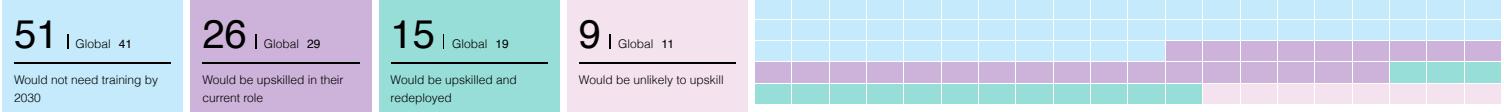


Middle East and Northern Africa

197.7

Upskilling and reskilling outlook



Human-machine frontier

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



2030

Key barriers for business transformation

Transformation barriers

Share of organisations surveyed expecting the barriers will hinder their organisation transformation

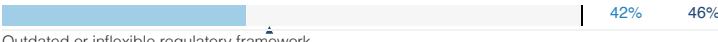
Region ▲ Global

REGION GLOBAL

Skills gaps in the labour market



Organization culture and resistance to change



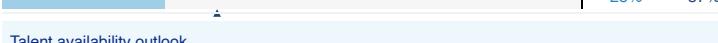
Outdated or inflexible regulatory framework



Lack of adequate data and technical infrastructure



Inability to attract talent to the industry



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

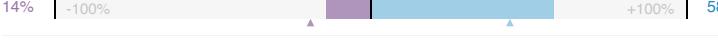
Talent availability when hiring



Talent development of existing workforce



Talent retention of existing workforce



Public policy

Public policies to improve talent availability

Share of respondents who agree that the particular public policy has the greatest potential to increase the talent availability

Region ▲ Global

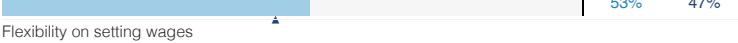
Funding for reskilling and upskilling



Provision of reskilling and upskilling



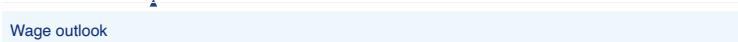
Improvements to public education systems



Flexibility on setting wages



Wage subsidies



Wage outlook

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



DEI Actions

Share of employers surveyed planning to implement the diversity, equity and inclusion measure

36 | Global 42

Set DEI goals, targets or quotas

35 | Global 48

Targeted recruitment, retention and progression initiatives

34 | Global 51

Run comprehensive DEI training for managers and staff

AI Strategy

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

73 | Global 77

Reskilling and upskilling your existing workforce to better work alongside AI

62 | Global 69

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

51 | Global 62

Hiring new people with skills to better work alongside AI

Northern America

255.5

21% | 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%

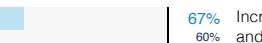
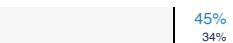
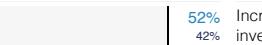
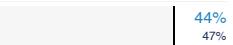
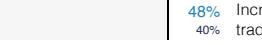
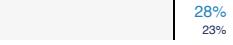
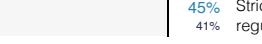
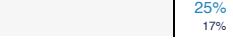
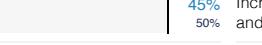
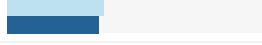
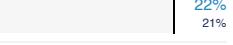
AI exposure

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

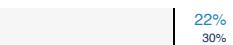
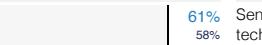
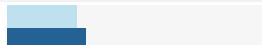
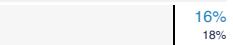
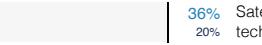
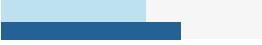
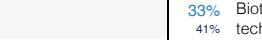
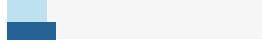
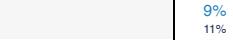
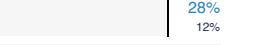
Region Global

Broadening digital access			67% 60%	Increased geopolitical division and conflicts			45% 34%
Slower economic growth			52% 42%	Increased efforts and investments to reduce carbon...			44% 47%
Increased focus on labour and social issues			48% 46%	Growing working-age populations			35% 24%
Ageing and declining working-age populations			48% 40%	Increased restrictions to global trade and investment			28% 23%
Increased efforts and investments to adapt to climate...			45% 41%	Stricter anti-trust and competition regulations			25% 17%
Rising cost of living, higher prices or inflation			45% 50%	Increased government subsidies and industrial policy			22% 21%

