

## Germany

63.8

## Upskilling and reskilling outlook

40 | Global 41

Would not need training by 2030

29 | Global 29

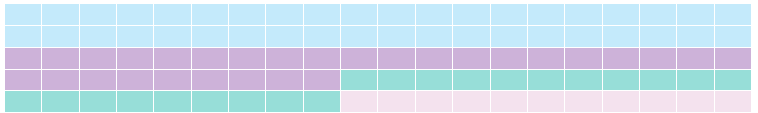
Would be upskilled in their current role

20 | Global 19

Would be upskilled and redeployed

11 | Global 11

Would be unlikely to upskill



## 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

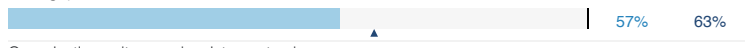
## Transformation barriers

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

Economy Global

ECONOMY GLOBAL

Skills gaps in the labour market



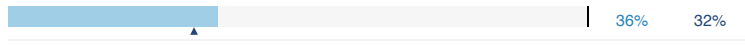
Organization culture and resistance to change



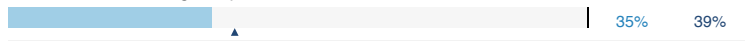
Inability to attract talent to the industry



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Outdated or inflexible regulatory framework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



## Public policy

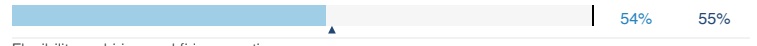
## Public policies to improve talent availability

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

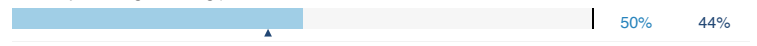
Economy Global

ECONOMY GLOBAL

Funding for reskilling and upskilling



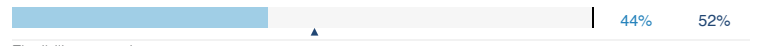
Flexibility on hiring and firing practices



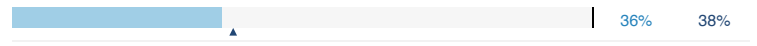
Improvements to public education systems



Provision of reskilling and upskilling



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



## DEI Actions

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

56 | Global 48

Targeted recruitment, retention and progression initiatives

53 | Global 51

Run comprehensive DEI training for managers and staff

50 | Global 42

Set DEI goals, targets or quotas

## 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

73 | Global 69

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

65 | Global 62

Hiring new people with skills to better work alongside AI

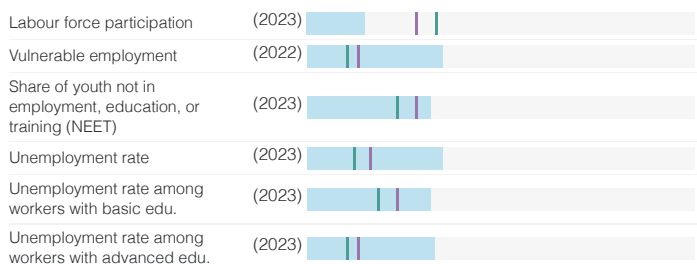
## Greece

8.0

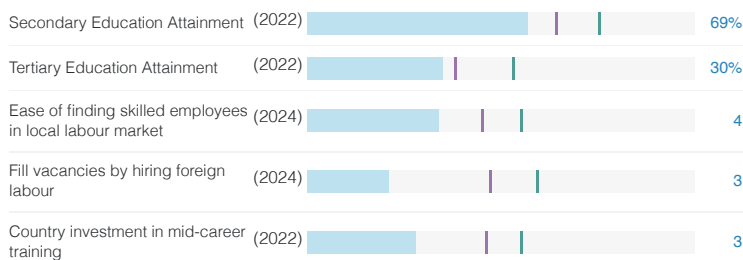
## Contextual indicators

Regional average Income Group average

## INDICATORS



## INDICATORS



## Jobs and Skills outlook

7% | Global 22%

## Labour-market churn

Five-year structural labour-force churn

39% | Global 39%

## Skill disruption

Shares of core skills which will change

83% | Global 83%

## Organizations with DEI priorities

Share of organizations with DEI priorities

83% | Global 88%

## AI exposure

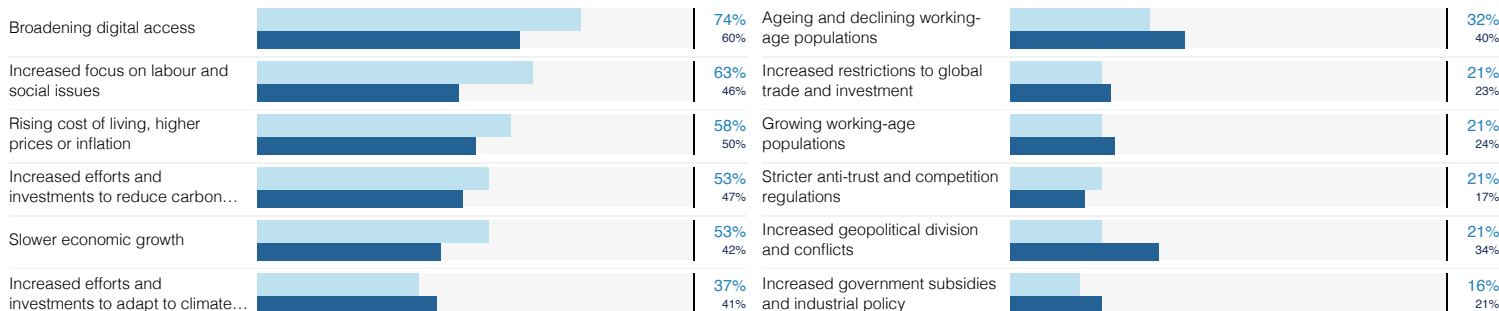
Share of organizations running AI programmes

