technologies	 15% 11%
Satellites and space technologies	13% 9%
Sensing, laser and optical technologies	13% 18%
Quantum and encryption	6% 12%

# Skill outlook

Skills of increasing use by 2030

Skills of the most increase in use by 2030

#### Economy 🔺 Global CORE SKILLS OF 2025 SKILLS OF INCREASING USE BY 2030 Resilience, flexibility and agility AI and big data 84% 92% Leadership and social influence Technological literacy 82% 67% Motivation and self-awareness Networks and cybersecurity 63% 73% Curiosity and lifelong learning Curiosity and lifelong learning 63% L 64% Empathy and active listening Resilience, flexibility and agility 60% 56%

Switzerland

Upskilling and reskilling	outlook					
40 Global 41 Would not need training by 2030	29 I Global 29 Would be upskilled in their current role	20 Global 19 Would be upskilled and redeployed	<b>11</b> Global 11 Would be unlikely to upskill			
Human-machine frontier				Public policy		
	r predominantly people, pre Combination Global		r a combination of both	the talent availability Economy  Global	that the particular public policy h	as the greatest potential to increase ECONOMY GLOBAL
Now			47%         35%         18%           48%         30%         22%	Provision of reskilling and upskilling Funding for reskilling and upskilling	▲	65% 52%
2030			33%         36%         31%           33%         33%         34%	Flexibility on hiring and firing prac	atices	57% 55% 54% 44%
				Improvements to public education Changes to immigration laws	n systems	49% 47%
Key barriers for business	s transformation			▲ Wage outlook		46% 26%
Economy Global Skills gaps in the labour r Organization culture and Inability to attract talent to Outdated or inflexible reg Lack of adequate data ar	resistance to change		ECONOMY         GLOBAL           66%         63%           51%         46%           45%         37%           34%         39%           32%         32%	ercentage of the company's tota		60% 35% 5% 52% 41% 8%
Talent availability outlool	k			DEI Actions		
	o expect their talent availat age Worsening & Globa ring		in five years	Share of employers surveyed plan	62   Global 51 Run comprehensive DEI training for	equity and inclusion measure
58%         -100%           Talent development of exit           3%         -100%	▲ isting workforce	Å	+100% <b>14%</b> +100% <b>58%</b>	Al Strategy	managers and staff	
Talent retention of existing	A	*	+100% 31%	Share of employers surveyed plan capability and prevalence 84 I Giobal 77	76 I Global 69	65   Giobal 62

Reskilling and upskilling your existing workforce to better work alongside Al

Hiring new people with skills to better work alongside AI

Hiring new people with skills to design Al tools and enhancements appropriate for the organization-specific skills

# 49.6

#### Contextual indicators

Thailand

Regional average Income Group	average							
NDICATORS				INDICATORS				
Labour force participation	(2023)		73%	Secondary Education Attainment	(2023)		39%	6
Vulnerable employment	(2022)		50%	Tertiary Education Attainment	(2023)		179	/6
Share of youth not in employment, education, or training (NEET)	(2023)		12%		. ,			5
Unemployment rate	(2023)		0%	Fill vacancies by hiring foreign	()			
Unemployment rate among workers with basic edu.	(2023)		0%	labour	(2024)			4
Unemployment rate among workers with advanced edu.	(2023)		1%	Country investment in mid-career training	(2022)		:	3

# Jobs and Skills outlook

12%   Global 22%	35%   Global 39%	97%   Giobal 83%	89%   Global 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	Al exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running Al programmes

# Trend outlook

# Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

Economy Global			
Increased efforts and investments to reduce carbon	<b>76%</b> 47%	Ageing and declining working-	54% 40%
Slower economic growth	73%		38% 46%
Broadening digital access	68% 60%		35% 23%
Rising cost of living, higher prices or inflation	68% 50%		32% 21%
Increased geopolitical division and conflicts	5 <b>7%</b> 34%		32% 24%
Increased efforts and investments to adapt to climate	54%	Stricter anti-trust and competition regulations	16% 17%

Skill outlook

Skills of increasing use by 2030

Skills of the most increase in use by 2030

# Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

 Economy
 Global

 Al and information processing technologies (big data, VR, AR...
 Image: Conomic data

 Robots and autonomous systems
 Image: Conomic data

 New materials and composites
 Image: Conomic data

 Energy generation, storage and distribution
 Image: Conomic data

 Sensing, laser and optical technologies
 Image: Conomic data

89% 86%	Semiconductors and computing technologies		27% 20%
76% 58%	Quantum and encryption		16% 12%
51% 30%	Biotechnology and gene technologies	_	14% 11%
<b>49%</b> 41%	Satellites and space technologies	-	11% 9%
27% 18%			

#### Key roles for business transformation

Jobs outlook

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

straotarar onann (percent)						
Net growth Job Growth Jo	b displacement	Net Growth				
1. Net growth 2. Global net grow	wth 3. Churr	1				
		NET GROWTH		1.	2.	3.
	-100%	0	100%			
AI and Machine Learning	1			41	82	41
Specialists				l	02	
Digital Transformation Specialist	s			20	35	20
Bigital Hanolomaton opeolator	.0				00	20
Managing Directors and Chief				5	5	5
Executives		ų		5	5	5
Assembly and Factory Workers				-3	0	23
Assembly and ractory workers				-3	0	23
Administrative Assistants and	1			-17	00	17
Executive Secretaries				-17	-20	17
Data Entry Clarks					00	
Data Entry Clerks				-23	-26	23

Economy A Global			
CORE SKILLS OF 2025		SKILLS OF INCREASING USE BY 2030	
Creative thinking		Al and big data	
	74%		93%
Analytical thinking		Analytical thinking	
<b>▲</b>	74%		72%
Resilience, flexibility and agility		Creative thinking	
	71%		71%
Leadership and social influence		Networks and cybersecurity	
	71%		67%
AI and big data		Leadership and social influence	
	55%		65%

Thailand

44   Global 41	26   Global 29	21   Global 19	9 Global 11		
Would not need training by 2030	Would be upskilled in their current role	Would be upskilled and redeployed	Would be unlikely to upskill		
Human-machine frontie	er			Public policy	
Human-machine frontion % of tasks completed by		redominantly technology, o	r a combination of both	Public policies to improve talent availability Share of respondents who agree that the particular public policy	/ has the greatest potential to increase
Human Global	Combination Global	Technology Global		the talent availability	
ALL TASKS					ECONOMY GLOBA
Now			44% 31% 25%	Funding for reskilling and upskilling	63% 55%
			48% 30% 22%	· · · · · · · · · · · · · · · · · · ·	
2030				▲	57% 44%
			33% <b>34% 33</b> % 33% <b>33%</b> 34%		
				Flexibility on setting wages	57% 52%
					40% 38%
				Improvements to public education systems	
					30% 47%
Key barriers for busines	ss transformation			Wage outlook	
Economy A Global	to the industry		ECONOMY GLOBAL	percentage of the company's total revenues	bal
Skills gaps in the labour	market		62% 37%		52% 41% 8
Inability to attract talent	to my firm	A	62% 63%		
			46% 27%		
-	ng of opportunities				
Insufficient understandir					
			41% 25%		
Insufficient understandir Organization culture and	d resistance to change				
▲ Organization culture and	<b>A</b>		41% 25% 35% 46%	DELActions	
A Organization culture and	<b>A</b>			DEI Actions	v oquity and inclusion moasuro
A Organization culture and Talent availability outloo Talent trend	 ⊳k	ability to improve or worser	35% 46%	DEI Actions Share of employers surveyed planning to implement the diversity	y, equity and inclusion measure
Corganization culture and Talent availability outloo Talent trend Share of respondents wh	 ⊳k		35% 46%		y, equity and inclusion measure
Corganization culture and Talent availability outloo Talent trend Share of respondents wh	ho expect their talent avail erage Worsening & Glo		35% 46%	Share of employers surveyed planning to implement the diversity           551 Global 42         522 I Global 51           Set DEI goals, targets or quotas         Run comprehensive DEI training for measures and staff	
Crganization culture and Talent availability outloo Talent trend Share of respondents wi Improving & Global ave Talent availability when P 42%100%	ho expect their talent avail erage Worsening & Glo niring		35% 46%	Share of employers surveyed planning to implement the diversity           551 Global 42         522 I Global 51           Set DEI goals, targets or quotas         Run comprehensive DEI training for measures and staff	48   Giobal 48 Targeted recruitment, retention and
Talent availability outloo Talent trend Share of respondents wi Improving & Global ave falent availability when H 12% _100%	ho expect their talent avail erage Worsening & Glo niring		35% 46%	Share of employers surveyed planning to implement the diversity 555 I Global 42 Set DEI goals, targets or quotas Al Strategy Share of employers surveyed planning to implement the stated s	48   Global 48 Targeted recruitment, retention and progression initiatives
Crganization culture and Talent availability outloo Talent trend Share of respondents wi Improving & Global ave Talent availability when h 42%100% Talent development of e	A ho expect their talent avail erage Worsening & Glo niring xisting workforce		35% 46% in five years +100% 29%	Share of employers surveyed planning to implement the diversity         551 Global 42         Set DEI goals, targets or quotas         Al Strategy         Share of employers surveyed planning to implement the stated scapability and prevalence	48 Global 48 Targeted recruitment, retention and progression initiatives

Reskilling and upskilling your existing workforce to better work alongside Al Hiring new people with skills to design AI tools and enhancements appropriate for the organization-specific skills

Hiring new people with skills to better work alongside AI

7.3

# Contextual indicators

INDICATORS				INDICATORS			
Labour force participation	(2023)		50%	Secondary Education Attainment	(2023)		44%
Vulnerable employment	(2022)		21%	Tertiary Education Attainment	(2023)	1	15%
Share of youth not in employment, education, or training (NEET)	(2023)		23%	Ease of finding skilled employees in local labour market	(2024)	1	4
Unemployment rate	(2023)		13%	Fill vacancies by hiring foreign	(000.4)		
Unemployment rate among workers with basic edu.	(2023)		11%	labour	(2024)		3
Unemployment rate among workers with advanced edu.	(2023)		21%	Country investment in mid-career training	(2022)		3

# Jobs and Skills outlook

20%   Giobal 22%	35%   Giobal 39%	86%   Giobal 83%	91%   Global 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	Al exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running Al programmes

#### Trend outlook

# Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

Economy Global				
Rising cost of living, higher prices or inflation		Increased efforts and investments to reduce carbon	32 <sup>4</sup> 47	
Broadening digital access	56% 60%	Increased focus on labour and social issues	324 46	
Increased efforts and investments to adapt to climate		Growing working-age populations	<b>24</b> 24	
Slower economic growth	<b>52%</b> 42%	Increased geopolitical division and conflicts	<b>24</b> 34	
Increased government subsidies and industrial policy		Stricter anti-trust and competition regulations	16 <sup>4</sup> 17	
Increased restrictions to global trade and investment		Ageing and declining working- age populations	8 40	

# Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy Global	
AI and information processing technologies (big data, VR, AR	
Robots and autonomous systems	

78% 86%	Semiconductors and computing technologies	2 <mark>2%</mark> 20%
61% 58%	Quantum and encryption	1 <mark>3%</mark> 12%
35% 41%	Sensing, laser and optical technologies	1 <mark>3%</mark> 18%
30% 30%	Biotechnology and gene technologies	<b>4%</b> 11%
	Skill outlook	

distribution

Jobs outlook

Key roles for business transformation

Energy generation, storage and

New materials and composites

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth	Job Growth	Job displacement	Net Growth	<ul> <li>Global net growth</li> </ul>
1. Net growth	2. Global ne	et growth 3. Chu	rn	

Net growth     Z. Global net grow	-100%	NET GROWTH	100%	1.	2.	3.
Big Data Specialists	- 100%	0	100%	27	113	27
Al and Machine Learning				I I		
Specialists				27	82	27
Robotics Engineers				23	37	23
Accountants and Auditors				0	-8	5
Assembly and Factory Workers				-4	0	36
Accounting, Bookkeeping and Payroll Clerks		Ļ		-21	-18	21

# Skills of increasing use by 2030

Resilience, flexibility and agility

Empathy and active listening

Skills of the most increase in use by 2030

# Economy A Global CORE SKILLS OF 2025 Leadership and social influence AI and big data Analytical thinking Creative thinking

SKILLS OF INCREASING USE BY 2030



Tunisia

Upskilling and reskilling	outlook							
47   Giobal 41 Would not need training by 2030	27   Global 29 Would be upskilled in their current role	17   Global 19 Would be upskilled and redeployed	10   Global 11 Would be unlikely to upskill				-	
Human-machine frontier	ŗ			Public policy				
	r predominantly people, pre Combination <b>Global</b>		a combination of both	Public policies to improve talent Share of respondents who agree t the talent availability Economy A Global	•	public policy has t		al to increas
Now				Funding for reskilling and upskillin	g		55	% 55%
2030			42%         24%         35%           48%         30%         22%	Flexibility on hiring and firing pract	tices		50	
			36%         23%         41%           33%         33%         34%	Changes to labour laws related to	remote work		41	% 36%
				Improvements to public education	systems		41	% 47%
				Wage subsidies			41	% 26%
Key barriers for busines	s transformation			Wage outlook				
Economy Global Skills gaps in the labour r Outdated or inflexible reg Organization culture and eack of adequate data an nability to attract talent to	ulatory framework resistance to change and technical infrastructure to the industry	ers win ninder mein organi	ECONOMY         GLOBAL           80%         63%           44%         39%           40%         46%           36%         32%           28%         37%	Share of organizations projecting I percentage of the company's total Growing Global Similar	revenues		6	3% <b>23%</b> 9
Talent availability outloo	k			DEI Actions				
	o expect their talent availal rage Worsening & Globa		in five years	Share of employers surveyed plan 57   Global 48	ning to implement		ty and inclusion m	
alent availability when hi 2% -100%	iring	Å	+100% <b>45%</b>	Targeted recruitment, retention and progression initiatives	Run comprehensiv managers and staf		Set DEI goals, targets	or quotas
alent development of ex	*		+100% <b>73%</b>	Al Strategy Share of employers surveyed plan capability and prevalence	nning to implemen	nt the stated strateg	y in response to A	l's increasin
alent retention of existing	g workforce	Å	+100% <b>50%</b>	71 I Global 69	62 I Global	62	52   Global 4	,

Hiring new people with skills to design AI tools and enhancements appropriate for the organization-specific skills

62 | Global 62 Hiring new people with skills to better work alongside Al

Re-orienting your organization to target new business opportunities created by Al

Türkiye

INDICATORS			INDICATORS		
Labour force participation	(2023)	55%	Secondary Education Attainment	(2023)	41%
Vulnerable employment	(2022)	25%	Tertiary Education Attainment	(2023)	22%
Share of youth not in employment, education, or training (NEET)	(2023)	22%		6 (2024)	4
Unemployment rate	(2023)	8%	Fill vacancies by hiring foreign	()	
Unemployment rate among workers with basic edu.	(2023)	7%	labour	(2024)	3
Unemployment rate among workers with advanced edu.	(2023)	8%	Country investment in mid-career training	(2022)	3

# Jobs and Skills outlook

29%   Giobal 22%	44%   Giobal 39%	88%   Giobal 83%	94%   Global 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	AI exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running AI programmes

#### Trend outlook

### Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

#### Economy Global

Broadening digital access	62% 60%	Increased geopolitical division and conflicts	<b>33%</b> 34%
Rising cost of living, higher prices or inflation	61% 50%	Increased restrictions to global trade and investment	30% 23%
Increased efforts and investments to reduce carbon		Ageing and declining working- age populations	29% 40%
Increased efforts and investments to adapt to climate	<b>49%</b> 41%	Increased government subsidies and industrial policy	23% 21%
Increased focus on labour and social issues	49% 46%	Stricter anti-trust and competition regulations	<mark>22%</mark> 17%
Slower economic growth		Growing working-age populations	20% 24%

Skill outlook

Skills of increasing use by 2030

# Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

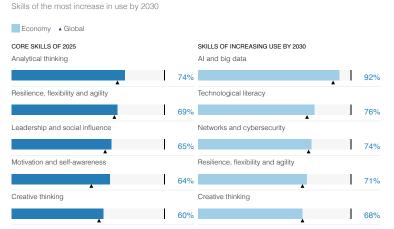
Economy Global	
AI and information processing technologies (big data, VR, AR	79% 86%
Robots and autonomous systems	63% 58%
Energy generation, storage and distribution	60% 41%
New materials and composites	40% 30%
Semiconductors and computing technologies	21% 20%
Jobs outlook	

79% 86%	Sensing, laser and optical technologies	20% 18%
63% 58%	Quantum and encryption	13% 12%
60% 41%	Biotechnology and gene technologies	<mark>8%</mark> 11%
40% 30%	Satellites and space technologies	6% 9%

#### Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth         Job Gro		Net Growth A Global net growth				
1. Net glowin 2. Global het glo	-100%	NET GROWTH	100%	1.	2.	з.
Sustainability Specialists				41	33	41
AI and Machine Learning Specialists				40	82	40
Business Development Professionals			-	28	19	29
Business Intelligence Analysts				20	18	21
Managing Directors and Chief Executives		l,		0	5	0
Accountants and Auditors				-4	-8	29



Türkiye

42 Global 41	28   Global 29	19   Global 19	11   Global 11			
Would not need training by	Would be upskilled in their	Would be upskilled and	Would be unlikely to upskill			
2030	current role	redeployed				
Human-machine frontier	r			Public policy		
uman-machine frontie			r a combination of both	Public policies to improve taler	•	the supplext potential to increase
	predominantly people, pro		r a complination of both	the talent availability	that the particular public policy has	s the greatest potential to increa
Human Global	Combination Global	Global		Economy A Global		ECONOMY GLO
ow				Wage subsidies		ECONOMI GLOI
			49% 29% 22%	<b>A</b>		49% 26
			48% 30% 22%	Changes to labour laws related to	o remote work	
030			000/ 000/ 050/	A		48% 369
			36%         29%         35%           33%         33%         34%	Funding for reskilling and upskilling	ng	48% 55
				Provision of reskilling and upskilli	na	40% 33
				Jan 199		43% 529
				Improvements to public educatio	n systems	
					*	39% 47
Key barriers for busines	s transformation			Wage outlook		
ansformation barriers	;			Wage trends		
nare of organisations su	irveyed expecting the barr	iers will hinder their organ	isation transformation		the share of wages and other form	s of workers' compensation as
Economy 🔺 Global			ECONOMY GLOBAL	percentage of the company's tota		
kills gaps in the labour r	market			Growing Global Similar	Global Declining Global	
		A	66% 63%			53% 41% 52% 41%
ability to attract talent to	o the industry		100/ 070/			
hortage of investment c	anital		42% 37%			
lonage of investment c	apitai		40% 26%			
ability to attract talent to	o my firm					
			38% 27%			
ack of adequate data ar	nd technical infrastructure					
	<b>A</b>		36% 32%			
Falent availability outlool	k			DEI Actions		
alent trend				Share of employers surveyed pla	nning to implement the diversity, eq	uity and inclusion measure
	o expect their talent availa		n in five years	50	- 4	40
Improving	rage Worsening A Glob	al average		59 I Global 48	54   Global 51	46   Global 39
alent availability when hi	iring			Targeted recruitment, retention and	Run comprehensive DEI training for	Pay equity reviews and salary audits
-100%	*	A	+100% 19%	progression initiatives	managers and staff	
alent development of ex	isting workforce			AI Strategy		
-100%	A		+100% <b>56%</b>	Share of employers surveyed pla	nning to implement the stated strate	egy in response to AI's increasi
alent retention of existing	g workforce			capability and prevalence	O P	
6% -100%	-		+100% 33%			
	A	<b>A</b>		78   Global 69	70 I Global 77	62   Global 62
				Hiring new people with skills to design AI	Reskilling and upskilling your existing	Hiring new people with skills to bette
				tools and enhancements appropriate for the organization-specific skills	workforce to better work alongside Al	work alongside Al

Hiring new people with skills to design Al tools and enhancements appropriate for the organization-specific skills

Regional average Income Group	average				
INDICATORS			INDICATORS		
Labour force participation	(2023)	84%	Secondary Education Attainment	(2022)	74%
Vulnerable employment	(2022)	1%	Tertiary Education Attainment	(2022)	54%
Share of youth not in employment, education, or training (NEET)	(2023)	9%	Ease of finding skilled employees in local labour market	(2024)	5
Unemployment rate	(2023)	2%	Fill vacancies by hiring foreign	(000.4)	 
Unemployment rate among workers with basic edu.	(2023)	1%	labour	(2024)	6
Unemployment rate among workers with advanced edu.	(2023)	2%	Country investment in mid-career training	(2022)	5

1/2

# Jobs and Skills outlook

21%   Giobal 22%	41%   Giobal 39%	85%   Giobal 83%	87%   Global 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	AI exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running AI programmes

#### Trend outlook

# Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

Economy Global

Broadening digital access	76% 60%	
Increased efforts and investments to adapt to climate	59% 41%	b Increased restrictions to global 30% 23%
Increased efforts and investments to reduce carbon	56%	
Rising cost of living, higher prices or inflation		Ageing and declining working- age populations
Increased geopolitical division and conflicts	41%	6 Growing working-age 17% 24%
Increased focus on labour and social issues	38%	5 Stricter anti-trust and competition 12% 6 regulations 17%

Skills of increasing use by 2030

# Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

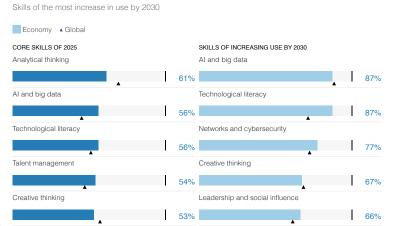
Economy Global		
Al and information processing technologies (big data, VR, AR	91% 86%	Semiconducte technologies
Robots and autonomous systems	66% 58%	Satellites and technologies
Energy generation, storage and distribution	48% 41%	Quantum and
New materials and composites	25% 30%	Biotechnology technologies
Sensing, laser and optical technologies	22% 18%	
Jobs outlook		Skill outlook

<ul><li>Semiconductors and computing</li><li>technologies</li></ul>	20% 20%
<ul><li>Satellites and space</li><li>technologies</li></ul>	14% 9%
Quantum and encryption	14% 12%
<ul> <li>Biotechnology and gene</li> <li>technologies</li> </ul>	8% 11%

#### Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

ou dotarar on ann (poroont)						
Net growth Job Growth Job	b displacement	Net Growth				
1. Net growth 2. Global net gro	wth <b>3.</b> Chur	'n				
		NET GROWTH		1.	2.	3.
	-100%	0	100%			
AI and Machine Learning				47	82	47
Specialists	-				02	
Business Intelligence Analysts				22	18	22
Dusiness intelligence Analysis				22	10	22
Human Resources Specialists				8	5	12
Human Resources Specialists		, IÌ		•	5	12
Managing Directors and Chief					-	
Executives		l II.		0	5	6
		_				
Accountants and Auditors		1		-4	-8	13
		•				
Data Entry Clerks				-27	-26	30



United Arab Emirates

Upskilling and reskilling	outlook													
<b>44</b> Global 41 Would not need training by 2030	28   Global 29 Would be upskilled in their current role	18   Global 19 Would be upskilled and redeployed	10   Global 11 Would be unlikely to upskill											
Human-machine frontier					olicy									
	r predominantly people, pre Combination Global		or a combination of both	Share of r the talent	licies to in espondents availability y ▲ Global	s who agr		-		lic policy	has the gr		otential to	
low	-		43%         27%         31%           48%         30%         22%		or reskilling of reskilling							1	63%	55%
030			26%         31%         43%           33%         33%         34%										55% 45%	52% 44%
					to labour la ents to put								37%	36%
Key barriers for busines	s transformation			Wage ou	tlook			•					0170	41 /0
Economy A Global Skills gaps in the labour r Organization culture and nability to attract talent to Dutdated or inflexible reg nsufficient understanding	resistance to change o the industry gulatory framework		ECONOMY         GLOBAL           72%         63%           47%         46%           42%         37%           34%         39%           28%         25%		rganizatior le of the co Globa	mpany's t	total reve	enues					33%	8% 59 41% 8
Talent availability outloo	k			DEI Actio	ns									
	A	al average	+100% 40%	49 I Targeted re progressio AI Strate Share of e	ecruitment, rete n initiatives gy employers s	ention and		45 I c	ilobal <b>42</b> s, targets or	quotas	4	O Glo a compreher nagers and	bal <b>51</b> nsive DEI tra staff	ining for
Talent retention of existing       6%       -100%	g workforce		+100% 44%		and preval Global 77	ience	(	5 <b>8</b> ⊺₀	ilobal <b>69</b>		5	5   GIO	bal <b>47</b>	

Transitioning people from jobs that AI will cause to decline, to other roles within your organization

Hiring new people with skills to design Al tools and enhancements appropriate for the organization-specific skills

Reskilling and upskilling your existing workforce to better work alongside AI

INDICATORS			INDICATORS		
Labour force participation	(2023)	64%	Secondary Education Attainment	(2023)	79%
Vulnerable employment	(2022)	14%	Tertiary Education Attainment	(2023)	42%
Share of youth not in employment, education, or training (NEET)	(2023)	13%	Ease of finding skilled employees in local labour market	6 (2024)	5
Unemployment rate	(2023)	3%	Fill vacancies by hiring foreign	(000.4)	
Unemployment rate among workers with basic edu.	(2023)	4%	1-1	(2024)	5
Unemployment rate among workers with advanced edu.	(2023)	2%	Country investment in mid-career training	(2022)	4

1/2

# Jobs and Skills outlook

23%   Giobal 22%	33%   Global 39%	95%   Giobal 83%	93%   Global 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	Al exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running Al programmes

### Trend outlook

# Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

Economy		Global
---------	--	--------

Broadening digital access		Rising cost of living, higher prices or inflation	47% 50%
Increased efforts and investments to reduce carbon	57% 47%	Increased focus on labour and social issues	43% 46%
Increased geopolitical division and conflicts	56% 34%	Growing working-age populations	28% 24%
Increased efforts and investments to adapt to climate	56% 41%	Increased restrictions to global trade and investment	26% 23%
Slower economic growth	51% 42%	Increased government subsidies and industrial policy	23% 21%
Ageing and declining working- age populations	48% 40%	Stricter anti-trust and competition regulations	20% 17%