Technology trends**Technology trends driving business transformation**

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

Region Global

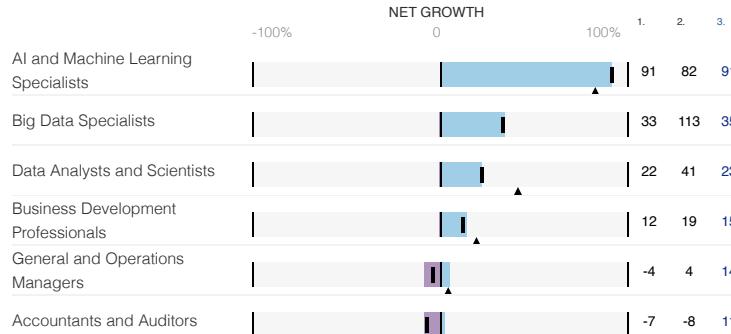
AI and information processing technologies (big data, VR, AR...)			96% 86%	New materials and composites			22% 30%
Robots and autonomous systems			61% 58%	Sensing, laser and optical technologies			16% 18%
Semiconductors and computing technologies			36% 20%	Satellites and space technologies			9% 9%
Energy generation, storage and distribution			33% 41%	Biotechnology and gene technologies			9% 11%
Quantum and encryption			28% 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)

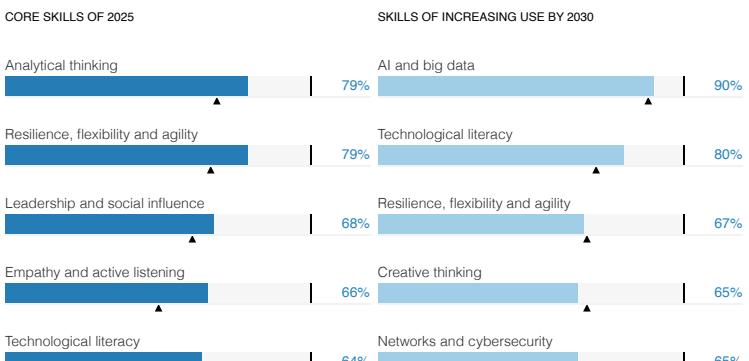
Net growth Job Growth Job displacement Net Growth Global net growth

1. Net growth 2. Global net growth 3. Churn

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

Skills of the most increase in use by 2030

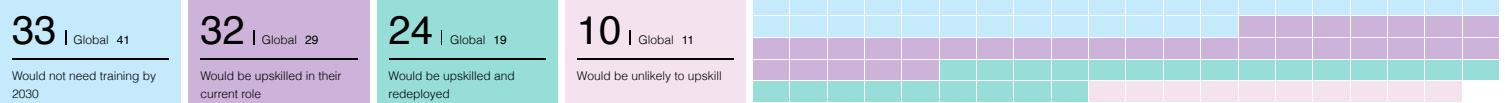
Region Global



Northern America

255.5

Upskilling and reskilling outlook



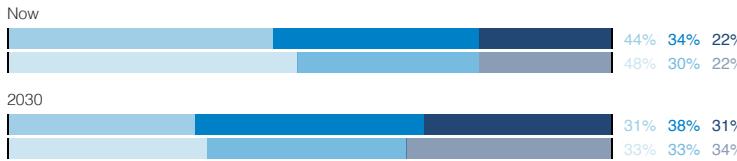
Human-machine frontier

Human-machine frontier

% of tasks completed by predominantly people, predominantly technology, or a combination of both

Human Global Combination Global Technology Global

ALL TASKS



Public policy

Public policies to improve talent availability

Share of respondents who agree that the particular public policy has the greatest potential to increase the talent availability

