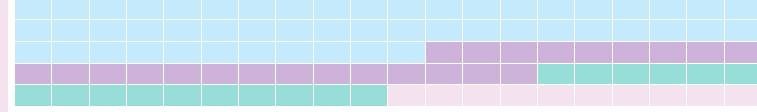


# Zimbabwe

6.3

## Upskilling and reskilling outlook



## Human-machine frontier

### Human-machine frontier

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

█ Human █ Global █ Combination █ Global █ Technology █ Global

ALL TASKS

Now



2030



## 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

Improvements to public education systems

70% 47%

Changes to labour laws related to remote work

60% 36%

Flexibility on setting wages

50% 38%

Funding for reskilling and upskilling

50% 55%

Provision of reskilling and upskilling

50% 52%

## Key barriers for business transformation

### Transformation barriers

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

█ Economy █ Global

ECONOMY GLOBAL

Organization culture and resistance to change

50% 46%

Shortage of investment capital

50% 26%

Skills gaps in the labour market

44% 63%

Outdated or inflexible regulatory framework

44% 39%

Lack of adequate data and technical infrastructure

39% 32%

## Talent availability outlook

### Talent trend

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

█ Improving █ Global average █ Worsening █ Global average

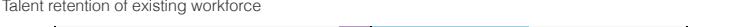
Talent availability when hiring



Talent development of existing workforce



Talent retention of existing workforce



## DEI Actions

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

70 | Global 48

Targeted recruitment, retention and progression initiatives

60 | Global 51

Run comprehensive DEI training for managers and staff

40 | 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

82 | Global 77

Reskilling and upskilling your existing workforce to better work alongside AI

55 | Global 47

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

55 | Global 49

Reorienting your organization to target new business opportunities created by AI

# Central Asia

33.1

23% | Global 22%

**Labour-market churn**

Five-year structural labour-force churn

38% | Global 39%

**Skill disruption**

Shares of core skills which will change

64% | Global 83%

**Organizations with DEI priorities**

Share of organizations with DEI priorities

63% | Global 88%

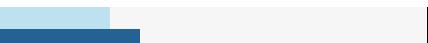
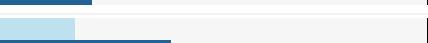
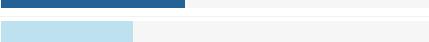
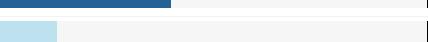
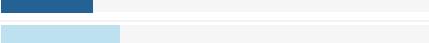
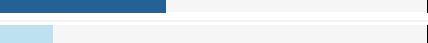
**AI exposure**

Share of organizations running AI programmes

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

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

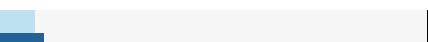
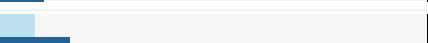
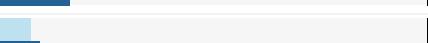
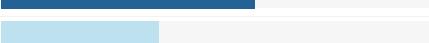
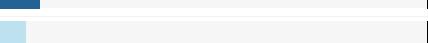
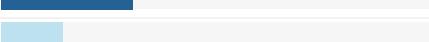
Region    Global

Broadening digital access		61% 60%	Increased geopolitical division and conflicts		27% 34%
Rising cost of living, higher prices or inflation		52% 50%	Increased efforts and investments to reduce carbon...		23% 47%
Increased focus on labour and social issues		37% 46%	Increased restrictions to global trade and investment		19% 23%
Slower economic growth		32% 42%	Increased efforts and investments to adapt to climate...		19% 41%
Increased government subsidies and industrial policy		30% 21%	Ageing and declining working-age populations		15% 40%
Growing working-age populations		27% 24%	Stricter anti-trust and competition regulations		14% 17%

