

# Education and Training

## Human-machine frontier

### Human-machine frontier

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



ALL TASKS

Now



2030



## Key barriers for business transformation

### Transformation barriers

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

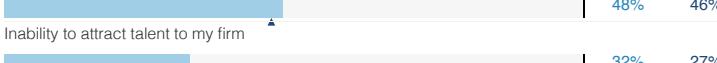


INDUSTRY GLOBAL

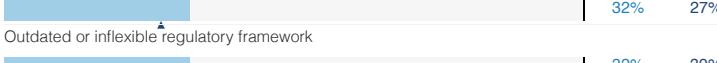
Skills gaps in the labour market



Organization culture and resistance to change



Inability to attract talent to my firm



Outdated or inflexible regulatory framework



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



Talent availability when hiring



Talent development of existing workforce



Talent retention of existing workforce



## Business Practice

### Business practices to improve talent availability

Top practices with the greatest potential to improve talent availability (share of organizations surveyed)



INDUSTRY GLOBAL

Improving talent progression and promotion processes



Offering higher wages



Supporting employee health and well-being



Tapping into diverse talent pools



Providing effective reskilling and upskilling



## 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



INDUSTRY GLOBAL

Growing



Global



## DEI Actions

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

55 | Global 51

Run comprehensive DEI training for managers and staff

41 | Global 48

Targeted recruitment, retention and progression initiatives

41 | Global 33

Anti-harassment protocols

## AI Strategy

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

81 | Global 77

Reskilling and upskilling your existing workforce to better work alongside AI

71 | Global 69

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

60 | Global 49

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

# Electronics

**17%** | Global 22%

## Labour-market churn

Five-year structural labour-force churn

**33%** | Global 39%

## Skill disruption

Shares of core skills which will change

**87%** | Global 83%

## Organizations with DEI priorities

Share of organizations with DEI priorities

**95%** | Global 88%

## AI exposure

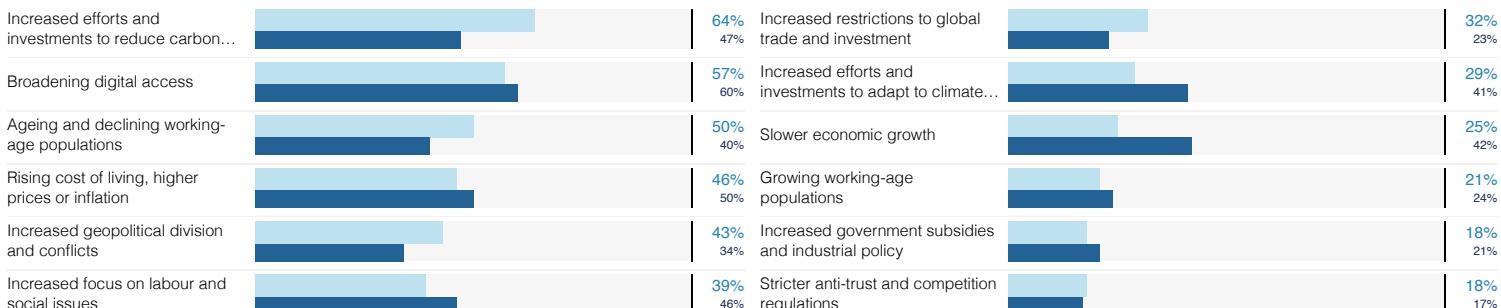
Share of organizations running AI programmes

