

# Education and Training

## 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

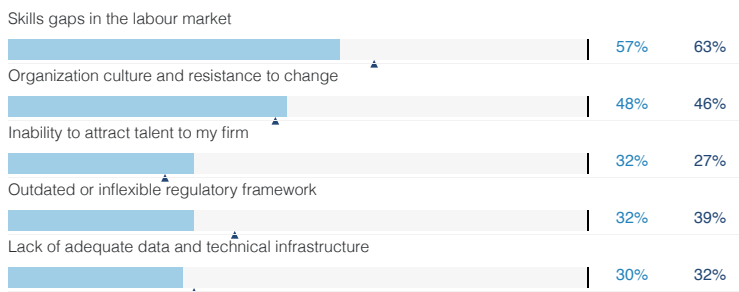


## Key barriers for business transformation

### Transformation barriers

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

Industry Global



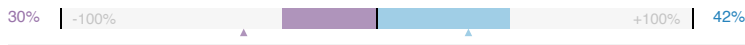
## Talent availability outlook

### Talent trend

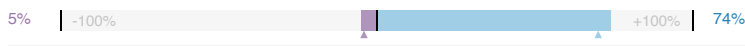
Share of respondents who expect their talent availability to improve or worsen in five years

Improving Global average Worsening Global average

Talent availability when hiring



Talent development of existing workforce



Talent retention of existing workforce

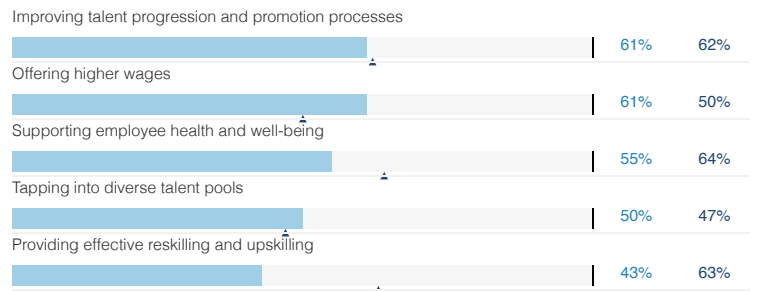


## Business Practice

### Business practices to improve talent availability

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

Industry Global



## 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

55 | Global 51

Run comprehensive DEI training for managers and staff

41 | Global 48

Targeted recruitment, retention and progression initiatives

41 | 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

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

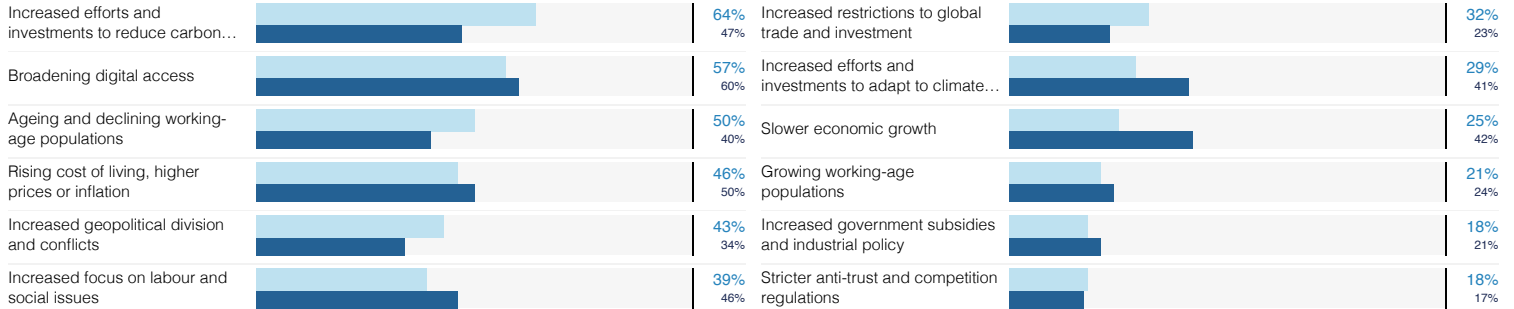
Share of organizations running AI programmes