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

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

Region    Global

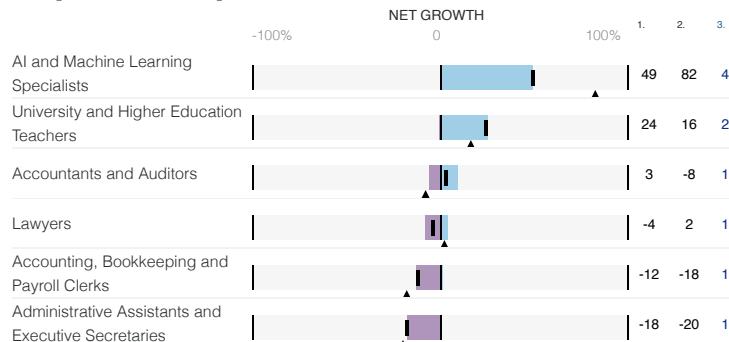
AI and information processing technologies (big data, VR, AR...)		69% 86%	Quantum and encryption		10% 12%
Energy generation, storage and distribution		50% 41%	Sensing, laser and optical technologies		10% 18%
Robots and autonomous systems		45% 58%	Biotechnology and gene technologies		9% 11%
New materials and composites		36% 30%	Satellites and space technologies		8% 9%
Semiconductors and computing technologies		14% 20%			

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

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

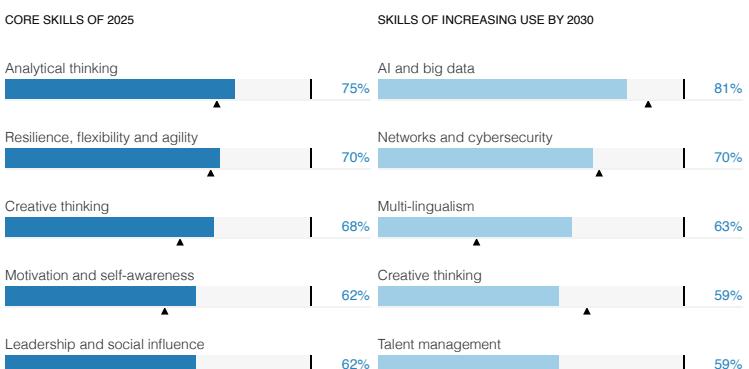
Net growth    Job Growth    Job displacement    Net Growth    Global net growth