Region ▲ Global

REGION GLOBAL

Funding for reskilling and upskilling

56% 55%

Provision of reskilling and upskilling

56% 52%

Flexibility on hiring and firing practices

46% 44%

Changes to labour laws related to remote work

40% 36%

Improvements to public education systems

40% 47%

Key barriers for business transformation

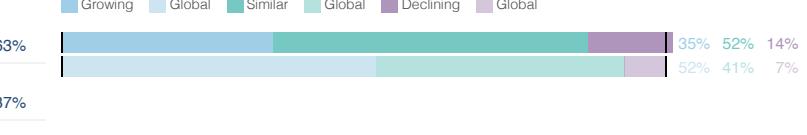
Transformation barriers

Share of organisations surveyed expecting the barriers will hinder their organisation transformation

Region ▲ Global

REGION GLOBAL

Skills gaps in the labour market



Inability to attract talent to the industry



Organization culture and resistance to change



Lack of adequate data and technical infrastructure



Outdated or inflexible regulatory framework



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

Talent availability when hiring



Talent development of existing workforce



Talent retention of existing workforce



DEI Actions

Share of employers surveyed planning to implement the diversity, equity and inclusion measure

79 | Global 48

Targeted recruitment, retention and progression initiatives

67 | Global 51

Run comprehensive DEI training for managers and staff

64 | Global 39

Pay equity reviews and salary audits

AI Strategy

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

84 | Global 77

Reskilling and upskilling your existing workforce to better work alongside AI

82 | Global 69

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

66 | Global 62

Hiring new people with skills to better work alongside AI

South-eastern Asia

400.5

20% | Global 22%

Labour-market churn

Five-year structural labour-force churn

43% | Global 39%

Skill disruption

Shares of core skills which will change

86% | Global 83%

Organizations with DEI priorities

Share of organizations with DEI priorities

96% | Global 88%

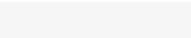
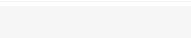
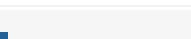
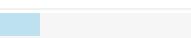
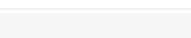
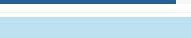
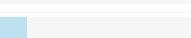
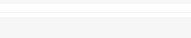
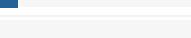
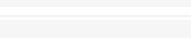
AI exposure

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

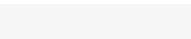
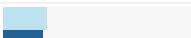
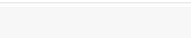
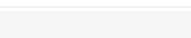
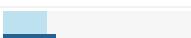
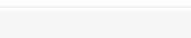
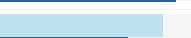
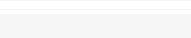
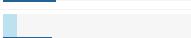
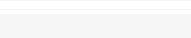
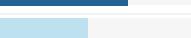
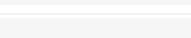
Region Global

Increased efforts and investments to reduce carbon...			72% 47%	Growing working-age populations			35% 24%
Broadening digital access			72% 60%	Increased geopolitical division and conflicts			31% 34%
Slower economic growth			69% 42%	Increased focus on labour and social issues			28% 46%
Increased efforts and investments to adapt to climate...			55% 41%	Increased government subsidies and industrial policy			24% 21%
Rising cost of living, higher prices or inflation			52% 50%	Increased restrictions to global trade and investment			21% 23%
Ageing and declining working-age populations			38% 40%	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

Region Global

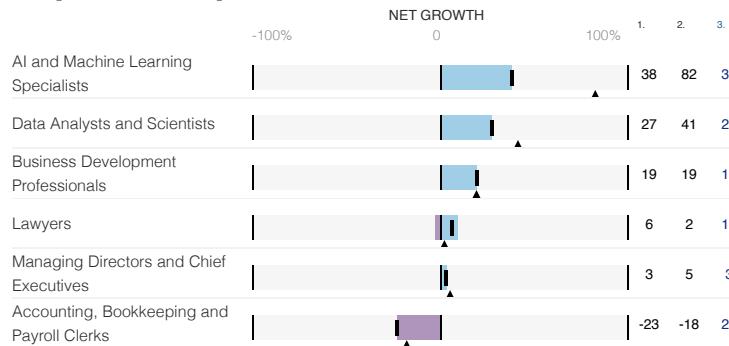
AI and information processing technologies (big data, VR, AR...)			90% 86%	Sensing, laser and optical technologies			14% 18%
Robots and autonomous systems			72% 58%	Satellites and space technologies			10% 9%
Energy generation, storage and distribution			45% 41%	Quantum and encryption			10% 12%
New materials and composites			38% 30%	Biotechnology and gene technologies			3% 11%
Semiconductors and computing technologies			21% 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)