## Trend outlook

## Macrotrends driving business transformation

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

Economy Global

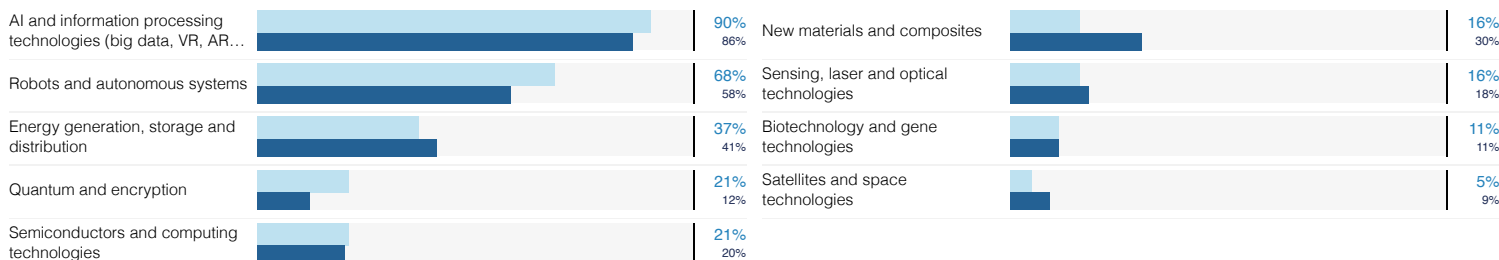


## Technology trends

## Technology trends driving business transformation

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

Economy Global

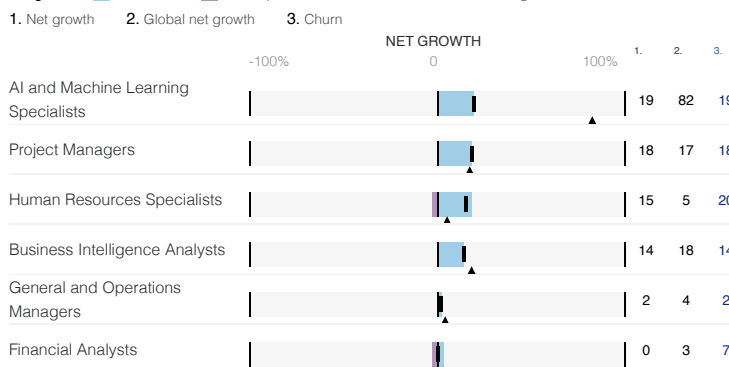


## Jobs outlook

## 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

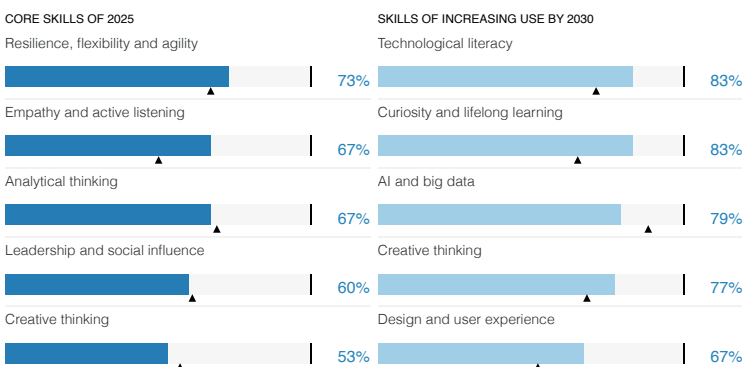


## Skill outlook

## Skills of increasing use by 2030

Skills of the most increase in use by 2030

Economy Global



Greece

8.0

## Upskilling and reskilling outlook

35 | Global 41

Would not need training by 2030

35 | Global 29

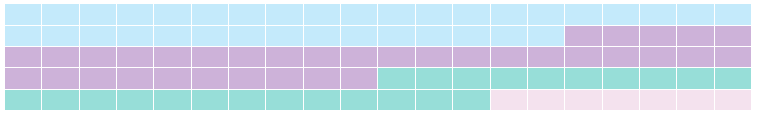
Would be upskilled in their current role

23 | Global 19

Would be upskilled and redeployed

8 | Global 11

Would be unlikely to upskill



## Human-machine 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

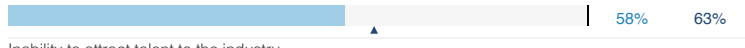
## Transformation barriers

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

Economy Global

ECONOMY GLOBAL

Skills gaps in the labour market



Inability to attract talent to the industry



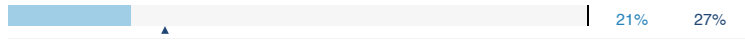
Insufficient understanding of opportunities