### Trend outlook

#### Macrotrends driving business transformation

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

■ Industry ■ Global

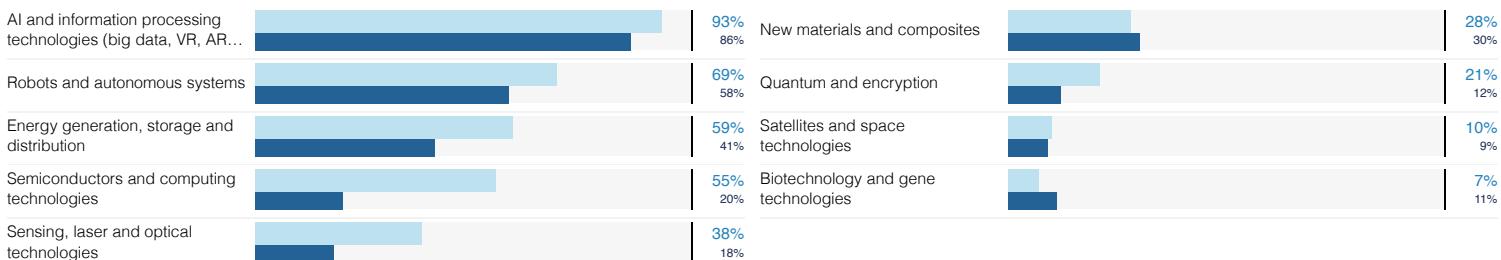


### Technology trends

#### Technology trends driving business transformation

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

■ Industry ■ Global



### Jobs outlook

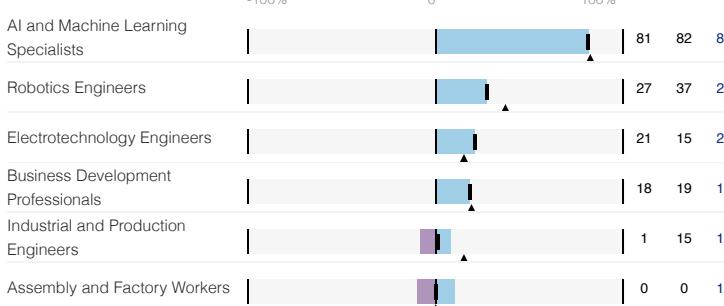
#### Key roles for business transformation

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

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



### Workforce Strategy outlook

#### Key components of your workforce strategy by 2030

% surveyed organizations selecting the macrotrend to drive workforce transformation

■ Industry ▲ Global

INDUSTRY GLOBAL



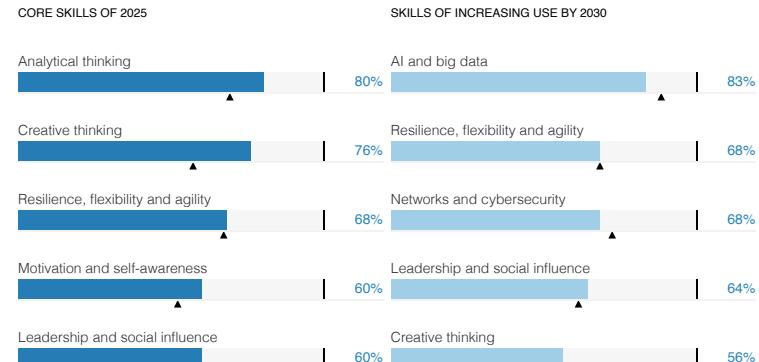
### Skill outlook

#### Skills of increasing use by 2030

Skills of the most increase in use by 2030

■ Industry ▲ Global

CORE SKILLS OF 2025



### Upskilling and reskilling outlook

38 | Global 41

Would not need training by 2030

33 | Global 29

Would be upskilled in their current role

17 | Global 19

Would be upskilled and redeployed

12 | Global 11

Would be unlikely to upskill

# Electronics

## 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

Industry Global

INDUSTRY GLOBAL

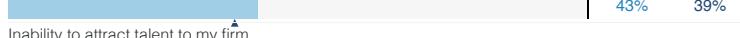
Skills gaps in the labour market



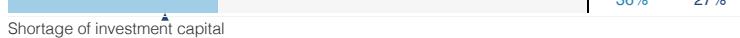
Inability to attract talent to the industry



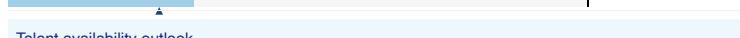
Outdated or inflexible regulatory framework



Inability to attract talent to my firm



Shortage of investment capital



## 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



+100% | 13%

Talent development of existing workforce



+100% | 74%

Talent retention of existing workforce



+100% | 44%

## Business Practice

### Business practices to improve talent availability

Top practices with the greatest potential to improve talent availability (share of organizations surveyed)