## Trend outlook

## Macrotrends driving business transformation

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

■ Industry ■ Global

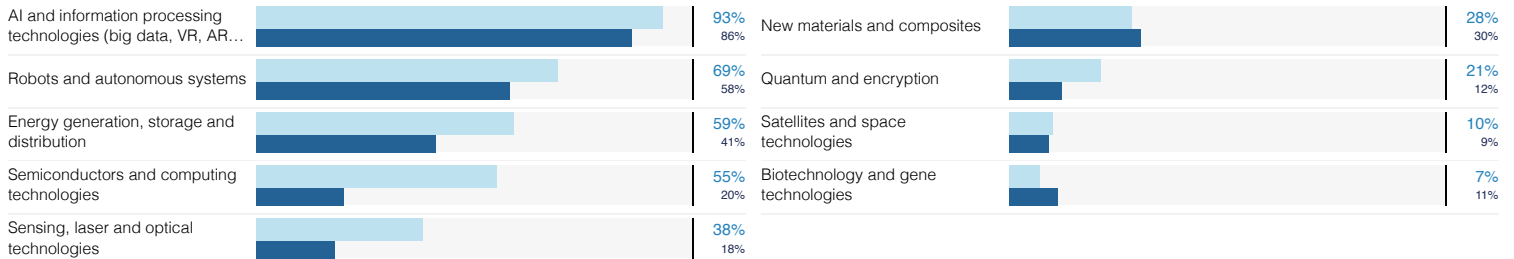


## Technology trends

## Technology trends driving business transformation

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

■ Industry ■ Global



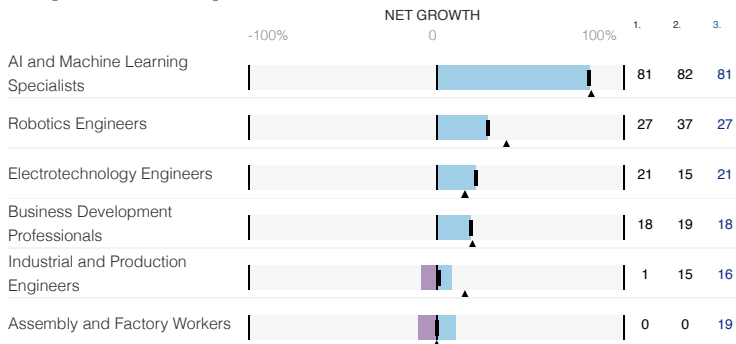
## Jobs outlook

## 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

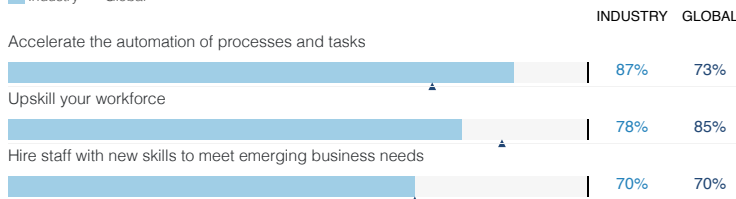


## Workforce Strategy outlook

## Key components of your workforce strategy by 2030

% surveyed organizations selecting the macrotrend to drive workforce transformation

■ Industry ▲ Global



## Skill outlook

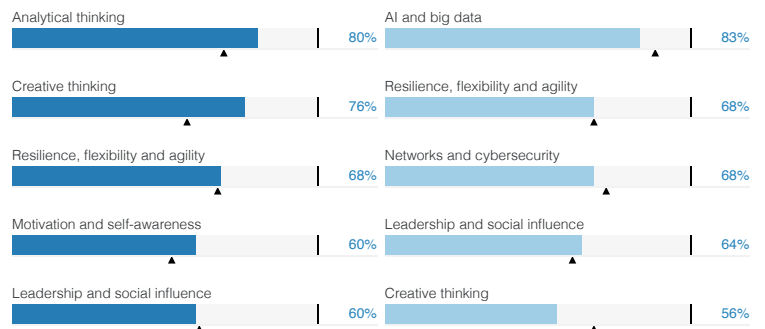
## Skills of increasing use by 2030

Skills of the most increase in use by 2030

■ Industry ▲ Global

CORE SKILLS OF 2025

SKILLS OF INCREASING USE BY 2030



## 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



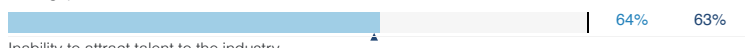
## Key barriers for business transformation

### Transformation barriers

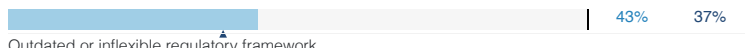
Share of organisations surveyed expecting the barriers will hinder their organisation transformation

Industry Global

Skills gaps in the labour market



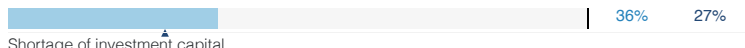
Inability to attract talent to the industry



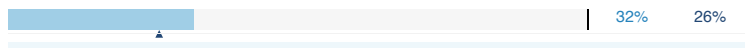
Outdated or inflexible regulatory framework



Inability to attract talent to my firm



Shortage of investment capital



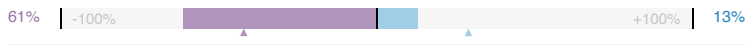
## Talent availability outlook

### Talent trend

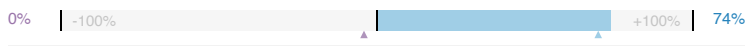
Share of respondents who expect their talent availability to improve or worsen in five years

Improving Global average Worsening Global average

Talent availability when hiring



Talent development of existing workforce



Talent retention of existing workforce



## Business Practice

### Business practices to improve talent availability

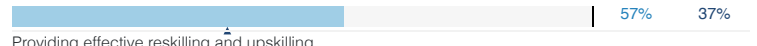
Top practices with the greatest potential to improve talent availability (share of organizations surveyed)

Industry Global

Supporting employee health and well-being



Articulate business purpose and impact



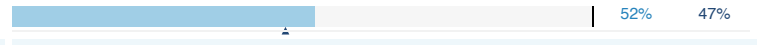
Providing effective reskilling and upskilling