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

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

Skills of the most increase in use by 2030

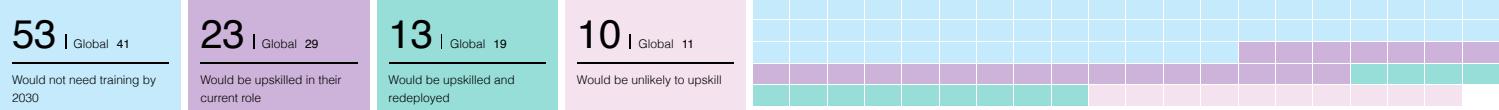
Region    Global



# Central Asia

33.1

## Upskilling and reskilling outlook



## Human-machine frontier

### Human-machine frontier

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

Human Global Combination Global Technology Global

ALL TASKS



## Public policy

### Public policies to improve talent availability

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

Region ▲ Global

REGION GLOBAL

Improvements to public education systems

61% 47%

Funding for reskilling and upskilling

55% 55%

Provision of reskilling and upskilling

52% 52%

Flexibility on setting wages

38% 38%

Flexibility on hiring and firing practices

36% 44%

## Key barriers for business transformation

### Transformation barriers

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

Region ▲ Global

REGION GLOBAL

Skills gaps in the labour market

Growing Global Similar Global Declining Global

66% 31% 3% 52% 41% 7%

Organization culture and resistance to change

75% 63%

Shortage of investment capital

35% 46%

Lack of adequate data and technical infrastructure

35% 26%

Outdated or inflexible regulatory framework

29% 32%

28% 39%

## 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

27% | -100% ▲ | 30% | +100%

Talent development of existing workforce

2% | -100% ▲ | 80% | +100%

Talent retention of existing workforce

6% | -100% ▲ | 66% | +100%

## DEI Actions

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

42 | Global 48

Targeted recruitment, retention and progression initiatives

38 | Global 39

Pay equity reviews and salary audits

31 | Global 51

Run comprehensive DEI training for managers and staff

## AI Strategy

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

62 | Global 69

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

54 | Global 77

Reskilling and upskilling your existing workforce to better work alongside AI

48 | Global 62

Hiring new people with skills to better work alongside AI

# Eastern Asia

1167.5

28% | Global 22%

**Labour-market churn**

Five-year structural labour-force churn

32% | Global 39%

**Skill disruption**

Shares of core skills which will change

93% | Global 83%

**Organizations with DEI priorities**

Share of organizations with DEI priorities

86% | Global 88%

**AI exposure**

Share of organizations running AI programmes

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

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

Region    Global

Ageing and declining working-age populations			84% 40%	Increased geopolitical division and conflicts			48% 34%
Broadening digital access			66% 60%	Increased efforts and investments to adapt to climate...			47% 41%
Slower economic growth			66% 42%	Increased restrictions to global trade and investment			28% 23%
Increased efforts and investments to reduce carbon...			61% 47%	Increased government subsidies and industrial policy			22% 21%
Rising cost of living, higher prices or inflation			58% 50%	Growing working-age populations			20% 24%
Increased focus on labour and social issues			52% 46%	Stricter anti-trust and competition regulations			9% 17%

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

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

Region    Global

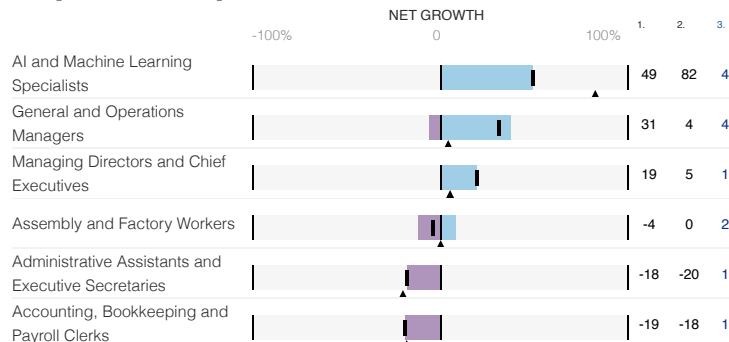
AI and information processing technologies (big data, VR, AR...)			92% 86%	Sensing, laser and optical technologies			31% 18%
Robots and autonomous systems			61% 56%	Quantum and encryption			27% 12%
Energy generation, storage and distribution			39% 41%	Biotechnology and gene technologies			27% 11%
Semiconductors and computing technologies			39% 20%	Satellites and space technologies			19% 9%
New materials and composites			34% 30%				

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

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

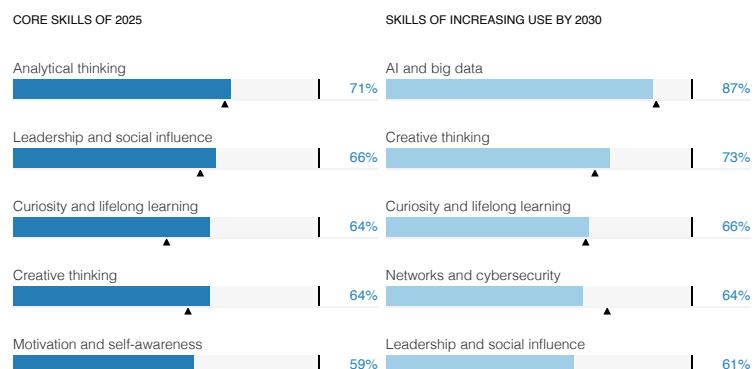
Net growth    Job Growth    Job displacement    Net Growth    Global net growth