Skill outlook

Skills of increasing use by 2030

# Technology trends

Jobs outlook

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

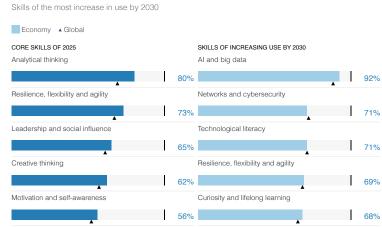
Economy Global		
Al and information processing technologies (big data, VR, AR	92% 86%	Sens techr
Robots and autonomous systems	62% 58%	Quar
Energy generation, storage and distribution	40% 41%	Biote techr
Semiconductors and computing technologies	33% 20%	Satel techr
New materials and composites	32% 30%	

<ul> <li>Sensing, laser and optical</li> <li>technologies</li> </ul>		24% 18%
Quantum and encryption		23% 12%
<ul><li>Biotechnology and gene</li><li>technologies</li></ul>		15% 11%
<ul> <li>Satellites and space</li> <li>technologies</li> </ul>	-	10% 9%

#### Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth	Job Growth	Job displacement	Net Growth   Global net growth				
1. Net growth	2. Global ne	et growth <b>3.</b> Churn	I				
		10001	NET GROWTH	1000	1.	2.	з.
		-100%	0	100%			
Big Data Spec	cialists				319	113	320
AI and Machir	ne Learning				151	82	151
Specialists					131	02	131
Data Analysts	and Scientis	ts			29	41	29
Ducino con Dou	alammant		•				
Business Dev Professionals	elopment				14	19	15
General and (	Operations		<b>A</b>				
Managers			<b>U</b>		-4	4	9
Data Entry Cle	erks				-26	-26	26



United Kingdom

Upskilling and reskilling	outlook					
35   Global 41 Would not need training by 2030	32   Global 29 Would be upskilled in their current role	22 Global 19 Would be upskilled and redeployed	12   Global 11 Would be unlikely to upskill		_	
Human-machine frontie	r			Public policy		
	Predominantly people, pre		a combination of both 45% 33% 22% 48% 30% 22% 29% 36% 34% 33% 33% 34%	the talent availability Economy A Global Provision of reskilling and upskillin Flexibility on hiring and firing prac	g g g g	ECONOMY         GLOBAL           55%         52%           51%         55%           46%         47%           42%         26%
Key barriers for busines	es transformation			▲ Wage outlook		42% 20%
Economy Global Skills gaps in the labour of Organization culture and Lack of adequate data a Inability to attract talent to Outdated or inflexible reg	resistance to change Ind technical infrastructure to the industry		ECONOMY         GLOBAL           62%         63%           46%         46%           40%         32%           38%         37%           30%         39%	percentage of the company's tota		42% 48% 10% 52% 41% 8%
Talent availability outloo	k			DEI Actions		
Improving & Global ave Talent availability when h 46% -100% Talent development of ex 5% -100% Talent retention of existin	kisting workforce		+100% 26%	Share of employers surveyed plan 58 I Global 51 Run comprehensive DEI training for managers and staff AI Strategy Share of employers surveyed plan capability and prevalence	58 Global 48 Targeted recruitment, retention and progression initiatives	52   Global 42 Set DEI goals, targets or quotas
-100%	Å	*	+100% 31%	90   Global 77	74   Global 69	66   Global 62

Reskilling and upskilling your existing workforce to better work alongside Al

74 | Global 69 Hiring new people with skills to design Al tools and enhancements appropriate for the organization-specific skills

Hiring new people with skills to better work alongside AI

# United States of America

# Contextual indicators

INDICATORS			INDICATORS			
Labour force participation	(2023)	64%	Secondary Education Attainment	(2023)	95	5%
Vulnerable employment	(2022)	4%	Tertiary Education Attainment	(2023)	49	3%
Share of youth not in employment, education, or training (NEET)	(2023)	11%	Ease of finding skilled employees in local labour market	(2024)		5
Unemployment rate	(2023)	3%	Fill vacancies by hiring foreign (; labour	(222.1)		
Unemployment rate among workers with basic edu.	(2023)	5%		(2024)		5
Unemployment rate among workers with advanced edu.	(2023)	2%	Country investment in mid-career training	(2022)		5

1/2

#### Jobs and Skills outlook

23%   Giobal 22%	35%   Giobal 39%	97%   Giobal 83%	94%   Global 88%			
Labour-market churn	Skill disruption	Organizations with DEI priorities	Al exposure			
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running Al programmes			

### Trend outlook

# Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

#### Economy Global

Broadening digital access		Ageing and declining working- age populations 47%
Increased efforts and investments to reduce carbon		Increased focus on labour and 42% 46%
Increased efforts and investments to adapt to climate	55%	
Increased geopolitical division and conflicts	52% 34%	Growing working-age 26% 24%
Slower economic growth	51% 42%	5
Rising cost of living, higher prices or inflation	49% 50%	Stricter anti-trust and competition regulations 20%

33% 30% 31% 20%

# Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy Global	
AI and information processing technologies (big data, VR, AR	
Robots and autonomous systems	
Energy generation, storage and distribution	
New materials and composites	
Semiconductors and computing technologies	

94% 86%	Sensing, laser and optical technologies	23% 18%
64% 58%	Quantum and encryption	19% 12%
<b>41%</b> 41%	Biotechnology and gene technologies	15% 11%
33% 30%	Satellites and space technologies	10% 9%

#### Key roles for business transformation

Jobs outlook

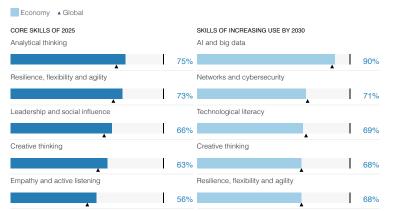
Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth Job Growth	Job displacement	Net Growth	1			
1. Net growth 2. Global net g	rowth <b>3.</b> Churn					
		NET GROWTH		1.	2.	3.
	-100%	0	100%			
AI and Machine Learning				142	82	142
Specialists			•	142	02	142
			_			
Data Analysts and Scientists				40	41	41
Sustainability Specialists				34	33	34
Business Development						
Professionals				14	19	15
General and Operations		-		-		
Managers				-2	4	11
Administrative Assistants and		_				
Executive Secretaries				-19	-20	21

# Skill outlook

Skills of increasing use by 2030

Skills of the most increase in use by 2030



United States of America

Upskilling and reskilling	outlook											
39 Global 41 Would not need training by 2030	29   Global 29 Would be upskilled in their current role	21   Global 19 Would be upskilled and redeployed	U Global 11 Would be unlikely to upskill									
Human-machine frontie	r			Public po	olicy							
	er y predominantly people, pre Combination Global		r a combination of both		esponden availability	ts who agr	lent availab	-	lic policy h	ias the gr	reatest potential to	o increase GLOBAL
Now			44%         33%         23%           48%         30%         22%			g and upsk g and upsk	_				55%	52%
			30%         36%         34%           33%         33%         34%				ation systems	•			48%	44%
				Changes	to labour la	aws related	d to remote v	vork			41%	47% 36%
Key barriers for busines	ss transformation			Wage ou	tlook							
Economy A Global Skills gaps in the labour Organization culture and Inability to attract talent t	arveyed expecting the barr market I resistance to change to the industry and technical infrastructure	ers will hinder their organ	ECONOMY         GLOBAL           58%         63%           43%         46%           41%         37%           37%         32%           31%         39%		rganizatio je of the co		total revenue	s			41% 52%	48% 11%
Talent availability outloo	ok			DEI Actio	ons							
	kisting workforce	al average	+100% 27%	62 I Targeted re progressio AI Strate Share of e	Global 48 ecruitment, ret n initiatives gy	ention and	B1 Run cor manage	Global 51 nprehensive DEI rrs and staff	training for	_ <u>5</u>	10 Inclusion measures 10 Inclusion measures 10 Inclusion 12 Inclusion	uotas
<b>21%</b> -100%	- 	*	+100% 35%	87 I	Global 77		73	Global 69		6	8   Global 62	

Reskilling and upskilling your existing workforce to better work alongside Al

Hiring new people with skills to better work alongside AI

Hiring new people with skills to design AI tools and enhancements appropriate for the organization-specific skills

# 19.8

### Contextual indicators

Uzbekistan

Regional average Income Group	average					
INDICATORS				INDICATORS		
Labour force participation	(2020)		62%	Secondary Education Attainment	(2022)	97%
Vulnerable employment	(2022)		34%	Tertiary Education Attainment	(2022)	62%
Share of youth not in employment, education, or training (NEET)			NA	Ease of finding skilled employees in local labour market	(2024)	 4
Unemployment rate	(2020)		4%	Fill vacancies by hiring foreign	(000 ()	
Unemployment rate among workers with basic edu.			NA	labour	(2024)	4
Unemployment rate among workers with advanced edu.	(2020)		1%	Country investment in mid-career training	(2021)	5

# Jobs and Skills outlook

30%   Giobal 22%	36%   Giobal 39%	60%   Giobal 83%	84%   Global 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	Al exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running Al programmes

#### Trend outlook

# Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

#### Economy Global

Broadening digital access	51% 60%	Increased geopolitical division and conflicts	27% 34%
Rising cost of living, higher prices or inflation	51% 50%	Increased restrictions to global trade and investment	19% 23%
Increased focus on labour and social issues	41% 46%	Increased efforts and investments to adapt to climate	16% 41%
Growing working-age populations	35% 24%	Increased efforts and investments to reduce carbon	14% 47%
Increased government subsidies and industrial policy		Ageing and declining working- age populations	14% 40%
Slower economic growth	30% 42%	Stricter anti-trust and competition regulations	5% 17%

Skill outlook

Skills of increasing use by 2030

# Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy Global	
Al and information processing technologies (big data, VR, AR	
Robots and autonomous systems	
New materials and composites	
Energy generation, storage and distribution	
Quantum and encryption	

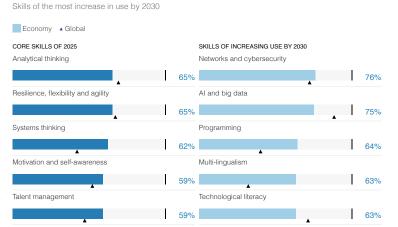
69% 86%	Biotechnology and gene technologies	17% 11%
<b>47%</b> 58%	Sensing, laser and optical technologies	11% 18%
36% 30%	Semiconductors and computing technologies	11% 20%
33% 41%	Satellites and space technologies	<mark>3%</mark> 9%
19% 12%		

#### Key roles for business transformation

Jobs outlook

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and

structural churn (percent)						
Net growth	b displacement	Net Growth				
1. Net growth 2. Global net grow	wth 3. Churn	I				
		NET GROWTH		1.	2.	з.
	-100%	0	100%			
Business Intelligence Analysts				21	18	21
		· · ·				
University and Higher Education	1			21	16	23
Teachers						
Lawyers				11	2	13
				l		
Accountants and Auditors				6	-8	27
		A .				
Accounting, Bookkeeping and				-13	-18	21
Payroll Clerks	I					
Administrative Assistants and				-27	-20	27
Executive Secretaries		1			20	21



Uzbekistan

52   Global 41	22   Global 29	14   Global 19	12   Global 11				
Would not need training by 2030	Would be upskilled in their current role	Would be upskilled and redeployed	Would be unlikely to upskill				
Human-machine frontie	r			Public policy			
	er v predominantly people, pre Combination Global		or a combination of both	the talent availability Economy A Global	that the particular public policy ha		o increas Y GLOBA
ow			43%         30%         26%           48%         30%         22%	Flexibility on hiring and firing practice of the second se	<b>A</b>	57%	44%
030			29% <b>33% 38%</b> 33% <b>33%</b> 34%	Provision of reskilling and upskilli	ng	57%	47%
				Flexibility on setting wages		37%	38%
				Changes to labour laws related to	o remote work	33%	36%
Key barriers for busines	ss transformation			Wage outlook			
ransformation barriers hare of organisations su Economy A Global	s urveyed expecting the barr	iers will hinder their orgar	isation transformation	Wage trends Share of organizations projecting percentage of the company's tota	the share of wages and other form al revenues	ns of workers' compense	ation as
kills gaps in the labour	market			Growing Global Similar	Global Declining Global	69%	29%
rganization culture and	resistance to change		78%         63%           30%         46%				41%
utdated or inflexible req	gulatory framework		30% 39%				
hortage of investment of hortage of investment of hortage of investment of hortage of ho			30% 26%				
			27% 37%				
Talent availability outloo	vk			DEI Actions			
alent trend hare of respondents wh	no expect their talent availa	bility to improve or worse	n in five years		nning to implement the diversity, ea		sure
Improving A Global ave	erage Worsening & Glob	al average		47   Global 48	<b>33</b> I Global 39	27   Global 51	
alent availability when h 7% -100%	iring		+100% 43%	Targeted recruitment, retention and progression initiatives	Pay equity reviews and salary audits	Run comprehensive DEI managers and staff	raining for
alent development of e>	kisting workforce			AI Strategy			
-100%	*		100% 84%		nning to implement the stated strat	tegy in response to Al's	increasin
alent retention of existin	g workforce		.1000 710/	capability and prevalence			
-100%			+100% 71%	0.5	50	50	

65 I Global 69 Hiring new people with skills to design Al tools and enhancements appropriate for the organization-specific skills 58 Global 41 Downsizing workforce where Al can replicate people's work

52 | Global 77 Reskilling and upskilling

Reskilling and upskilling your existing workforce to better work alongside Al

### Contextual indicators

Viet Nam

Regional average Income Group	average						
INDICATORS			INDICATORS				
Labour force participation	(2023)	79%	Secondary Education Attainment	(2023)		39	%
Vulnerable employment	(2022)	52%	Tertiary Education Attainment	(2023)		15	%
Share of youth not in employment, education, or training (NEET)	(2023)	11%	Ease of finding skilled employees in local labour market				5
Unemployment rate	(2023)	1%	Fill vacancies by hiring foreign	(22.2.4)			
Unemployment rate among workers with basic edu.	(2023)	1%	labour	(2024)			4
Unemployment rate among workers with advanced edu.	(2023)	2%	Country investment in mid-career training	(2022)			4

### Jobs and Skills outlook

16%   Giobal 22%	37%   Giobal 39%	87%   Giobal 83%	96%   Giobal 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	Al exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running Al programmes

### Trend outlook

### Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

### Economy Global

Broadening digital access	69 <sup>4</sup> 60	
Increased efforts and investments to reduce carbon	66' 47	b Increased focus on labour and 41% social issues 46%
Rising cost of living, higher prices or inflation	59 <sup>.</sup> 50	
Slower economic growth	48	Growing working-age     21%       populations     24%
Ageing and declining working- age populations	48 <sup>*</sup> 40	
Increased restrictions to global trade and investment	45'	

20%

### Technology trends

### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy Global	
AI and information processing technologies (big data, VR, AR	
Robots and autonomous systems	
Energy generation, storage and distribution	
New materials and composites	
Semiconductors and computing technologies	
Jobs outlook	

76% 86%	Quantum and encryption	10% 12%
72% 58%	Sensing, laser and optical technologies	<b>7%</b> 18%
59% 41%	Biotechnology and gene technologies	<b>7%</b> 11%
52% 30%	Satellites and space technologies	3% 9%
24%		

### Key roles for business transformation

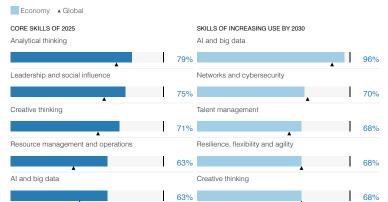
Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

structural enann (percent)						
Net growth Job Growth	lob displacement	Net Growth				
1. Net growth 2. Global net gr	owth 3. Chur	n				
		NET GROWTH		1.	2.	3.
	-100%	0	100%			
AI and Machine Learning						
Specialists				36	82	36
E-commerce Specialists				26	20	26
				20	20	20
Business Development						
Professionals				24	19	24
Managing Directors and Chief					_	
Executives				8	5	8
General and Operations		-				-
Managers		ų.		5	4	5
Assembly and Factory Worker				-7	0	20
Assembly and Factory Worker	5			-/	0	20

### Skill outlook

### Skills of increasing use by 2030

Skills of the most increase in use by 2030



Viet Nam

Upskilling and reskilling	outlook					
<b>41</b>   Global 41	26   Global 29	19 Global 19	14 Giobal 11			
Nould not need training by 2030	Would be upskilled in their current role	Would be upskilled and redeployed	Would be unlikely to upskill			
luman-machine frontie	r			Public policy		
uman-machine frontie				Public policies to improve tal		
	v predominantly people, pro		r a combination of both	the talent availability	ee that the particular public policy ha	as the greatest potential to increas
Human Global	Combination Global	Global		Economy A Global		ECONOMY GLOB
0W				Flexibility on hiring and firing pr	actices	ECONOMY GLOB
			40% 34% 25%	,	A	59% 44%
			48% 30% 22%	Funding for reskilling and upski	illing	
)30			25% 37% 38%	<ul> <li>Changes to immigration laws</li> </ul>	*	59% 55%
			33% 33% 34%			50% 26%
				Changes to pension schemes a	and retirement ages	
				<b>A</b>		46% 25%
				Wage subsidies		
						41% 26%
ey barriers for busines	s transformation			Wage outlook		
ansformation barriers	S			Wage trends		
	urveyed expecting the barr	iers will hinder their organ	isation transformation	Share of organizations projectir percentage of the company's to	ng the share of wages and other forr	ns of workers' compensation as
Economy A Global			ECONOMY GLOBAL		r Global Declining Global	
kills gaps in the labour	market			arowing arobai		
eck of adequate data a	nd technical infrastructure	<b>A</b>	62% 63%			59% 36% 52% 41%
			55% 32%			
rganization culture and	resistance to change					
	<b>A</b>		41% 46%			
sufficient understandin	g of opportunities					
A stated or inflorible re-	n datan i francusarli		41% 25%			
utdated or inflexible req			41% 39%			
Talent availability outloo	▲ 0k			DEI Actions		
alent trend				Share of employers surveyed p	lanning to implement the diversity, e	quity and inclusion measure
	no expect their talent availa	bility to improve or worser	n in five years		g p t and an an another only o	
Improving A Global ave	erage Worsening 🔺 Glob	al average		61 I Giobal 42	61 I Global 48	57   Global 51
alent availability when h	iring			Set DEI goals, targets or quotas	Targeted recruitment, retention and	Run comprehensive DEI training for
-100%	A		+100% 30%		progression initiatives	managers and staff
lent development of ex	kisting workforce			AI Strategy		
-100%			+100% 77%		lanning to implement the stated stra	iteav in response to Al's increasin
	-		-	capability and prevalence	stated stre	
lent retention of existin	g workforce					



68 I Global 62 Hiring new people with skills to better work alongside Al 68 | Global 47

Transitioning people from jobs that AI will cause to decline, to other roles within your organization

### Contextual indicators

Zimbabwe

Regional average Income Group	average								
INDICATORS					INDICATORS				
Labour force participation	(2023)			76%	Secondary Education Attainment	(2022)		(	66%
Vulnerable employment	(2022)			61%	Tertiary Education Attainment	(2022)			17%
Share of youth not in	(2023)			0000					
employment, education, or training (NEET)	(2023)			30%	30% Ease of finding skilled employees in local labour market	(2024)			5
Unemployment rate	(2023)			8%	Fill vacancies by hiring foreign		 _		
Unemployment rate among workers with basic edu.	(2023)			7%	labour	(2024)			4
Unemployment rate among workers with advanced edu.	(2023)			5%	Country investment in mid-career training	(2022)			4

### Jobs and Skills outlook

16%   Global 22%	47%   Global 39%	100%   Global 83%	91%   Global 88%
Labour-market churn	Skill disruption	Organizations with DEI priorities	AI exposure
Five-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	Share of organizations running AI programmes

### Trend outlook

### Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

Economy Global			
Rising cost of living, higher prices or inflation		Increased government subsidies and industrial policy	28% 21%
Broadening digital access	61% 60%	Increased restrictions to global trade and investment	22% 23%
Increased focus on labour and social issues		Growing working-age populations	22% 24%
Slower economic growth		Ageing and declining working- age populations	17% 40%
Increased efforts and investments to adapt to climate	<b>44%</b> 41%	Increased geopolitical division and conflicts	11% 34%
Increased efforts and investments to reduce carbon	39% 47%		

### Technology trends

### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Economy Global	
AI and information processing technologies (big data, VR, AR	72% 86%
Energy generation, storage and distribution	67% 41%
Robots and autonomous systems	50% 58%
Satellites and space technologies	28% 9%
New materials and composites	17% 30%

<ul><li>Semiconductors and computing</li><li>technologies</li></ul>	17% 20%
<ul><li>Sensing, laser and optical</li><li>technologies</li></ul>	11% 18%
<ul><li>Biotechnology and gene</li><li>technologies</li></ul>	11% 11%
Quantum and encryption	6% 12%

### Key roles for business transformation

Jobs outlook

Administration Managers

Accountants and Auditors

General and Operations

Managers

Assembly and Factory Workers

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth Job Growth	Job displacement	Net Growth	▲ Global net growth			
1. Net growth 2. Global net g	rowth <b>3.</b> Churr	ı				
		NET GF	ROWTH		1.	2.
	-100%	(	D	100%		
Sustainability Specialists					22	33
Environmental Protection					18	28
Professionals					10	20
Business Services and					٥	7

Skill outlook

З.

22

18

-7 29

9

0 10

-8 12

-9 4

### Skills of increasing use by 2030

Skills of the most increase in use by 2030

Economy A Global CORE SKILLS OF 2025 SKILLS OF INCREASING USE BY 2030 Motivation and self-awareness Resilience, flexibility and agility 75% 82% Resilience, flexibility and agility Systems thinking 67% 82% Service orientation and customer service Creative thinking 58% 80% Analytical thinking AI and big data 58% 80% Technological literacy Creative thinking 78% 58%

Future of Jobs Report 2025 220

Zimbabwe

Upskilling and reskilling	outlook					
51   Global 41 Would not need training by 2030	23 Global 29 Would be upskilled in their current role	16   Global 19 Would be upskilled and redeployed	10   Global 11 Would be unlikely to upskill			
Human-machine frontier	r			Public policy		
	er predominantly people, pre Combination Global		r a combination of both	Public policies to improve talen Share of respondents who agree to the talent availability Economy A Global		as the greatest potential to increase
Now				Improvements to public education	n systems	
			54%         25%         20%           48%         30%         22%		remote work	70% 47%
2030			30%         29%         42%           33%         33%         34%	r toxability off ootallig tragoo		60% 36% 50% 38%
				Funding for reskilling and upskilling	g	50% 55%
				Provision of reskilling and upskillir	ng	50% 52%
Key barriers for busines	s transformation			Wage outlook		
Share of organisations su Economy A Global Organization culture and Shortage of investment c		iers will hinder their organi	ECONOMY GLOBAL 50% 46%	Share of organizations projecting percentage of the company's tota Growing Global Similar	revenues	
Skills gaps in the labour r	market		50% 26%			
Outdated or inflexible reg	A		44% 39%			
	nd technical infrastructure		39% 32%			
Talent availability outloo	ĸ			DEI Actions		
	no expect their talent availa rage 📕 Worsening 🔺 Glob		in five years	Share of employers surveyed plar	60 I Global 51	40   Global 42
Talent availability when hi50%-100%	iring		+100% 40%	Targeted recruitment, retention and	Run comprehensive DEI training for managers and staff	Set DEI goals, targets or quotas
Talent development of ex     10%	kisting workforce		⊭10 <mark>0%</mark> 90%		nning to implement the stated stra	ategy in response to AI's increasing
Talent retention of existing     10%	g workforce	A	+100% 50%	capability and prevalence	55   Giobal 47	55   Global 49

Reskilling and upskilling your existing workforce to better work alongside Al

55 I Global 47 Transitioning people from jobs that AI will cause to decline, to other roles within your organization

Re-orienting your organization to target new business opportunities created by Al

Region Profile Central Asia			1	/ 2	Working Age Populatic	on (Millions) <b>33.1</b>
23%   Global 22%	<b>38%</b>   Global 39	%		64%   Global 83%	63%   Global 88%	
Labour-market churn Five-year structural labour-force churn	Skill disruption Shares of core skills w	hich will change		Organizations with DEI priorities Share of organizations with DEI priorities	AI exposure Share of organizations running AI pro	grammes
Trend outlook						
Accrotrends driving business transformations are of organizations surveyed that identified Region Global		nsformation in thei	r organiza	tion		
Broadening digital access			61% 60%	Increased geopolitical division and conflicts		27% 345
Rising cost of living, higher			52% 50%	Increased efforts and investments to reduce carbon		23%
ncreased focus on labour and			37% 46%	Increased restrictions to global trade and investment		199
Slower economic growth			32% 42%	Increased efforts and investments to adapt to climate		19%
ncreased government subsidies			30% 21%	Ageing and declining working- age populations		159 409
Growing working-age			27% 24%	Stricter anti-trust and competition regulations		149
Technology trends						
Region     Global       N and information processing echnologies (big data, VR, AR       Energy generation, storage and distribution	-	-	69% 86% 50% 41%	Quantum and encryption       Sensing, laser and optical technologies       Biotechnology and gene		109 129 109 189
Robots and autonomous systems			45% 58%	technologies Satellites and space		9% 115 8%
New materials and composites			30%	technologies		99
echnologies			14% 20%			
Jobs outlook				Skill outlook		
Key roles for business transformation Roles most selected by organizations surveye structural churn (percent) Net growth Job Growth Job displacement			th and	Skills of increasing use by 2030 Skills of the most increase in use by 2030 Region A Global		
I. Net growth 2. Global net growth 3. Churr			2	CORE SKILLS OF 2025	SKILLS OF INCREASING USE BY 2030	
-100%	0	100% <sup>1. 2.</sup>	3. 32 49	Analytical thinking	Al and big data	81%
Specialists Jniversity and Higher Education Teachers		▲	16 26	Resilience, flexibility and agility	Networks and cybersecurity 70%	70%
Accountants and Auditors		3	-8 15	Creative thinking	Multi-lingualism	63%
awyers	II.	-4	2 12	Motivation and self-awareness	Creative thinking	639
Accounting, Bookkeeping and Payroll Clerks	, E	-12 -	18 13		62%	59%
Administrative Assistants and				Leadership and social influence	Talent management	