Improving talent progression and promotion processes



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 Declining Global



## 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**

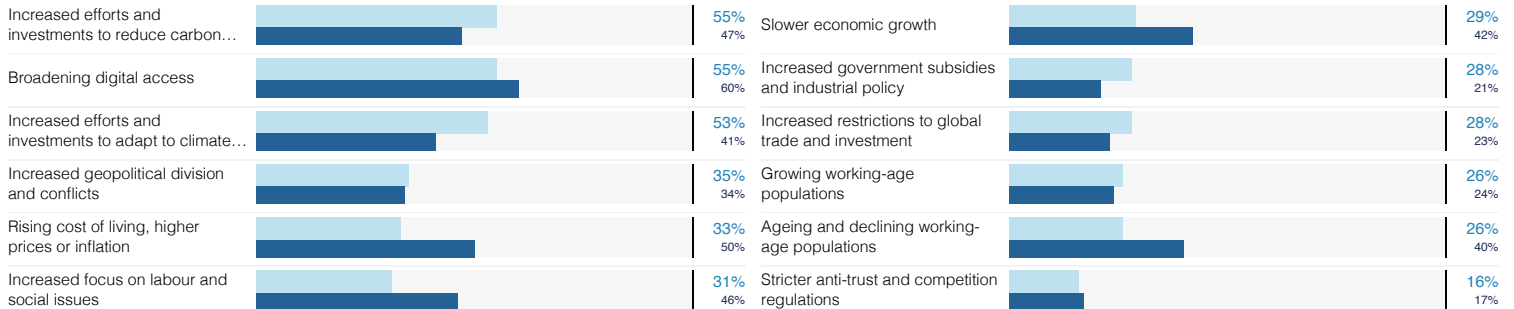
Share of organizations running AI programmes

## Trend outlook

### Macrotrends driving business transformation

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

■ Industry ■ Global

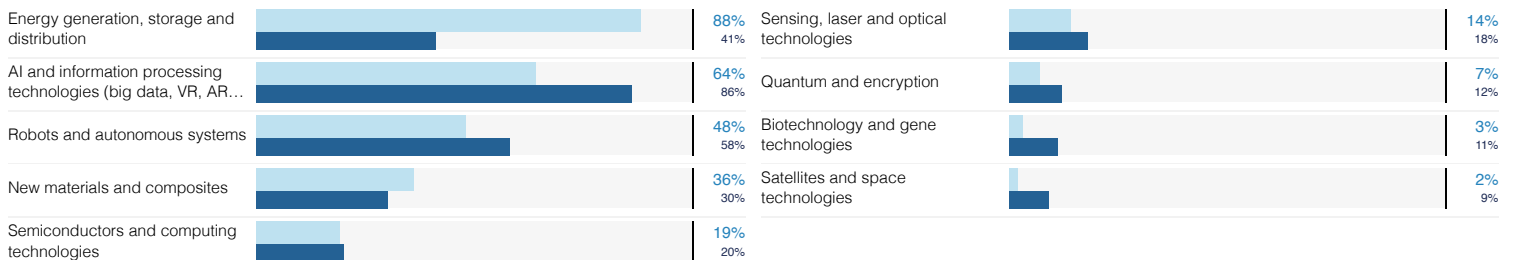


## Technology trends

### Technology trends driving business transformation

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

■ Industry ■ Global



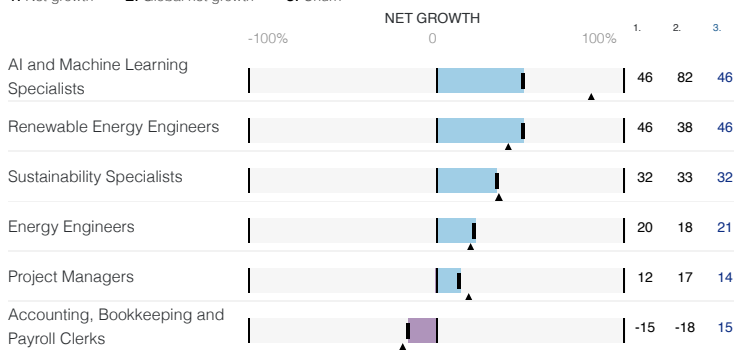
## Jobs outlook

### 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

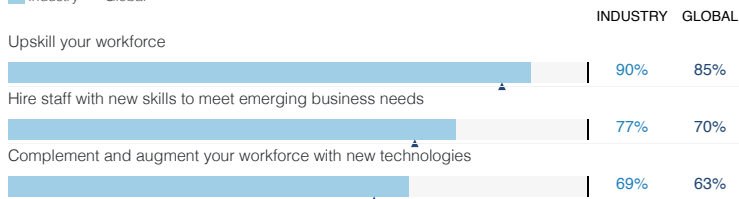


## Workforce Strategy outlook

### Key components of your workforce strategy by 2030

% surveyed organizations selecting the macrotrend to drive workforce transformation