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

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

Skills of the most increase in use by 2030

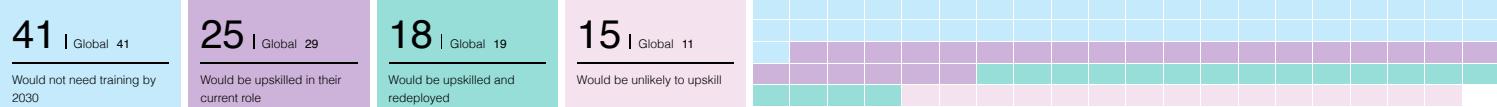
Region    Global



# Eastern Asia

1167.5

## Upskilling and reskilling outlook



## Human-machine frontier

### Human-machine frontier

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

Human Global Combination Global Technology Global

ALL TASKS

Now



2030



## Public policy

### Public policies to improve talent availability

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

Region ▲ Global

REGION GLOBAL

Provision of reskilling and upskilling

60% 52%

Flexibility on hiring and firing practices

55% 44%

Flexibility on setting wages

49% 38%

Funding for reskilling and upskilling

43% 55%

Changes to pension schemes and retirement ages

36% 25%

## 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

## Key barriers for business transformation

### Transformation barriers

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

Region ▲ Global

REGION GLOBAL

Organization culture and resistance to change

64% 46%

Inability to attract talent to the industry

53% 37%

Insufficient understanding of opportunities

44% 25%

Inability to attract talent to my firm

41% 27%

Outdated or inflexible regulatory framework

39% 39%

## Talent availability outlook

### Talent trend

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

Improving ▲ Global average Worsening ▲ Global average

Talent availability when hiring



Talent development of existing workforce



Talent retention of existing workforce



## DEI Actions

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

60 | Global 51

Run comprehensive DEI training for managers and staff

38 | Global 33

Anti-harassment protocols

36 | 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

82 | Global 77

Reskilling and upskilling your existing workforce to better work alongside AI

70 | Global 62

Hiring new people with skills to better work alongside AI

68 | Global 69

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

# Europe

597.0

21% | Global 22%

**Labour-market churn**

Five-year structural labour-force churn

36% | Global 39%

**Skill disruption**

Shares of core skills which will change

84% | Global 83%

**Organizations with DEI priorities**

Share of organizations with DEI priorities

90% | Global 88%

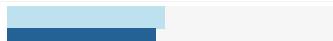
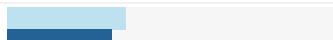
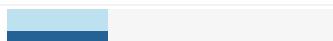
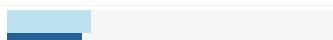
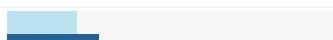
**AI exposure**

Share of organizations running AI programmes

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

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

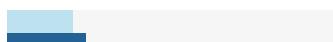
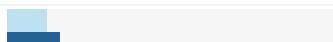
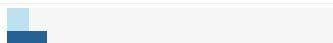
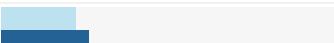
Region    Global

Broadening digital access		57% 60%	Slower economic growth		37% 42%
Rising cost of living, higher prices or inflation		51% 50%	Increased geopolitical division and conflicts		36% 34%
Increased efforts and investments to reduce carbon...		51% 47%	Growing working-age populations		27% 24%
Ageing and declining working-age populations		49% 40%	Increased restrictions to global trade and investment		23% 23%
Increased focus on labour and social issues		47% 46%	Stricter anti-trust and competition regulations		19% 17%
Increased efforts and investments to adapt to climate...		44% 41%	Increased government subsidies and industrial policy		16% 21%

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

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

Region    Global

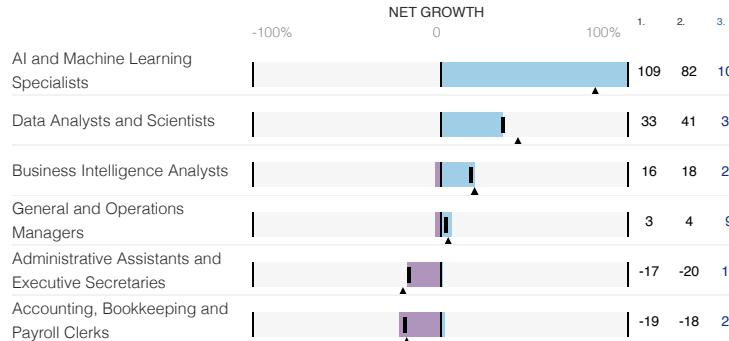
AI and information processing technologies (big data, VR, AR...)		87% 86%	Sensing, laser and optical technologies		15% 18%
Robots and autonomous systems		62% 58%	Quantum and encryption		9% 12%
Energy generation, storage and distribution		44% 41%	Biotechnology and gene technologies		9% 11%
New materials and composites		30% 30%	Satellites and space technologies		5% 9%
Semiconductors and computing technologies		17% 20%			