Industry Global

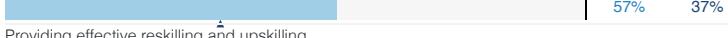
INDUSTRY GLOBAL

Supporting employee health and well-being



61% 64%

Articulate business purpose and impact



57% 37%

Providing effective reskilling and upskilling



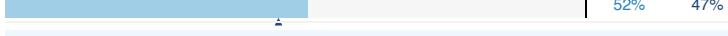
57% 63%

Improving talent progression and promotion processes



52% 62%

Tapping into diverse talent pools



52% 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

INDUSTRY GLOBAL

Growing Global Similar Global Declining Global

35% 56% 9%

Global Similar Global Declining Global

52% 41% 7%

## DEI Actions

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

48 | Global 51

Run comprehensive DEI training for managers and staff

44 | Global 39

Pay equity reviews and salary audits

39 | 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

81 | 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

52 | Global 47

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

# Energy Technology and Utilities

**19%** | Global 22%

## Labour-market churn

Five-year structural labour-force churn

**40%** | Global 39%

## Skill disruption

Shares of core skills which will change

**81%** | Global 83%

## Organizations with DEI priorities

Share of organizations with DEI priorities

**72%** | Global 88%

## AI exposure

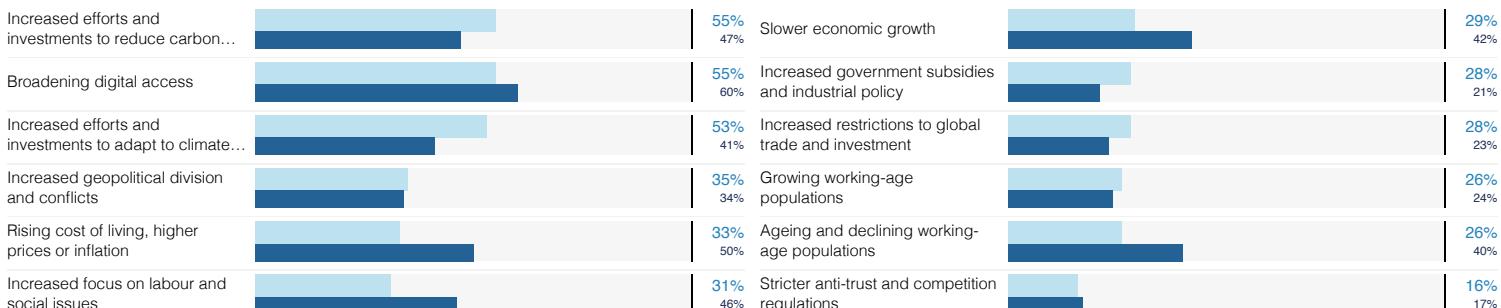
Share of organizations running AI programmes