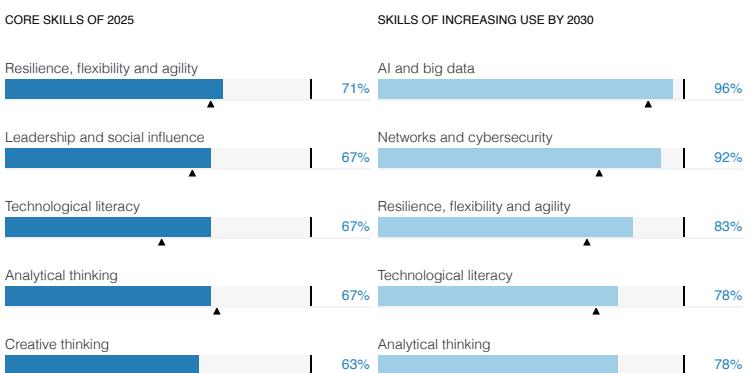
Net growth Job Growth Job displacement Net Growth Global net growth

1. Net growth 2. Global net growth 3. Churn

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

Skills of the most increase in use by 2030

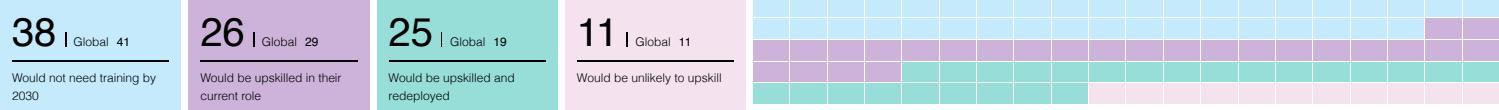
Region Global



South-eastern Asia

400.5

Upskilling and reskilling outlook



Human-machine frontier

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

Human	Global	Combination	Global	Technology	Global
41%	32%	27%			

2030

Human	Global	Combination	Global	Technology	Global
48%	30%	22%	31%	33%	37%

Key barriers for business transformation

Transformation barriers

Share of organisations surveyed expecting the barriers will hinder their organisation transformation

Region ▲ Global

Skills gaps in the labour market

Region	Global
69%	63%

Lack of adequate data and technical infrastructure

Region	Global
59%	32%

Outdated or inflexible regulatory framework

Region	Global
52%	39%

Inability to attract talent to the industry

Region	Global
41%	37%

Organization culture and resistance to change

Region	Global
41%	46%

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

Talent availability when hiring

Improving	-100%	Worsening	+100%	Global average
27%		45%		

Talent development of existing workforce

Improving	-100%	Worsening	+100%	Global average
32%		68%		

Talent retention of existing workforce

Improving	-100%	Worsening	+100%	Global average
14%		55%		

Public policy

Public policies to improve talent availability

Share of respondents who agree that the particular public policy has the greatest potential to increase the talent availability

Region ▲ Global

Flexibility on hiring and firing practices

Region	Global
59%	44%

Provision of reskilling and upskilling

Region	Global
59%	52%

Flexibility on setting wages

Region	Global
50%	38%

Funding for reskilling and upskilling

Region	Global
50%	55%

Improvements to public education systems

Region	Global
50%	47%

Wage outlook

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

Skills gaps in the labour market

Growing	Global	Similar	Global	Declining	Global
59%	27%	14%			

Lack of adequate data and technical infrastructure

Growing	Global	Similar	Global	Declining	Global
52%	41%	7%			

DEI Actions

Share of employers surveyed planning to implement the diversity, equity and inclusion measure