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

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

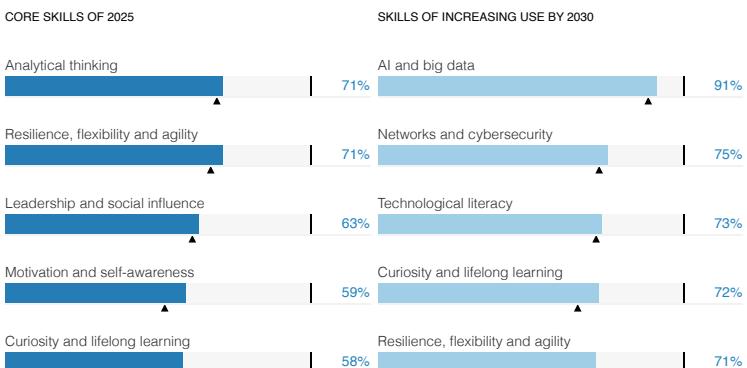
Net growth    Job Growth    Job displacement    Net Growth    Global net growth

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

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

Skills of the most increase in use by 2030

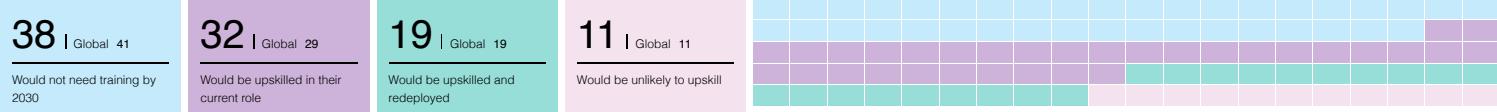
Region    Global



# Europe

597.0

## Upskilling and reskilling outlook



## Human-machine frontier

### Human-machine frontier

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

Human Global Combination Global Technology Global

ALL TASKS

Now



2030



## Public policy

### Public policies to improve talent availability

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

Region ▲ Global

REGION GLOBAL

Funding for reskilling and upskilling

57% 55%

Provision of reskilling and upskilling

47% 52%

Flexibility on hiring and firing practices

46% 44%

Improvements to public education systems

44% 47%

Changes to labour laws related to remote work

39% 36%

## Key barriers for business transformation

### Transformation barriers

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

Region ▲ Global

REGION GLOBAL

Skills gaps in the labour market

Growing Global Similar Global Declining Global



Organization culture and resistance to change

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# Latin America and the Caribbean