## Trend outlook

### Macrotrends driving business transformation

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

■ Industry ■ Global

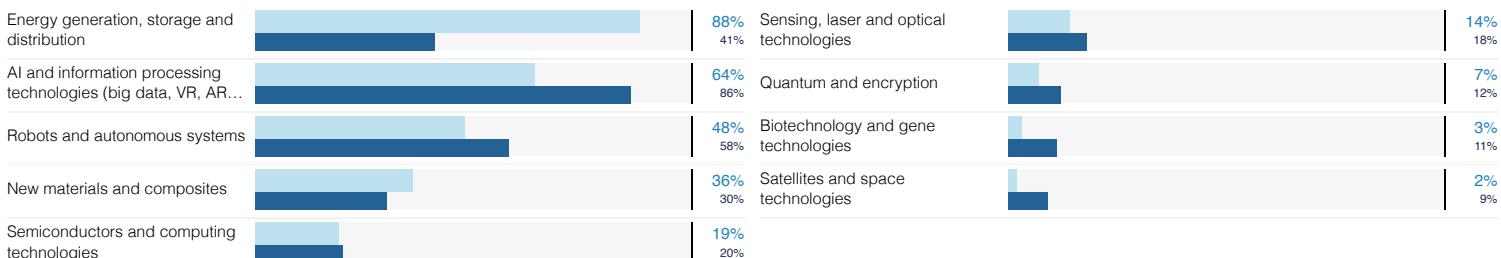


## Technology trends

### Technology trends driving business transformation

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

■ Industry ■ Global



## Jobs outlook

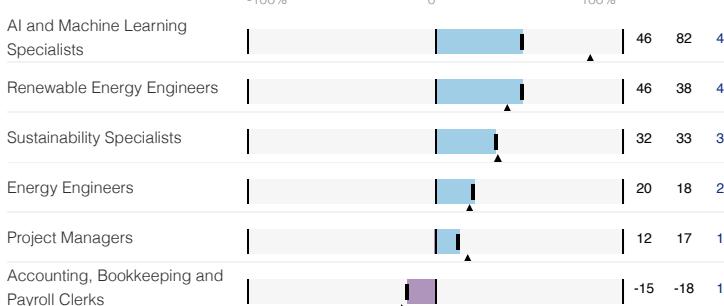
### Key roles for business transformation

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

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



## Workforce Strategy outlook

### Key components of your workforce strategy by 2030

% surveyed organizations selecting the macrotrend to drive workforce transformation

■ Industry ▲ Global

INDUSTRY GLOBAL



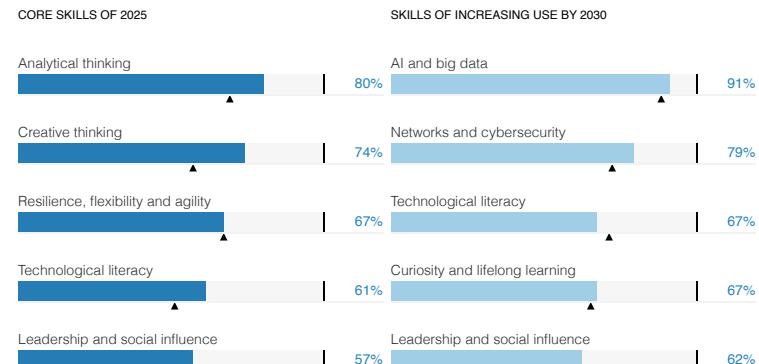
## Skill outlook

### Skills of increasing use by 2030

Skills of the most increase in use by 2030

■ Industry ▲ Global

CORE SKILLS OF 2025



## Upskilling and reskilling outlook

**39** | Global 41

Would not need training by 2030

**32** | Global 29

Would be upskilled in their current role

**18** | Global 19

Would be upskilled and redeployed

**11** | Global 11

Would be unlikely to upskill

# Energy Technology and Utilities

## 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

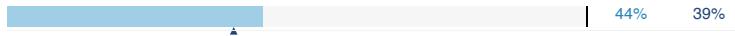
Industry Global

INDUSTRY GLOBAL

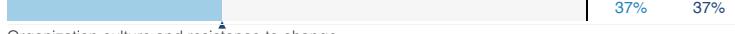
Skills gaps in the labour market



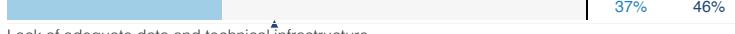
Outdated or inflexible regulatory framework



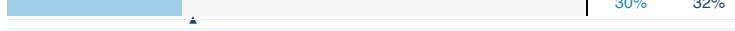
Inability to attract talent to the industry



Organization culture and resistance to change



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



## Business Practice

### Business practices to improve talent availability

Top practices with the greatest potential to improve talent availability (share of organizations surveyed)

Industry Global

INDUSTRY GLOBAL

Improving talent progression and promotion processes



Providing effective reskilling and upskilling



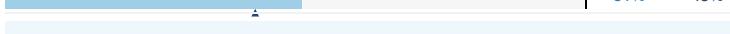
Supporting employee health and well-being