Central Asia

Upskilling and reskilling of	outlook						
53   Global 41	23   Global 29	13   Global 19	10   Global 11				
Would not need training by 2030	Would be upskilled in their current role	Would be upskilled and redeployed	Would be unlikely to upskill				
Human-machine frontier				Public policy			
	r predominantly people, pre Combination 📕 Global 📕		a combination of both	the talent availability Region A Global	o agree that the particular public	policy has the greatest potential t	
Now			44%         31%         25%           48%         30%         22%	Improvements to public e Funding for reskilling and		61%	47%
2030			29% <b>32% 39%</b> 33% 33% 34%	Provision of reskilling and	d upskilling	55%	55% 52%
				Flexibility on setting wag		38%	38%
				Flexibility on hiring and fi	ring practices	36%	44%
Key barriers for business	s transformation			Wage outlook			
Region A Global Skills gaps in the labour m Organization culture and n Shortage of investment ca ack of adequate data an Dutdated or inflexible region	resistance to change		REGION         GLOBAL           75%         63%           35%         46%           35%         26%           29%         32%           28%         39%	Growing Global	Similar Global Declining	66%	<b>31% 3</b> ' 41% 7'
Talent availability outlook	<			DEI Actions			
Talent trend Share of respondents who	o expect their talent availat	bility to improve or worsen	in five years	Share of employers surve	eyed planning to implement the di	versity, equity and inclusion meas	sure
Improving  A Global avera	age Worsening A Globa	al average		42   Global 48	<b>38</b>   Global 39	31   Global 51	
Talent availability when hir       27%       -100%	ring	A.	+100% 30%	Targeted recruitment, retention progression initiatives	and Pay equity reviews and salar	y audits Run comprehensive DEI to managers and staff	raining for
Talent development of exi	isting workforce		+100% 80%	AI Strategy			
Talent retention of existing	A		A	Share of employers surve capability and prevalenc	eyed planning to implement the st e	ated strategy in response to AI's	increasing

Hiring new people with skills to design Al tools and enhancements appropriate for the organization-specific skills Reskilling and upskilling your existing workforce to better work alongside Al Hiring new people with skills to better work alongside AI

Eastern Asia					1167.5
28%   Global 22%	<b>32%</b>   Giobal 39%			93%   Giobal 83%	86%   Giobal 88%
Labour-market churn Five-year structural labour-force churn	Skill disruption Shares of core skills which	will change		Organizations with DEI priorities Share of organizations with DEI priorities	Al exposure Share of organizations running Al programmes
Trend outlook					
lacrotrends driving business transformation					
hare of organizations surveyed that identified Region Global	d this trend as likely to drive transform	nation in their or	ganiza	tion	
geing and declining working- ge populations			84% 40%	Increased geopolitical division and conflicts	48
roadening digital access			66% 60%	Increased efforts and investments to adapt to climate	47
lower economic growth			66% 42%	Increased restrictions to global trade and investment	28
ncreased efforts and nvestments to reduce carbon			61% 47%	Increased government subsidies and industrial policy	22 21
ising cost of living, higher rices or inflation			58% 50%	Growing working-age populations	<b>20</b> ' 24
ncreased focus on labour and ocial issues			52% 46%	Stricter anti-trust and competition regulations	9' 17
Technology trends					
Region       Global         Il and information processing echnologies (big data, VR, AR         tobots and autonomous systems         nergy generation, storage and	_		92% 86% 61% 58% 39%	Sensing, laser and optical technologies Quantum and encryption Biotechnology and gene	27 1 27
istribution emiconductors and computing	_		41% 39%	technologies	1
echnologies	-		20% 34% 30%	technologies	
Jobs outlook				Skill outlook	
ey roles for business transformation				Skills of increasing use by 2030	
oles most selected by organizations surveye tructural churn (percent)	a, ordered by het role growth, and ti	tell fiel growth a	anu	Skills of the most increase in use by 2030	
et growth Job Growth Job displacement . Net growth 2. Global net growth 3. Chur	_			Region A Global	SKILLS OF INCREASING USE BY 2030
-100%	NET GROWTH	1. 2.	з.		
I and Machine Learning pecialists		49 82	49	Analytical thinking 7	Al and big data 1% 87
ieneral and Operations		31 4	43	Leadership and social influence	Creative thinking
lanaging Directors and Chief xecutives		19 5	19	Curiosity and lifelong learning	Curiosity and lifelong learning
		-4 0	20		
ssembly and Factory Workers				One office this life a	-
dministrative Assistants and xecutive Secretaries	, E	-18 -20	18	Creative thinking	Networks and cybersecurity 4% 64

Region Profile

Working Age Population (Millions)

Eastern Asia

Upskilling and reskilling o	outlook						
41 Global 41 Would not need training by 2030	25 Global 29 Would be upskilled in their current role	18 Global 19 Would be upskilled and redeployed	15   Global 11 Would be unlikely to upskill				
Human-machine frontier				Public policy			
	r predominantly people, pre Combination Global		a combination of both 51% 31% 18% 48% 30% 22% 35% 38% 27% 33% 33% 34%	Public policies to improve talent Share of respondents who agree the the talent availability Region A Global Provision of reskilling and upskilling Flexibility on hiring and firing pract Flexibility on setting wages Funding for reskilling and upskilling	hat the particular public polic g ices	y has the greatest potenti REGI 609 559 499	DN GLOBAL 6 52% 6 44% 6 38%
				Changes to pension schemes and	I retirement ages		
				*		369	6 25%
Key barriers for business	s transformation			Wage outlook			
Share of organisations sur Region  Global Organization culture and i Inability to attract talent to Insufficient understanding Inability to attract talent to Outdated or inflexible region	g of opportunities	ers will hinder their organis	Sation transformation           REGION         GLOBAL           64%         46%           53%         37%           44%         25%           41%         27%           39%         39%	Share of organizations projecting t percentage of the company's total Growing Global Similar	revenues	obal	sation as
Talent availability outlook	<			DEI Actions			
Talent trend	o ovpost their talent au-9-1	sility to improve as were as	in five veere	Share of employers surveyed plan	ning to implement the diversi	ty, equity and inclusion m	easure
Improving A Global avera	o expect their talent availat age Worsening A Globa		in nve years	60   Global 51	<b>38</b>   Global 33	<b>36</b>   Giobal 42	
Talent availability when hir     51%     -100%	nng		+100% 28%	Run comprehensive DEI training for managers and staff	Anti-harrasment protocols	Set DEI goals, targets	or quotas
Talent development of exi       0%     -100%	isting workforce	-	100% 83%	Al Strategy Share of employers surveyed plan	ning to implement the stated	strategy in response to A	's increasing
Talent retention of existing     23%     -100%	g workforce	<b>A</b>	+100% 30%	Capability and prevalence	<b>70</b>   Giobal 62	68   Global 69	

Reskilling and upskilling your existing workforce to better work alongside Al

Hiring new people with skills to better work alongside Al

68 | Global 69

Hiring new people with skills to design Al tools and enhancements appropriate for the organization-specific skills

Europo		1	/ 2	Working Age Population (Millions
Europe				597.0
21%   Global 22%	36%   Global 39%		84%   Global 83%	90%   Global 88%
Labour-market churn Five-year structural labour-force churn	Skill disruption Shares of core skills whic	h will change	Organizations with DEI priorities Share of organizations with DEI priorities	AI exposure Share of organizations running AI programmer
Trend outlook				
lacrotrends driving business transformatic hare of organizations surveyed that identified Region Global		ormation in their organiz:	ation	
roadening digital access	_	57% 60%	Slower economic growth	37
ising cost of living, higher rices or inflation	_	51% 50%		36
ncreased efforts and investments to reduce carbon		51% 47%	Growing working-age	27
geing and declining working-		49% 40%	Increased restrictions to global	23
ncreased focus on labour and		47% 46%	Stricter anti-trust and competition	19
ncreased efforts and nvestments to adapt to climate		44%		16
Technology trends				
Hare of organizations surveyed that identify the         Region       Global         Al and information processing schoologies (big data, VR, AR	e technology trend as likely to driv	87%	Sensing, laser and optical	15
Robots and autonomous systems		62% 58%		9 1:
nergy generation, storage and		44%		
Istribution		41%	0. 0	9
listribution			technologies Satellites and space	
	-	41%	technologies Satellites and space technologies	1
lew materials and composites		41% 30% 30% 17%	technologies Satellites and space technologies	1
lew materials and composites echnologies Jobs outlook Key roles for business transformation	i ordered by pet role growth, and	41% 30% 30% 17% 20%	technologies Satellites and space technologies Skill outlook Skills of increasing use by 2030	1
lew materials and composites echnologies Jobs outlook Cey roles for business transformation loles most selected by organizations surveyed tructural churn (percent)		41% 30% 30% 17% 20%	technologies Satellites and space technologies Skill outlook Skills of increasing use by 2030 Skills of the most increase in use by 2030	1
lew materials and composites emiconductors and computing achnologies Jobs outlook Cey roles for business transformation toles most selected by organizations surveyer tructural churn (percent) let growth Job Growth Job displacement	Net Growth	41% 30% 30% 17% 20%	technologies Satellites and space technologies Skill outlook Skills of increasing use by 2030	1
lew materials and composites emiconductors and computing achnologies Jobs outlook Cey roles for business transformation loles most selected by organizations surveyer tructural churn (percent) et growth Job Growth Job displacement . Net growth 2. Global net growth 3. Churr -100%	Net Growth A Global net growth	41% 30% 30% 17% 20%	technologies Satellites and space technologies Skill outlook Skills of increasing use by 2030 Skills of the most increase in use by 2030 Region  Global	SKILLS OF INCREASING USE BY 2030 Al and big data
ew materials and composites emiconductors and computing schnologies Jobs outlook ey roles for business transformation oles most selected by organizations surveyer tructural churn (percent) et growth Job Growth Job displacement . Net growth 2. Global net growth 3. Churr -100%	Net Growth A Global net growth	41% 30% 30% 17% 20%	technologies Satellites and space technologies Skill outlook Skills of increasing use by 2030 Skills of the most increase in use by 2030 Region  Global CORE SKILLS OF 2025	SKILLS OF INCREASING USE BY 2030
ew materials and composites emiconductors and computing chnologies Jobs outlook ey roles for business transformation oles most selected by organizations surveyer tructural churn (percent) et growth Job Growth Job displacement . Net growth 2. Global net growth 3. Churr -100% I and Machine Learning pecialists	Net Growth A Global net growth	41% 30% 30% 20%	technologies Satellites and space technologies Skill outlook Skills of increasing use by 2030 Skills of the most increase in use by 2030 Region  Global CORE SKILLS OF 2025	SKILLS OF INCREASING USE BY 2030 Al and big data
lew materials and composites emiconductors and computing schnologies Jobs outlook tey roles for business transformation loles most selected by organizations surveyer tructural churn (percent) et growth Job Growth Job displacement . Net growth Scientists	Net Growth A Global net growth	4 1% 30% 30% 20% 4 their net growth and 100% <sup>1.</sup> 2. 3. 109 82 109	technologies Satellites and space technologies Skill outlook Skills of increasing use by 2030 Skills of the most increase in use by 2030 Region A Global CORE SKILLS OF 2025 Analytical thinking	SKILLS OF INCREASING USE BY 2030 Al and big data 71% 99 Networks and cybersecurity 71% 75 Technological literacy
lew materials and composites iemiconductors and computing achnologies Jobs outlook Tey roles for business transformation toles most selected by organizations surveyer tructural churn (percent) let growth Job Growth Job displacement . Net growth Job Growth Job Growth Job Growth Job displacement . Net growth Job Growt	Net Growth A Global net growth	4 1% 30% 30% 17% 20% 100% 1. 2. 3. 100% 1. 2. 3. 100% 1.09 82 109 82 109	technologies Satellites and space technologies Skill outlook Skills of increasing use by 2030 Skills of the most increase in use by 2030 Region A Global CORE SKILLS OF 2025 Analytical thinking Resilience, flexibility and agility Leadership and social influence	SKILLS OF INCREASING USE BY 2030 Al and big data 71% 91 Networks and cybersecurity 71% 72 Technological literacy 63% 73
lew materials and composites iemiconductors and computing achnologies Jobs outlook Key roles for business transformation toles most selected by organizations surveyer tructural churn (percent) let growth Job Growth Job displacement . Net growth 2. Global net growth 3. Churr	Net Growth A Global net growth	41% 30% 30% 17% 20% 4 their net growth and 100% 1. 2. 3. 100% 109 82 109 33 41 33 16 18 21	technologies Satellites and space technologies Skill outlook Skills of increasing use by 2030 Skills of the most increase in use by 2030 Region  Global CORE SKILLS OF 2025 Analytical thinking Resilience, flexibility and agility	SKILLS OF INCREASING USE BY 2030 Al and big data 71% 99 Networks and cybersecurity 71% 75 Technological literacy

Europe

Upskilling and reskilling o	outlook							
38   Global 41 Would not need training by 2030	<b>32</b> I Global 29 Would be upskilled in their current role	19 Global 19 Would be upskilled and redeployed	U Global 11 Would be unlikely to upskill					
Human-machine frontier				Public policy				
	redominantly people, pre		a combination of both         48%       32%       20%         48%       30%       22%         34%       34%       32%         33%       33%       34%	Public policies to impro Share of respondents whe the talent availability Region A Global Funding for reskilling and Provision of reskilling and Flexibility on hiring and fir Improvements to public e Changes to labour laws re	o agree that the particular p I upskilling I upskilling	ublic policy has t	he greatest potential to REGION 57% 47% 46% 46% 44%	Clobal 55% 52% 44% 47% 36%
Key barriers for business	s transformation			Wage outlook	<u> </u>		00,0	00,0
Share of organisations su Region A Global Skills gaps in the labour m Organization culture and m Inability to attract talent to Outdated or inflexible reg Lack of adequate data an	the industry ulatory framework	ers will hinder their organis	Sation transformation           REGION         GLOBAL           66%         63%           46%         46%           41%         37%           39%         39%           32%         32%	percentage of the compa		and other forms o	49%	
Talent availability outlook	÷ <			DEI Actions				
	Å		+100% 21%	Share of employers surve 52 I Global 51 Run comprehensive DEI training managers and staff AI Strategy	g for Aray equity reviews an	)	ty and inclusion measured and inclusion measured and a gradient of the second s	
5%   -100%     Talent retention of existing     22%   -100%	g workforce	A	+100% <b>63%</b>	Share of employers surve capability and prevalence <b>79</b>   Global 77	eyed planning to implement to e 70 I Global 63	-	y in response to Al's ir 65   Global 62	ncreasing

Reskilling and upskilling your existing workforce to better work alongside Al

Hiring new people with skills to design AI tools and enhancements appropriate for the organization-specific skills

Hiring new people with skills to better work alongside AI

23%   Global 22%	42%   Global 3	9%		89%   Global 83%	94%   Giobal 88%
Labour-market churn Five-year structural labour-force churn	Skill disruption Shares of core skills which will change		Organizations with DEI priorities Share of organizations with DEI priorities	Al exposure Share of organizations running Al programm	
Trend outlook					
lacrotrends driving business transformation	n				
hare of organizations surveyed that identified t Region Global	his trend as likely to drive tra	ansformation in the	ir organiza	tion	
roadening digital access			70% 60%	Ageing and declining working- age populations	
creased focus on labour and creased focus on labour and			57% 46%	Growing working-age	2
creased efforts and vestments to reduce carbon			50% 47%	Increased restrictions to global trade and investment	1
creased efforts and vestments to adapt to climate			43% 41%	Increased geopolitical division and conflicts	1
ising cost of living, higher rices or inflation			43% 50%	Increased government subsidies and industrial policy	1
ower economic growth			42% 42%	Stricter anti-trust and competition regulations	1
Technology trends					
Region Global I and information processing schnologies (big data, VR, AR	_	-	93% 86%	Semiconductors and computing technologies	2
obots and autonomous systems			58%		
			38%	technologies	1
istribution	-		38% 41% 34%	-	1
istribution events and composites ensing, laser and optical			38% 41%	Satellites and space technologies	
istribution events and composites ensing, laser and optical echnologies	•		38% 41% 34% 30% 28%	Satellites and space technologies	
istribution ew materials and composites ensing, laser and optical cchnologies Jobs outlook ey roles for business transformation oles most selected by organizations surveyed	, ordered by net role growth,	and their net grov	38% 41% 34% 30% 28% 18%	Satellites and space technologies Quantum and encryption Skill outlook Skills of increasing use by 2030 Skills of the most increase in use by 2030	
stribution  ew materials and composites ensing, laser and optical chnologies  Jobs outlook ey roles for business transformation oles most selected by organizations surveyed ructural churn (percent) et growth Job Growth Job displacement			38% 41% 34% 30% 28% 18%	Satellites and space technologies Quantum and encryption Skill outlook Skills of increasing use by 2030 Skills of the most increase in use by 2030 Region • Global	
stribution strengther stribution structural churn (percent) stribution strength Stribution structure stribution structure st			38% 41% 30% 28% 18%	Satellites and space technologies Quantum and encryption Skill outlook Skills of increasing use by 2030 Skills of the most increase in use by 2030 Region  Global CORE SKILLS OF 2025	SKILLS OF INCREASING USE BY 2030
stribution  ew materials and composites ensing, laser and optical chnologies lobs outlook ey roles for business transformation oles most selected by organizations surveyed ructural churn (percent) et growth Job Growth Job displacement Net growth 2. Global net growth 3. Churn -100%	Net Growth	1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1	38% 41% 30% 28% 18%	Satellites and space technologies Quantum and encryption Skill outlook Skills of increasing use by 2030 Skills of the most increase in use by 2030 Region  Global CORE SKILLS OF 2025 Resilience, flexibility and agility	
stribution ew materials and composites ensing, laser and optical chnologies lobs outlook ey roles for business transformation oles most selected by organizations surveyed ructural churn (percent) et growth Job Growth Job displacement Net growth 2. Global net growth 3. Churn -100% ata Analysts and Scientists and Machine Learning	Net Growth	rth 100% <sup>1.</sup> 2 51	38% 41% 34% 30% 28% 18%	Satellites and space technologies Quantum and encryption Skill outlook Skills of increasing use by 2030 Skills of the most increase in use by 2030 Region • Global CORE SKILLS OF 2025 Resilience, flexibility and agility Analytical thinking	SKILLS OF INCREASING USE BY 2030 Al and big data
stribution ew materials and composites ensing, laser and optical chnologies  Jobs outlook ey roles for business transformation oles most selected by organizations surveyed ructural churn (percent) et growth Job Growth Job displacement Net growth Z. Global net growth 3. Churn -100% ata Analysts and Scientists I and Machine Learning becialists	Net Growth	100% <sup>1.</sup> 2 51 50	38%         41%           34%         30%           28%         18%           vth and         2           2         3.           41         51	Satellites and space technologies Quantum and encryption Skill outlook Skills of increasing use by 2030 Skills of the most increase in use by 2030 Region A Global CORE SKILLS OF 2025 Resilience, flexibility and agility Analytical thinking T Leadership and social influence	SKILLS OF INCREASING USE BY 2030 Al and big data Creative thinking Technological literacy
	Net Growth	100% <sup>1.</sup> 2 51 50 31	38%         41%           34%         30%           28%         18%           vth and         41           2         3.           41         51           82         50	Satellites and space technologies Quantum and encryption Skill outlook Skills of increasing use by 2030 Skills of the most increase in use by 2030 Region A Global CORE SKILLS OF 2025 Resilience, flexibility and agility Analytical thinking T Leadership and social influence	SKILLS OF INCREASING USE BY 2030 Al and big data Creative thinking Technological literacy

-26 -20 26 Empathy and active listening

Region Profile

Administrative Assistants and

Executive Secretaries

Design and user experience

.

70%

67%

Working Age Population (Millions)

# Latin America and the Caribbean

Upskilling and reskilling	outlook						
41 Global 41 Would not need training by 2030	27   Global 29 Would be upskilled in their current role	22   Global 19 Would be upskilled and redeployed	10   Global 11 Would be unlikely to upskill				
Human-machine frontie	r			Public policy			
Human Global	r predominantly people, pre Combination <b>Global</b>		a combination of both	Public policies to improve talent Share of respondents who agree t the talent availability Region A Global			
ll tasks Jow	_		51% 28% 21% 48% 30% 22%		4	REGION 57%	GLOBA 44%
030	_		37% 29% 34% 33% 33% 34%	Improvements to public education	_	51%	52% 47%
				Funding for reskilling and upskillin	g	47%	55%
Key barriers for busines	s transformation			.▲ Wage outlook		44%	38%
	s Irveyed expecting the barri	ers will hinder their organis	sation transformation	Wage trends Share of organizations projecting f percentage of the company's total		ns of workers' compensa	tion as
Region A Global	market		REGION GLOBAL	Growing Global Similar			48% 9
Organization culture and Outdated or inflexible reg			49% 46%			52%	41%
Shortage of investment o			48% 39% 28% 26%				
ack of adequate data a	nd technical infrastructure		28% 32%				
Talent availability outloo	k			DEI Actions			
	o expect their talent availab		in five years	Share of employers surveyed plan			Jre
	rage Worsening A Globa	ıl average		66   Global 51	59 I Global 48	54   Global 33	
alent availability when h 7% -100%	iring	A	+100% 37%	Run comprehensive DEI training for managers and staff	Targeted recruitment, retention and progression initiatives	Anti-harrasment protocols	
alent development of ex	sisting workforce			AI Strategy			
% -100% alent retention of existin	g workforce		+100% <b>80%</b>	Share of employers surveyed plar capability and prevalence	nning to implement the stated stra	ategy in response to AI's in	ncreasing
-100%	- A	Å	+100% 57%	79   Global 77	74 I Global 69	72   Global 62	
				Reskilling and upskilling your existing workforce to better work alongside Al	Hiring new people with skills to design <i>I</i> tools and enhancements appropriate fo the organization-specific skills		ls to better

19%   Global 22%							197.7
Global 22%	46%   Global	39%		72%   Global 83%		85%   Global 88%	
Labour-market churn Five-year structural labour-force ch	Urn Shares of core skill	Is which will change		Organizations with DEI priorities Share of organizations with DEI prioritie	s	Al exposure Share of organizations running Al	programmes
Trend outlook							
Macrotrends driving business trans		teres formenting in the income					
Region Global	identified this trend as likely to drive	transformation in their org	janizalio				
Rising cost of living, higher prices or inflation				Increased government subsidies and industrial policy			319 21
Broadening digital access			53% I	Increased restrictions to global			299
Slower economic growth			47% I	Increased focus on labour and			23
ncreased efforts and				social issues Stricter anti-trust and competition			46 249
nvestments to reduce carbon				regulations			17
and conflicts			34% 8	age populations			40
ncreased efforts and nvestments to adapt to climate				Growing working-age populations			13º 24
Technology trends							
Region     Global       AI and information processing echnologies (big data, VR, AR       Robots and autonomous systems       Energy generation, storage and	_		86% t 44% l 58% t	Sensing, laser and optical technologies Biotechnology and gene technologies Satellites and space			149 18 89 11
distribution			41% t	technologies			9
New materials and composites Semiconductors and computing echnologies	_		20% 20%	Quantum and encryption			12
Jobs outlook				Skill outlook			
structural churn (percent)	ion s surveyed, ordered by net role growt lacement Net Growth • Global net gr		nd S	Skills of increasing use by 2030 Skills of the most increase in use by 2030 Region A Global			
I. Net growth 2. Global net growth	3. Churn		(	CORE SKILLS OF 2025	:	SKILLS OF INCREASING USE BY 2030	
-100	NET GROWTH	1. <b>2</b> .	3. (	Creative thinking		AI and big data	
AI and Machine Learning Specialists		65 82	65	A	57%		<b>74</b> <sup>•</sup>
Business Development Professionals		26 19	26	Resilience, flexibility and agility	50%	Networks and cybersecurity	729
Business Intelligence Analysts	ļ	19 18	23	Analytical thinking		Technological literacy	67
Assembly and Factory Workers		8 0	26		47%		671
Accountants and Auditors	, II	-3 -8	9	Leadership and social influence	46%	Resilience, flexibility and agility	661
Administrative Assistants and Executive Secretaries		-33 -20	42	Al and big data	46%	Creative thinking	64

# Middle East and Northern Africa

Upskilling and	reskilling outloo	k
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Upskilling and reskilling	outlook												
51 Global 41	26   Global 29	15   Global 19	9   Global 11										
Vould not need training by 2030	Would be upskilled in their current role	Would be upskilled and redeployed	Would be unlikely to	upskill									
luman-machine frontier	r				Public polic	y							
uman-machine frontie	ər					ies to improv		-					
of tasks completed by	/ predominantly people, pre	dominantly technology, c	or a combination of b	oth	Share of resp the talent ava	oondents who ailability	agree tha	at the partic	ular public	c policy ha	as the grea	test potential	to increas
	Combination Global	Technology Global			Region 🔺	-							
L TASKS					Eunding for r	eskilling and	unskilling					REGIO	N GLOB
W			42% 26%	32%		contining and	aportining					58%	55%
				22%	Provision of r	eskilling and	upskilling	۵					
)30												53%	52%
			29% 28% 33% 33%	<b>43%</b>	Improvemen	ts to public e	ducation s	ystems				53%	47%
			00,0 00,0	01/0	Flexibility on	setting wage	s	*					
							Â					41%	38%
					Wage subsic	lies	_					41%	26%
						*						41%	20%
ey barriers for busines	ss transformation				Wage outlo	ok							
ansformation barriers					Wage trends								
nare of organisations su Region 🔺 Global	urveyed expecting the barr	ers will hinder their organ	nisation transformation	n		anizations pro of the compar			vages and	i other fori	ns of worke	ers' compens	ation as
			REGION GI	OBAL	Growing	Global	Similar	Global	Declining	Global			
ills gaps in the labour r	market		63%	63%								63%	o 27% 1
rganization culture and	resistance to change		0376	50 /0								52%	
			42%	46%									
utdated or inflexible reg	gulatory framework		_										
ak of adaguata data a	nd technical infrastructure		39%	39%									
ack of adequate data a	ind technical initastructure		34%	32%									
ability to attract talent to	to the industry												
			28%	37%									
alent availability outloo	ok				DEI Actions								
alent trend	no expect their talent availa	bilitu ta improva ar waraa	a in fivo vooro		Share of emp	ployers surve	yed planni	ng to imple	ement the o	diversity, e	quity and i	nclusion mea	isure
	erage Worsening & Globa				<b>36</b> I Gir	ibal <b>42</b>		<b>35</b> 1a	lobal <b>48</b>		34	Global 51	
alent availability when h	iring		+100%	46%	Set DEI goals,	targets or quotas		Targeted rec progression i	uitment, reten nitiatives	ntion and		mprehensive DEI ers and staff	training for
lent development of ex	xisting workforce	<b>A</b>			AI Strategy								
6 -100%			+100%	69%									
			A			oloyers surve d prevalence		ng to imple	ement the s	stated stra	tegy in res	ponse to Al's	increasin
lent retention of existing	U WORKTORCE		+100%	58%	and they can								
-100%	A	Å	+100%	00 /0	73 I GIO	bal <b>77</b>		<b>62</b> 1 G	lobal <b>69</b>		51	Global 62	
					Reskilling and workforce to be	upskilling your ex			eople with skill	ls to design A ppropriate fo		new people with s	kills to better

Region Profile Northern America		1 / 2	Working Age Population (Millions)
21% I Global 22% Labour-market churn Five-year structural labour-force churn	37%   Global 39% Skill disruption Shares of core skills which will change	96%   Global 83% Organizations with DEI priorities Share of organizations with DEI priorities	94%   Global 88% Al exposure Share of organizations running AI programmes
Trend outlook			

### Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

Broadening digital accessImage: Comparison of the compariso	Region Global		
Slower economic growth       42%       investments to reduce carbon       47%         Increased focus on labour and social issues       48%       Growing working-age populations       35%         Ageing and declining working-age populations       48%       Increased restrictions to global trade and investment       28%         Increased efforts and investments to adapt to climate       45%       Stricter anti-trust and competition regulations       25%         Rising cost of living, higher       45%       Increased government subsidies       22%	Broadening digital access		
social issues       46% populations       24%         Ageing and declining working- age populations       1ncreased restrictions to global trade and investment       1ncreased restrictions to global trade and investment       28%         Increased efforts and investments to adapt to climate       45%       Stricter anti-trust and competition regulations       25%         Rising cost of living, higher       45%       Increased government subsidies       22%	Slower economic growth		
age populations     40% trade and investment     23%       Increased efforts and investments to adapt to climate     45%     Stricter anti-trust and competition 41%     25%       Rising cost of living, higher     45%     Increased government subsidies     22%			
investments to adapt to climate 41% regulations 17% Rising cost of living, higher 45% Increased government subsidies 22%			
		•	

### Technology trends

### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Region Global								
Al and information processing technologies (big data, VR, A					96% 86%	New materials and composites		22% 30%
Robots and autonomous syst	ems				61% 58%	Sensing, laser and optical technologies		16% 18%
Semiconductors and computi technologies	ing				36% 20%	Satellites and space technologies		9% 9%
Energy generation, storage a distribution	nd				33% 41%	0, 0		9% 11%
Quantum and encryption					28% 12%			
Jobs outlook						Skill outlook		
Key roles for business trans Roles most selected by orgar structural churn (percent)		ordered by net role growth	n, and their ne	t growth	and	Skills of increasing use by 2030 Skills of the most increase in use by 20	30	
Net growth Job Growth	Job displacement	Net Growth	wth			Region A Global		
1. Net growth 2. Global net g	growth <b>3.</b> Churn					CORE SKILLS OF 2025	SKILLS OF INCREASING USE BY 2030	
	-100%	NET GROWTH	100% <sup>1</sup>	. 2.	3.	Analytical thinking	AI and big data	
AI and Machine Learning Specialists			, II	91 82	91	<b>^</b>	79%	90%
Big Data Specialists				33 113	35	Resilience, flexibility and agility	Technological literacy 79%	80%

specialists	<b>.</b>			
Big Data Specialists		33	113	35
Data Analysts and Scientists		22	41	23
Business Development Professionals		12	19	15
General and Operations Managers	I	-4	4	14
Accountants and Auditors	, I	-7	-8	11

### Leadership and social influence Resilience, flexibility and agility 68% 67% Empathy and active listening Creative thinking 66% 65% Technological literacy Networks and cybersecurity 64% 65% .