■ Industry ▲ Global



## Skill outlook

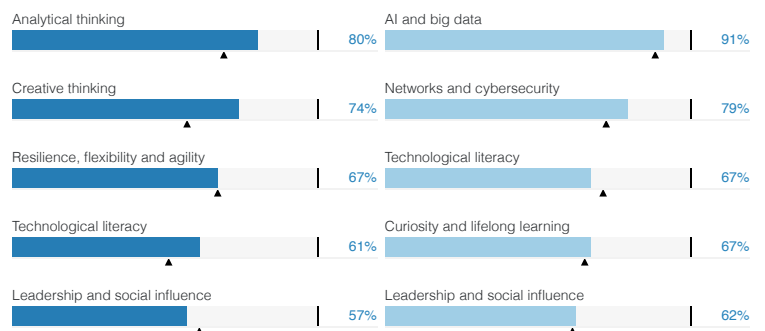
### Skills of increasing use by 2030

Skills of the most increase in use by 2030

■ Industry ▲ Global

CORE SKILLS OF 2025

SKILLS OF INCREASING USE BY 2030



## 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

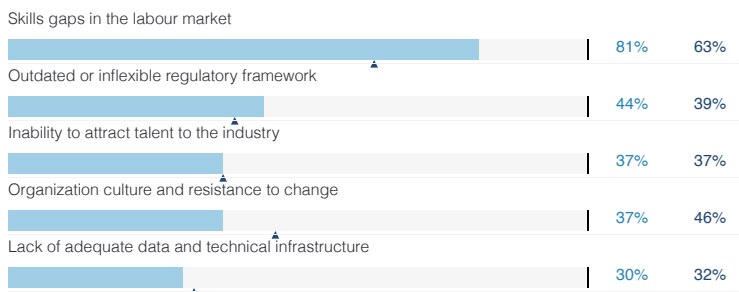


## Key barriers for business transformation

### Transformation barriers

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

Industry Global

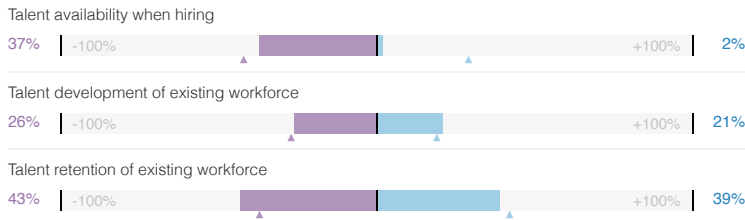


## Talent availability outlook

### Talent trend

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

Improving Global average Worsening Global average

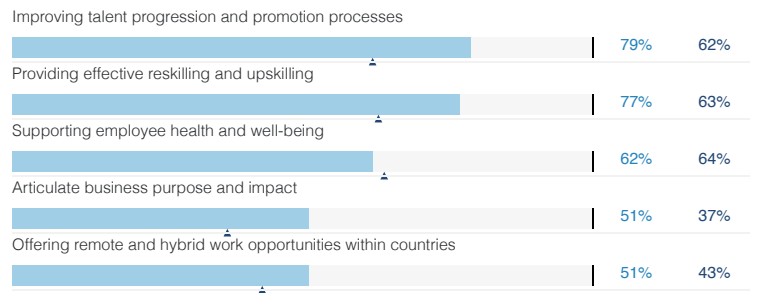


## Business Practice

### Business practices to improve talent availability

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

Industry Global



## 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

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

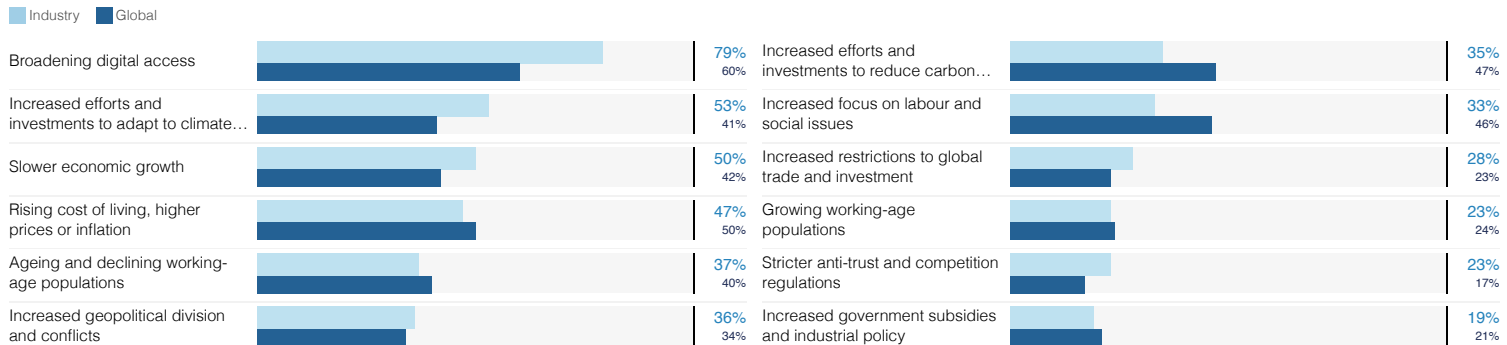
**97%** | Global 88%**AI exposure**

Share of organizations running AI programmes

## Trend outlook

### Macrotrends driving business transformation

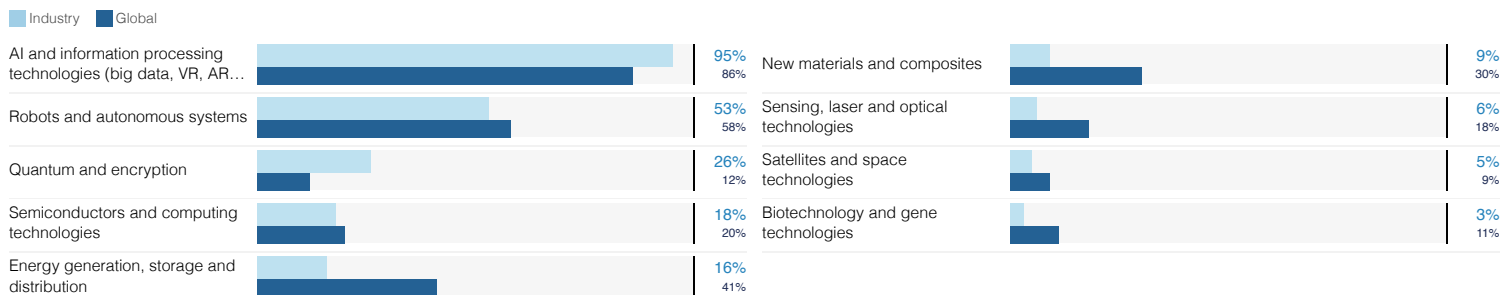