59 | Global 42

Set DEI goals, targets or quotas

46 | Global 51

Run comprehensive DEI training for managers and staff

46 | Global 48

Targeted recruitment, retention and progression initiatives

AI Strategy

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

91 | Global 77

Reskilling and upskilling your existing workforce to better work alongside AI

77 | Global 69

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

59 | Global 62

Hiring new people with skills to better work alongside AI

Southern Asia

873.8

28% | Global 22%

Labour-market churn

Five-year structural labour-force churn

52% | Global 39%

Skill disruption

Shares of core skills which will change

86% | Global 83%

Organizations with DEI priorities

Share of organizations with DEI priorities

92% | Global 88%

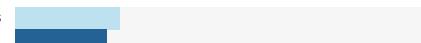
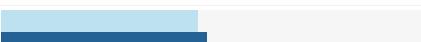
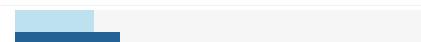
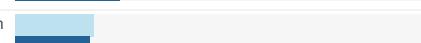
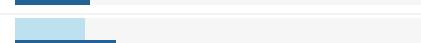
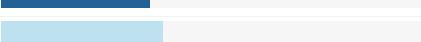
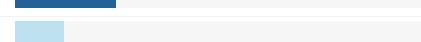
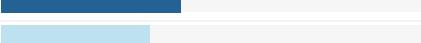
AI exposure

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

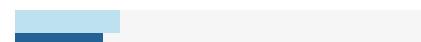
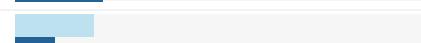
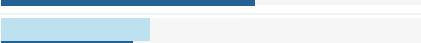
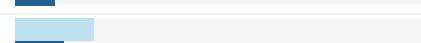
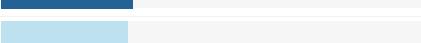
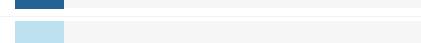
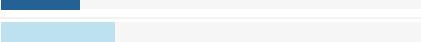
Region Global

Broadening digital access		63% 60%	Increased government subsidies and industrial policy		24% 21%
Increased efforts and investments to reduce carbon...		45% 47%	Growing working-age populations		18% 24%
Increased focus on labour and social issues		45% 46%	Stricter anti-trust and competition regulations		18% 17%
Increased geopolitical division and conflicts		40% 34%	Increased restrictions to global trade and investment		16% 23%
Increased efforts and investments to adapt to climate...		37% 41%	Ageing and declining working-age populations		11% 40%
Rising cost of living, higher prices or inflation		34% 50%	Slower economic growth		8% 42%

Technology trends**Technology trends driving business transformation**

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

Region Global

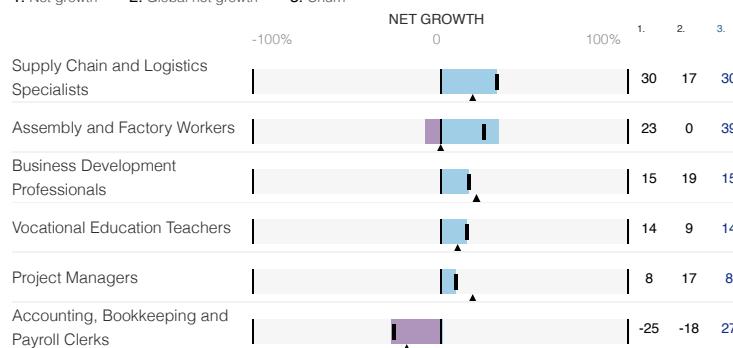
AI and information processing technologies (big data, VR, AR...)		79% 86%	Semiconductors and computing technologies		24% 20%
Robots and autonomous systems		53% 56%	Satellites and space technologies		18% 9%
New materials and composites		34% 30%	Biotechnology and gene technologies		18% 11%
Sensing, laser and optical technologies		29% 18%	Quantum and encryption		11% 12%
Energy generation, storage and distribution		26% 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)

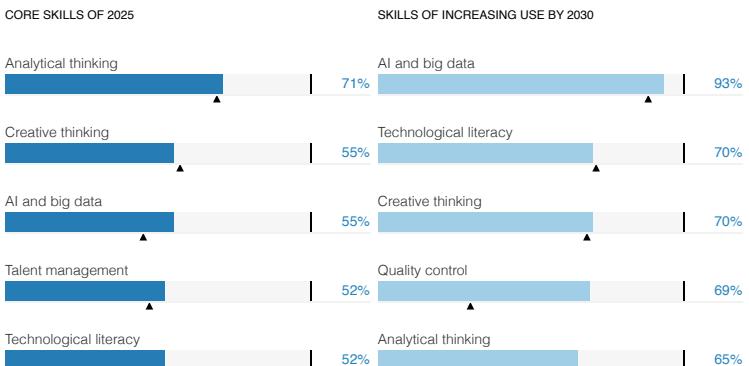
Net growth Job Growth Job displacement Net Growth Global net growth