Northern America

Upskilling and reskilling	outlook							
<b>33</b> Global 41 Would not need training by 2030	32 Global 29 Would be upskilled in their current role	24   Global 19 Would be upskilled and redeployed	10   Global 11 Would be unlikely to upskill					
Human-machine frontier				Public policy				
	r predominantly people, pre Combination Global		a combination of both 44% 34% 22% 48% 30% 22% 31% 38% 31% 33% 33% 34%	Public policies to improve talen Share of respondents who agree to the talent availability Region A Global Funding for reskilling and upskilling Provision of reskilling and upskilling Flexibility on hiring and firing prac Changes to labour laws related to	hat the particular public polic g g tices	y has the greatest p	notential to           REGION           56%           56%           46%           40%	increase GLOBAI 55% 52% 44% 36%
				Improvements to public education	systems		40%	47%
Key barriers for business	s transformation			Wage outlook	•			
Region Global Skills gaps in the labour r Inability to attract talent to Organization culture and	b the industry	ers will hinder their organi	sation transformation           REGION         GLOBAL           67%         63%           48%         37%           42%         46%           35%         32%           33%         39%	Share of organizations projecting percentage of the company's total Growing Global Similar	revenues		35%	52% 149 41% 79
Talent availability outlool	k			DEI Actions				
Improving A Global aver Talent availability when hi 43% -100%			in five years +100% 22%	Share of employers surveyed plar 79 I Global 48 Targeted recruitment, retention and progression initiatives	Aning to implement the diversite of the	<b>64</b>   GH	obal <b>39</b>	
Talent development of exit			+100% 69%	Al Strategy Share of employers surveyed plan capability and prevalence	ning to implement the stated	strategy in respons	e to Al's ir	creasing
Talent retention of existing     22%     -100%	g worktorce	Å	+100% 29%	84   Global 77	82   Global 69	<b>66</b> I G		

Reskilling and upskilling your existing workforce to better work alongside Al

Hiring new people with skills to design Al tools and enhancements appropriate for the organization-specific skills

66 | Global 62 Hiring new people with skills to better work alongside AI

Region	Profile	

86% | Global 83%

Organizations with DEI priorities

Share of organizations with DEI priorities

96% | Global 88%

Share of organizations running AI programmes

Al exposure

## 400.5

## 20% | Global 22%

Labour-market churn Five-year structural labour-force churn

Trend outlook

### Macrotrends driving business transformation

South-eastern Asia

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

43% | Global 39%

Shares of core skills which will change

Skill disruption



Managing Directors and Chief

Accounting, Bookkeeping and

Executives

Payroll Clerks

Decise Clobel

### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Net growth Job Growth Job displacement Net Growth A Global ne	t growth	Region A Global	
Roles most selected by organizations surveyed, ordered by net role gr structural churn (percent)	owth, and their net growth and	Skills of the most increase in use by 2030	
Key roles for business transformation		Skills of increasing use by 2030	
Jobs outlook		Skill outlook	
Semiconductors and computing technologies	21% 20%		
New materials and composites	38% 30%	Biotechnology and gene technologies	<mark>3%</mark> 11%
Energy generation, storage and distribution	<b>45%</b> 41%	Quantum and encryption	10% 12%
Robots and autonomous systems	72% 58%	Satellites and space technologies	10% 9%
Al and information processing technologies (big data, VR, AR	90% 86%	Sensing, laser and optical technologies	<b>14%</b> 18%
Region Global			

3.

38

27

19

12

23

3 5 3

-23 -18

CORE SKILLS OF 2025

Technological literacy

Analytical thinking

Creative thinking

Resilience, flexibility and agility

Leadership and social influence

1. Net growth 2. Global net g	rowth 3. Churn				
		NET GROWTH		1.	2.
	-100%	0	100%		
AI and Machine Learning					
Specialists				38	82
			•		
Data Analysts and Scientists				27	41
		•			
Business Development				19	19
Professionals					
Lawyers				6	2

l

SKILLS OF INCREASING USE BY 2030

AI and big data 71% 96% Networks and cybersecurity 67% 92% Resilience, flexibility and agility 67% 83% Technological literacy 67% 78% Analytical thinking 63% 78%

South-eastern Asia

Upskilling and reskilling outlook							
38 [ Global 41]     26 [ Global 29]     25 [ Global 19]     11 [ Global 7]       Would not need training by 2030     Would be upskilled in their current role     Would be upskilled and redeployed     Would be unlikely to the							
Human-machine frontier		Public policy					
Human-machine frontier % of tasks completed by predominantly people, predominantly technology, or a combination of Human Global Combination Global Technology Global	both	Public policies to improve talent Share of respondents who agree th the talent availability Region  Global	-	lar public policy	has the greates	t potential to	o increase
ALL TASKS Now 41% 32		Flexibility on hiring and firing pract	<u>.</u>			REGION	GLOBAL 44%
2030 31% <b>33</b>	% 37%	Provision of reskilling and upskilling Flexibility on setting wages	g			59%	52%
33% 33	% 34%	Funding for reskilling and upskilling	g			50%	38% 55%
		Improvements to public education	systems			50%	47%
Key barriers for business transformation		Wage outlook					
Share of organisations surveyed expecting the barriers will hinder their organisation transformation transforma	ion SLOBAL 63% 32% 39% 37% 46%	Share of organizations projecting the percentage of the company's total Growing Global Similar	revenues	- -		59%	
Talent availability outlook		DEI Actions					
Talent trend         Share of respondents who expect their talent availability to improve or worsen in five years         Improving A Global average         Worsening A Global average		Share of employers surveyed plant	ning to implem		r, equity and incl		ure
Talent availability when hiring	45%	Set DEI goals, targets or quotas	Run compreher managers and	nsive DEI training for staff	Targeted re progression	cruitment, reten n initiatives	tion and
	68%	Al Strategy Share of employers surveyed plani capability and prevalence	ning to implem	nent the stated s	trategy in respor	nse to Al's ir	ncreasing
Talent retention of existing workforce       14%       -100%   +100%	55%	91 I Global 77	77 I Giot	bal <b>69</b>	59	Global 62	

Reskilling and upskilling your existing workforce to better work alongside Al

Hiring new people with skills to design AI tools and enhancements appropriate for the organization-specific skills

Hiring new people with skills to better work alongside AI

Region Profile Southern Asia			1 /	/ 2	Working Age Population (Millions)
Southern Asia					070.0
28%   Global 22%	52% Global	39%		86%   Giobal 83%	92%   Global 88%
Labour-market churn Five-year structural labour-force churn	Skill disruption Shares of core skills	s which will change		Organizations with DEI priorities Share of organizations with DEI priorities	Al exposure Share of organizations running Al programmes
Trend outlook					
Accrotrends driving business transformatio		ransformation in their org	Janizat	ion	
Broadening digital access				Increased government subsidies and industrial policy	249 21
ncreased efforts and nvestments to reduce carbon				Growing working-age populations	189
ncreased focus on labour and				Stricter anti-trust and competition regulations	189 17 <sup>4</sup>
ncreased geopolitical division				Increased restrictions to global trade and investment	169 239
ncreased efforts and nvestments to adapt to climate				Ageing and declining working- age populations	119 403
Rising cost of living, higher prices or inflation			34% 50%	Slower economic growth	89 424
Technology trends					
Region Global Al and information processing echnologies (big data, VR, AR				Semiconductors and computing technologies	249
Robots and autonomous systems			53%	Satellites and space technologies	189 99
lew materials and composites				Biotechnology and gene technologies	189
Sensing, laser and optical echnologies			29% 18%	Quantum and encryption	119 12
Energy generation, storage and distribution			26% 41%		
Jobs outlook				Skill outlook	
Key roles for business transformation Roles most selected by organizations surveyed structural churn (percent)	d, ordered by net role growth	n, and their net growth ar	nd	Skills of increasing use by 2030 Skills of the most increase in use by 2030 Region A Global	
let growth         Job Growth         Job displacement           . Net growth         2. Global net growth         3. Churn           -100%         -100%         -100%		wth 100% 1. 2. :	3.	CORE SKILLS OF 2025	SKILLS OF INCREASING USE BY 2030
Supply Chain and Logistics			30	Analytical thinking 7	Al and big data 939
Assembly and Factory Workers		23 0	39	Creative thinking 5	Technological literacy 70
Business Development Professionals		15 19	15	Al and big data	Creative thinking
ocational Education Teachers		14 9	14	Talent management	Quality control
Project Managers		8 17	8		69%
Accounting, Bookkeeping and Payroll Clerks		-25 -18	27	Technological literacy 5	Analytical thinking 65%
					A

Southern Asia

44 Global 41	24   Global 29	20   Global 19	12   Global 11				
Would not need training by	Would be upskilled in their	Would be upskilled and	Would be unlikely to upskill				
2030	current role	redeployed					
Human-machine fronti	ier			Public policy			
uman-machine front	<b>tier</b> by predominantly people, pr		a combination of both	Public policies to improve talen Share of respondents who agree	•	as the exected establish	
	Combination Global	, 0,,	or a combination of both	the talent availability	that the particular public policy h	las trie greatest potential to	Increas
L TASKS	Gombinatori			Region A Global		REGION	GLOB/
WC				Provision of reskilling and upskilling	ng		
			55% 19% 26% 48% 30% 22%	Funding for reskilling and upskillir		57%	52%
30			40/0 30/0 22/0		ig	54%	55%
			34% 23% 43%	Improvements to public education	n systems		
			33% 33% 34%	Flexibility on hiring and firing prac	tices	54%	47%
				Floxibility of fining and fining prac		32%	44%
				Changes to labour laws related to	p remote work		
				A		29%	36%
Key barriers for busine	ess transformation			Wage outlook			
kills gaps in the labou rganization culture an	ir market ind resistance to change		REGION GLOBAL	Growing Global Similar	Global Declining Globa	64%	<b>29%</b> 41%
utdated or inflexible re	egulatory framework		45% 46%				
aufficient un devoter d	ing of an any witten		34% 39%				
sufficient understandi	ing of opportunities		32% 25%				
nability to attract talent	to the industry		•				
	÷		29% 37%				
Talent availability outlo	ook			DEI Actions			
<b>alent trend</b> hare of respondents w	vho expect their talent availa	ability to improve or worse	n in five years	Share of employers surveyed plan	nning to implement the diversity, a	equity and inclusion meas	ure
Improving A Global av	verage Worsening & Glob	bal average		61 I Global 51	57   Global 42	54   Global 48	
alent availability when	hiring		+100% 39%	Run comprehensive DEI training for managers and staff	Set DEI goals, targets or quotas	Targeted recruitment, reter progression initiatives	ntion and
	existing workforce			AI Strategy			
lent development of e			+100% 74%				
			+100% 74%	Share of employers surveyed plan	nning to implement the stated stra	ategy in response to AI's ir	ncreasin
-100%	ing workforce		+100% 7470	Share of employers surveyed plan capability and prevalence	nning to implement the stated stra	ategy in response to AI's ir	ncreasin
alent development of e % -100% alent retention of existing 2% -100%	ing workforce		+100% 48%		62   Global 69	ategy in response to Al's ir	ncreasin

Reskilling and upskilling your existing workforce to better work alongside Al Hiring new people with skills to design Al tools and enhancements appropriate for the organization-specific skills

Hiring new people with skills to better work alongside Al

Region Profile	1 / 2
Sub-Saharan Africa	

40% | Global 39%

Shares of core skills which will change

Skill disruption

89% | Global 88%

Share of organizations running AI programmes

Al exposure

# 341.2

# 31% | Global 22%

Labour-market churn Five-year structural labour-force churn

Trend outlook

## Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

Region Global			
Increased focus on labour and social issues		Increased government subsidies and industrial policy	26% 21%
Broadening digital access	<b>59%</b> 60%	Increased restrictions to global trade and investment	23% 23%
Rising cost of living, higher prices or inflation		Increased geopolitical division and conflicts	21% 34%
Slower economic growth		Growing working-age populations	15% 24%
Increased efforts and investments to reduce carbon		Ageing and declining working- age populations	13% 40%
Increased efforts and investments to adapt to climate		Stricter anti-trust and competition regulations	<b>3%</b> 17%

96% | Global 83%

Organizations with DEI priorities

Share of organizations with DEI priorities

## Technology trends

## Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Region Global							
Al and information processing technologies (big data, VR, AR.				85	% Quantum and encryption	-	<b>13%</b> 12%
Energy generation, storage and distribution					<ul><li>% Sensing, laser and optical</li><li>% technologies</li></ul>		8% 18%
Robots and autonomous system	IS				% Semiconductors and computing technologies		8% 20%
New materials and composites				18 3	<ul><li>% Biotechnology and gene</li><li>% technologies</li></ul>		8% 11%
Satellites and space technologies				15	%		
Jobs outlook					Skill outlook		
Roles most selected by organiz structural churn (percent) Net growth Job Growth Jo 1. Net growth 2. Global net grov	b displacement	Net Growth    Global net gro		owth and	Skills of the most increase in use Region A Global CORE SKILLS OF 2025	e by 2030 Skills of increasing use by 2030	
Al and Machine Learning	-100%	NET GROWTH 0	100% <sup>1.</sup>	2. 3. 82 3.	Resilience, flexibility and agility	AI and big data	89%
Specialists Assembly and Factory Workers		ļ.	2	0 10	Technological literacy	Technological literacy 64%	88%
Accountants and Auditors		,I	-3	-8 9	Leadership and social influence	Resilience, flexibility and agility	83%
General and Operations Managers			-9	4 10	Analytical thinking	Networks and cybersecurity	03%
Business Services and Administration Managers			-11	-7 27		61%	79%
Administrative Assistants and Executive Secretaries			-20	-20 28	Motivation and self-awareness	Creative thinking 58%	76%

Sub-Saharan Africa

46   Global 41	25   Global 29	20   Global 19	9   Global 11			
Would not need training by 2030	Would be upskilled in their current role	Would be upskilled and redeployed	Would be unlikely to upskill			
Human-machine fronti	er			Public policy		
	ier by predominantly people, pr Combination Global		r a combination of both	Public policies to improve talent availability Share of respondents who agree that the particular put the talent availability Region A Global	blic policy has the greatest potential to	increas
LL TASKS				Funding for reskilling and upskilling	REGION	GLOB/
low			51%         34%         15%           48%         30%         22%	Provision of reskilling and upskilling	68%	55%
030			32% 40% 28%	Changes to labour laws related to remote work	64%	52%
			33% 33% 34%	Improvements to public education systems	54%	36%
				Flexibility on setting wages	36%	38%
Key barriers for busine	ass transformation			▲ Wage outlook	30%	30 /6
hortage of investment organization culture an Dutdated or inflexible re	d resistance to change	<u>.</u>	51%         63%           51%         26%           46%         46%           39%         39%			<b>35%</b> 1 41%
ack of adequate data						
	±		33% 32%	DEI Actione		
Talent availability outlo	2 Dok		33% 32%	DEI Actions Share of employers surveyed planning to implement th	ne diversity, equity and inclusion measu	ıre
Talent availability outlo alent trend share of respondents w	vho expect their talent availa			Share of employers surveyed planning to implement the		ıre
Talent availability outlo alent trend hare of respondents w Improving & Global av alent availability when	vho expect their talent availa verage Worsening & Glot				<b>39</b>   Global 42	
Talent availability outlo alent trend hare of respondents w Improving & Global av alent availability when 3%100% alent development of e	vho expect their talent availa verage Worsening & Glot hiring		n in five years +100% 48%	Share of employers surveyed planning to implement th 71   Global 48 Targeted recruitment, retention and 57   Global 51 Run comprehensive DI	<b>39</b>   Global 42	
Talent availability outlo alent trend ihare of respondents w Improving & Global av alent availability when	who expect their talent availate werage Worsening & Glob hiring existing workforce		n in five years	Share of employers surveyed planning to implement th       71 I Global 48       Targeted recruitment, retention and progression initiatives	El training for	iotas

Reskilling and upskilling your existing workforce to better work alongside Al tools and enhancements appropriate for the organization-specific skills Re-orienting your organization to target new business opportunities created by Al

80% | Global 83%

Organizations with DEI priorities

Share of organizations with DEI priorities

# Accommodation, Food, and Leisure

# 24% | Global 22%

Labour-market churn Five-year structural labour-force churn

### Trend outlook

### Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

42% | Global 39%

Shares of core skills which will change

Skill disruption

Industry Global			
Rising cost of living, higher prices or inflation		Increased geopolitical division and conflicts	30% 34%
Increased focus on labour and social issues		Increased efforts and investments to adapt to climate	22% 41%
Broadening digital access		Growing working-age populations	21% 24%
Increased efforts and investments to reduce carbon	<b>43%</b> 47%	Increased government subsidies and industrial policy	13% 21%
Slower economic growth		Increased restrictions to global trade and investment	11% 23%
Ageing and declining working- age populations		Stricter anti-trust and competition regulations	8% 17%

### Technology trends

### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Industry Global		
AI and information processing technologies (big data, VR, AR	<mark>0%</mark> 86%	Biotechnology and gene technologies
Robots and autonomous systems	<mark>3%</mark> 58%	Satellites and space technologies
Energy generation, storage and distribution	<mark>8%</mark> 41%	Quantum and encryption
New materials and composites	<mark>0%</mark> 30%	Semiconductors and comp technologies
Sensing, laser and optical technologies	<b>7%</b> 18%	
Jobs outlook		Skill outlook

Biotechnology and gene technologies	_	13% 11%
Satellites and space technologies		7% 9%
Quantum and encryption		<b>7%</b> 12%
Semiconductors and computing technologies		<b>7%</b> 20%

77% | Global 88%

Share of organizations running AI programmes

Al exposure

### Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth Job Growth Job displacement Net Growth A Global net growth

1. Net growth 2. Global net grow	vth 3. Churn					
	-100%	NET GROWTH	100%	1.	2.	З.
AI and Machine Learning Specialists				64	82	64
General and Operations Managers				41	4	43
Hotel and Restaurant Managers				18	19	20
Food and Beverage Serving Workers		Ļ		12	6	16
Chefs and Cooks				11	15	13
Accountants and Auditors				2	-8	11

# Skill outlook

Skills of increasing use by 2030 Skills of the most increase in use by 2030

Industry A Global

## CORE SKILLS OF 2025

Resilience, flexibility and agility AI and big data 53% 69% Analytical thinking Networks and cybersecurity 51% 69% Leadership and social influence Leadership and social influence 49% 63% Creative thinking Technological literacy 47% 60% Dependability and attention to detail Resilience, flexibility and agility l 45% 55%

SKILLS OF INCREASING USE BY 2030

### Key components of your workforce strategy by 2030

% surveyed organizations selecting the macrotrend to drive workforce transformation

Industry A Global

Workforce Strategy outlook

		INDUSTRY	GLOBAL
Upskill your workforce			
		81%	85%
Hire staff with new skills to meet emerging business needs	÷		
		69%	70%
Complement and augment your workforce with new technologies			
		64%	63%

Upskilling and reskilling outlook						
38 Global 41 Would not need training by 2030	<b>31</b> Global 29 Would be upskilled in their current role	19 Global 19 Would be upskilled and redeployed	<b>12</b> I Global 11 Would be unlikely to upskill			

Human-machine frontier	Business Practice
Human-machine frontier % of tasks completed by predominantly people, predominantly technology, or a combination of both	Business practices to improve talent availability Top practices with the greatest potential to improve talent availability (share of organizations surveyed)
Human Global Combination Global Technology Global	Industry A Global INDUSTRY GLOBAL
ALL TASKS	Supporting employee health and well-being
Now	. 69% 64%
55% <b>21% 24</b> 48% <b>30% 2</b> 2	
	6 58% 62% Offering higher wages
2030 43% 23% 34'	
33% 33% 34	
	51% 63%
	Improving working hours and overtime policies
	49% 38%
Key barriers for business transformation	Wage outlook
Transformation barriers	Wage trends
Share of organisations surveyed expecting the barriers will hinder their organisation transformation	Share of organizations projecting the share of wages and other forms of workers' compensation as
Industry A Global	percentage of the company's total revenues
Skills gaps in the labour market	Growing Global Global Global Global
66% 63%	- 56% <b>38% 7%</b>
Inability to attract talent to the industry	32% 41% 1%
Organization culture and resistance to change	
47% 46%	
Outdated or inflexible regulatory framework	
33% 39%	
Lack of adequate data and technical infrastructure	
28% 32%	
Talent availability outlook	DEI Actions
Talent trend	Share of employers surveyed planning to implement the diversity, equity and inclusion measure
Share of respondents who expect their talent availability to improve or worsen in five years	
Improving & Global average	52   Global 51 48   Global 42 46   Global 48
Talent availability when hiring	Run comprehensive DEI training for Set DEI goals, targets or quotas Targeted recruitment, retention and
59% -100% +100% 20%	managers and staff
Talent development of existing workforce	AI Strategy
5% -100% +100% 68'	6 Share of employers surveyed planning to implement the stated strategy in response to AI's increasing
Talent retention of existing workforce	capability and prevalence
23% -100% +100% 50°	
	67   Global 77 56   Global 69 51   Global 62
	Reskilling and upskilling your existing Hiring new people with skills to design AI Hiring new people with skills to better
	workforce to better work alongside AI tools and enhancements appropriate for work alongside AI the organization-specific skills

78% | Global 83%

Organizations with DEI priorities

Share of organizations with DEI priorities

# Advanced Manufactoring

## 50% | Global 22%

Labour-market churn

Five-year structural labour-force churn

### Trend outlook

### Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

37% | Global 39%

Shares of core skills which will change

Skill disruption



### Technology trends

Industry Global

Jobs outlook

### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

technologies (big data, VR, AR       86% techn         Robots and autonomous systems       69%         New materials and composites       63% 30%         Energy generation, storage and       49% Satelli				
New materials and composites     63% 30%     Quantility       Energy generation, storage and distribution     41%     Satellity       Sensing, laser and optical     30%				 Semic techn
New materials and composites     30%       Energy generation, storage and distribution     49%       Sensing, laser and optical     30%	Robots and autonomous systems			 Biotec techn
distribution 41% techn Sensing, laser and optical 30%	New materials and composites	_		 Quant
			1	 Satelli techn
	0.			