Articulate business purpose and impact



Offering remote and hybrid work opportunities within countries



## 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



## DEI Actions

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

**62** | Global 51

Run comprehensive DEI training for managers and staff

**60** | Global 42

Set DEI goals, targets or quotas

**55** | 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

**74** | Global 69

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

**74** | Global 77

Reskilling and upskilling your existing workforce to better work alongside AI

**61** | Global 62

Hiring new people with skills to better work alongside AI

# Financial services and Capital markets

**30%** | Global 22%

**Labour-market churn**

Five-year structural labour-force churn

**41%** | Global 39%

**Skill disruption**

Shares of core skills which will change

**88%** | Global 83%

**Organizations with DEI priorities**

Share of organizations with DEI priorities

**97%** | 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

■ Industry ■ Global

Broadening digital access	79% 60%	Increased efforts and investments to reduce carbon...	35% 47%
Increased efforts and investments to adapt to climate...	53% 41%	Increased focus on labour and social issues	33% 46%
Slower economic growth	50% 42%	Increased restrictions to global trade and investment	28% 23%
Rising cost of living, higher prices or inflation	47% 50%	Growing working-age populations	23% 24%
Ageing and declining working-age populations	37% 40%	Stricter anti-trust and competition regulations	23% 17%
Increased geopolitical division and conflicts	36% 34%	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

■ Industry ■ Global

AI and information processing technologies (big data, VR, AR...)	95% 86%	New materials and composites	9% 30%
Robots and autonomous systems	53% 56%	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%		

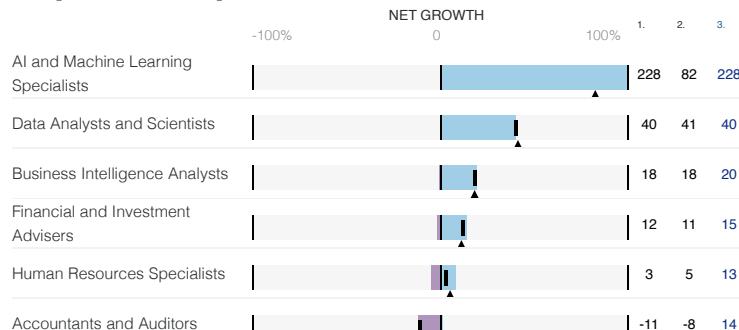
## Jobs outlook

### 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 ▲ Global net growth

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

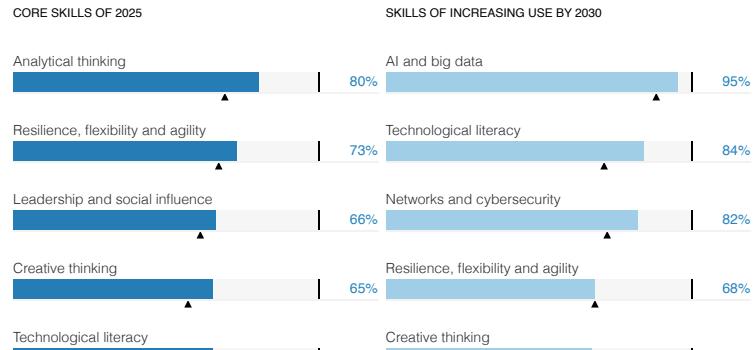


## Skill outlook

### Skills of increasing use by 2030

Skills of the most increase in use by 2030

■ Industry ▲ Global



## 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	87%	85%
Accelerate the automation of processes and tasks	82%	73%
Hire staff with new skills to meet emerging business needs	73%	70%

**42** | Global 41

Would not need training by 2030

**25** | 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

# Financial services and Capital markets

## Human-machine frontier

### Human-machine frontier

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



ALL TASKS

Now



2030



## Key barriers for business transformation

### Transformation barriers

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



INDUSTRY GLOBAL

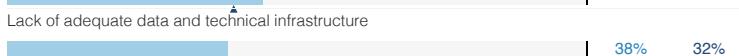
Skills gaps in the labour market



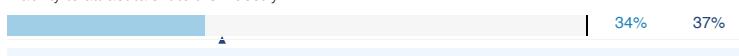
Organization culture and resistance to change



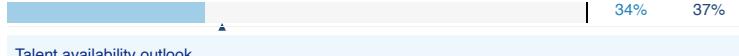
Outdated or inflexible regulatory framework