Share of organizations surveyed that identified this trend as likely to drive transformation in their organization



## Technology trends

### Technology trends driving business transformation

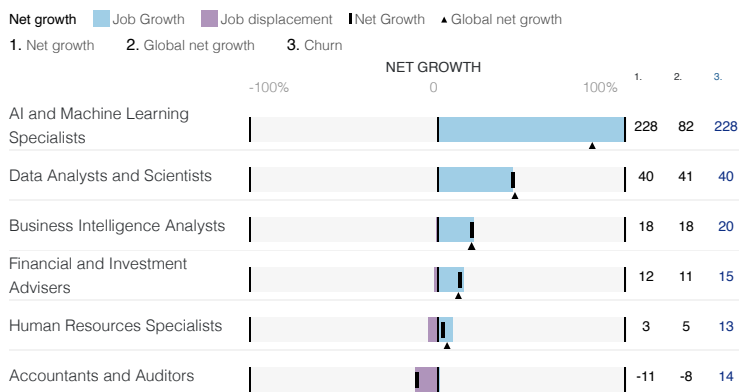
Share of organizations surveyed that identify the technology trend as likely to drive business transformation



## Jobs outlook

### Key roles for business transformation

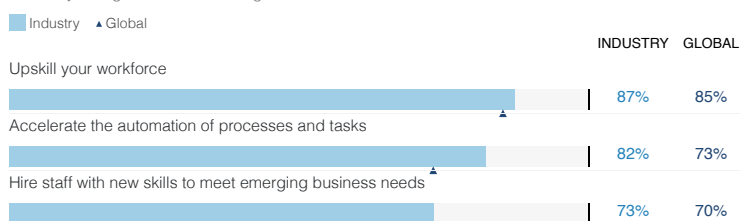
Roles most selected by organizations surveyed, ordered by net role growth, and their net growth and structural churn (percent)



## Workforce Strategy outlook

### Key components of your workforce strategy by 2030

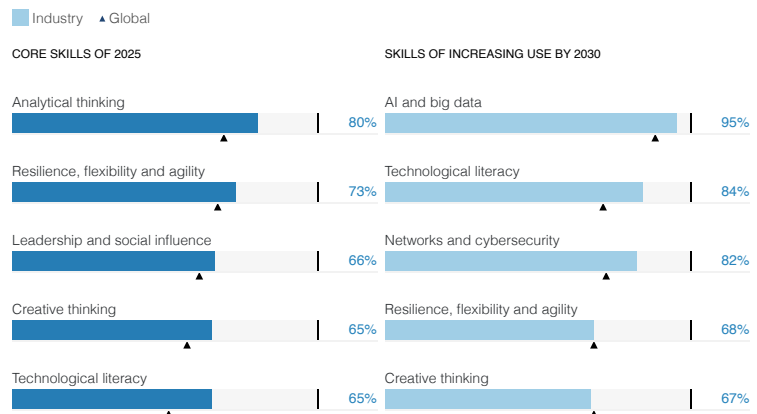
% surveyed organizations selecting the macrotrend to drive workforce transformation



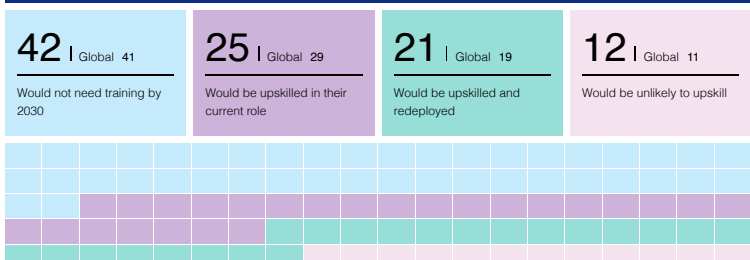
## Skill outlook

### Skills of increasing use by 2030

Skills of the most increase in use by 2030



## Upskilling and reskilling outlook



# Financial services and Capital markets

## 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

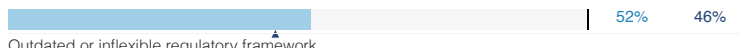
Share of organisations surveyed expecting the barriers will hinder their organisation transformation