Organization culture and resistance to change



Inability to attract talent to my firm



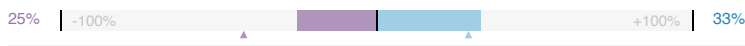
## Talent availability outlook

## 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

Economy Global

ECONOMY GLOBAL

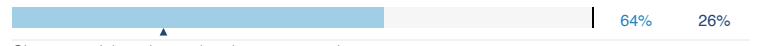
Funding for reskilling and upskilling



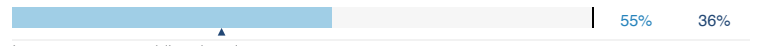
Provision of reskilling and upskilling



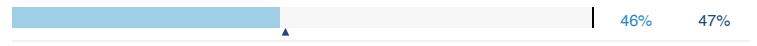
Wage subsidies



Changes to labour laws related to remote work



Improvements to public education systems



## 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

67 | Global 48

Targeted recruitment, retention and progression initiatives

58 | Global 27

Embed DEI goals and solutions across the supply chain

58 | Global 33

Anti-harrasment protocols

## AI Strategy

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

75 | Global 77

Reskilling and upskilling your existing workforce to better work alongside AI

67 | Global 69

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

67 | Global 62

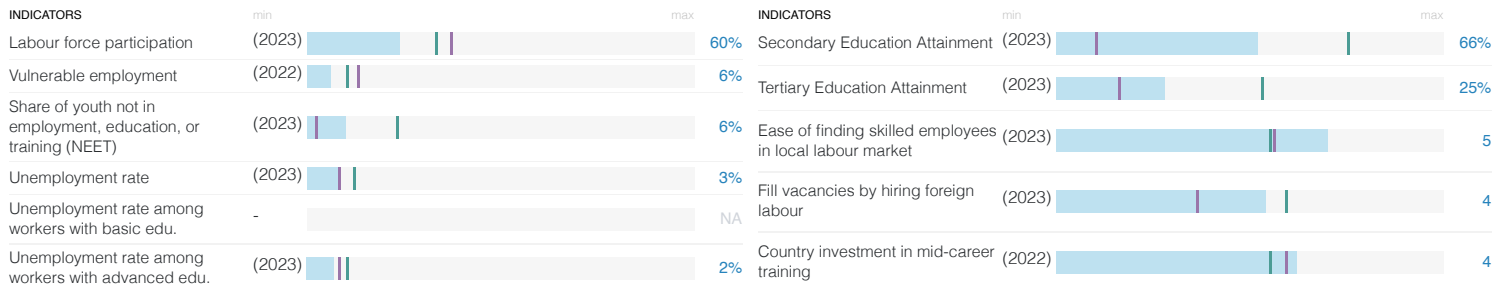
Hiring new people with skills to better work alongside AI

## Hong Kong SAR, China

6.1

## Contextual indicators

Regional average Income Group average



## Jobs and Skills outlook

15% | Global 22%

## Labour-market churn

Five-year structural labour-force churn

35% | Global 39%

## Skill disruption

Shares of core skills which will change

94% | Global 83%

## Organizations with DEI priorities

Share of organizations with DEI priorities

94% | Global 88%

## AI exposure

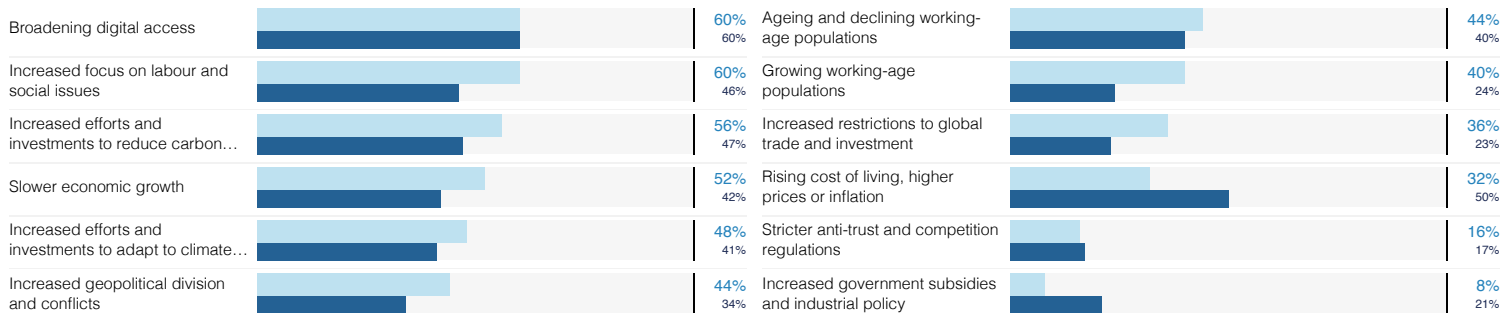
Share of organizations running AI programmes