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



Talent availability when hiring



Talent development of existing workforce



Talent retention of existing workforce



## Business Practice

### Business practices to improve talent availability

Top practices with the greatest potential to improve talent availability (share of organizations surveyed)



INDUSTRY GLOBAL

Providing effective reskilling and upskilling



Supporting employee health and well-being



Improving talent progression and promotion processes



Offering remote and hybrid work opportunities within countries



Tapping into diverse talent pools



## 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 Global Declining Global



## DEI Actions

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

58 | Global 51

Run comprehensive DEI training for managers and staff

57 | Global 48

Targeted recruitment, retention and progression initiatives

47 | 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

80 | Global 77

Reskilling and upskilling your existing workforce to better work alongside AI

74 | Global 69

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

69 | Global 62

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

**38%** | Global 39%

## Skill disruption

Shares of core skills which will change

**75%** | Global 83%

## Organizations with DEI priorities

Share of organizations with DEI priorities

**76%** | Global 88%

## AI exposure

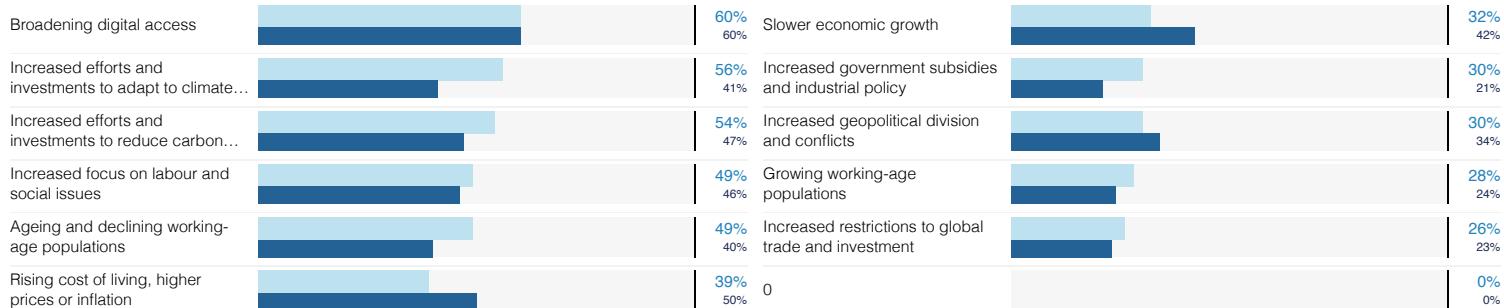
Share of organizations running AI programmes