%	Semiconductors and computing technologies	26% 20%
%	Biotechnology and gene technologies	22% 11%
%	Quantum and encryption	<mark>8%</mark> 12%
%	Satellites and space technologies	7% 9%

### Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth Job Growth Job displacement Net Growth A Global net growth

<ol> <li>Net growth</li> <li>Global net grow</li> </ol>	vth 3. Churn					
		NET GROWTH		1.	2.	3.
	-100%	0	100%	1.	2.	0.
AI and Machine Learning						
Specialists				82	82	82
			-			
Sustainability Specialists				30	33	30
Industrial and Production				-		
Engineers				19	15	28
0		▲				
Assembly and Factory Workers				11	0	25
General and Operations		<b>A</b>		_		
Managers				1	4	9
Administrative Assistants and		<b>^</b>		-		
Executive Secretaries				-24	-20	24
		▲				

# Skill outlook

Industry A Global

CORE SKILLS OF 2025

Analytical thinking

Creative thinking

2030

Skills of increasing use by 2030 Skills of the most increase in use by 2030

# SKILLS OF INCREASING USE BY 2030

86% | Global 88%

Share of organizations running AI programmes

Al exposure

Resilience, flexibility and agility AI and big data 73% 86% Creative thinking 71% 76% Motivation and self-awareness Networks and cybersecurity 64% 75% Technological literacy 55% Curiosity and lifelong learning Resilience, flexibility and agility 53% Upskilling and reskilling outlook 46 | Global 41 29 | Global 29 15 | Global 19 9 Global 11 Would be upskilled in their Would be unlikely to upskill Would not need training by Would be up killed and current role

Key components of your workforce strategy by 2030

% surveyed organizations selecting the macrotrend to drive workforce transformation

Industry A Global

Workforce Strategy outlook

	INDUSTRY	GLOBAL
Upskill your workforce		
	83%	85%
Complement and augment your workforce with new technologies		
	71%	63%
Accelerate the automation of processes and tasks		
	67%	73%

# Advanced Manufactoring

Human-machine frontier	Business Practice
Human-machine frontier % of tasks completed by predominantly people, predominantly technology, or a combination of both Human Global Combination Global Combination Edicate	Business practices to improve talent availability Top practices with the greatest potential to improve talent availability (share of organizations surveyed) Industry AGlobal INDUSTRY GLOBAL
ALL TASKS	Providing effective reskilling and upskilling
Now 43% 29% 28% 48% 30% 22%	
2030 31% 35% 35%	Improving talent progression and promotion processes 60% 62%
33% <b>33% 34%</b>	Offering higher wages
	Tapping into diverse talent pools
Key barriers for business transformation	Wage outlook
Transformation barriers Share of organisations surveyed expecting the barriers will hinder their organisation transformation Industry  GLOBAL INDUSTRY GLOBAL	Wage trends Share of organizations projecting the share of wages and other forms of workers' compensation as percentage of the company's total revenues
Skills gaps in the labour market	Growing Global Similar Global Declining Global
Inability to attract talent to the industry	50% <b>30</b> % <b>6</b> %
Organization culture and resistance to change	
Inability to attract talent to my firm	
32%     27%       Outdated or inflexible regulatory framework     20%	
alent availability outlook	DELActions
Talent trend	Share of employers surveyed planning to implement the diversity, equity and inclusion measure
Share of respondents who expect their talent availability to improve or worsen in five years Improving A Global average Worsening A Global average	57   Giobal 51 49   Giobal 39 47   Giobal 48
Talent availability when hiring	S7     Global 51     49     Global 39     47     Global 48       Run comprehensive DEI training for     Pay equity reviews and salary audits     Targeted recruitment, retention and
42% -100% +100% 37%	managers and staff Pay equity reviews and salary adults regression initiatives
Talent development of existing workforce	AI Strategy
2% -100% +100% 77%	Share of employers surveyed planning to implement the stated strategy in response to AI's increasing
Talent retention of existing workforce           21%         -100%         +100%         54%	capability and prevalence
A A 4100% 3478	80   Global 77 72   Global 69 58   Global 62
	Reskilling and upskilling your existing workforce to better work alongside AI         Hiring new people with skills to design AI         Hiring new people with skills to better           tools and enhancements appropriate for the organization-specific skills         work alongside AI         work alongside AI

### Industry Profile

# Agriculture Forestry and Fishing

24% | Global 22%

# Labour-market churn

Five-year structural labour-force churn

### Trend outlook

### Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

41% | Global 39%

Shares of core skills which will change

Skill disruption



1/2

67% | Global 83%

Organizations with DEI priorities

Share of organizations with DEI priorities

### Technology trends

Industry Global

Jobs outlook

### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

AI and information processing technologies (big data, VR, AR	84% 86%	New materials and compo
Robots and autonomous systems	60% 58%	Semiconductors and corr technologies
Energy generation, storage and distribution	57% 41%	Satellites and space technologies
Biotechnology and gene technologies	41% 11%	Quantum and encryption
Sensing, laser and optical technologies	32% 18%	

%	New materials and composites		0% 30%
	Semiconductors and computing technologies		9% 20%
	Satellites and space technologies	1	4% 9%
%	Quantum and encryption		8% 12%

83% | Global 88%

Share of organizations running AI programmes

Al exposure

### Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth Job Growth Job displacement Net Growth A Global net growth

1. Net growth 2. Global net grow	wth 3. Churn					
		NET GROWTH	1.		2.	3.
	-100%	0	100%			
AI and Machine Learning				42	82	42
Specialists					02	
Farmworkers, Labourers, and				20	17	31
Other Agricultural Workers			"	20	17	31
General and Operations			1.	13	4	13
Managers				13	4	13
Assembly and Factory Workers			1.	10	0	20
Assembly and ractory workers				10	0	20
Accounting, Bookkeeping and				14	-18	26
Payroll Clerks			-	14	-10	20
Administrative Assistants and						
Executive Secretaries			-	19	-20	30
		=				

# Skills of increasing use by 2030

Skill outlook

Industry A Global

Skills of the most increase in use by 2030

CORE SKILLS OF 2025 SKILLS OF INCREASING USE BY 2030 Systems thinking Resilience, flexibility and agility 639 L Analytical thinking Environmental stewardship 59% Leadership and social influence Technological literacy 56% 71% Creative thinking AI and big data 56% 70% Resilience, flexibility and agility Creative thinking 1 56% 65% Upskilling and reskilling outlook 16 | Global 19 54 | Global 41 21 | Global 29 10 Global 11 Would be upskilled in their Would be unlikely to upskill Would not need training by Would be up 2030 current role

Workforce Strategy outlook

### Key components of your workforce strategy by 2030

% surveyed organizations selecting the macrotrend to drive workforce transformation

Industry A Global

	INDUSTRY	GLOBAL
Upskill your workforce		
	88%	85%
Hire staff with new skills to meet emerging business needs		
	71%	70%
Complement and augment your workforce with new technologies		
	67%	63%

# Agriculture Forestry and Fishing

Human-machine frontier	Business Practice
Human-machine frontier         % of tasks completed by predominantly people, predominantly technology, or a combination of both         Human       Global         Combination       Global         Technology       Global	Business practices to improve talent availability Top practices with the greatest potential to improve talent availability (share of organizations surveyed) Industry A Global INDUSTRY GLOBAL
Now	Improving talent progression and promotion processes 67% 62%
NOW         51%         27%         22%           48%         30%         22%	<u> </u>
2030	Offering higher wages
35%         28%         38%           33%         33%         33%         34%	Providing effective reskilling and upskilling
	Articulate business purpose and impact
	42% 37%
Key barriers for business transformation	Wage outlook
Transformation barriers	Wage trends
Share of organisations surveyed expecting the barriers will hinder their organisation transformation	Share of organizations projecting the share of wages and other forms of workers' compensation as percentage of the company's total revenues
Industry A Global INDUSTRY GLOBAL	
Skills gaps in the labour market	Growing Global Similar Global Declining Global
68% 63%	63% 29% 89 52% 41% 79
Outdated or inflexible regulatory framework 51% 39%	
Lack of adequate data and technical infrastructure	
46% 32%	
Inability to attract talent to the industry	
Organization culture and resistance to change	
38% 46%	
▲ Talast socials its south als	
Talent availability outlook	DEI Actions
Talent trend Share of respondents who expect their talent availability to improve or worsen in five years	Share of employers surveyed planning to implement the diversity, equity and inclusion measure
Improving * Global average Worsening * Global average	42   Global 42 38   Global 51 33   Global 48
Talent availability when hiring	Set DEI goals, targets or quotas Run comprehensive DEI training for Targeted recruitment, retention and
38% -100% +100% 33%	managers and staff progression initiatives
Talent development of existing workforce	Al Strategy
0% -100% +100% <b>63%</b>	Share of employers surveyed planning to implement the stated strategy in response to AI's increasing
Talent retention of existing workforce	capability and prevalence
13% -100% +100% 54%	61   Global 69 61   Global 62 57   Global 77
	Hiring new people with skills to design AI tools and enhancements appropriate for the organization-specific skills

### Industry Profile

87% | Global 83%

Organizations with DEI priorities

Share of organizations with DEI priorities

# Automotive and Aerospace

17% | Global 22%

Labour-market churn

Five-year structural labour-force churn

### Trend outlook

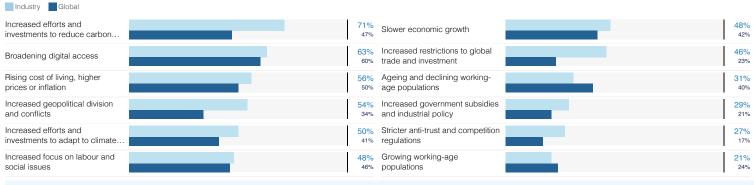
### Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

38% | Global 39%

Shares of core skills which will change

Skill disruption



### Technology trends

Jobs outlook

### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Industry Global	
Al and information processing technologies (big data, VR, AR	92% 86%
Robots and autonomous systems	73% 58%
Energy generation, storage and distribution	60% 41%
New materials and composites	52% 30%
Sensing, laser and optical technologies	40% 18%

<ul><li>% Semiconductors and compu</li><li>% technologies</li></ul>	ting	38% 20%
<ul><li>Satellites and space</li><li>technologies</li></ul>		25% 9%
% Quantum and encryption		<b>17%</b> 12%
<ul><li>Biotechnology and gene</li><li>technologies</li></ul>		6% 11%

### Key roles for business transformation

Key components of your workforce strategy by 2030

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth	Job Growth		Job displacement	Net Growth	<ul> <li>Global net growth</li> </ul>
------------	------------	--	------------------	------------	---------------------------------------

1. Net growth 2. Global net grow	vth 3. Churn					
	-100%	NET GROWTH	100%	1.	2.	З.
Robotics Engineers			l	65	37	65
Al and Machine Learning Specialists			•	35	82	35
Business Intelligence Analysts				20	18	25
Human Resources Specialists		N,		3	5	7
Assembly and Factory Workers				2	0	24
Accounting, Bookkeeping and Payroll Clerks				-23	-18	23
Workforce Strategy outlook						

## Skill outlook

Industry A Global CORE SKILLS OF 2025

Creative thinking

2030

# Skills of increasing use by 2030

Skills of the most increase in use by 2030

# SKILLS OF INCREASING USE BY 2030

83% | Global 88%

Share of organizations running AI programmes

Al exposure

Analytical thinking AI and big data 72% 100% Technological literacy 69% 84% Resilience, flexibility and agility Networks and cybersecurity 67% 78% Motivation and self-awarene Leadership and social influence 62% 71% Leadership and social influence Resilience, flexibility and agility 59% 71% Upskilling and reskilling outlook 43 | Global 41 27 | Global 29 20 | Global 19 Global 11 Would be unlikely to upskill Would be upskilled in their Would not need training by Would be up: killed and

% surveyed organizations selecting the macrotrend to drive workforce tr	ansformation	
Industry A Global	INDUSTRY	GLOBAL
Upskill your workforce		
	95%	85%
Transition existing staff from declining to growing roles		
	74%	51%
Hire staff with new skills to meet emerging business needs		
	74%	70%

# Automotive and Aerospace

Human-machine frontier	Business Practice
luman-machine frontier	Business practices to improve talent availability
% of tasks completed by predominantly people, predominantly technology, or a combination of both	Top practices with the greatest potential to improve talent availability (share of organizations surveyed
Human Global Combination Global Technology Global	Industry A Global INDUSTRY GLOB/
LL TASKS	Providing effective reskilling and upskilling
Now	73% 63%
46% 32% 22	
2030	Supporting employee health and well-being
31% 33% 36	65% 64%
33% 33% 34	
	60% 38%
	Articulate business purpose and impact 51% 37%
	<u>.</u>
Key barriers for business transformation	Wage outlook
Transformation barriers	Wage trends
Share of organisations surveyed expecting the barriers will hinder their organisation transformation	Share of organizations projecting the share of wages and other forms of workers' compensation as percentage of the company's total revenues
INDUSTRY GLOBA	Growing Global Global Global Global
Skills gaps in the labour market	47% 42% 1
Crganization culture and resistance to change	- 52% 41%
52% 46%	
nability to attract talent to my firm	
42% 27%	
Shortage of investment capital 40% 26%	
ack of adequate data and technical infrastructure	
38% 32%	
Talent availability outlook	DEI Actions
•	
<b>Falent trend</b> Share of respondents who expect their talent availability to improve or worsen in five years	Share of employers surveyed planning to implement the diversity, equity and inclusion measure
Improving * Global average Worsening * Global average	65   Global 48 54   Global 51 46   Global 39
alent availability when hiring	Targeted recruitment, retention and Run comprehensive DEI training for Pay equity reviews and salary audits
27% -100% +100% 5	progression initiatives managers and staff
alent development of existing workforce	AI Strategy
<b>1</b> % -100% +100% <b>0</b>	% Share of employers surveyed planning to implement the stated strategy in response to AI's increasing
alent retention of existing workforce	capability and prevalence
6% -100% +100% 46	
	86   Global 77 74   Global 69 71   Global 62
	Reskilling and upskilling your existing Hiring new people with skills to design AI Hiring new people with skills to better

### Industry Profile

1 / 2

91% | Global 83%

Organizations with DEI priorities

Share of organizations with DEI priorities

83% | Global 88%

Share of organizations running AI programmes

18% 11% 12% 12% 12% 18%

Al exposure

# Chemical and Advanced materials

19% | Global 22%

### .

Labour-market churn Five-year structural labour-force churn

### Trend outlook

### Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

42% | Global 39%

Shares of core skills which will change

Skill disruption



### Technology trends

Industry Global

### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

New materials and composites	76%     Biotechnology and gene       30%     technologies
Al and information processing technologies (big data, VR, AR	73% Quantum and encryption
Energy generation, storage and distribution	64% Sensing, laser and optical 41% technologies
Robots and autonomous systems	49%     Satellites and space       58%     technologies
Semiconductors and computing technologies	18% 20%

### Jobs outlook

Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth Job Growth Job displacement Net Growth A Global net growth

1. Net growth 2. Global net gro	owth 3. Churn					
	-100%	NET GROWTH	100%	1.	2.	З.
AI and Machine Learning Specialists				52	82	52
Business Development Professionals				23	19	23
Strategic Advisors				20	20	27
Chemical Processing Plant Operators		Ļ		11	9	15
Lawyers		l,		-1	2	10
Administrative Assistants and Executive Secretaries				-22	-20	22
Workforce Strategy outlook						

# Skills of increasing use by 2030

Skill outlook

Industry A Global

Skills of the most increase in use by 2030

### CORE SKILLS OF 2025 SKILLS OF INCREASING USE BY 2030 Resilience, flexibility and agility AI and big data 66% 86% Creative thinking Environmental stewardship 62% 75% Leadership and social influence Talent management 59% 67% Motivation and self-awareness Networks and cybersecurity 52% 65% Curiosity and lifelong learning Leadership and social influence 48% 639 Upskilling and reskilling outlook 48 | Global 41 26 I Global 29 18 | Global 19 8 | Global 11 Would be unlikely to upskill Would be upskilled in their Would not need training by Would be up killed and 2030 current role

Key components of your workforce strategy by 2030 % surveyed organizations selecting the macrotrend to drive workforce transformation

Industry A Global

A		
	68%	63%
Complement and augment your workforce with new technologies		
	68%	70%
Hire staff with new skills to meet emerging business needs		
	73%	85%
Upskill your workforce		
	INDUSTRY	GLOBAL

Human-machine frontier	Business Practice
Human-machine frontier % of tasks completed by predominantly people, predominantly technology, or a combination of both Human Global Combination Global Technology Global ALL TASKS Now 38% 37% 26% 48% 30% 22% 2030 28% 35% 37% 33% 33% 34%	63%     64%       Offering higher wages     50%       50%     50%
Key barriers for business transformation	A Wage outlook
Transformation barriers         Share of organisations surveyed expecting the barriers will hinder their organisation transformation         Industry ▲ Global         INDUSTRY GLOBAL         Skills gaps in the labour market         Image: State of the industry         Inability to attract talent to the industry	Wage trends         Share of organizations projecting the share of wages and other forms of workers' compensation as percentage of the company's total revenues         Growing       Global         Similar       Global         Declining       Global         46%       50%       4%         52%       41%       7%
50%     37%       Organization culture and resistance to change     44%     46%       Outdated or inflexible regulatory framework     44%     39%       nability to attract talent to my firm     44%     39%	
Talent availability outlook	DEI Actions
Talent trend	Share of employers surveyed planning to implement the diversity, equity and inclusion measure
Share of respondents who expect their talent availability to improve or worsen in five years         Improving A Global average         Worsening A Global average         Talent availability when hiring         33%       -100%         +100%       25%	48 I Global 51     48 I Global 42     44 I Global 39       Run comprehensive DEI training for managers and staff     Set DEI goals, targets or quotas     Pay equity reviews and salary audits
Talent development of existing workforce	Al Strategy
4%         -100%         +100%         75%           Talent retention of existing workforce         +100%         54%	Share of employers surveyed planning to implement the stated strategy in response to Al's increasing capability and prevalence 65 I Global 69 65 I Global 69 65 I Global 69
	USI [Global 69     USI [Global 77     40 [Global 62       Hiring new people with skills to design AI tools and enhancements appropriate for the organization-specific skills     Reskilling and upskilling your existing workforce to better work alongside AI     Hiring new people with skills to better work alongside AI

### Industry Profile

# Education and Training

22% | Global 22%

Labour-market churn

Five-year structural labour-force churn

Trend outlook

Industry Global

### Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

44% | Global 39%

Shares of core skills which will change

Skill disruption

Global			
Broadening digital access		Ageing and declining working- age populations	29% 40%
Increased focus on labour and social issues		Growing working-age populations	27% 24%
Slower economic growth		Increased government subsidies and industrial policy	20% 21%
Rising cost of living, higher prices or inflation		Stricter anti-trust and competition regulations	18% 17%
Increased geopolitical division and conflicts		Increased efforts and investments to reduce carbon	16% 47%
Increased efforts and investments to adapt to climate		Increased restrictions to global trade and investment	11% 23%

1/2

91% | Global 83%

Organizations with DEI priorities

Share of organizations with DEI priorities

93% | Global 88%

Share of organizations running AI programmes

Al exposure

### Technology trends

Industry Global

### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

AI and information processing technologies (big data, VR, AR	911		_	11% 9%
Robots and autonomous systems	55 <sup>5</sup>			11% 30%
Semiconductors and computing technologies	23			9% 12%
Energy generation, storage and distribution	20	0, 0		<b>7%</b> 11%
Sensing, laser and optical technologies	16'			

### Jobs outlook

Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth Job Growth Job displacement Net Growth A Global net growth

<ol> <li>Net growth</li> <li>Global net grow</li> </ol>	rth <b>3.</b> Churn					
	-100%	NET GROWTH	100%	1.	2.	з.
AI and Machine Learning Specialists				42	82	42
Sustainability Specialists			•	34	33	34
University and Higher Education Teachers				19	16	24
Vocational Education Teachers				13	9	21
Administrative Assistants and Executive Secretaries				-8	-20	21
Data Entry Clerks				-30	-26	33

## Skills of increasing use by 2030

Skill outlook

CORE SKILLS OF 2025

Skills of the most increase in use by 2030

# Industry A Global

Analytical thinking AI and big data 85% 70% Resilience, flexibility and agility Curiosity and lifelong learning 66% Creative thinking Creative thinking 64% 79% AI and big data Technological literacy 56% 76% Curiosity and lifelong learning Analytical thinking 54% 1 Upskilling and reskilling outlook 13 | Global 11 18 | Global 19 42 | Global 41 26 | Global 29 Would not need training by Would be unlikely to upskill Would be upskilled in their Would be up: 2030 current role

SKILLS OF INCREASING USE BY 2030

% surveyed organizations	selecting the macrotrend to	drive workforce transformation

Key components of your workforce strategy by 2030

Industry A Global

Workforce Strategy outlook

	INDUSTRY	GLOBAL
Upskill your workforce		
	73%	85%
Accelerate the automation of processes and tasks		
	68%	73%
Hire staff with new skills to meet emerging business needs		
	61%	70%

# Education and Training

Human-machine frontier	Business Practice			
Human-machine frontier % of tasks completed by predominantly people, predominantly technology, or a combination of both Human Global Combination Global Technology Global	Business practices to improve talent availability Top practices with the greatest potential to improve talent availability (share of organizations survey Industry  GLO INDUSTRY GLO			
ALL TASKS	Improving talent progression and promotion processes			
Now 57% 25% 19%	Offering higher wages			
48% 30% 22%	61% 50%			
2030	Supporting employee health and well-being			
39% 29% 31%	55% 64%			
33% 33% 34%	· · · · · · · · · · · · · · · · · · ·			
	50%         47%           Providing effective reskilling and upskilling         50%			
	43% 63%			
Key barriers for business transformation	Landon Antonio Antoni			
Transformation barriers	Wage trends			
Share of organisations surveyed expecting the barriers will hinder their organisation transformation	Share of organizations projecting the share of wages and other forms of workers' compensation as			
Industry A Global INDUSTRY GLOBAL	percentage of the company's total revenues			
Skills gaps in the labour market	Growing Global Global Global Global			
57% 63%	57% 41% 2			
Organization culture and resistance to change	52% 41% 7			
Inability to attract talent to my firm				
32% 27%				
Outdated or inflexible regulatory framework				
32% 39%				
Lack of adequate data and technical infrastructure				
*				
Talent availability outlook	DEI Actions			
Talent trend Share of respondents who expect their talent availability to improve or worsen in five years	Share of employers surveyed planning to implement the diversity, equity and inclusion measure			
Improving A Global average Worsening A Global average	55   Global 51 41   Global 48 41   Global 33			
Telest eveilebilt uther bides				
Talent availability when hiring           30%         -100%         +100%         42%	Run comprehensive DEI training for         Targeted recruitment, retention and         Anti-harrasment protocols           managers and staff         progression initiatives         https://doi.org/10.00000000000000000000000000000000000			
-100/6 +100/6 +100/6 +100/6				
Talent development of existing workforce	AI Strategy			
5% -100% +100% 74%	Share of employers surveyed planning to implement the stated strategy in response to AI's increasing			
Talent retention of existing workforce	capability and prevalence			
20% -100% +100% 49%	01 71 00			
	81 I Global 77 71 I Global 69 60 Global 49			
	Reskilling and upskilling your existing workforce to better work alongside AI Hiring new people with skills to design AI Re-orienting your organization to target tools and enhancements appropriate for the organization-specific skills AI			

**2** / 2

ndustry Profile Electronics		1/2	
17%   Global 22%	<b>33%</b>   Global 39%	87%   Global 83%	95%   Global 88% Al exposure Share of organizations running Al programmes
abour-market churn	<b>Skill disruption</b>	Organizations with DEI priorities	
ive-year structural labour-force churn	Shares of core skills which will change	Share of organizations with DEI priorities	

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

Industry Global			
Increased efforts and investments to reduce carbon		%         Increased restrictions to global           %         trade and investment	32% 23%
Broadening digital access	57	% Increased efforts and investments to adapt to climate	29% 41%
Ageing and declining working- age populations	50	% Slower economic growth	25% 42%
Rising cost of living, higher prices or inflation		% Growing working-age populations	21% 24%
Increased geopolitical division and conflicts		% Increased government subsidies and industrial policy	18% 21%
Increased focus on labour and social issues	39	% Stricter anti-trust and competition % regulations	18% 17%

### Technology trends

Industry Global

### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

AI and information processing technologies (big data, VR, AR	93			28% 30%
Robots and autonomous systems	69 58			21% 12%
Energy generation, storage and distribution	59'	<ul><li>Satellites and space</li><li>technologies</li></ul>	_	10% 9%
Semiconductors and computing technologies	55' 20	0, 0		7% 11%
Sensing, laser and optical technologies	38'			

### Jobs outlook

Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth	Job Growth	Job displacement	Net Growth	<ul> <li>Global net growth</li> </ul>
------------	------------	------------------	------------	---------------------------------------

1. Net growth 2. Global net grow	vth 3. Churn					
	-100%	NET GROWTH	100%	1.	2.	З.
AI and Machine Learning Specialists			ļ	81	82	81
Robotics Engineers				27	37	27
Electrotechnology Engineers				21	15	21
Business Development Professionals				18	19	18
Industrial and Production Engineers				1	15	16
Assembly and Factory Workers				0	0	19

# Skill outlook

Industry A Global

CORE SKILLS OF 2025

Skills of increasing use by 2030 Skills of the most increase in use by 2030

### SKILLS OF INCREASING USE BY 2030

Analytical thinking AI and big data 83% 80% Creative thinking Resilience, flexibility and agility 76% 68% Resilience, flexibility and agility Networks and cybersecurity 68% 68% Motivation and self-awareness Leadership and social influence 60% 64% Leadership and social influence Creative thinking 60% 56% 1 Upskilling and reskilling outlook 12 | Global 11 38 | Global 41 33 | Global 29 17 | Global 19 Would not need training by 2030 Would be unlikely to upskill Would be upskilled in their Would be upskilled and current role

### Key components of your workforce strategy by 2030

% surveyed organizations selecting the macrotrend to drive workforce transformation

Industry A Global

	INDUSTRY	GLOBAL
Accelerate the automation of processes and tasks		
	87%	73%
Upskill your workforce		
	78%	85%
Hire staff with new skills to meet emerging business needs		
	70%	70%