Industry Global

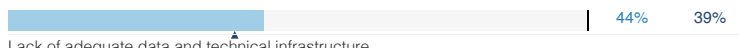
Skills gaps in the labour market



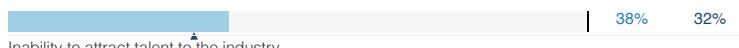
Organization culture and resistance to change



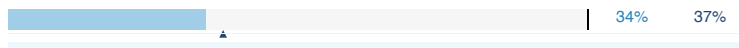
Outdated or inflexible regulatory framework



Lack of adequate data and technical infrastructure



Inability to attract talent to the industry



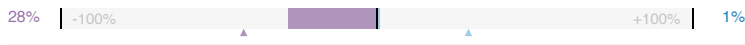
## Talent availability outlook

### Talent trend

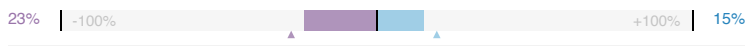
Share of respondents who expect their talent availability to improve or worsen in five years

Improving Global average Worsening Global average

Talent availability when hiring



Talent development of existing workforce



Talent retention of existing workforce



## 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



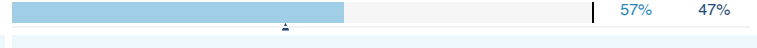
Improving talent progression and promotion processes



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 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

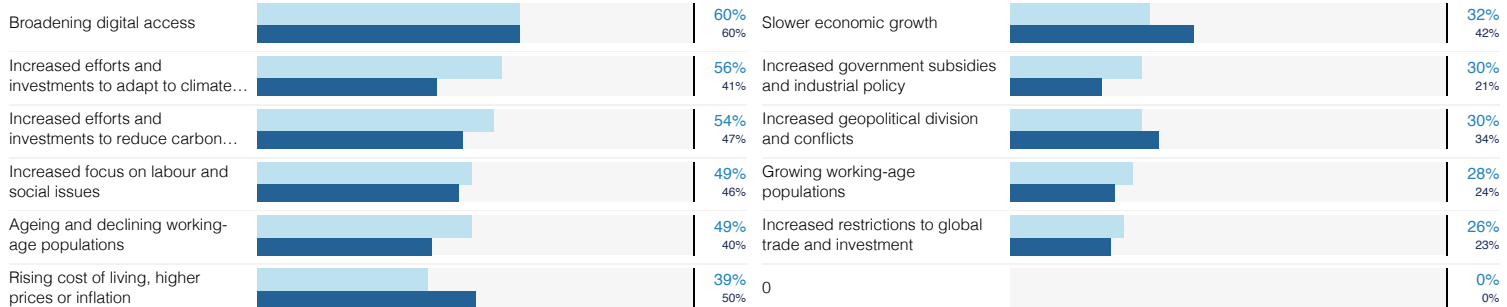
**76%** | Global 88%**AI exposure**

Share of organizations running AI programmes

**Trend outlook****Macrotrends driving business transformation**

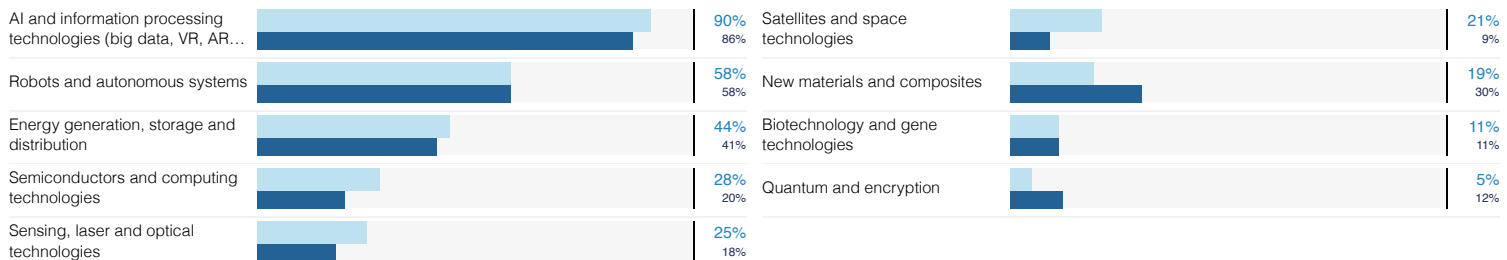
Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