### Trend outlook

#### Macrotrends driving business transformation

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

■ Industry ■ Global

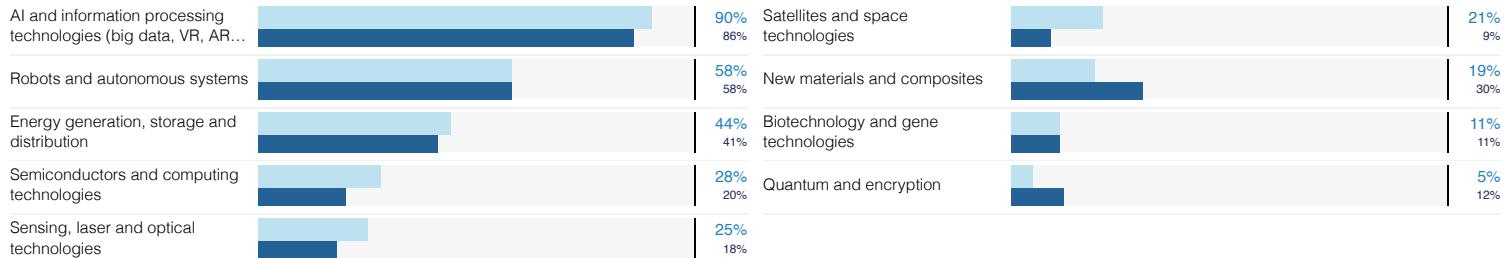


### Technology trends

#### Technology trends driving business transformation

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

■ Industry ■ Global



### Jobs outlook

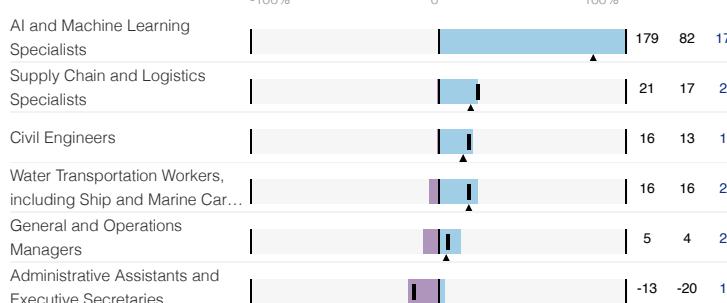
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1. Net growth 2. Global net growth 3. Churn

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



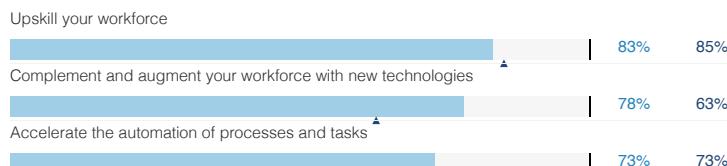
### Workforce Strategy outlook

#### Key components of your workforce strategy by 2030

% surveyed organizations selecting the macrotrend to drive workforce transformation

■ Industry ▲ Global

INDUSTRY GLOBAL



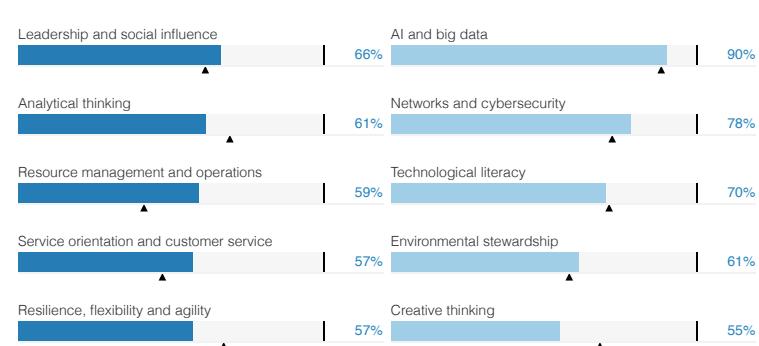
### Skill outlook

#### Skills of increasing use by 2030

Skills of the most increase in use by 2030

■ Industry ▲ Global

##### CORE SKILLS OF 2025



#### Upskilling and reskilling outlook

37 | Global 41

Would not need training by 2030

33 | Global 29

Would be upskilled in their current role

18 | Global 19

Would be upskilled and redeployed

12 | Global 11

Would be unlikely to upskill

# Government and Public sector

## 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

█ Industry █ Global

INDUSTRY GLOBAL

Organization culture and resistance to change



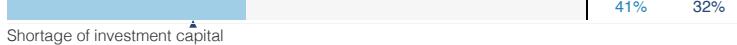
Skills gaps in the labour market



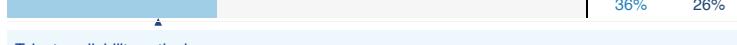
Outdated or inflexible regulatory framework



Lack of adequate data and technical infrastructure



Shortage of investment capital



## 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

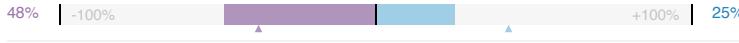
Talent availability when hiring



Talent development of existing workforce



Talent retention of existing workforce



## Business Practice

### Business practices to improve talent availability

Top practices with the greatest potential to improve talent availability (share of organizations surveyed)

█ Industry █ Global

INDUSTRY GLOBAL

Improving talent progression and promotion processes



Providing effective reskilling and upskilling



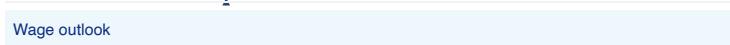
Supporting employee health and well-being