Human-machine frontier		-			
		Business practices to improve	•		
% of tasks completed by predominantly people, predominantly technolog	ly, or a combination of both		otential to improve talent availability	(share of organizations si	urveyed
Human Global Combination Global Technology Global		Industry A Global		INDUSTRY	GLOBA
ALL TASKS		Supporting employee health and	well-being		
Now			4	61%	64%
	40% 40% 21%		impact		
	48% 30% 22%	*	un el All'en el	57%	37%
2030	25% 39% 35%	Providing effective reskilling and u	Jpskilling	57%	63%
	33% 33% 34%		promotion processes	5176	0070
		improving talont progrossion and		52%	62%
		Tapping into diverse talent pools	÷		
				52%	47%
Key barriers for business transformation		Wage outlook	Â		
•		-			
Transformation barriers Share of organisations surveyed expecting the barriers will hinder their or	ganisation transformation	Wage trends	the share of wages and other forms	of workers' componentic	n 96
Industry A Global	ganisation transformation	percentage of the company's tota		s of workers compensatio	11 a5
	INDUSTRY GLOBAL	Growing Global Similar	Global Declining Global		
Skills gaps in the labour market		crowing crobal ormital	Ciobal Deciming Ciobal		
	64% 63%			35% 5	6% 9' 1% 7'
nability to attract talent to the industry	43% 37%			5278 4	170 1
Dutdated or inflexible regulatory framework	43% 37%				
	43% 39%				
nability to attract talent to my firm					
	36% 27%				
	36% 27%				
	36%         27%           32%         26%				
Shortage of investment capital		DEI Actions			
Shortage of investment capital			ning to implement the diversity, and		
A capital capi	32% 26%		nning to implement the diversity, eq	uity and inclusion measur	е
Shortage of investment capital Talent availability outlook Falent trend Share of respondents who expect their talent availability to improve or wo	32% 26%		nning to implement the diversity, eq 44   Global 39	uity and inclusion measur 39 Giobal 48	е
Shortage of investment capital Talent availability outlook Talent trend Share of respondents who expect their talent availability to improve or wo Improving & Global average Worsening & Global average	32% 26%	Share of employers surveyed plan			
Shortage of investment capital Talent availability outlook Talent trend Share of respondents who expect their talent availability to improve or wo Improving & Global average Worsening & Global average	32% 26%	Share of employers surveyed plan 48   Global 51 Run comprehensive DEI training for measurement and right	<b>44</b>   Global 39	<b>39</b>   Global 48	
Shortage of investment capital Talent availability outlook Talent trend Share of respondents who expect their talent availability to improve or wo Improving & Global average Worsening & Global average Talent availability when hiring S1% -100%	32% 26% rsen in five years +100% 13%	Share of employers surveyed plan 48 I Global 51 Run comprehensive DEI training for managers and staff AI Strategy	<b>44</b>   Global 39	<b>39</b>   Global 48 Targeted recruitment, retention	
Shortage of investment capital Talent availability outlook Talent trend Share of respondents who expect their talent availability to improve or wo Improving & Global average Worsening & Global average Talent availability when hiring Talent development of existing workforce	32% 26%	Share of employers surveyed plan 48   Global 51 Run comprehensive DEI training for managers and staff AI Strategy	<b>44</b>   Global 39	39 Global 48 Targeted recruitment, retention progression initiatives	on and
Shortage of investment capital Talent availability outlook Talent trend Share of respondents who expect their talent availability to improve or wo Improving & Global average Worsening & Global average Talent availability when hiring Talent development of existing workforce O% -100%	32% 26% rsen in five years +100% 13%	Share of employers surveyed plan 48   Global 51 Run comprehensive DEI training for managers and staff AI Strategy	<b>44</b>   Global 39 Pay equity reviews and salary audits	39 Global 48 Targeted recruitment, retention progression initiatives	on and
Shortage of investment capital Talent availability outlook Talent trend Share of respondents who expect their talent availability to improve or wo Improving & Global average Worsening & Global average Talent availability when hiring Talent development of existing workforce Talent retention of existing workforce Talent retention of existing workforce	32% 26% rsen in five years +100% 13%	Share of employers surveyed plan 48 I Global 51 Run comprehensive DEI training for managers and staff AI Strategy Share of employers surveyed plan capability and prevalence	44 Global 39 Pay equity reviews and salary audits	39 Global 48 Targeted recruitment, retention progression initiatives	on and
Shortage of investment capital Talent availability outlook Talent trend Share of respondents who expect their talent availability to improve or wo Improving & Global average Worsening & Global average Talent availability when hiring 61% -100%	32% 26% rsen in five years +100% 13% ▲ +100% 74%	Share of employers surveyed plan 48 I Global 51 Run comprehensive DEI training for managers and staff AI Strategy Share of employers surveyed plan capability and prevalence	<b>44</b>   Global 39 Pay equity reviews and salary audits	39 Global 48 Targeted recruitment, retention progression initiatives	on and

## Energy Technology and Utilities

19% | Global 22%

## Labour-market churn

Five-year structural labour-force churn

Trend outlook

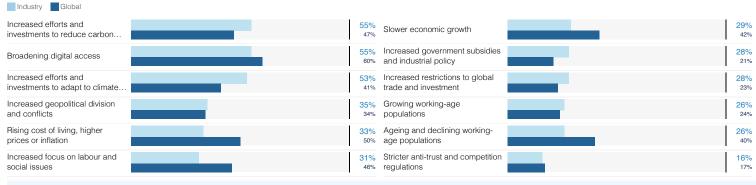
#### Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

40% | Global 39%

Shares of core skills which will change

Skill disruption



1/2

81% | Global 83%

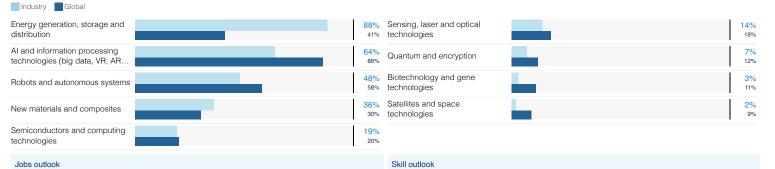
Organizations with DEI priorities

Share of organizations with DEI priorities

#### Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation



#### Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth Job Growth Job displacement Net Growth A Global net growth

1. Net growth 2. Global net gr	rowth <b>3.</b> Churn				
		NET GROWTH	1.	2.	3.
	-100%	0	100%	<b>-</b>	0.
AI and Machine Learning Specialists			46	82	46
Renewable Energy Engineers			46	38	46
Sustainability Specialists		ļ	32	33	32
Energy Engineers		ļ	20	18	21
Project Managers			12	17	14
Accounting, Bookkeeping and Payroll Clerks			-15	-18	15
Workforce Strategy outlook					

#### 0,

#### Key components of your workforce strategy by 2030

% surveyed organizations selecting the macrotrend to drive workforce transformation

	INDUST	RY GLOBAL
Upskill your workforce		
	90%	85%
Hire staff with new skills to meet emerging business needs		
	77%	70%
Complement and augment your workforce with new technologies		
	69%	63%

## Skills of increasing use by 2030

Skills of the most increase in use by 2030

#### Industry A Global CORE SKILLS OF 2025 SKILLS OF INCREASING USE BY 2030 Analytical thinking AI and big data 91% Creative thinking Networks and cybersecurity 74% Resilience, flexibility and agility Technological literacy 67% 67% Technological literacy Curiosity and lifelong learning 61% 67% Leadership and social influence Leadership and social influence 57 Upskilling and reskilling outlook 39 | Global 41 32 I Global 29 18 | Global 19 Global 11 Would not need training by Would be up Would be unlikely to upskill Would be upskilled in their 2030

## 72% | Global 88%

Al exposure

Share of organizations running AI programmes

# Energy Technology and Utilities

Human-machine frontier	Business Practice		
Human-machine frontier	Business practices to improve talent availability		
% of tasks completed by predominantly people, predominantly technology, or a combination of both	Top practices with the greatest potential to improve talent availability (share of organizations surveye		
Human Global Combination Global Technology Global	Industry A Global		
ALL TASKS	Improving talent progression and promotion processes		
Now	79% 62%		
43% 34% 23	% Providing effective reskilling and upskilling		
48% 30% 22	% 77% 63%		
2030	Supporting employee health and well-being		
31% 38% 31	4 · · · · · · · · · · · · · · · · · · ·		
33% 33% 34			
	Offering remote and hybrid work opportunities within countries		
	51% 43%		
	<u>.</u>		
Key barriers for business transformation	Wage outlook		
Transformation barriers	Wage trends		
Share of organisations surveyed expecting the barriers will hinder their organisation transformation	Share of organizations projecting the share of wages and other forms of workers' compensation as		
Industry A Global INDUSTRY GLOBAI	percentage of the company's total revenues		
Skills gaps in the labour market	Growing Global Global Global Global Global		
81% 63%	50% 38% 12		
Outdated or inflexible regulatory framework	52% 41% 7		
44% 39%			
Inability to attract talent to the industry			
37% 37%			
Organization culture and resistance to change 37% 46%			
Lack of adequate data and technical infrastructure			
30% 32%			
▲			
Talent availability outlook	DEI Actions		
Talent trend	Share of employers surveyed planning to implement the diversity, equity and inclusion measure		
Share of respondents who expect their talent availability to improve or worsen in five years			
Improving & Global average Worsening & Global average	62   Global 51 60   Global 42 55   Global 48		
Talent availability when hiring	Run comprehensive DEI training for Set DEI goals, targets or quotas Targeted recruitment, retention and		
37% -100% +100% 2	managers and staff progression initiatives		
Talent development of existing workforce	AI Strategy		
+100% +100% 21	% Share of employers surveyed planning to implement the stated strategy in response to AI's increasing		
Falent retention of existing workforce	capability and prevalence		
43% -100% +100% 39'	%		
	74 I Global 69 74 I Global 77 61 I Global 62		
	Hiring new people with skills to design Al tools and enhancements appropriate for the organization-specific skills		

**2** / 2

1 / 2

88% | Global 83%

Organizations with DEI priorities

Share of organizations with DEI priorities

## Financial services and Capital markets

## 30% | Global 22%

Labour-market churn

Five-year structural labour-force churn

## Trend outlook

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#### Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

41% | Global 39%

Shares of core skills which will change

Skill disruption

Global			
Broadening digital access	10/0	Increased efforts and investments to reduce carbon	<b>35%</b> 47%
Increased efforts and investments to adapt to climate	0070	Increased focus on labour and social issues	<b>33%</b> 46%
Slower economic growth	<b>50%</b> 42%	Increased restrictions to global trade and investment	<b>28%</b> 23%
Rising cost of living, higher prices or inflation		Growing working-age populations	23% 24%
Ageing and declining working- age populations		Stricter anti-trust and competition regulations	23% 17%
Increased geopolitical division and conflicts	<mark>36%</mark> 34%	Increased government subsidies and industrial policy	<b>19%</b> 21%
Technology trends			

Technology trends driving business transformation Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Industry Global

Al and information processing technologies (big data, VR, AR	95% 86%	New materials and composites	9% 30%
Robots and autonomous systems		Sensing, laser and optical technologies	6% 18%
Quantum and encryption	26% 12%	Satellites and space technologies	5% 9%
Semiconductors and computing technologies	18% 20%	Biotechnology and gene technologies	3% 11%
Energy generation, storage and distribution	16% 41%		

## Jobs outlook

Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth Job Growth Job displacement Net Growth A Global net growth

1. Net growth 2. Global net gr	owth 3. Churn					
		NET GROWTH		1.	2.	3.
	-100%	0	100%			
AI and Machine Learning						
Specialists				228	82	228
			•			
Data Analysts and Scientists				40	41	40
		<b>1</b>				
Business Intelligence Analysts				18	18	20
Baeineee intelligenee / indigete						20
Financial and Investment						
Advisers				12	11	15
		▲				
Human Resources Specialists				3	5	13
		<b>1</b>				
Accountants and Auditors				-11	-8	14
, looca name and / duitoro				I	U	

## Workforce Strategy outlook

## Key components of your workforce strategy by 2030

% surveyed organizations selecting the macrotrend to drive workforce transformation

Industry A Global

	INDUSTRY	GLOBAL
Upskill your workforce		
	87%	85%
Accelerate the automation of processes and tasks		
	82%	73%
Hire staff with new skills to meet emerging business needs		
	73%	70%
-		



Skill outlook

Industry A Global

CORE SKILLS OF 2025

Skills of the most increase in use by 2030

## SKILLS OF INCREASING USE BY 2030

97% | Global 88%

Share of organizations running AI programmes

Al exposure

Analytical thinking AI and big data 95% 80% Resilience, flexibility and agility Technological literacy 73% 84% Leadership and social influence Networks and cybersecurity 66% 82% Creative thinking Resilience, flexibility and agility 65% 68% Technological literacy Creative thinking

## Upskilling and reskilling outlook

42 I Global 41	25   Global 29	21   Global 19	12   Global 11	
Would not need training by 2030	Would be upskilled in their current role	Would be upskilled and redeployed	Would be unlikely to upskill	

65%

67%

# Financial services and Capital markets

Human-machine frontier	Business Practice
Human-machine frontier % of tasks completed by predominantly people, predominantly technology, or a combination of both	Business practices to improve talent availability Top practices with the greatest potential to improve talent availability (share of organizations surveyed)
Human Global Combination Global Technology Global	Industry A Global INDUSTRY GLOBAL
ALL TASKS	Providing effective reskilling and upskilling
Now	71% 63%
44% <b>35% 21%</b> 48% <b>30% 22%</b>	
	Improving talent progression and promotion processes
2030	61% 62%
33% <b>33% 34%</b>	Offering remote and hybrid work opportunities within countries
	58% 43%
	Tapping into diverse talent pools
	57% 47%
Key barriers for business transformation	Wage outlook
Transformation barriers	Wage trends
Share of organisations surveyed expecting the barriers will hinder their organisation transformation	Share of organizations projecting the share of wages and other forms of workers' compensation as percentage of the company's total revenues
Industry A Global INDUSTRY GLOBAL	
Skills gaps in the labour market	Growing Global Similar Global Declining Global
66% 63%	46% 45% 8% 41% 8% 0%
Organization culture and resistance to change	41% 0% 0%
Outdated or inflexible regulatory framework	
44% 39%	
Lack of adequate data and technical infrastructure	
38% 32%	
Inability to attract talent to the industry	
34% 37%	
Talent availability outlook	DEI Actions
Talent trend	Share of employers surveyed planning to implement the diversity, equity and inclusion measure
Share of respondents who expect their talent availability to improve or worsen in five years	
Improving A Global average Worsening A Global average	58   Global 51 57   Global 48 47   Global 39
Talent availability when hiring	Run comprehensive DEI training for Targeted recruitment, retention and Pay equity reviews and salary audits
28% -100% +100% 1%	managers and staff progression initiatives
Talent development of existing workforce	Al Strategy
23% -100% +100% 15%	AI Strategy
	Share of employers surveyed planning to implement the stated strategy in response to AI's increasing capability and prevalence
Talent retention of existing workforce	
37% -100% +100% 37%	80 I Global 77 74 I Global 69 Global 62
	Reskilling and upskilling your existing workforce to better work alongside AI         Hiring new people with skills to design AI tools and enhancements appropriate for the organization-specific skills         Hiring new people with skills to better work alongside AI

## Government and Public sector

23% | Global 22%

Labour-market churn

Five-year structural labour-force churn

## Trend outlook

Industry Global

#### Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

38% | Global 39%

Shares of core skills which will change

Skill disruption

Broadening digital access	60% 60%	Slower economic growth	32% 42%
Increased efforts and investments to adapt to climate		Increased government subsidies and industrial policy	<b>30%</b> 21%
Increased efforts and investments to reduce carbon		Increased geopolitical division and conflicts	<b>30%</b> 34%
Increased focus on labour and social issues		Growing working-age populations	28% 24%
Ageing and declining working- age populations		Increased restrictions to global trade and investment	26% 23%
Rising cost of living, higher prices or inflation	<b>39%</b> 50%	0	0% 0%

#### Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Industry Global		
Al and information processing technologies (big data, VR, AR	90% 86%	Satellites and space 21% 9%
Robots and autonomous systems	58% 58%	New materials and composites
Energy generation, storage and distribution	44% 41%	Biotechnology and gene 11% technologies 11%
Semiconductors and computing technologies	28% 20%	Quantum and encryption 5%
Sensing, laser and optical technologies	25% 18%	

### Jobs outlook

Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth Job Growth Job displacement Net Growth A Global net growth

1. Net growth 2. Global net gro	owth 3. Churn					
		NET GROWTH		1.	2.	3.
	-100%	0	100%		<b>b</b>	0.
AI and Machine Learning Specialists			▲	179	82	179
Supply Chain and Logistics Specialists				21	17	22
Civil Engineers				16	13	19
Water Transportation Workers, including Ship and Marine Car				16	16	26
General and Operations Managers		ļ		5	4	20
Administrative Assistants and Executive Secretaries				-13	-20	19
Workforce Strategy outlook						

Skill outlook

Skills of increasing use by 2030 Skills of the most increase in use by 2030

## Industry A Global CORE SKILLS OF 2025 Leadership and social influence Analytical thinking

66% Networks and cybersecurity 61%

59%

57%

Resource management and operations

Service orientation and customer service

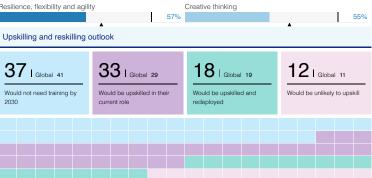
## Resilience, flexibility and agility

## Key components of your workforce strategy by 2030

% surveyed organizations selecting the macrotrend to drive workforce transformation

Industry A Global

	INDUSTRY	GLOBAL
Upskill your workforce		
	83%	85%
Complement and augment your workforce with new technologies		
	78%	63%
Accelerate the automation of processes and tasks		
	73%	73%



SKILLS OF INCREASING USE BY 2030

90%

70%

61%

AI and big data

Technological literacy

Environmental stewardship

76% | Global 88%

Share of organizations running AI programmes

Al exposure



75% | Global 83%

Organizations with DEI priorities

Share of organizations with DEI priorities

# Government and Public sector

Human-machine frontier	Business Practice
48%         30%         22%           2030         34%         39%         27%	Supporting employee health and well-being
Key barriers for business transformation	40% 38%
•	
Transformation barriers         Share of organisations surveyed expecting the barriers will hinder their organisation transformation         Industry & Global         INDUSTRY GLOBAL         Organization culture and resistance to change	Wage trends Share of organizations projecting the share of wages and other forms of workers' compensation as percentage of the company's total revenues Growing Global Global Global Global Global
68% 46%	52% 38% 10%
Skills gaps in the labour market	8% 52% 41
52% 63%	
Outdated or inflexible regulatory framework	
52% 39%	
Lack of adequate data and technical infrastructure	
41% 32%	
Shortage of investment capital	
36% 26%	
Talent availability outlook	DEI Actions
Talent trend	
Share of respondents who expect their talent availability to improve or worsen in five years	Share of employers surveyed planning to implement the diversity, equity and inclusion measure
Improving A Global average Worsening A Global average	50   Global 51 48   Global 33 43   Global 48
Talent availability when hiring	Run comprehensive DEI training for Anti-harrasment protocols Targeted recruitment, retention and
23% -100% +100% 3%	managers and staff progression initiatives
Talent development of existing workforce	AI Strategy
33% -100% +100% 20%	Share of employers surveyed planning to implement the stated strategy in response to AI's increasing
Talent retention of existing workforce	capability and prevalence
48% -100% +100% 25%	84 I Global 77 76 I Global 69 63   Global 62
	Reskilling and upskilling your existing workforce to better work alongside AI       Hiring new people with skills to design AI       Hiring new people with skills to better work alongside AI         tools and enhancements appropriate for the organization-specific skills       work alongside AI       work alongside AI

1 / 2

89% | Global 83%

Organizations with DEI priorities

Share of organizations with DEI priorities

## Information and Technology services

## 34% | Global 22%

Labour-market churn

Five-year structural labour-force churn

## Trend outlook

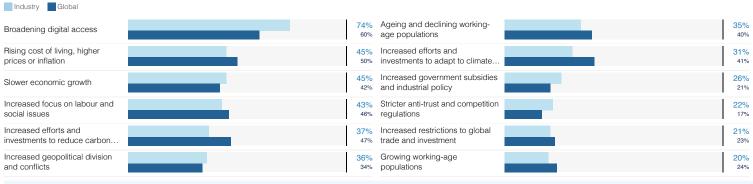
## Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

32% | Global 39%

Shares of core skills which will change

Skill disruption



#### Technology trends

Industry Global

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Al and information processing technologies (big data, VR, AR		atellites and space 20 chnologies	<b>)%</b> 9%
Robots and autonomous systems	48% 58% Ne	ew materials and composites	<b>2%</b> 0%
Quantum and encryption		ensing, laser and optical 12 chnologies 18	2% 8%
Semiconductors and computing technologies			<b>%</b> 1%
Energy generation, storage and distribution	28% 41%		

### Jobs outlook

Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth	Job Growth	Job displacement	Net Growth	<ul> <li>Global net growth</li> </ul>
------------	------------	------------------	------------	---------------------------------------

1. Net growth 2. Global net gro	wth 3. Churn					
		NET GROWTH		1.	2.	3.
	-100%	0	100%	1.	2.	0.
Software and Applications				100	57	138
Developers			•	132	57	130
AI and Machine Learning						
Specialists				98	82	98
			_			
Data Analysts and Scientists			ļ	42	41	46
			-			
Data Engineers				32	36	32
Accounting, Bookkeeping and						
Payroll Clerks				-27	-18	27
		· .				
Data Entry Clerks		I.		-30	-26	30
		•				

## Skills of the most increase in use by 2030

Skills of increasing use by 2030

Skill outlook

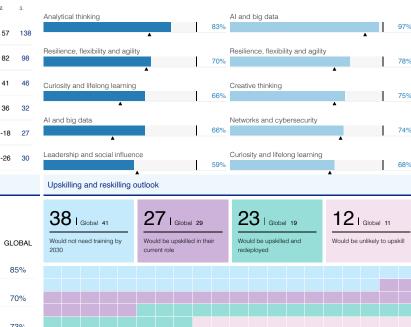
Industry A Global

SKILLS OF INCREASING USE BY 2030

93% | Global 88%

Share of organizations running AI programmes

Al exposure



## Workforce Strategy outlook

Key components of your workforce strategy by 2030

% surveyed organizations selecting the macrotrend to drive workforce transformation

Industry A Global

	INDUSTRY	GLOBAL
Upskill your workforce		
	92%	85%
Hire staff with new skills to meet emerging business needs		
	86%	70%
Accelerate the automation of processes and tasks		
	76%	73%

Human-machine frontier		Business Practice			
Human-machine frontier	( )	Business practices to improve t	•		
% of tasks completed by predominantly people, predominantly technology, or a combination	on of both	Industry A Global	tential to improve talent availability (	share of organizations s	urveyed;
Human Global Combination Global Technology Global		Industry A Global		INDUSTRY	GLOBAI
ALL TASKS		Providing effective reskilling and u	ıpskilling		
Now			÷	63%	63%
41%	%     38%     22%       %     30%     22%	Improving talent progression and	promotion processes	61%	62%
	0 00 /0 22 /0	Tapping into diverse talent pools	<u>+</u>	01%	02%
2030	% 41% 34%			61%	47%
33%	% <b>33%</b> 34%	Supporting employee health and	well-being		
				56%	64%
		Offering remote and hybrid work of	opportunities within countries		
			<u>.</u>	53%	43%
Key barriers for business transformation		Wage outlook			
ransformation barriers		Wage trends			
hare of organisations surveyed expecting the barriers will hinder their organisation transfo	ormation		the share of wages and other forms	of workers' compensatio	on as
Industry A Global		percentage of the company's total	revenues		
INDUST/ kills gaps in the labour market	RY GLOBAL	Growing Global Similar	Global Declining Global		
64%	63%			49% 3	39% 11
Drganization culture and resistance to change				8% 5	5 <b>2%</b> 41
40%	46%				
ack of adequate data and technical infrastructure					
31%	32%				
nability to attract talent to my firm	070/				
30% Dutdated or inflexible regulatory framework	27%				
30%	39%				
▲ ▲	0070				
Talent availability outlook		DEI Actions			
Talent trend		Share of employers surveyed plar	nning to implement the diversity, equ	ity and inclusion measu	re
Share of respondents who expect their talent availability to improve or worsen in five years					
Improving 🔺 Global average 🔛 Worsening 🔺 Global average		59   Global 51	54   Global 42	51   Global 48	
alent availability when hiring		Run comprehensive DEI training for	Set DEI goals, targets or quotas	Targeted recruitment, retenti	on and
	00% <b>3%</b>	managers and staff	···· 0···· 0···· 4····	progression initiatives	
alent development of existing workforce		AI Strategy			
-100% +11	00% <b>0%</b>	Share of employers surveyed plan	ning to implement the stated strates	w in response to Alls in	oreasing
alent retention of existing workforce		capability and prevalence	ning to implement the stated strate(	gy in response to ALS INC	เรลงเปล
	00% 44%				
	00 % 44 %	87 I Global 77	79 I Global 69	73   Global 62	
		Reskilling and upskilling your existing workforce to better work alongside Al	Hiring new people with skills to design Al tools and enhancements appropriate for the organization-specific skills	Hiring new people with skills work alongside Al	to better

Hiring new people with skills to design AI Hiring new people with skills to better tools and enhancements appropriate for the organization-specific skills

81% | Global 83%

Organizations with DEI priorities

Share of organizations with DEI priorities

Infrastructure

14% | Global 22%

Labour-market churn Five-year structural labour-force churn

Trend outlook

#### Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

35% | Global 39%

Shares of core skills which will change

Skill disruption



## Technology trends

Jobs outlook

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Industry Global		
AI and information processing technologies (big data, VR, AR	87% 86%	Sensing, laser and optical technologies
Robots and autonomous systems	58% 58%	Satellites and space technologies
New materials and composites	57% 30%	Quantum and encryption
Energy generation, storage and distribution	55% 41%	Biotechnology and gene technologies
Semiconductors and computing technologies	25% 20%	

Sensing, laser and optical technologies	21% 18%
Satellites and space technologies	8% 9%
Quantum and encryption	4% 12%
Biotechnology and gene technologies	<b>3%</b> 11%

78% | Global 88%

Share of organizations running AI programmes

Al exposure

#### Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth Job Growth Job displacement Net Growth A Global net growth

1. Net growth 2. Global net grow	vth 3. Churn					
	-100%	NET GROWTH	100%	1.	2.	з.
Al and Mashina Learning	- 100 %	0	100 /6			
Al and Machine Learning Specialists				50	82	50
Sustainability Specialists				30	33	30
Assembly and Factory Workers				20	0	25
Civil Engineers		L,		14	13	14
Administrative Assistants and Executive Secretaries		, <b>L</b>		-17	-20	18
Accounting, Bookkeeping and Payroll Clerks				-21	-18	22
Workforce Strategy outlook						