■ Industry ■ Global

**Technology trends****Technology trends driving business transformation**

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

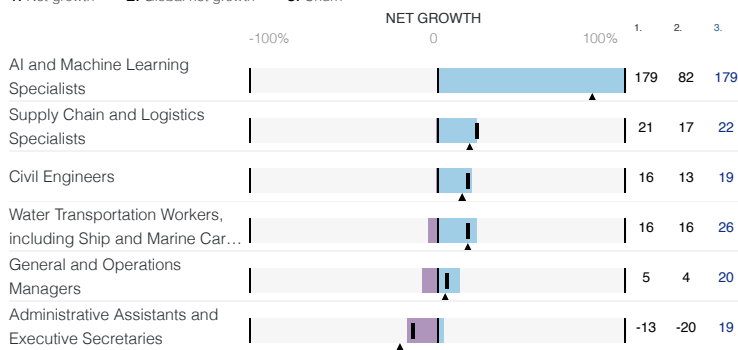
■ Industry ■ Global

**Jobs outlook****Key roles for business transformation**

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

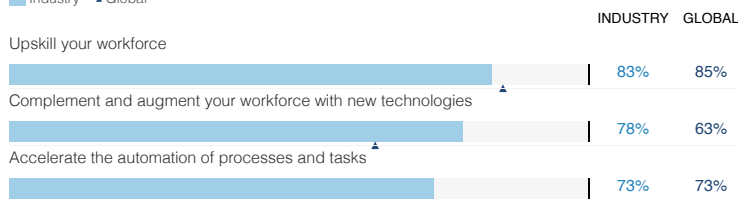
Net growth ■ Job Growth ■ Job displacement ■ Net Growth ▲ Global net growth

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

**Workforce Strategy outlook****Key components of your workforce strategy by 2030**

% surveyed organizations selecting the macrotrend to drive workforce transformation

■ Industry ▲ Global

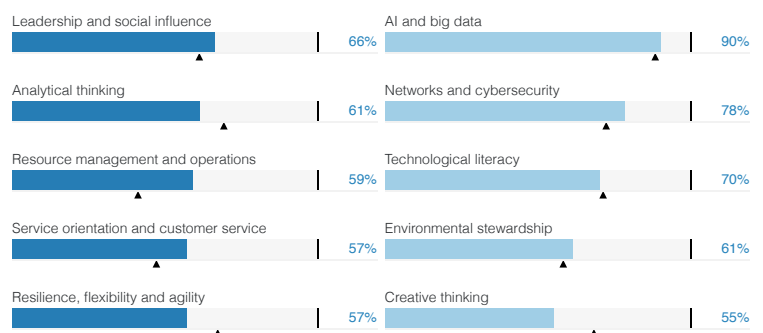
**Skill outlook****Skills of increasing use by 2030**