Offering higher wages



Improving working hours and overtime policies



### 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

52% 38% 10%

8% 52% 41%

## DEI Actions

### DEI Actions

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

50 | Global 51

Run comprehensive DEI training for managers and staff

48 | Global 33

Anti-harassment protocols

43 | 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

84 | Global 77

Reskilling and upskilling your existing workforce to better work alongside AI

76 | Global 69

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

63 | Global 62

Hiring new people with skills to better work alongside AI

# Information and Technology services

**34%** | Global 22%

**Labour-market churn**

Five-year structural labour-force churn

**32%** | Global 39%

**Skill disruption**

Shares of core skills which will change

**89%** | Global 83%

**Organizations with DEI priorities**

Share of organizations with DEI priorities

**93%** | 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

■ Industry ■ Global

Broadening digital access	74% 60%	Ageing and declining working-age populations	35% 40%
Rising cost of living, higher prices or inflation	45% 50%	Increased efforts and investments to adapt to climate...	31% 41%
Slower economic growth	45% 42%	Increased government subsidies and industrial policy	26% 21%
Increased focus on labour and social issues	43% 46%	Stricter anti-trust and competition regulations	22% 17%
Increased efforts and investments to reduce carbon...	37% 47%	Increased restrictions to global trade and investment	21% 23%
Increased geopolitical division and conflicts	36% 34%	Growing working-age populations	20% 24%

## 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...)	99% 86%	Satellites and space technologies	20% 9%
Robots and autonomous systems	48% 56%	New materials and composites	12% 30%
Quantum and encryption	41% 12%	Sensing, laser and optical technologies	12% 18%
Semiconductors and computing technologies	36% 20%	Biotechnology and gene technologies	9% 11%
Energy generation, storage and distribution	28% 41%		

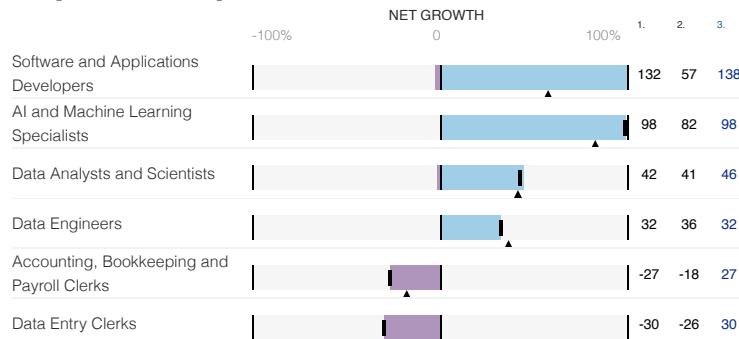
## Jobs outlook

### 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 ▲ Global net growth

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

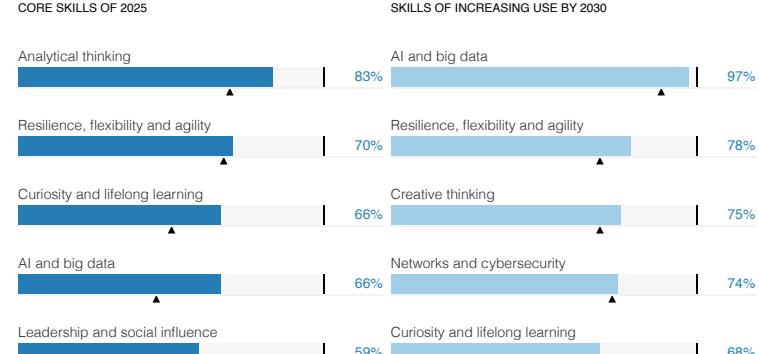


## Skill outlook

### Skills of increasing use by 2030

Skills of the most increase in use by 2030

■ Industry ▲ Global



## 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	92%	85%
Hire staff with new skills to meet emerging business needs	86%	70%
Accelerate the automation of processes and tasks	76%	73%

**38** | Global 41

Would not need training by 2030

**27** | Global 29

Would be upskilled in their current role

**23** | Global 19

Would be upskilled and redeployed

**12** | Global 11

Would be unlikely to upskill