377.5

23% | Global 22%

**Labour-market churn**

Five-year structural labour-force churn

42% | Global 39%

**Skill disruption**

Shares of core skills which will change

89% | Global 83%

**Organizations with DEI priorities**

Share of organizations with DEI priorities

94% | Global 88%

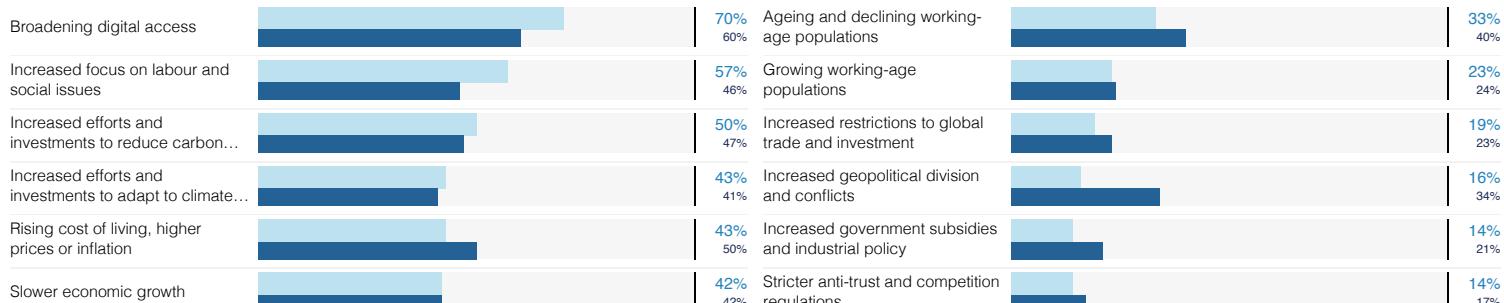
**AI exposure**

Share of organizations running AI programmes

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

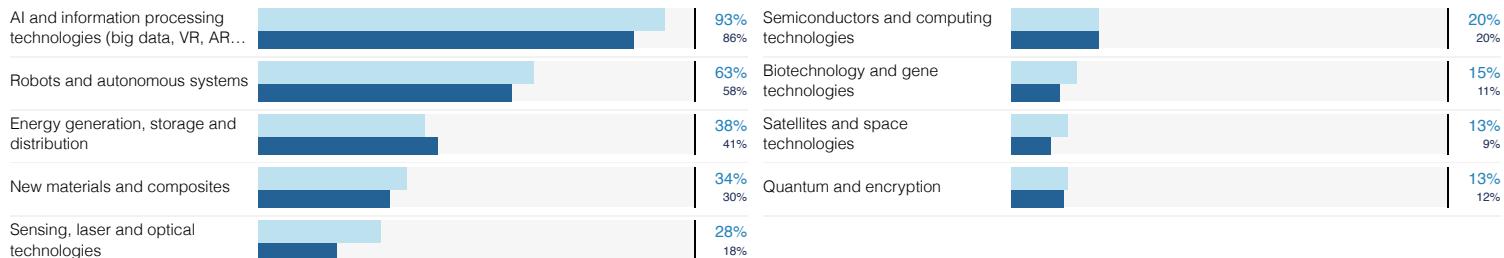
Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

Region    Global

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

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

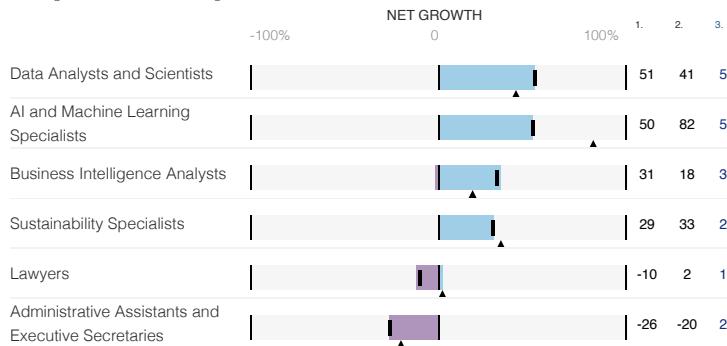
Region    Global

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

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

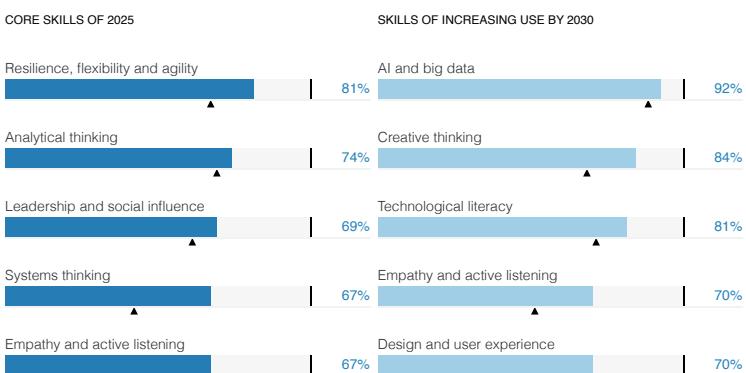
Net growth    Job Growth    Job displacement    Net Growth    Global net growth