1. Net growth 2. Global net growth 3. Churn

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

Skills of the most increase in use by 2030

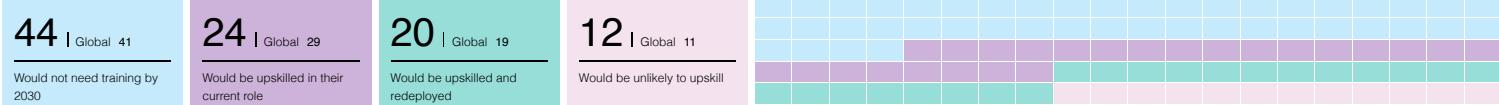
Region Global



Southern Asia

873.8

Upskilling and reskilling outlook



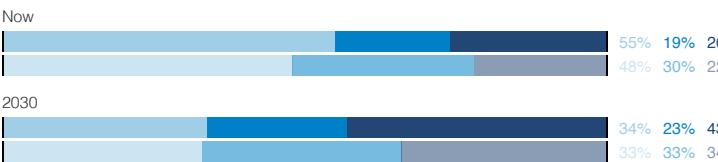
Human-machine frontier

Human-machine frontier

% of tasks completed by predominantly people, predominantly technology, or a combination of both

Human Global Combination Global Technology Global

ALL TASKS



Public policy

Public policies to improve talent availability

Share of respondents who agree that the particular public policy has the greatest potential to increase the talent availability

Region ▲ Global

REGION GLOBAL

Provision of reskilling and upskilling

57% 52%

Funding for reskilling and upskilling

54% 55%

Improvements to public education systems

54% 47%

Flexibility on hiring and firing practices

32% 44%

Changes to labour laws related to remote work

29% 36%

Key barriers for business transformation

Transformation barriers

Share of organisations surveyed expecting the barriers will hinder their organisation transformation

Region ▲ Global

REGION GLOBAL

Skills gaps in the labour market

Growing Global Similar Global Declining Global

64% 29% 7% 52% 41% 7%

Organization culture and resistance to change

64% 29% 7% 52% 41% 7%

Outdated or inflexible regulatory framework

64% 29% 7% 52% 41% 7%

Insufficient understanding of opportunities

64% 29% 7% 52% 41% 7%

Inability to attract talent to the industry

64% 29% 7% 52% 41% 7%

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

Talent availability when hiring

29% -100% ▲ Worsening ▲ Improving +100% 39%

Talent development of existing workforce

7% -100% ▲ Worsening ▲ Improving +100% 74%

Talent retention of existing workforce

22% -100% ▲ Worsening ▲ Improving +100% 48%

DEI Actions

Share of employers surveyed planning to implement the diversity, equity and inclusion measure