## Skill outlook

CORE SKILLS OF 2025

Analytical thinking

Skills of increasing use by 2030 Skills of the most increase in use by 2030

Industry A Global

## SKILLS OF INCREASING USE BY 2030 Al and big data

55%

Creative thinking Networks and cybersecurity 59%

## Leadership and social influence

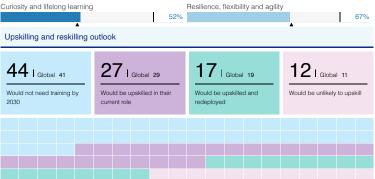
Curiosity and lifelong learning

## Key components of your workforce strategy by 2030

% surveyed organizations selecting the macrotrend to drive workforce transformation

Industry A Global

		INDUSTRY	GLOBAL
Upskill your workforce			
		83%	85%
Hire staff with new skills to meet emerging business needs	•		
		72%	70%
Accelerate the automation of processes and tasks			
		69%	73%



Technological literacy

80%

Human-machine frontier		Business Practice			
Human-machine frontier		Business practices to improve	•		
% of tasks completed by predominantly people, predominantly technology, or a combination of	of both		otential to improve talent availability (	share of organizations	surveyed
Human Global Combination Global Technology Global		Industry A Global		INDUSTR	Y GLOBA
ALL TASKS		Providing effective reskilling and	upskilling		
Now			<u>+</u>	73%	63%
	<b>29% 20%</b> 30% 22%	Improving talent progression and	promotion processes	0000	000/
	070 2270	Supporting employee health and	well-being	68%	62%
2030	33% 31%	Supporting employee nearth and	weil-beilig	68%	64%
	33% 34%	Offering remote and hybrid work	opportunities within countries		
				54%	43%
		Tapping into diverse talent pools	÷		
				44%	47%
Key barriers for business transformation		Wage outlook			
Transformation barriers		Wage trends			
Share of organisations surveyed expecting the barriers will hinder their organisation transformation	ation	-	the share of wages and other forms	of workers' compensa	ation as
Industry A Global		percentage of the company's tota	al revenues		
INDUSTRY Skills gaps in the labour market	GLOBAL	Growing Global Similar	Global Declining Global		
58%	63%			58%	<b>3%</b> 39
Organization culture and resistance to change				8%	<b>52%</b> 4 <sup>-</sup>
46%	46%				
Inability to attract talent to the industry					
40%	37%				
Lack of adequate data and technical infrastructure	32%				
Outdated or inflexible regulatory framework	32%				
33%	39%				
A					
Talent availability outlook		DEI Actions			
Talent trend		Share of employers surveyed pla	nning to implement the diversity, equ	ity and inclusion meas	sure
Share of respondents who expect their talent availability to improve or worsen in five years					
Improving A Global average Worsening A Global average		58   Global 42	53 I Global 48	48   Global 51	
Talent availability when hiring		Set DEI goals, targets or quotas	Targeted recruitment, retention and	Run comprehensive DEI t	raining for
41% -100% +100%	6 33%		progression initiatives	managers and staff	
Talent development of existing workforce					
-100%     -100%     +100%	6 0%	AI Strategy			
▲ ▲	\$ 10		nning to implement the stated strates	gy in response to Al's	increasing
Talent retention of existing workforce		capability and prevalence			
67% -100% +100%	6 28%	74	64	50	
		74   Global 77	64 I Global 69	59   Global 62	
		Reskilling and upskilling your existing workforce to better work alongside Al	Hiring new people with skills to design AI tools and enhancements appropriate for	Hiring new people with sk	ills to better
				work alongside Al	

Industry Pr	ofile
-------------	-------

1/2

97% | Global 83%

Organizations with DEI priorities

Share of organizations with DEI priorities

## Insurance and Pensions management

## 19% | Global 22%

## Labour-market churn

Five-year structural labour-force churn

## Trend outlook

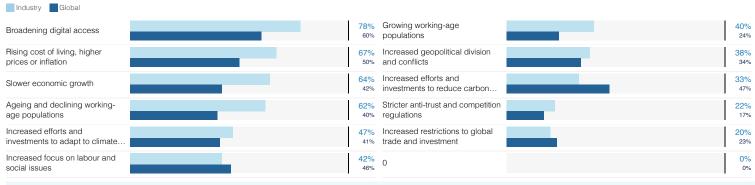
## Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

47% | Global 39%

Shares of core skills which will change

Skill disruption



### Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Key roles for business transformation		Skills of increasing use by 2030	
Jobs outlook		Skill outlook	
Biotechnology and gene technologies	13% 11%		
Semiconductors and computing technologies	20% 20%	0	0% 0%
Quantum and encryption	24% 12%	0	0% 0%
Robots and autonomous systems		Sensing, laser and optical technologies	9% 18%
Al and information processing technologies (big data, VR, AR		Energy generation, storage and distribution	11% 41%
Industry Global			

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth Job Growth Job displacement Net Growth A Global net growth

1. Net growth 2. Global net gro	wth 3. Churr	1			
		NET GROWTH	1.	2.	3
	-100%	0	100%	2.	3.
AI and Machine Learning Specialists			40	82	40
Data Analysts and Scientists			35	41	35
Digital Transformation Specialis	sts		33	35	33
Risk Management Specialists			11	17	11
Accountants and Auditors		Ļ	-11	-8	14
Administrative Assistants and Executive Secretaries			-29	-20	29
Workforce Strategy outlook					

## Key components of your workforce strategy by 2030

% surveyed organizations selecting the macrotrend to drive workforce transformation

Industry A Global

	INDUSTRY	GLOBAL
Accelerate the automation of processes and tasks		
	97%	73%
Upskill your workforce		
	91%	85%
Hire staff with new skills to meet emerging business needs		
	76%	70%

Industry A Global

CORE SKILLS OF 2025

2030

Skills of the most increase in use by 2030

## SKILLS OF INCREASING USE BY 2030

0% | Global 0%

Share of organizations running AI programmes

Al exposure

Resilience, flexibility and agility AI and big data 94% 97% Analytical thinking Creative thinking 899 86% Curiosity and lifelong learning Networks and cybersecurity 83% 81% Leadership and social influence Technological literacy 75% 81% Creative thinking Curiosity and lifelong learning 72% 1 779 Upskilling and reskilling outlook 39 | Global 41 29 | Global 29 22 | Global 19 9 Global 11 Would be upskilled in their Would be upskilled and Would be unlikely to upskill Would not need training by current role

**2** / 2

# Insurance and Pensions management

Human-machine frontier	Business Practice		
Human-machine frontier % of tasks completed by predominantly people, predominantly technology, or a combination of both	Business practices to improve talent availability Top practices with the greatest potential to improve talent availability (share of organizations surveye		
Human Global Combination Global Technology Global	Industry A Global	INDUSTRY GLOBAL	
ALL TASKS	Supporting employee health and well-being		
Now		85% 64%	
41% 44% 16 48% 30% 22		77% 62%	
2030	Offering remote and hybrid work opportunities within countries		
25% 44% 31	4	74% 43%	
33% <b>33%</b> 34	% Providing effective reskilling and upskilling	74% 63%	
	Tapping into diverse talent pools	74% 03%	
		74% 47%	
Key barriers for business transformation	- Wage outlook		
Transformation barriers	Wage trends		
Share of organisations surveyed expecting the barriers will hinder their organisation transformation	Share of organizations projecting the share of wages and other	forms of workers' compensation as	
Industry A Global INDUSTRY GLOBA	percentage of the company's total revenues		
Skills gaps in the labour market	Growing Global Similar Global Declining Gl	obal	
69% 63%		59% 32% 99	
Organization culture and resistance to change		8% 52% 419	
Outdated or inflexible regulatory framework			
47% 39%			
Lack of adequate data and technical infrastructure			
38% 32%			
Inability to attract talent to the industry			
33% 37%			
Talent availability outlook	DEI Actions		
Talent trend	Share of employers surveyed planning to implement the diversi	ty, equity and inclusion measure	
Share of respondents who expect their talent availability to improve or worsen in five years			
Improving   Global average Worsening Global average	65   Giobal 51 59   Giobal 39	50   Global 48	
Talent availability when hiring	Run comprehensive DEI training for Pay equity reviews and salary audi		
36% -100% +100% C	% managers and staff	progression initiatives	
Falent development of existing workforce	AI Strategy		
<b>0%</b> -100% +100% <b>0</b>	% Share of employers surveyed planning to implement the stated	etrotogy in response to Alla increasing	
Talent retention of existing workforce	capability and prevalence	sualegy in response to Ars increasing	
	%		
A A A A	91   Global 62 85   Global 77	77   Global 69	
	Hiring new people with skills to better work alongside Al workforce to better work alongside	ng Hiring new people with skills to design A	

Hiring new people with skills to design AI tools and enhancements appropriate for the organization-specific skills

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## Medical and Healthcare services

19% | Global 22%

## Labour-market churn

Five-year structural labour-force churn

Trend outlook

#### Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

39% | Global 39%

Shares of core skills which will change

Skill disruption

Global			
Broadening digital access		Increased geopolitical division and conflicts	35% 34%
Ageing and declining working- age populations		Growing working-age populations	30% 24%
Rising cost of living, higher prices or inflation	50% 50%	Slower economic growth	30% 42%
Increased focus on labour and social issues		Stricter anti-trust and competition regulations	24% 17%
Increased efforts and investments to adapt to climate	<b>43%</b> 41%	Increased government subsidies and industrial policy	20% 21%
Increased efforts and investments to reduce carbon	41% 47%	Increased restrictions to global trade and investment	15% 23%

#### Technology trends

Industry Global

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Al and information processing technologies (big data, VR, AR	91% 86%		24% 41%
Biotechnology and gene technologies	63% 11%	Semiconductors and computing technologies	20% 20%
Robots and autonomous systems	59% 58%	Quantum and encryption	11% 12%
Sensing, laser and optical technologies	32% 18%	Satellites and space technologies	7% 9%
New materials and composites	24% 30%		

### Jobs outlook

Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth Job Growth Job displacement Net Growth A Global net growth

1. Net growth 2. Global net grov	vth 3. Churn	NET GROWTH				
	-100%	0	100%	1.	2.	3.
Data Analysts and Scientists				50	41	50
AI and Machine Learning Specialists				38	82	38
Business Intelligence Analysts				24	18	24
Assembly and Factory Workers		ļ		5	0	19
Accountants and Auditors		Ļ		-9	-8	13
Administrative Assistants and Executive Secretaries				-17	-20	30
Workforce Strategy outlook						

## Skill outlook

Skills of increasing use by 2030 Skills of the most increase in use by 2030

Industry A Global

## CORE SKILLS OF 2025 Resilience, flexibility and agility

Analytical thinking

Systems thinking

Technological literacy 60% Networks and cybersecurity 57% Empathy and active listening Creative thinking 51%

AI and big data

65%

SKILLS OF INCREASING USE BY 2030

92%

81%

78%

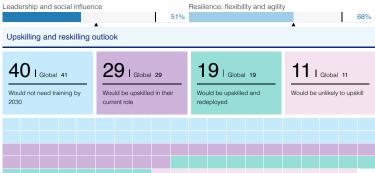
## Leadership and social influence

## Key components of your workforce strategy by 2030

% surveyed organizations selecting the macrotrend to drive workforce transformation







## 94% | Global 88%

Al exposure Share of organizations running AI programmes



91% | Global 83%

Organizations with DEI priorities

Share of organizations with DEI priorities

Human-machine frontier	Business Practice
Human-machine frontier % of tasks completed by predominantly people, predominantly technology, or a combination of both	Business practices to improve talent availability Top practices with the greatest potential to improve talent availability (share of organizations surveyed) Industry  Global
Human Global Combination Global Technology Global	Providing effective reskilling and upskilling
Now	63% 63%
50% 27% 23% 48% 30% 22%	
2030	Offering higher wages
34% 35% 31%	
33% 33% 34%	Tapping into diverse talent pools
	Offering diversity, equity and inclusion (DEI) policies and programmes
	40% 39%
Key barriers for business transformation	 Wage outlook
•	
Transformation barriers Share of organisations surveyed expecting the barriers will hinder their organisation transformation	Wage trends Share of organizations projecting the share of wages and other forms of workers' compensation as
Industry A Global	percentage of the company's total revenues
INDUSTRY GLOBAL Organization culture and resistance to change	Growing Global Similar Global Declining Global
59% 46%	41% 47% 129
Skills gaps in the labour market	8% 52% 41%
46%         63%           Outdated or inflexible regulatory framework         •	
46% 39%	
Lack of adequate data and technical infrastructure	
Insufficient understanding of opportunities	
30% 25%	
Talent availability outlook	DEI Actions
Talent trend	Share of employers surveyed planning to implement the diversity, equity and inclusion measure
Share of respondents who expect their talent availability to improve or worsen in five years Improving  Global average Worsening  Global average	51 I Global 51 40 I Global 48 34   Global 39
Talent availability when hiring	
43% -100% +100% 37%	Run comprehensive DEI training for Targeted recruitment, retention and Pay equity reviews and salary audits managers and staff progression initiatives
Talent development of existing workforce	AI Strategy
0% -100% +100% 69%	Share of employers surveyed planning to implement the stated strategy in response to AI's increasing
Talent retention of existing workforce	capability and prevalence
-100% +100% 43%	881 Global 77 591 Global 69 561 Global 62
	Reskilling and upskilling your existing workforce to better work alongside AI         Hiring new people with skills to design AI tools and enhancements appropriate for the organization-specific skills         Hiring new people with skills to better work alongside AI

# Mining and metals

89% | Global 83%

Organizations with DEI priorities

Share of organizations with DEI priorities

# 14% | Global 22%

Labour-market churn Five-year structural labour-force churn

## Trend outlook

## Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

35% | Global 39%

Shares of core skills which will change

Skill disruption



## Technology trends

la duatau Clabal

Jobs outlook

## Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Industry Global	
Energy generation, storage and distribution	<b>79%</b> 41%
New materials and composites	66% 30%
Al and information processing technologies (big data, VR, AR	66% 86%
Robots and autonomous systems	48% 58%
Semiconductors and computing technologies	28% 20%

Sensing, laser and optical technologies	21% 18%
Biotechnology and gene technologies	<b>3%</b> 11%
0	0% 0%
0	0% 0%

### Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth Job Growth Job displacement Net Growth A Global net growth

1. Net growth 2. Global net grow	vth 3. Churn	NET GROWTH				
	-100%	0	100%	1.	2.	3.
AI and Machine Learning Specialists				43	82	43
Chemical Processing Plant Operators				6	9	16
Mining, Petroleum and Other Extraction Workers				6	1	21
General and Operations Managers		ļ		2	4	2
Assembly and Factory Workers		ļ		-2	0	9
Administrative Assistants and Executive Secretaries		, C		-18	-20	18
Workforce Strategy outlook						

## Skills of increasing use by 2030

Skill outlook

Industry A Global

CORE SKILLS OF 2025

Creative thinking

Systems thinking

2030

Skills of the most increase in use by 2030

## SKILLS OF INCREASING USE BY 2030

79% | Global 88%

Share of organizations running AI programmes

Al exposure

AI and big data 65% 79% Talent management 65% Leadership and social influence Environmental stewardship 55% 68% Curiosity and lifelong learning Networks and cybersecurity 55% 65% Resilience, flexibility and agility Technological literacy 55% 65% Upskilling and reskilling outlook 56 | Global 41 24 | Global 29 13 | Global 19 7 Global 11 Would be unlikely to upskill Would not need training by Would be up Would be upskilled in thei

#### Key components of your workforce strategy by 2030

% surveyed organizations selecting the macrotrend to drive workforce transformation

Industry A Global

	INDUSTRY	GLOBAL
Accelerate the automation of processes and tasks		
	79%	73%
Upskill your workforce		
	79%	85%
Complement and augment your workforce with new technologies		
	74%	63%

# Mining and metals

Human-machine frontier	Business Practice
Human-machine frontier         % of tasks completed by predominantly people, predominantly technology, or a combination of both         Human       Global       Combination       Global       Technology       Global         ALL TASKS         Now       42%       27%       31%         48%       30%       22%         2030       28%       30%       42%         33%       33%       34%	Business practices to improve talent availability         Top practices with the greatest potential to improve talent availability (share of organizations surveyed)         Industry ▲Global         INDUSTRY ▲Global         Supporting employee health and well-being         Articulate business purpose and impact         ▲
Key barriers for business transformation	Tapping into diverse talent pools 58% 47% Wage outlook
Transformation barriers         Share of organisations surveyed expecting the barriers will hinder their organisation transformation         Industry & Global         Industry & Global         Skills gaps in the labour market         Corganization culture and resistance to change         43%       46%         Inability to attract talent to the industry         Outdated or inflexible regulatory framework         39%       39%         Shortage of investment capital	Wage trends         Share of organizations projecting the share of wages and other forms of workers' compensation as percentage of the company's total revenues         Growing       Global       Similar       Global       Declining       Global         Growing       Global       Similar       Global       Declining       Global         47%       47%       6%         8%       41%       0%
Talent availability outlook	DEI Actions
Talent trend         Share of respondents who expect their talent availability to improve or worsen in five years         Improving * Global average         Worsening * Global average         Talent availability when hiring         50%       -100%         * 400%       33%	Share of employers surveyed planning to implement the diversity, equity and inclusion measure         67 I Global 51         Run comprehensive DEI training for managers and staff             Pay equity reviews and salary audits             56 I Global 39         Pay equity reviews and salary audits             Targeted recruitment, retention and progression initiatives
Talent development of existing workforce       17%     -100%       Talent retention of existing workforce       72%     -100%       +100%     28%	Al Strategy Share of employers surveyed planning to implement the stated strategy in response to Al's increasing capability and prevalence          74 I Global 77         Reskilling and upskilling your existing workforce to better work alongside Al             74 I Global 47             Transitioning people from jobs that Al will cause to decline, to other roles within your organization

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Industry Profile Oil and Gas		1/2	
22%   Giobal 22%	<b>28%</b>   Global 39%	<b>75%</b>   Global 83%	82%   Global 88%
Labour-market churn Five-year structural labour-force churn	Skill disruption Shares of core skills which will change	Organizations with DEI priorities Share of organizations with DEI priorities	Al exposure Share of organizations running Al programm
Trend outlook			

## rends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

Industry Global		
Increased efforts and investments to reduce carbon	66% Increased geopolitical division 47% and conflicts	31% 34%
Slower economic growth	49%     Increased restrictions to global       42%     trade and investment	29% 23%
Increased efforts and investments to adapt to climate	43% 41% Broadening digital access	26% 60%
Increased government subsidies and industrial policy	40%     Ageing and declining working-       21%     age populations	23% 40%
Rising cost of living, higher prices or inflation	37% Growing working-age 50% populations	14% 24%
Increased focus on labour and social issues	34%Stricter anti-trust and competition46%regulations	6% 17%

## Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Industry Global		
Energy generation, storage and distribution	86%     Sensing, laser and optical       41%     technologies	9% 18%
Al and information processing technologies (big data, VR, AR	69% 86% Quantum and encryption	<mark>6%</mark> 12%
New materials and composites	51% Satellites and space 30% technologies	3% 9%
Robots and autonomous systems	40% 0 58% 0	0% 0%
Semiconductors and computing technologies	14% 20%	

#### Jobs outlook

Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth Job Growth Job displacement Net Growth A Global net growth

1. Net growth 2. Global net gro	wth 3. Churn					
		NET GROWTH		1.	2.	3.
	-100%	0	100%			
AI and Machine Learning						
Specialists				81	82	81
	_		-			
Project Managers				16	17	17
Mining, Petroleum and Other	-			-		
*				5	1	7
Extraction Workers		L.				
Accounting, Bookkeeping and				-19	-18	21
Payroll Clerks				I		
Administrative Assistants and				07	-20	27
Executive Secretaries		<b>I</b>		-27	-20	21
		-				
Data Entry Clerks	1			-40	-26	40
		<b>A</b>				

## Skills of increasing use by 2030

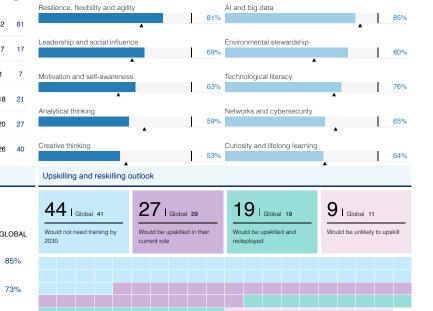
Skill outlook

Industry A Global

CORE SKILLS OF 2025

Skills of the most increase in use by 2030

SKILLS OF INCREASING USE BY 2030



Workforce Strategy outlook

## Key components of your workforce strategy by 2030

% surveyed organizations selecting the macrotrend to drive workforce transformation

Industry Global

Industry A Global	INDUSTRY	GLOBAL
Upskill your workforce		
	96%	85%
Accelerate the automation of processes and tasks		
	71%	73%
Complement and augment your workforce with new technologies		
	68%	63%

## Oil and Gas

Talent availability when hiring

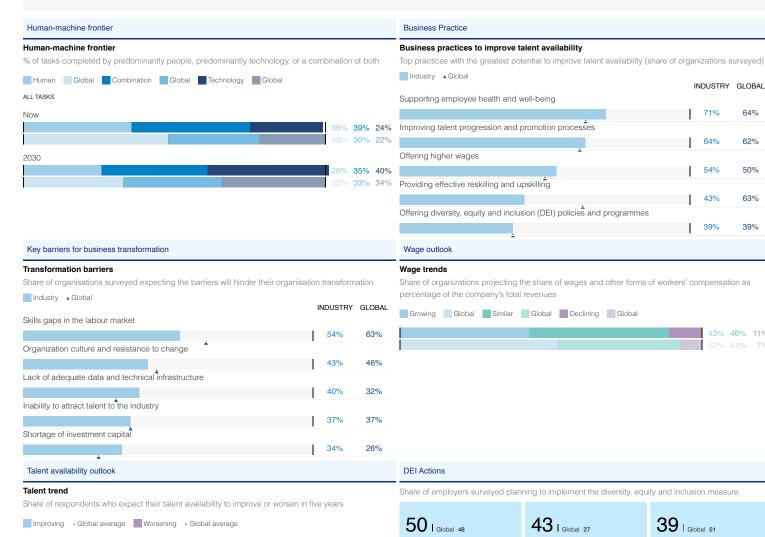
Talent development of existing workforce

Talent retention of existing workforce **29%** -100%

**43%** -100%

-100%

0%



39 | Global 51

INDUSTRY GLOBAL

64%

62%

50%

63%

39%

43% 46% 11%

71%

64%

54%

43%

39%

I

Embed DEI goals and solutions across Run comprehensive DEI training for managers and staff

## AI Strategy

+100% 18%

+100% 75%

+100% 50%

progression initiatives

Share of employers surveyed planning to implement the stated strategy in response to AI's increasing capability and prevalence

64 | Global 77

Targeted recruitment, retention and

## 61 I Global 69

the supply chain

Reskilling and upskilling your existing workforce to better work alongside Al

Hiring new people with skills to design AI tools and enhancements appropriate for the organization-specific skills

54 | Global 62 Hiring new people with skills to better

alongside Al

## Production of Consumer goods

## 18% | Global 22%

## Labour-market churn

Five-year structural labour-force churn

## Trend outlook

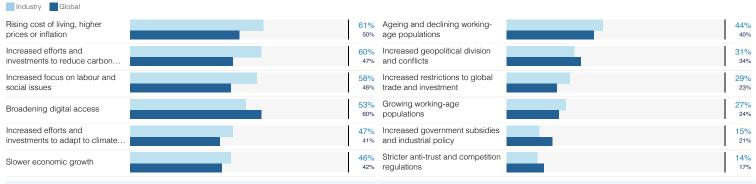
## Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

40% | Global 39%

Shares of core skills which will change

Skill disruption



1/2

82% | Global 83%

Organizations with DEI priorities

Share of organizations with DEI priorities

### Technology trends

Jobs outlook

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Industry Global	
AI and information processing technologies (big data, VR, AR	79% 86%
Robots and autonomous systems	71% 58%
New materials and composites	61% 30%
Energy generation, storage and distribution	60% 41%
Sensing, laser and optical technologies	23% 18%

19% 20%
14% 11%
8% 9%
3% 12%

90% | Global 88%

Share of organizations running AI programmes

Al exposure

#### Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth	Job Growth	Job displacement	Net Growth	<ul> <li>Global net growth</li> </ul>
------------	------------	------------------	------------	---------------------------------------

1. Net growth 2. Global net grow	vth 3. Churn					
	-100%	NET GROWTH	100%	1.	2.	3.
Business Development Professionals				26	19	26
Supply Chain and Logistics Specialists				17	17	19
Managing Directors and Chief Executives		ļ.		6	5	6
General and Operations Managers		ļ		4	4	9
Assembly and Factory Workers				-2	0	18
Administrative Assistants and Executive Secretaries		Ļ		-25	-20	25

## Skill outlook

Skills of increasing use by 2030 Skills of the most increase in use by 2030

#### Industry A Global CORE SKILLS OF 2025 SKILLS OF INCREASING USE BY 2030 Analytical thinking AI and big data 69% Resilience, flexibility and agility Resilience, flexibility and adility 65% Leadership and social influence Networks and cybersecurity 63% Technological literacy Technological literacy 61% Creative thinking Creative thinking 59% Upskilling and reskilling outlook 18 | Global 19 10 | Global 11 41 | Global 41 31 I Global 29 Would be upskilled in their Would be unlikely to upskill Would not need training by Would be ups killed and 2030 current role

Workforce Strategy outlook

Key components of your workforce strategy by 2030

% surveyed organizations selecting the macrotrend to drive workforce transformation

Industry A Global

		INDUSTRY	GLOBAL
Upskill your workforce			
		88%	85%
Accelerate the automation of processes and tasks	÷		
		79%	73%
Hire staff with new skills to meet emerging business needs			
		72%	70%