## Trend outlook

## Macrotrends driving business transformation

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

Economy Global

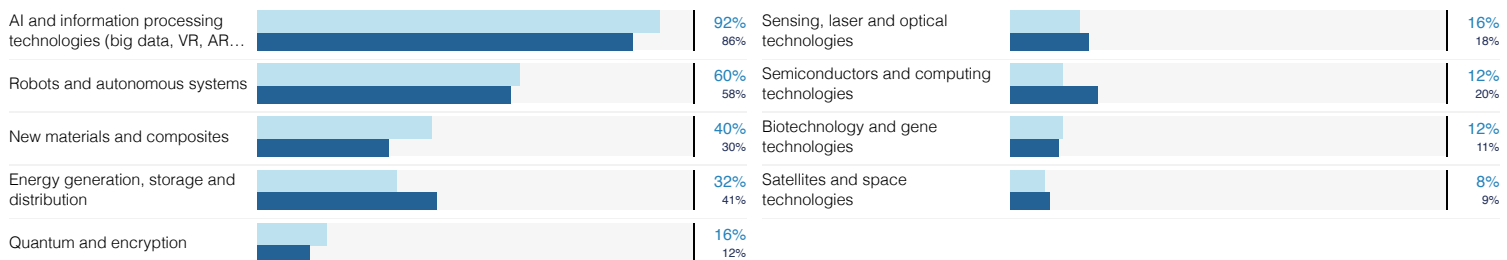


## Technology trends

## Technology trends driving business transformation

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

Economy Global

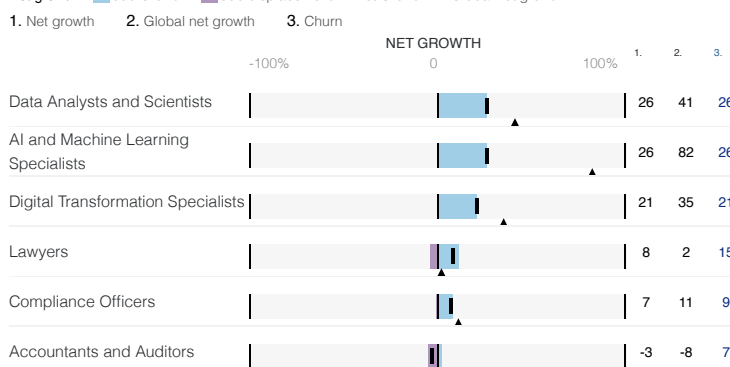


## Jobs outlook

## 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

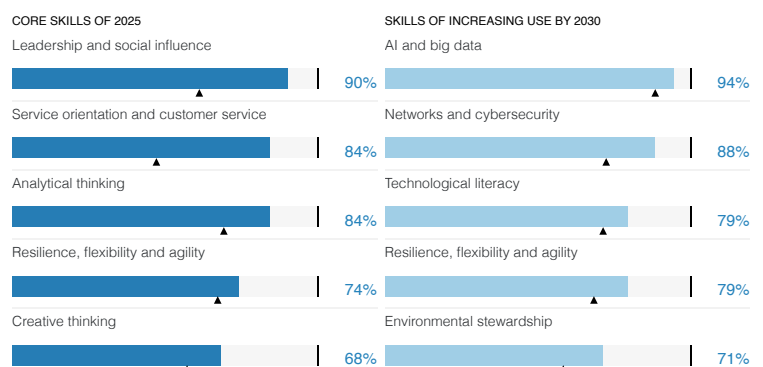


## Skill outlook

## Skills of increasing use by 2030

Skills of the most increase in use by 2030

Economy Global



## Hong Kong SAR, China

6.1

## Upskilling and reskilling outlook

34 | Global 41

Would not need training by 2030

35 | Global 29

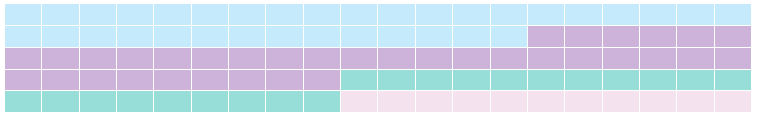
Would be upskilled in their current role

20 | Global 19

Would be upskilled and redeployed

11 | Global 11

Would be unlikely to upskill



## 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

Economy Global

ECONOMY GLOBAL

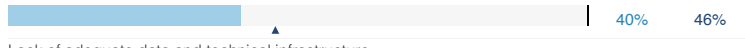
Skills gaps in the labour market



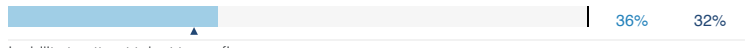
Inability to attract talent to the industry



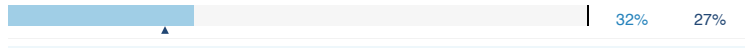
Organization culture and resistance to change



Lack of adequate data and technical infrastructure



Inability to attract talent to my firm



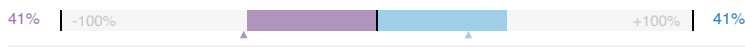
## Talent availability outlook

## Talent trend

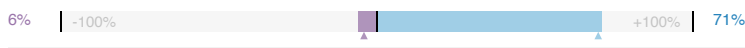
Share of respondents who expect their talent availability to improve or worsen in five years

Improving Global average Worsening Global average

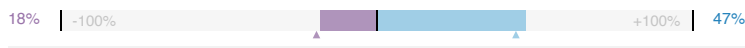
Talent availability when hiring



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

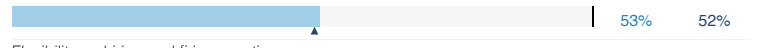
Economy Global

ECONOMY GLOBAL

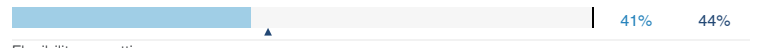
Funding for reskilling and upskilling



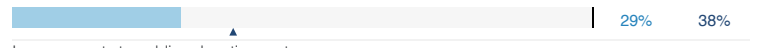
Provision of reskilling and upskilling



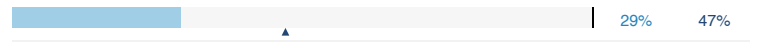
Flexibility on hiring and firing practices



Flexibility on setting wages



Improvements to public education systems



## 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

82 | Global 48

Targeted recruitment, retention and progression initiatives

59 | Global 51

Run comprehensive DEI training for managers and staff

53 | Global 42

Set DEI goals, targets or quotas

## AI Strategy

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

94 | Global 77

Reskilling and upskilling your existing workforce to better work alongside AI

65 | Global 69

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

59 | Global 47

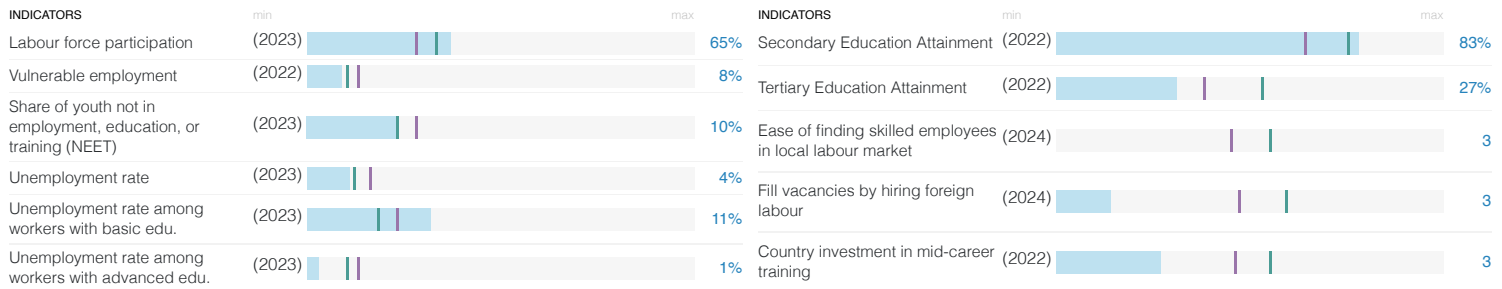
Transitioning people from jobs that AI will cause to decline, to other roles within your organization