61 | Global 51

Run comprehensive DEI training for managers and staff

57 | Global 42

Set DEI goals, targets or quotas

54 | Global 48

Targeted recruitment, retention and progression initiatives

AI Strategy

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

73 | Global 77

Reskilling and upskilling your existing workforce to better work alongside AI

62 | Global 69

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

58 | Global 62

Hiring new people with skills to better work alongside AI

Sub-Saharan Africa

341.2

31% | Global 22%

Labour-market churn

Five-year structural labour-force churn

40% | Global 39%

Skill disruption

Shares of core skills which will change

96% | Global 83%

Organizations with DEI priorities

Share of organizations with DEI priorities

89% | Global 88%

AI exposure

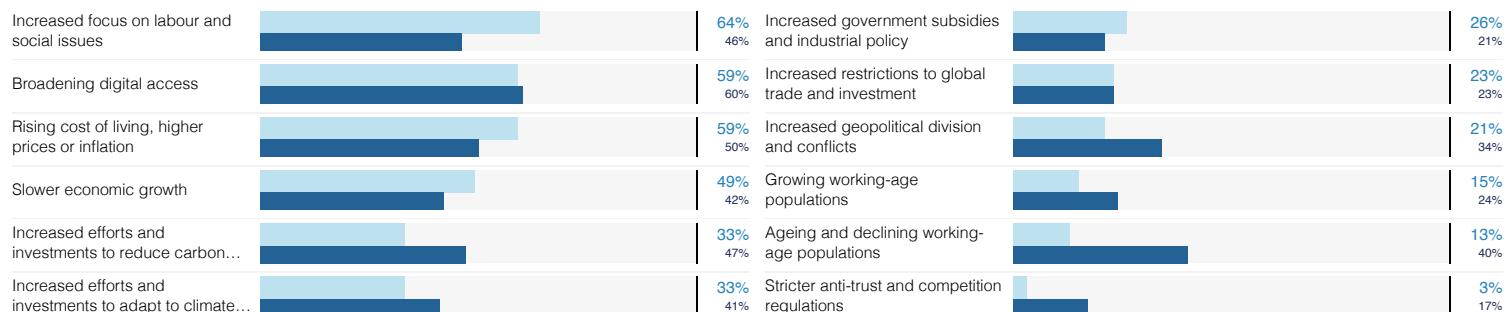
Share of organizations running AI programmes