88%

73% 

73%

# Production of Consumer goods

Human-machine frontier		Business Practice			
Human-machine frontier % of tasks completed by predominantly people, predominantly technology, or a combinati Human Global Combination Global Technology Global	ion of both	Business practices to improve to Top practices with the greatest po Industry  Global	alent availability tential to improve talent availability	(share of organizations s	
ALLTASKS		Supporting employee health and	well-being		
Now 45%	% <b>30% 24</b> % 30% 22		promotion processes	65%	64% 62%
2030			pskilling	65%	63%
339	% 33% 34	Offering higher wages Improving working hours and over	time policies	60%	50%
				52%	38%
Key barriers for business transformation		Wage outlook			
Transformation barriers         Share of organisations surveyed expecting the barriers will hinder their organisation transformation         Industry       A Global         INDUST	ormation	percentage of the company's total		of workers' compensation	on as
Skills gaps in the labour market 67%	63%	Growing Global Similar	Giodal Declining Giodal	56% 4	42% 2%
Inability to attract talent to the industry 42% Organization culture and resistance to change		-			41% 8%
40% Lack of adequate data and technical infrastructure					
Outdated or inflexible regulatory framework 36%					
Talent availability outlook		DEI Actions			
Talent trend		1			
Share of respondents who expect their talent availability to improve or worsen in five years Improving  Global average Worsening  Global average	5	53   Global 51	46 I Global 48	42   Global 42	
Talent availability when hiring       57%     -100%	100% 23	Run comprehensive DEI training for managers and staff	Targeted recruitment, retention and progression initiatives	Set DEI goals, targets or que	otas
Talent development of existing workforce		AI Strategy			
	100% 70	Share of employers surveyed plar capability and prevalence	ning to implement the stated strate	gy in response to Al's in	creasing
Talent retention of existing workforce       17%       -100%	100% 41	75   Global 77 Reskilling and upskilling your existing	70 I Giobal 69 Hiring new people with skills to design Al	55   Global 62 Hiring new people with skills	s to better
		workforce to better work alongside Al	tools and enhancements appropriate for the organization-specific skills	work alongside Al	

90% | Global 83%

Organizations with DEI priorities

Share of organizations with DEI priorities

# Professional services

19% Global 22%

Labour-market churn

Five-year structural labour-force churn

## Trend outlook

#### Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

41% | Global 39%

Shares of core skills which will change

Skill disruption

Industry Global 67% Increased geopolitical division 37% Broadening digital access 60% and conflicts 34% Increased focus on labour and Increased efforts and 52% 26% social issues 46% investments to adapt to climate ... 41% Rising cost of living, higher Growing working-age 44% 26% prices or inflation 50% populations 24% Ageing and declining working-Increased restrictions to global 43% 20% age populations 40% trade and investment Stricter anti-trust and competition 41% 17% Slower economic growth regulations 42% Increased efforts and 37% Increased government subsidies 13% investments to reduce carbon.. and industrial policy 21%

#### Technology trends

Industry Global

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Al and information processing technologies (big data, VR, AR	Quantum and encryption	17% 12%
Robots and autonomous systems	50% Sensing, laser and optical technologies	17% 18%
Energy generation, storage and distribution	10% Biotechnology and gene	<b>7%</b> 11%
New materials and composites	22%     Satellites and space       30%     technologies	6% 9%
Semiconductors and computing technologies	22% 20%	

#### Jobs outlook

Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth Job Growth Job displacement Net Growth A Global net growth

1. Net growth 2. Global net gro	wth 3. Churn	NET GROWTH				
	-100%	0	100%	1.	2.	3.
Al and Machine Learning Specialists				61	82	61
Business Intelligence Analysts				15	18	20
Project Managers				14	17	14
Accountants and Auditors		Ļ		-8	-8	13
Administrative Assistants and Executive Secretaries				-14	-20	19
Accounting, Bookkeeping and Payroll Clerks				-22	-18	22
Workforce Strategy outlook						

## Skill outlook

Industry A Global

CORE SKILLS OF 2025

Skills of increasing use by 2030 Skills of the most increase in use by 2030

## SKILLS OF INCREASING USE BY 2030

95% | Global 88%

Share of organizations running AI programmes

Al exposure

Analytical thinking AI and big data Creative thinking Technological literacy 67 Service orientation and customer service Creative thinking 58% 69% Leadership and social influence Networks and cybersecurity 58% Empathy and active listening Environmental stewardship Upskilling and reskilling outlook 14 | Global 11 42 | Global 41 27 | Global 29 17 | Global 19 Would be upskilled in their Would be unlikely to upskill Would not need training by Would be up 2030

Key components of your workforce strategy by 2030

% surveyed organizations selecting the macrotrend to drive workforce transformation



## Professional services

Human-machine frontier	Business Practice
luman-machine frontier	Business practices to improve talent availability
% of tasks completed by predominantly people, predominantly technology, or a combination of both	Top practices with the greatest potential to improve talent availability (share of organizations survey)
Human Global Combination Global Technology Global	Industry A Global INDUSTRY GLOB
ILL TASKS	Providing effective reskilling and upskilling
low	68% 639
52% 30% 18	% Offering higher wages
48% 30% 22	60% 50%
2030	Supporting employee health and well-being
31% 37% 32	4
33% 33% 34	
	53% 62%
	Tapping into diverse talent pools
	48% 479
Key barriers for business transformation	Wage outlook
Fransformation barriers	Wage trends
Share of organisations surveyed expecting the barriers will hinder their organisation transformation	Share of organizations projecting the share of wages and other forms of workers' compensation as
Industry A Global	percentage of the company's total revenues
INDUSTRY GLOBAL	Growing Global Similar Global Declining Global
55% 63%	60% 35%
Drganization culture and resistance to change	52% 41%
45% 46%	
nability to attract talent to the industry	
40% 37%	
Dutdated or inflexible regulatory framework	
34% 39%	
nsufficient understanding of opportunities	
<u>30%</u> 25%	
Talent availability outlook	DEI Actions
Talent trend	Share of employers surveyed planning to implement the diversity, equity and inclusion measure
Share of respondents who expect their talent availability to improve or worsen in five years	
Improving * Global average Worsening * Global average	60   Global 51 53   Global 42 53   Global 48
alent availability when hiring	Run comprehensive DEI training for Set DEI goals, targets or quotas Targeted recruitment, retention and
-100% +100% Of	managers and staff progression initiatives
alent development of existing workforce	AI Strategy
₩ -100% +100% O <sup>C</sup>	% Share of employers surveyed planning to implement the stated strategy in response to AI's increasir
A A	<ul> <li>Snare of employers surveyed planning to implement the stated strategy in response to AI s increasin capability and prevalence</li> </ul>
Falent retention of existing workforce	
+100% 255	<sup>%</sup> 83   Global 77 78   Global 69 63   Global 62

workforce to better work alongside Al

Hiring new people with skills to design AI Hiring new people tools and enhancements appropriate for work alongside AI the organization-specific skills

Industry Profile Real Estate		1 / 2	
23%   Global 22%	40%   Global 39%	95%   Global 83%	90%   Giobal 88%
Labour-market churn Five-year structural labour-force churn	Skill disruption Shares of core skills which will change	Organizations with DEI priorities Share of organizations with DEI priorities	Al exposure Share of organizations running Al prog
Trend outlook			

#### driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

Broadening digital access	0070		31% 46%
Rising cost of living, higher prices or inflation			27% 34%
Slower economic growth			19% 41%
Ageing and declining working- age populations		•	15% 23%
Increased efforts and investments to reduce carbon			15% 21%
Growing working-age populations			<b>4%</b> 17%

#### Technology trends

Industry Global

Industry Global

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Al and information processing technologies (big data, VR, AR	
New materials and composites 42% 30%	
Robots and autonomous systems 39%	
Energy generation, storage and distribution 41%	
Sensing, laser and optical 15% technologies 18%	
Jobs outlook	Skill outlook

#### Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth Job Growth Job displacement Net Growth A Global net growth

1. Net growth 2. Global net gro	wth 3. Churn	NET GROWTH				
	-100%	0	100%	1.	2.	3.
AI and Machine Learning Specialists			I,	75	82	75
Business Intelligence Analysts				26	18	26
Business Development Professionals				22	19	22
Managing Directors and Chief Executives				18	5	18
Accounting, Bookkeeping and Payroll Clerks				-29	-18	29
Administrative Assistants and Executive Secretaries		<b>A</b>		-42	-20	42

## Skills of increasing use by 2030

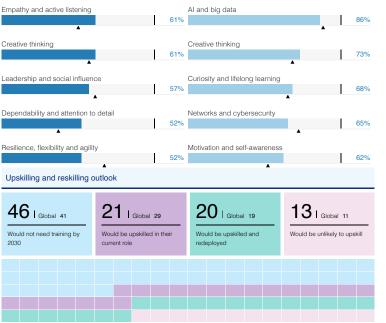
Skills of the most increase in use by 2030

Industry A Global

CORE SKILLS OF 2025

SKILLS OF INCREASING USE BY 2030

grammes



## Workforce Strategy outlook

Key components of your workforce strategy by 2030

% surveyed organizations selecting the macrotrend to drive workforce transformation

Industry A Global

	INDUSTRY	GLOBAL
Upskill your workforce		
	86%	85%
Hire staff with new skills to meet emerging business needs		
	81%	70%
Transition existing staff from declining to growing roles		
	57%	51%

## **Real Estate**

Human-machine frontier	Business Practice
Human-machine frontier % of tasks completed by predominantly people, predominantly technology, or a combination of both Human Global Combination Global Technology Global ALL TASKS	Business practices to improve talent availability Top practices with the greatest potential to improve talent availability (share of organizations surveyed) Industry
Now 64% 22% 15% 48% 30% 22% 2030	65%     64%       Providing effective reskilling and upskilling     60%       60%     63%       Improving talent progression and promotion processes     55%       55%     62%
	Offering remote and hybrid work opportunities within countries       55%       43%       Articulate business purpose and impact       50%       37%
Key barriers for business transformation	- Wage outlook
Transformation barriers         Share of organisations surveyed expecting the barriers will hinder their organisation transformation         Industry ▲ Global       INDUSTRY GLOBAL         Inability to attract talent to the industry       60% 37%         Skills gaps in the labour market       50% 37%	Wage trends         Share of organizations projecting the share of wages and other forms of workers' compensation as percentage of the company's total revenues         Growing       Global         Similar       Global         Declining       Global         57%       43%       0%         52%       41%       7%
52%       63%         Organization culture and resistance to change       44%         44%       46%         Insufficient understanding of opportunities       36%       25%         Outdated or inflexible regulatory framework       36%       39%	
Talent availability outlook	DEI Actions
Talent trend         Share of respondents who expect their talent availability to improve or worsen in five years         Improving & Global average         Worsening & Global average         Talent availability when hiring	Share of employers surveyed planning to implement the diversity, equity and inclusion measure          45 I Global 51       45 I Global 42       40 I Global 33         Run comprehensive DEI training for managers and staff       Set DEI goals, targets or quotas       Anti-harrasment protocols
40%         -100%         +100%         45%           Talent development of existing workforce         25%         -100%         +100%         30%	Al Strategy Share of employers surveyed planning to implement the stated strategy in response to Al's increasing
Talent retention of existing workforce	74   Global 77       58   Global 69         Peskilling and upskilling your existing workforce to better work alongside Al       Hiring new people with skills to design Al tools and enhancements appropriate for the organization-specific skills       53   Global 62

1/2

78% | Global 83%

Organizations with DEI priorities

Share of organizations with DEI priorities

## Retail and wholesale of consumer goods

## 28% | Global 22%

01.1

Labour-market churn Five-year structural labour-force churn

## Trend outlook

#### Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

38% | Global 39%

Shares of core skills which will change

Skill disruption

Global			
Rising cost of living, higher prices or inflation	69% 50%	Increased efforts and investments to adapt to climate	<b>30%</b> 41%
Increased focus on labour and social issues	64% 46%	Increased restrictions to global trade and investment	27% 23%
Broadening digital access	60% 60%	Increased geopolitical division and conflicts	25% 34%
Slower economic growth		Growing working-age populations	24% 24%
Ageing and declining working- age populations	43% 40%	Increased government subsidies and industrial policy	18% 21%
Increased efforts and investments to reduce carbon	41% 47%	Stricter anti-trust and competition regulations	17% 17%

### Technology trends

Industry Global

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Al and information processing technologies (big data, VR, AR	87% 86%		<b>3%</b> 20%
Robots and autonomous systems	71% 58%	Quantum and encryption	<b>7%</b> 12%
Energy generation, storage and distribution	38% 41%	0. 0	6% 11%
New materials and composites	33% 30%		3% 9%
Sensing, laser and optical technologies	18% 18%		

### Jobs outlook

Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth Job Growth Job displacement Net Growth A Global net growth

1. Net growth 2. Global net gro	wth 3. Churn					
	-100%	NET GROWTH	100%	1.	2.	3.
AI and Machine Learning Specialists			•	44	82	44
General and Operations Managers				27	4	29
Business Development Professionals				22	19	22
Shop Salespersons		Ļ		14	6	24
Accounting, Bookkeeping and Payroll Clerks				-14	-18	20
Data Entry Clerks		,		-24	-26	26

## Skill outlook

Industry A Global

CORE SKILLS OF 2025

2030

Skills of increasing use by 2030 Skills of the most increase in use by 2030

## SKILLS OF INCREASING USE BY 2030

87% | Global 88%

Share of organizations running AI programmes

Al exposure

Leadership and social influence AI and big data 73% 86% Resilience, flexibility and agility Resilience, flexibility and agility 73% Analytical thinking Technological literacy 71% 69% Empathy and active listening Networks and cybersecurity 68% Motivation and self-awareness Curiosity and lifelong learning 64% Upskilling and reskilling outlook 18 | Global 19 10 | Global 11 42 | Global 41 29 | Global 29 Would not need training by Would be upskilled in their Would be unlikely to upskill Would be upskilled and

## Workforce Strategy outlook

## Key components of your workforce strategy by 2030

% surveyed organizations selecting the macrotrend to drive workforce transformation

Industry A Global

	INDUSTRY	GLOBAL
Upskill your workforce		
	88%	85%
Accelerate the automation of processes and tasks		
	76%	73%
Hire staff with new skills to meet emerging business needs		
	70%	70%

## Retail and wholesale of consumer goods

Human-machine frontier		Business Practice			
Human-machine frontier		Business practices to improve	-		
% of tasks completed by predominantly people, predominantly technology, or a combinatio	n of both	Top practices with the greatest potential to improve talent availability (share of organizations survey			
Human Global Combination Global Technology Global		Industry A Global			GLOBAI
ALL TASKS		Supporting employee health and	well-being		
Now				76%	64%
	27% 17%	Providing effective reskilling and u	upskilling		
	30% 22%			65%	63%
2030	000/ 000/	Improving talent progression and	promotion processes	62%	62%
33%	32% 26%	Tapping into diverse talent pools	1	0278	02 /0
				51%	47%
		Offering higher wages	÷.		
				50%	50%
Key barriers for business transformation		Wage outlook	-		
Transformation barriers					
Share of organisations surveyed expecting the barriers will hinder their organisation transfor	rmation	Wage trends Share of organizations projecting	the share of wages and other forms	of workers' compensat	ion as
Industry A Global		percentage of the company's tota	-		
	RY GLOBAL	Growing Global Similar	Global Declining Global		
Skills gaps in the labour market 65%	63%			58%	38% 4
Organization culture and resistance to change	03%				52% 41 <sup>°</sup>
40%	46%				
Lack of adequate data and technical infrastructure					
39%	32%				
Inability to attract talent to the industry					
38%	37%				
Outdated or inflexible regulatory framework	39%				
<u>∠</u>	39%				
Talent availability outlook		DEI Actions			
Talent trend		Share of employers surveyed plan	nning to implement the diversity, eq	uity and inclusion meas	ure
Share of respondents who expect their talent availability to improve or worsen in five years					
Improving   Global average Worsening  Global average		51   Global 51	45   Global 48	38 Global 42	
Talent availability when hiring		Run comprehensive DEI training for	Targeted recruitment, retention and	Set DEI goals, targets or qu	valaa
	)0% <b>28%</b>	managers and staff	progression initiatives	Set DEI goals, targets of qu	JOIAS
	070				
Talent development of existing workforce		AI Strategy			
14% -100% +10	0% <b>30%</b>	Share of employers surveyed pla	nning to implement the stated strate	gy in response to Al's ir	ncreasing
Talent retention of existing workforce		capability and prevalence			Ŭ
· · · · · · · · · · · · · · · · · · ·	0% <b>37%</b>				
		70   Global 77	68   Global 69	63   Global 62	
		·	Hiring new people with skills to design Al	Hiring new people with skill	
		Reskilling and upskilling your existing workforce to better work alongside Al	tools and enhancements appropriate for	Hiring new people with skil work alongside AI	is to better
			the organization-specific skills		

## Supply-chain and transportation

## 35% | Global 22%

Labour-market churn

Five-year structural labour-force churn

## Trend outlook

## Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

37% | Global 39%

Shares of core skills which will change

Skill disruption

Industry Global		
Increased efforts and investments to reduce carbon	66%         Increased geopolitical division           47%         and conflicts	43% 34%
Broadening digital access	56% 60% Slower economic growth	40% 42%
Increased efforts and investments to adapt to climate	50%         Increased restrictions to global           41%         trade and investment	36% 23%
Rising cost of living, higher prices or inflation	50% Increased government subsidies 50% and industrial policy	29% 21%
Increased focus on labour and social issues	44% Growing working-age 46% populations	26% 24%
Ageing and declining working-	44%     Stricter anti-trust and competition       40%     regulations	20% 17%

1/2

84% | Global 83%

Organizations with DEI priorities

Share of organizations with DEI priorities

#### Technology trends

Industry Global

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Al and information processing technologies (big data, VR, AR		Semiconductors and computing technologies	20% 20%
Robots and autonomous systems			17% 9%
Energy generation, storage and distribution	56% 41%		8% 12%
New materials and composites	31% 30%		6% 11%
Sensing, laser and optical technologies	25% 18%		
Jobs outlook		Skill outlook	

**1**. **2**.

53 48

INDUSTRY GLOBAL

80%

70%

67%

85%

70%

73%

53

## Jobs outlook

Key roles for business transformation

Workforce Strategy outlook

Industry A Global

Upskill your workforce

Key components of your workforce strategy by 2030

Hire staff with new skills to meet emerging business needs

Accelerate the automation of processes and tasks

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth Job Growth Job displacement Net Growth A Global net growth

1. Net growth	<ol><li>Global net growth</li></ol>	3. Churn		
			NET GROWTH	
	-10	0%	0	
Autonomous a	and Electric Vehicle			
Specialiete				

% surveyed organizations selecting the macrotrend to drive workforce transformation

AI and Machine Learning Specialists		41	82	41
Supply Chain and Logistics Specialists		21	17	23
General and Operations Managers		4	4	14
Accounting, Bookkeeping and Payroll Clerks	1	-19	) -18	29
Administrative Assistants and Executive Secretaries		-21	I -20	23

## Skills of increasing use by 2030

Industry A Global

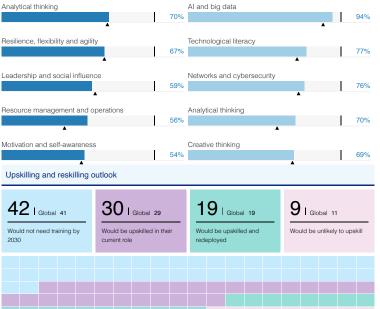
42 | Global 41

2030

Skills of the most increase in use by 2030

CORE SKILLS OF 2025 Analytical thinking

SKILLS OF INCREASING USE BY 2030



88% | Global 88%

Al exposure Share of organizations running AI programmes

Human-machine frontier	Business Practice
Human-machine frontier % of tasks completed by predominantly people, predominantly technology, or a combination of both	Business practices to improve talent availability Top practices with the greatest potential to improve talent availability (share of organizations surveyed) Industry A Global INDUSTRY GLOBAL Improving talent progression and promotion processes 69% 62% Supporting employee health and well-being
48% 30% 22% 2030	59%         64%           Providing effective reskilling and upskilling         59%
34%         32%         34%           33%         33%         34%	58%     63%       Offering higher wages     52%       50%
Key barriers for business transformation	Tapping into diverse talent pools 46% 47% Wage outlook
Transformation barriers Share of organisations surveyed expecting the barriers will hinder their organisation transformation Industry	Wage trends         Share of organizations projecting the share of wages and other forms of workers' compensation as percentage of the company's total revenues         Growing       Global         Global       Similar
State       55%       63%         Organization culture and resistance to change       54%       46%         Outdated or inflexible regulatory framework       54%       46%	61% 30% 9% 8% 52% 41%
44%     39%       Inability to attract talent to the industry     37%       37%     37%	
Lack of adequate data and technical infrastructure 35% 32% Talent availability outlook	DEI Actions
Talent trend         Share of respondents who expect their talent availability to improve or worsen in five years         Improving * Global average         Worsening * Global average	Share of employers surveyed planning to implement the diversity, equity and inclusion measure 53   Global 48 44   Global 51 43   Global 42
Talent availability when hiring       39%     -100%       +100%     28%	Targeted recruitment, retention and progression initiatives         Run comprehensive DEI training for managers and staff         Set DEI goals, targets or quotas
Talent development of existing workforce       0%     -100%       1%       Talent retention of existing workforce	AI Strategy Share of employers surveyed planning to implement the stated strategy in response to AI's increasing capability and prevalence
29% -100% +100% 18%	79 I Global 77     688 I Global 69       Reskilling and upskilling your existing workforce to better work alongside AI     Hiring new people with skills to design AI tools and enhancements appropriate for the organization-specific skills     Hiring new people with skills to better work alongside AI

85% | Global 83%

Organizations with DEI priorities

Share of organizations with DEI priorities

# **Telecommunications**

20% | Global 22%

Labour-market churn Five-year structural labour-force churn

Trend outlook

#### Macrotrends driving business transformation

Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

40% | Global 39%

Shares of core skills which will change

Skill disruption

Industry Global		
Broadening digital access	Increased geopolitical division and conflicts	32% 34%
Rising cost of living, higher prices or inflation	Growing working-age populations	30% 24%
Increased efforts and investments to reduce carbon	Stricter anti-trust and competition regulations	24% 17%
Slower economic growth	Ageing and declining working- age populations	24% 40%
Increased focus on labour and social issues	Increased government subsidies and industrial policy	16% 21%
Increased efforts and investments to adapt to climate	Increased restrictions to global trade and investment	14% 23%

#### Technology trends

#### Technology trends driving business transformation

Share of organizations surveyed that identify the technology trend as likely to drive business transformation

Industry Global			
AI and information processing technologies (big data, VR, AR	100° 86		29% 12%
Robots and autonomous systems	58° 58		16% 30%
Satellites and space technologies	40° 9	<ul><li>Sensing, laser and optical</li><li>technologies</li></ul>	16% 18%
Energy generation, storage and distribution	<b>34</b> 9 41		5% 11%
Semiconductors and computing technologies	34 <sup>4</sup> 20		

Skill outlook

Industry A Global

CORE SKILLS OF 2025

Analytical thinking

Creative thinking

AI and big data

2030

### Jobs outlook

Key roles for business transformation

Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)

Net growth	Job Growth	Job displ	acement	Net Growth	<ul> <li>Global net growth</li> </ul>
1 Not growth	2 Global a	at arouth	2 Churn		

1. Net growth 2. Global net gro	wth <b>3.</b> Churn	NET GROWTH				
	-100%	0	100%	1.	2.	3.
AI and Machine Learning Specialists			۱.	65	82	65
Data Analysts and Scientists				52	41	52
Data Engineers				35	36	35
Managing Directors and Chief Executives				13	5	13
Accounting, Bookkeeping and Payroll Clerks				-17	-18	27
Administrative Assistants and Executive Secretaries				-24	-20	24

## Skills of increasing use by 2030

Skills of the most increase in use by 2030

## SKILLS OF INCREASING USE BY 2030

89% | Global 88%

Share of organizations running AI programmes

Al exposure

AI and big data 86% 100% Leadership and social influence Resilience, flexibility and agility 76% I 79% Curiosity and lifelong learning 66% 75% Resilience, flexibility and agility Networks and cybersecurity 66% 75% Creative thinking 66% 1 75% Upskilling and reskilling outlook 37 | Global 41 29 | Global 29 24 | Global 19 11 | Global 11 Would not need training by Would be unlikely to upskill Would be upskilled in their Would be ups

Workforce Strategy outlook

Key components of your workforce strategy by 2030

% surveyed organizations selecting the macrotrend to drive workforce transformation



	INDUSTRY	GLOBAL
Upskill your workforce		
	96%	85%
Accelerate the automation of processes and tasks		
	82%	73%
Hire staff with new skills to meet emerging business needs		
	70%	70%

## Telecommunications

Human-machine frontier		Business Practice			
Human-machine frontier		Business practices to improve talent availability			
% of tasks completed by predominantly people, predominantly technology, or a combination	Top practices with the greatest pot	ential to improve talent availability	(share of organizations s	urveyed)	
Human Global Combination Global Technology Global		Industry A Global		INDUSTRY	GLOBAL
ALL TASKS		Providing effective reskilling and up	pskilling		
Now				67%	63%
		Improving talent progression and p	promotion processes		
	30% 22%			63%	62%
2030	33% 39%	Offering remote and hybrid work of	pportunities within countries	59%	43%
	33% 34%	Supporting employee health and w	vell-being	0070	4070
				56%	64%
		Offering higher wages	<u> </u>		
			1	52%	50%
Key barriers for business transformation		Wage outlook	-		
Transformation barriers		Wage trends			
Share of organisations surveyed expecting the barriers will hinder their organisation transform	mation	Share of organizations projecting the	he share of wages and other forms	of workers' compensati	on as
Industry A Global		percentage of the company's total	revenues		
INDUSTRY Skills gaps in the labour market	( GLOBAL	Growing Global Similar	Global Declining Global		
66%	63%			41%	52% 7
Outdated or inflexible regulatory framework				8%	52% 41
42%	39%				
Organization culture and resistance to change					
40% Lack of adequate data and technical infrastructure	46%				
Lack of adequate data and technical infrastructure 29%	32%				
Inability to attract talent to the industry	0270				
24%	37%				
Talent availability outlook		DEI Actions			
•					
Talent trend Share of respondents who expect their talent availability to improve or worsen in five years		Share of employers surveyed plan	ning to implement the diversity, equ	uity and inclusion measu	re
		07	50	40	
Improving A Global average Worsening A Global average		67 I Global 51	52 I Global 48	48   Global 42	
Talent availability when hiring		Run comprehensive DEI training for	Targeted recruitment, retention and	Set DEI goals, targets or que	otas
48% -100% +100	)% 40%	managers and staff	progression initiatives		
Talent development of existing workforce		AI Strategy			
36% -100% +100	)% 8%				
	-	Share of employers surveyed plan capability and prevalence	ning to implement the stated strate	gy in response to Al's in	creasing
Talent retention of existing workforce       40%       -100%       +100	)% 24%	the second se			
+100	J% <b>24%</b>	89   Global 69	74   Global 77	67   Global 62	
			·		
		Hiring new people with skills to design Al tools and enhancements appropriate for the organization-specific skills	Reskilling and upskilling your existing workforce to better work alongside Al	Hiring new people with skills work alongside Al	to better

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# Collaborators

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