## Hungary

7.1

## Contextual indicators

Regional average Income Group average



## Jobs and Skills outlook

17% | Global 22%

## Labour-market churn

Five-year structural labour-force churn

36% | Global 39%

## Skill disruption

Shares of core skills which will change

100% | Global 83%

## Organizations with DEI priorities

Share of organizations with DEI priorities

92% | Global 88%

## AI exposure

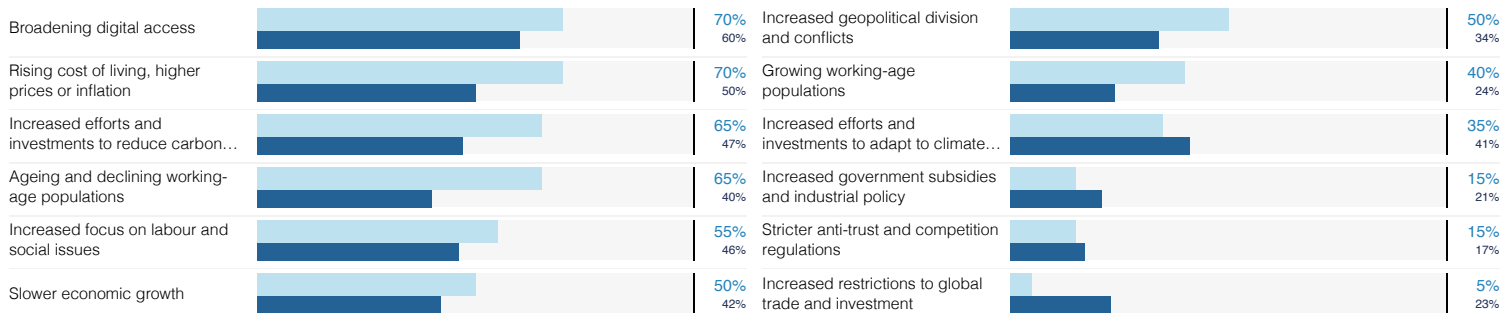
Share of organizations running AI programmes

## Trend outlook

## Macrotrends driving business transformation

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

Economy Global

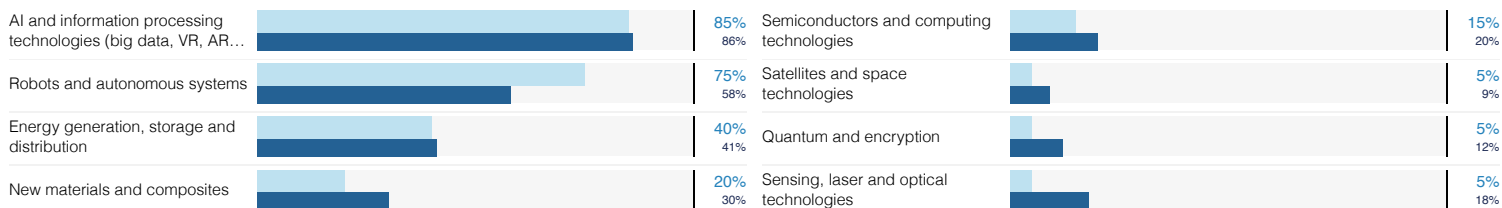


## Technology trends

## Technology trends driving business transformation

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

Economy Global



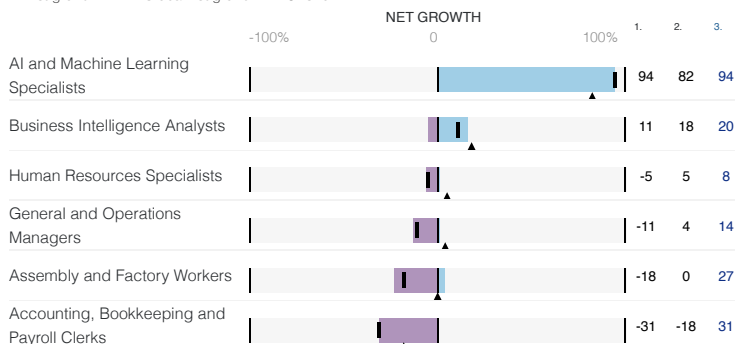
## Jobs outlook

## 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

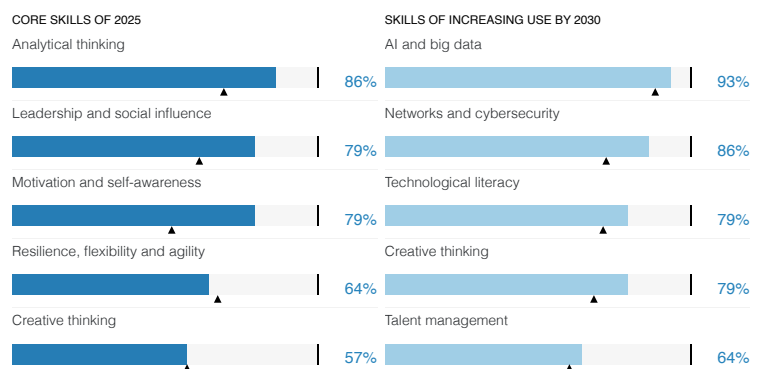


## Skill outlook

## Skills of increasing use by 2030

Skills of the most increase in use by 2030

Economy Global



## Hungary

7.1

## Upskilling and reskilling outlook

40 | Global 41

Would not need training by 2030

29 | Global 29

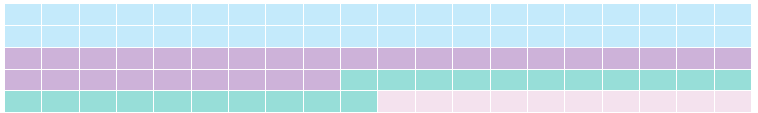
Would be upskilled in their current role

21 | Global 19

Would be upskilled and redeployed

10 | Global 11

Would be unlikely to upskill



## 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

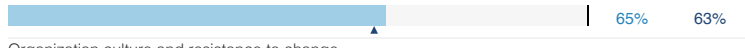
## Transformation barriers

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

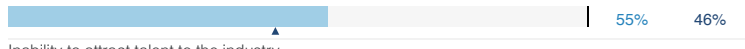
Economy Global

ECONOMY GLOBAL

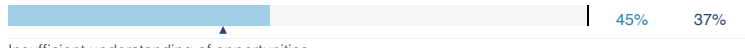
Skills gaps in the labour market



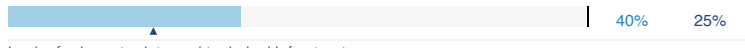
Organization culture and resistance to change