Trend outlook

Macrotrends driving business transformation

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

Region Global

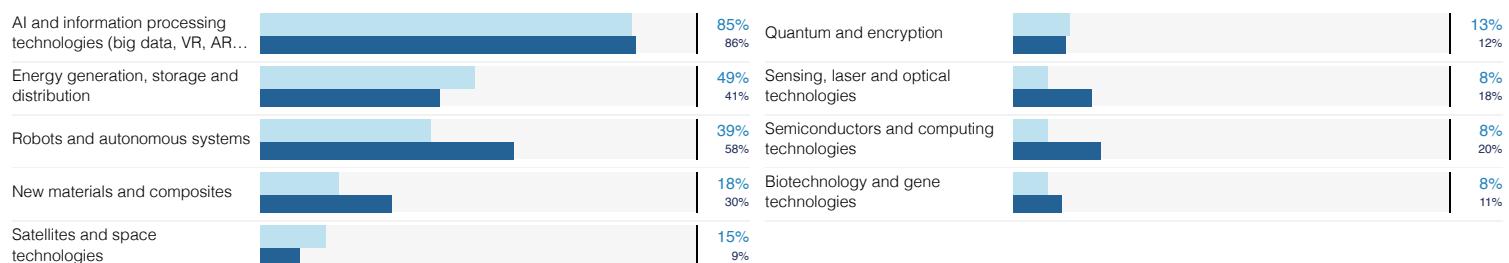


Technology trends

Technology trends driving business transformation

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

Region Global



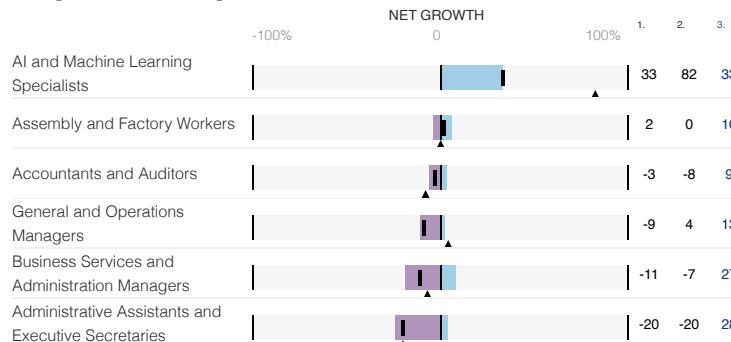
Jobs outlook

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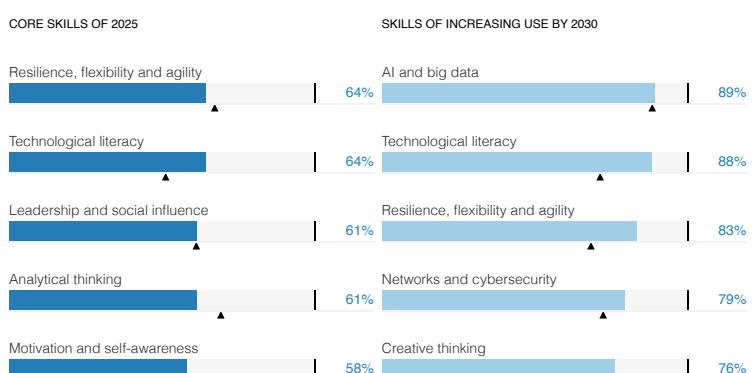


Skill outlook

Skills of increasing use by 2030

Skills of the most increase in use by 2030

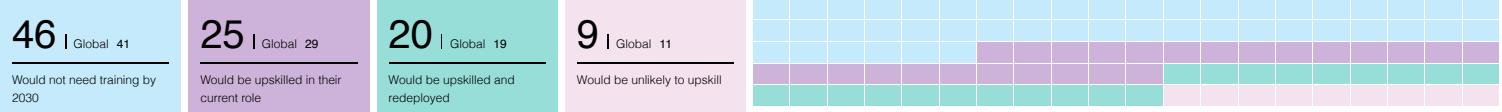
Region Global



Sub-Saharan Africa

341.2

Upskilling and reskilling outlook



Human-machine frontier

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% of tasks completed by predominantly people, predominantly technology, or a combination of both

Human Global Combination Global Technology Global

ALL TASKS



Now



Key barriers for business transformation

Transformation barriers

Share of organisations surveyed expecting the barriers will hinder their organisation transformation

Region ▲ Global

REGION GLOBAL

Skills gaps in the labour market



Shortage of investment capital



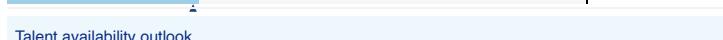
Organization culture and resistance to change



Outdated or inflexible regulatory framework



Lack of adequate data and technical infrastructure



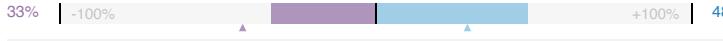
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Talent development of existing workforce



Talent retention of existing workforce



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Share of respondents who agree that the particular public policy has the greatest potential to increase the talent availability

Region ▲ Global

REGION GLOBAL

Funding for reskilling and upskilling



Provision of reskilling and upskilling



Changes to labour laws related to remote work



Improvements to public education systems



Flexibility on setting wages



Wage outlook

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



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71 | Global 48

Targeted recruitment, retention and progression initiatives

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61 | Global 69

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

61 | Global 49

Reorienting your organization to target new business opportunities created by AI

Accommodation, Food, and Leisure

24% | Global 22%

Labour-market churn

Five-year structural labour-force churn

42% | Global 39%

Skill disruption

Shares of core skills which will change

80% | Global 83%

Organizations with DEI priorities

Share of organizations with DEI priorities

77% | Global 88%

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Industry Global

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Net growth Job Growth Job displacement Net Growth Global net growth

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NET GROWTH -100% 0 100% 1. 2. 3.

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	12	6	16
Chefs and Cooks	11	15	13
Accountants and Auditors	2	-8	11

Workforce Strategy outlook

Key components of your workforce strategy by 2030

% surveyed organizations selecting the macrotrend to drive workforce transformation

Industry Global

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%

Skill outlook

Skills of increasing use by 2030

Skills of the most increase in use by 2030

Industry Global

CORE SKILLS OF 2025

SKILLS OF INCREASING USE BY 2030

Resilience, flexibility and agility	53%	AI and big data	69%
Analytical thinking	51%	Networks and cybersecurity	69%
Leadership and social influence	49%	Leadership and social influence	63%
Creative thinking	47%	Technological literacy	60%
Dependability and attention to detail	45%	Resilience, flexibility and agility	55%

Upskilling and reskilling outlook

38 | Global 41

Would not need training by 2030

31 | Global 29

Would be upskilled in their current role

19 | Global 19

Would be upskilled and redeployed

12 | Global 11

Would be unlikely to upskill