Skills of the most increase in use by 2030

■ Industry ▲ Global

CORE SKILLS OF 2025

SKILLS OF INCREASING USE BY 2030

**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

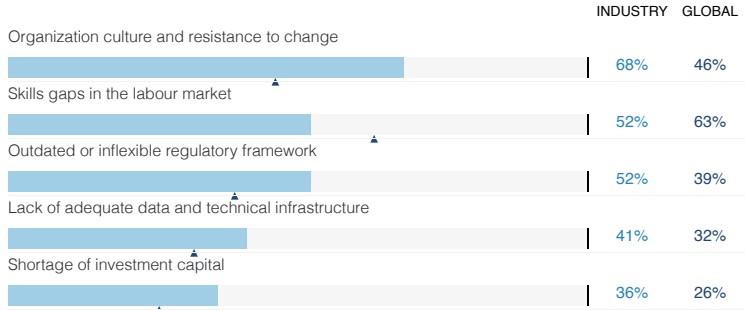


## Key barriers for business transformation

### Transformation barriers

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

Industry Global



## 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

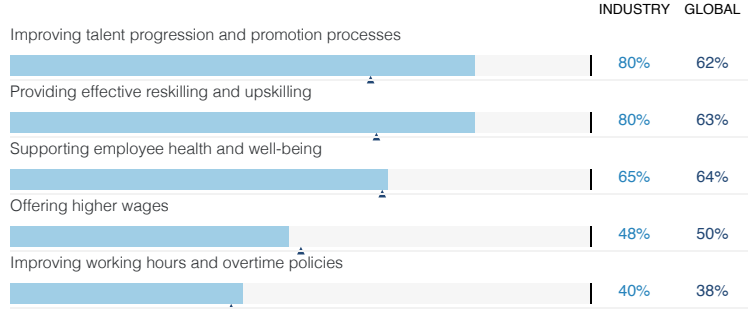


## Business Practice

### Business practices to improve talent availability

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

Industry Global

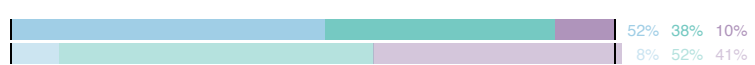


## Wage outlook

### 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

50 | Global 51

Run comprehensive DEI training for managers and staff

48 | Global 33

Anti-harrasment 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**

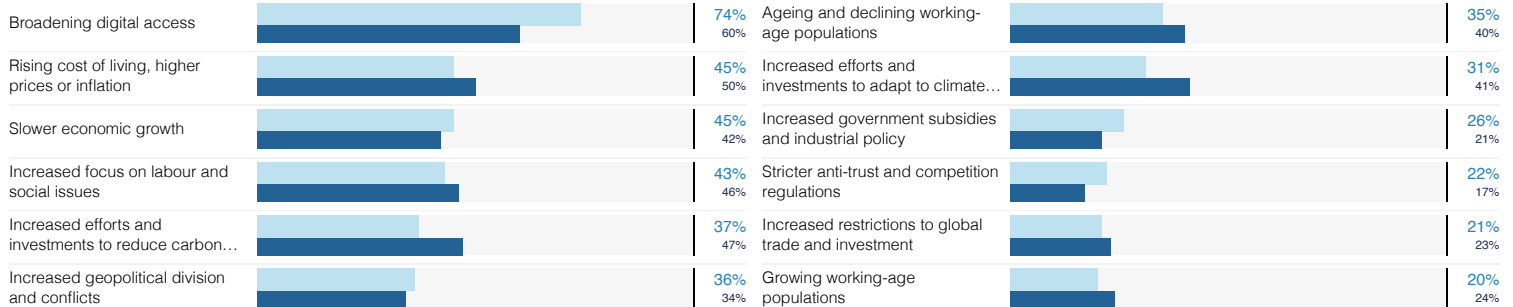
Share of organizations running AI programmes

## Trend outlook

### Macrotrends driving business transformation

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

■ Industry ■ Global

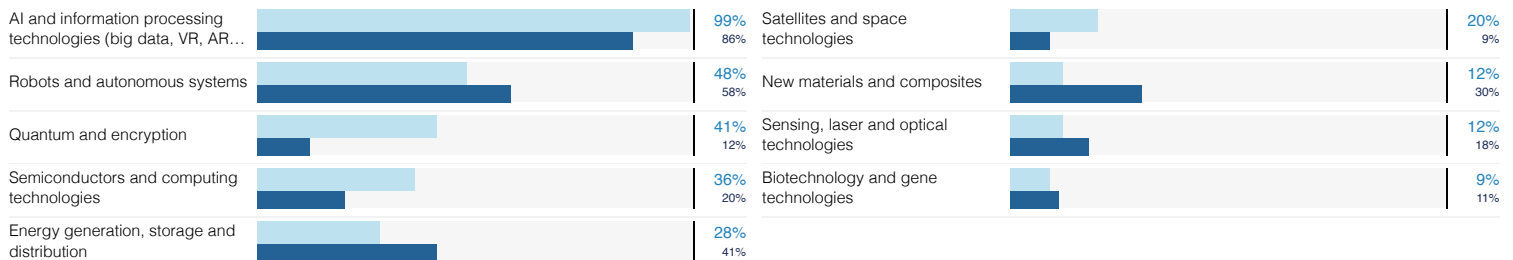


## Technology trends

### Technology trends driving business transformation

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

■ Industry ■ Global



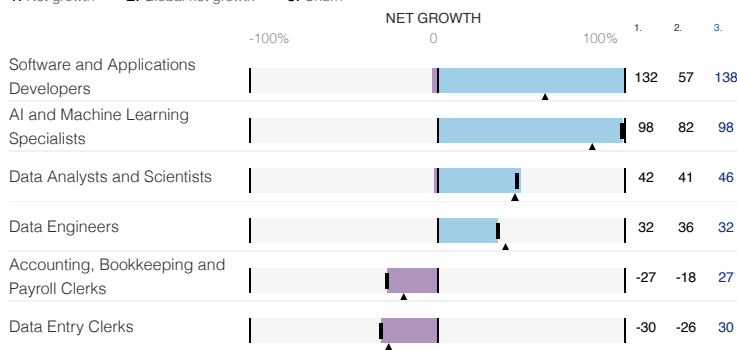
## Jobs outlook

### 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

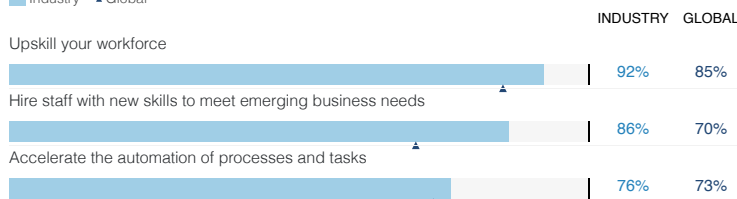


## Workforce Strategy outlook

### Key components of your workforce strategy by 2030

% surveyed organizations selecting the macrotrend to drive workforce transformation

■ Industry ▲ Global



## Skill outlook

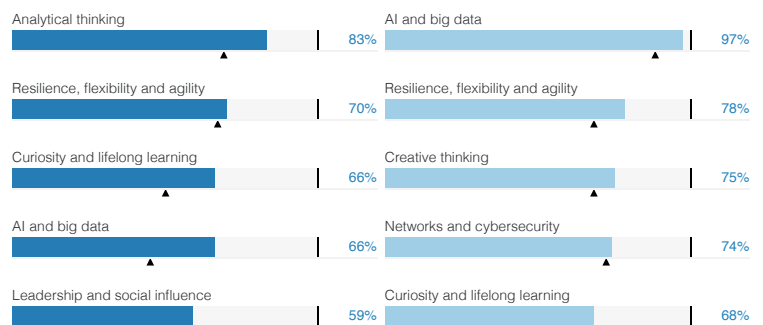
### Skills of increasing use by 2030

Skills of the most increase in use by 2030

■ Industry ▲ Global

CORE SKILLS OF 2025

SKILLS OF INCREASING USE BY 2030



## Upskilling and reskilling outlook

**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