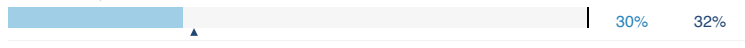
Inability to attract talent to the industry



Insufficient understanding of opportunities



Lack of adequate data and technical infrastructure



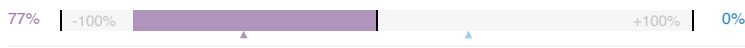
## Talent availability outlook

## Talent trend

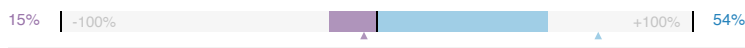
Share of respondents who expect their talent availability to improve or worsen in five years

Improving Global average Worsening Global average

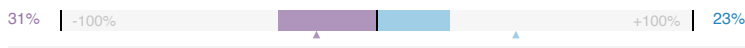
Talent availability when hiring



Talent development of existing workforce



Talent retention of existing workforce



## Public policy

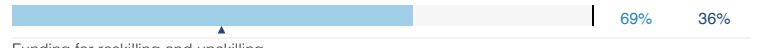
## Public policies to improve talent availability

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

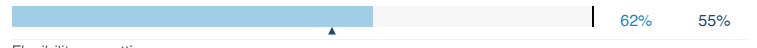
Economy Global

ECONOMY GLOBAL

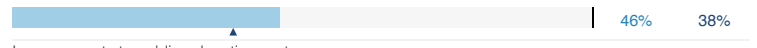
Changes to labour laws related to remote work



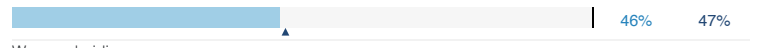
Funding for reskilling and upskilling



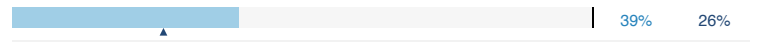
Flexibility on setting wages



Improvements to public education systems



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

46 | Global 27

Embed DEI goals and solutions across the supply chain

39 | Global 51

Run comprehensive DEI training for managers and staff

39 | 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

83 | 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

58 | Global 49

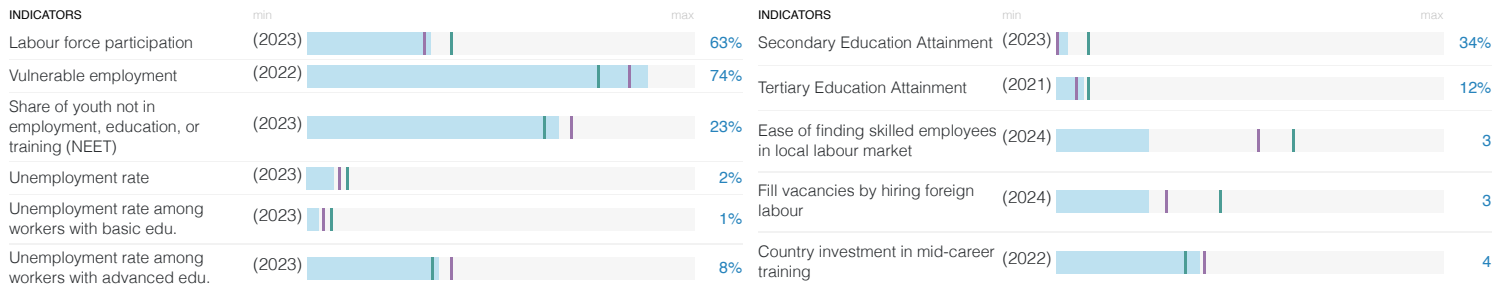
Re-orienting your organization to target new business opportunities created by AI

## India

672.8

## Contextual indicators

Regional average Income Group average



## Jobs and Skills outlook

20% | Global 22%

## Labour-market churn

Five-year structural labour-force churn

38% | Global 39%

## Skill disruption

Shares of core skills which will change

95% | Global 83%

## Organizations with DEI priorities

Share of organizations with DEI priorities

96% | Global 88%

## AI exposure

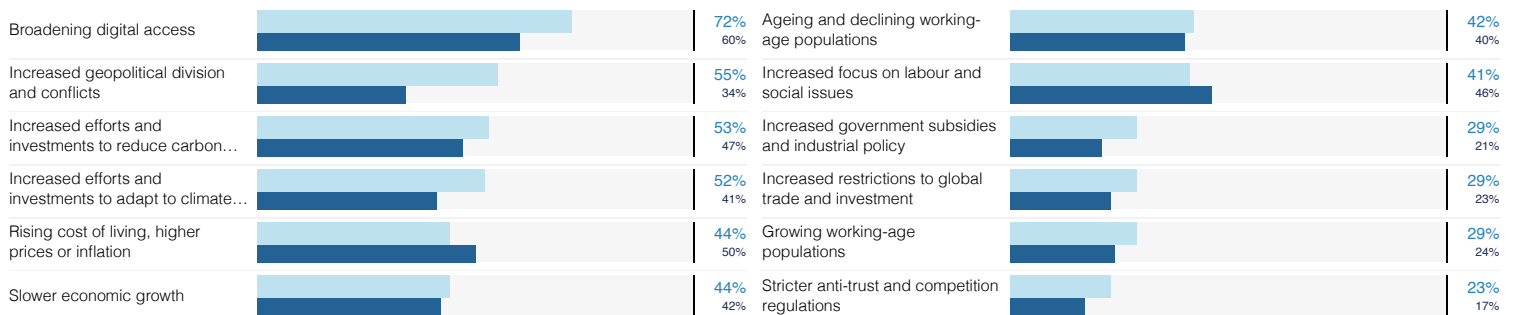
Share of organizations running AI programmes

## Trend outlook

## Macrotrends driving business transformation

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

Economy Global

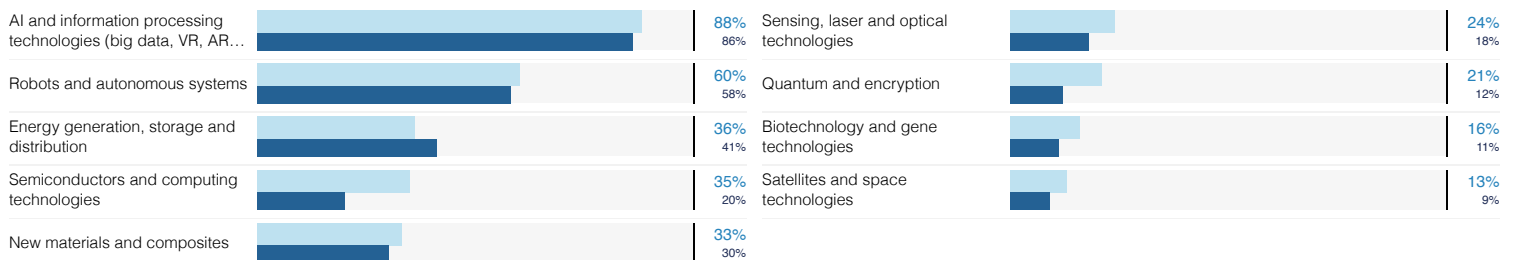


## Technology trends

## Technology trends driving business transformation

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

Economy Global

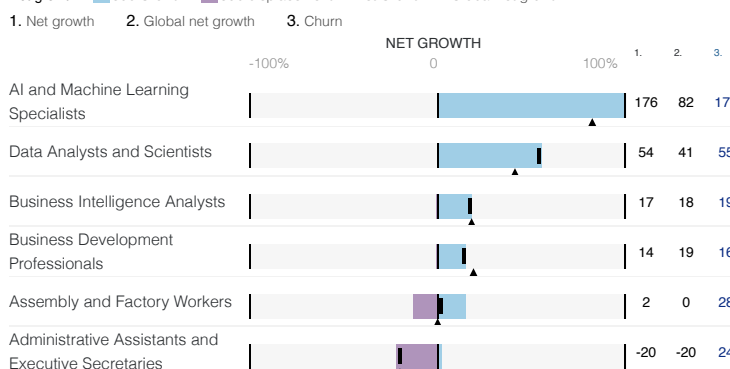


## Jobs outlook

## 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

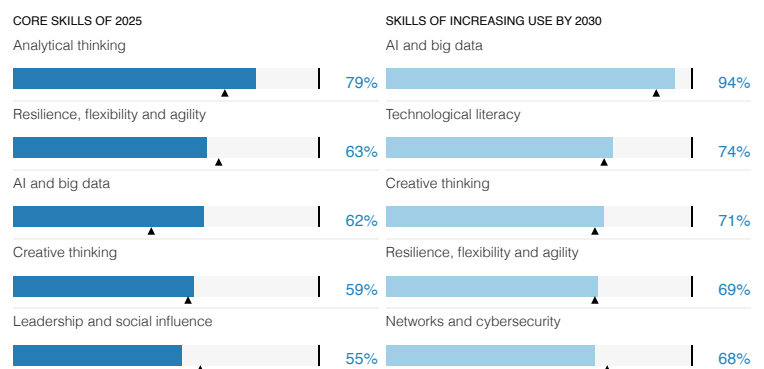


## Skill outlook

## Skills of increasing use by 2030

Skills of the most increase in use by 2030

Economy Global



## India

672.8

## Upskilling and reskilling outlook

37 | Global 41

Would not need training by 2030

29 | Global 29

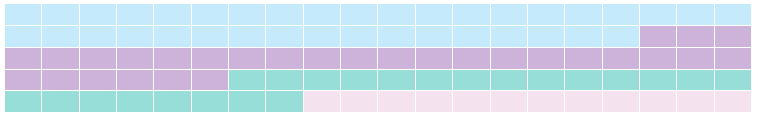
Would be upskilled in their current role

22 | Global 19

Would be upskilled and redeployed

12 | Global 11

Would be unlikely to upskill



## Human-machine 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

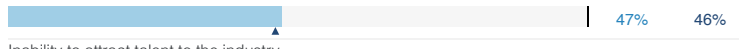
Economy Global

ECONOMY GLOBAL

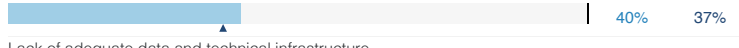
Skills gaps in the labour market



Organization culture and resistance to change



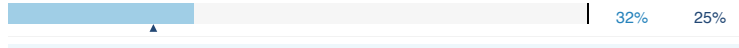
Inability to attract talent to the industry



Lack of adequate data and technical infrastructure



Insufficient understanding of opportunities



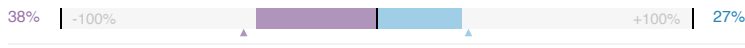
## Talent availability outlook

## Talent trend

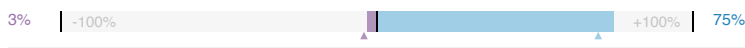
Share of respondents who expect their talent availability to improve or worsen in five years

Improving Global average Worsening Global average

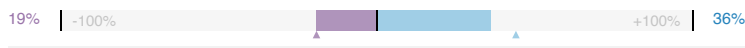
Talent availability when hiring



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

Economy Global

ECONOMY GLOBAL

Funding for reskilling and upskilling



Provision of reskilling and upskilling



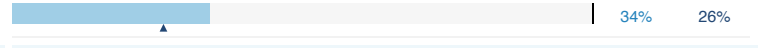
Improvements to public education systems



Flexibility on hiring and firing practices



Changes to immigration laws



## 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

67 | Global 51

Run comprehensive DEI training for managers and staff

60 | Global 42

Set DEI goals, targets or quotas

56 | 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

86 | Global 77

Reskilling and upskilling your existing workforce to better work alongside AI

72 | Global 69

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

66 | Global 49

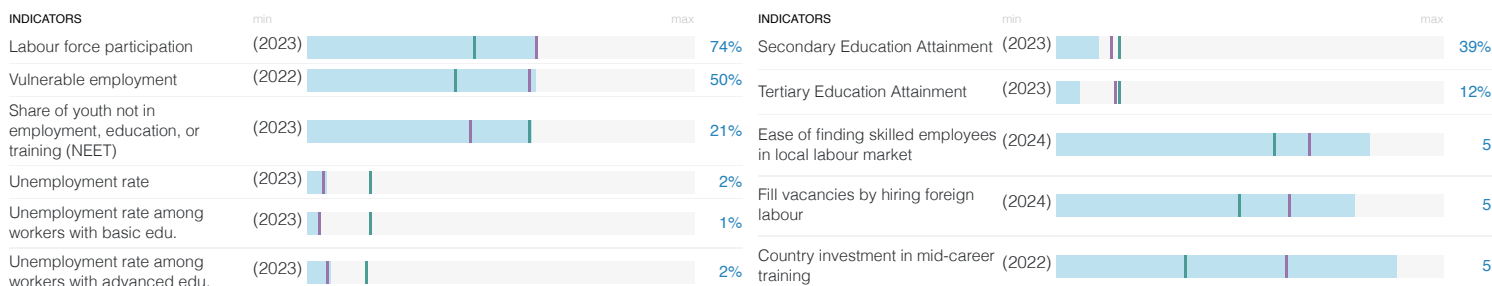
Re-orienting your organization to target new business opportunities created by AI

## Indonesia

167.6

## Contextual indicators

Regional average Income Group average



## Jobs and Skills outlook

14% | Global 22%

## Labour-market churn

Five-year structural labour-force churn

36% | Global 39%

## Skill disruption

Shares of core skills which will change

94% | Global 83%

## Organizations with DEI priorities

Share of organizations with DEI priorities

90% | Global 88%

## AI exposure

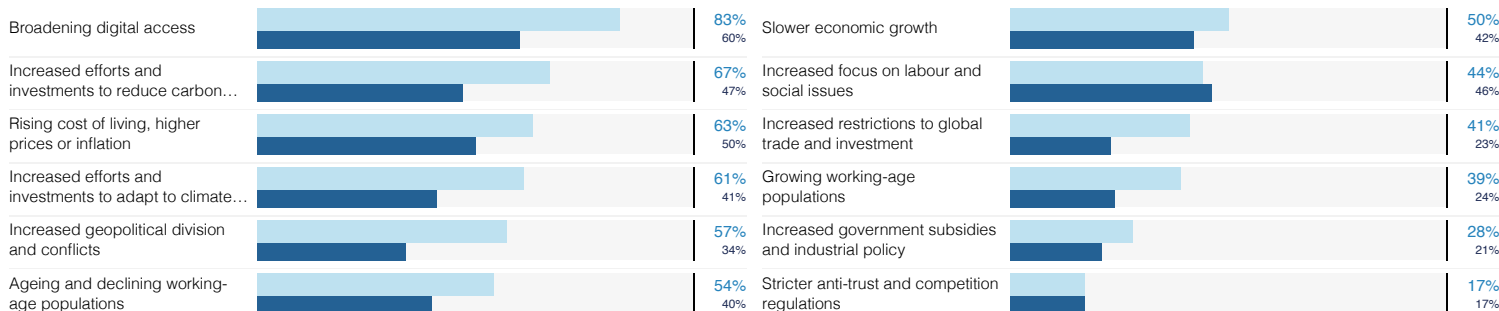
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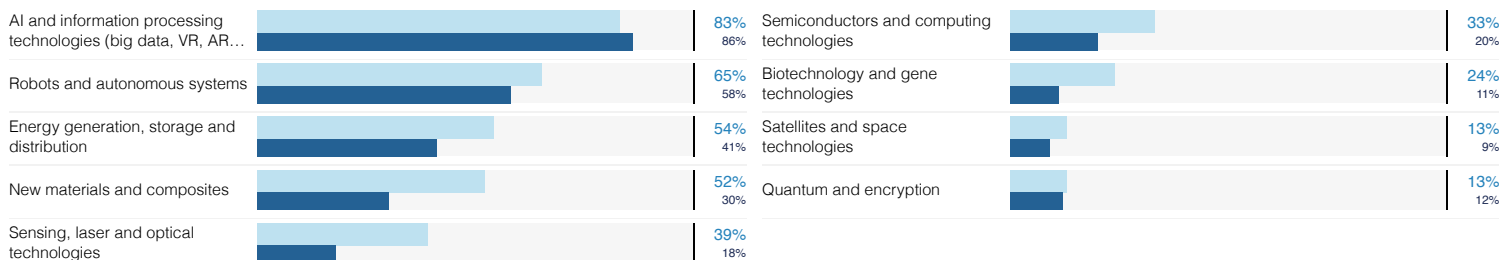


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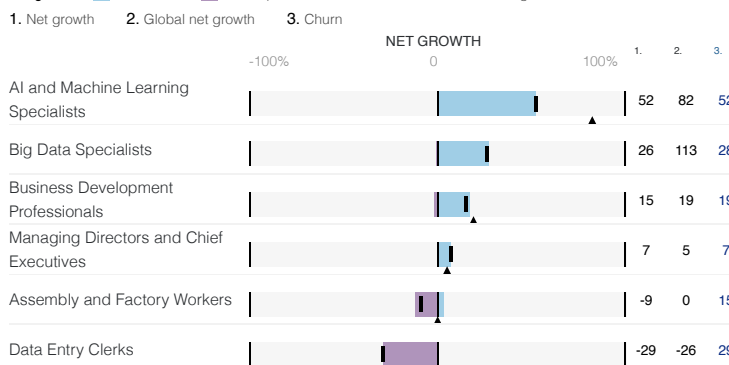


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Economy Global