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

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

Skills of the most increase in use by 2030

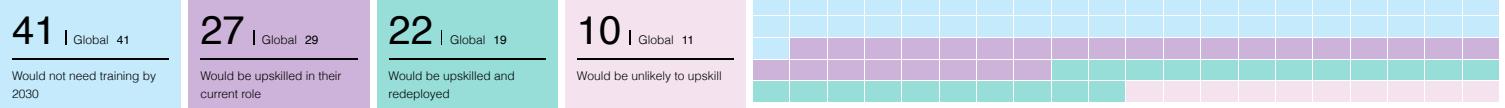
Region    Global



# Latin America and the Caribbean

377.5

## Upskilling and reskilling outlook



## Human-machine frontier

### Human-machine frontier

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

■ Human ■ Global ■ Combination ■ Global ■ Technology ■ Global

ALL TASKS



Now



## Key barriers for business transformation

### Transformation barriers

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

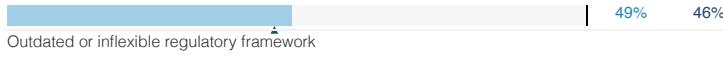
■ Region ▲ Global

REGION GLOBAL

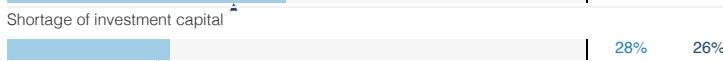
Skills gaps in the labour market



Organization culture and resistance to change



Outdated or inflexible regulatory framework



Shortage of investment capital



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

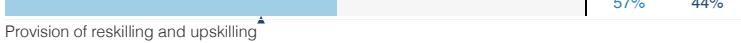
### Public policies to improve talent availability

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

■ Region ▲ Global

REGION GLOBAL

Flexibility on hiring and firing practices



Provision of reskilling and upskilling



Improvements to public education systems



Funding for reskilling and upskilling



Flexibility on setting wages



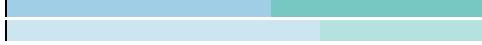
## Wage outlook

### 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

GROWING GLOBAL SIMILAR DECLINING GLOBAL



## DEI Actions

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

■ 66 ■ Global 51

Run comprehensive DEI training for managers and staff

■ 59 ■ Global 48

Targeted recruitment, retention and progression initiatives

■ 54 ■ 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

■ 79 ■ 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

■ 72 ■ Global 62

Hiring new people with skills to better work alongside AI

## Middle East and Northern Africa

197.7

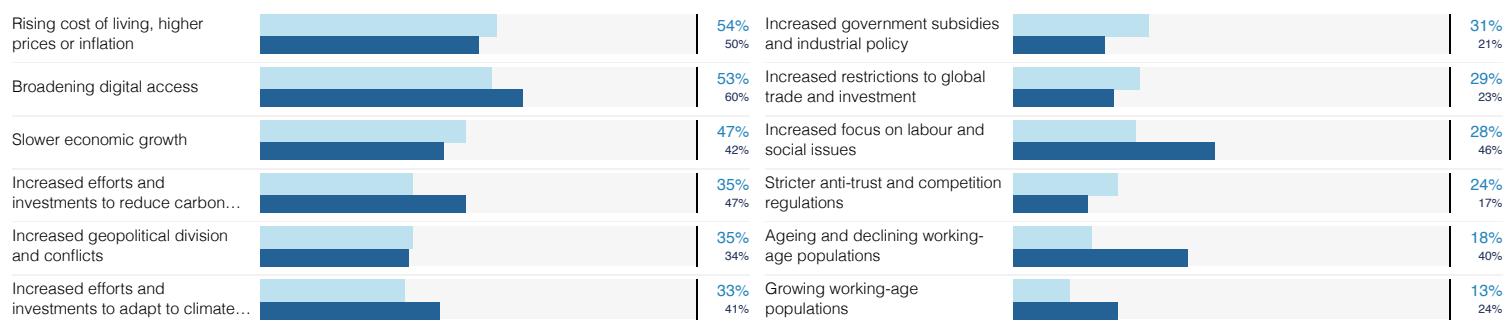


## Trend outlook

## **Macrotrends driving business transformation**

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

Region Global

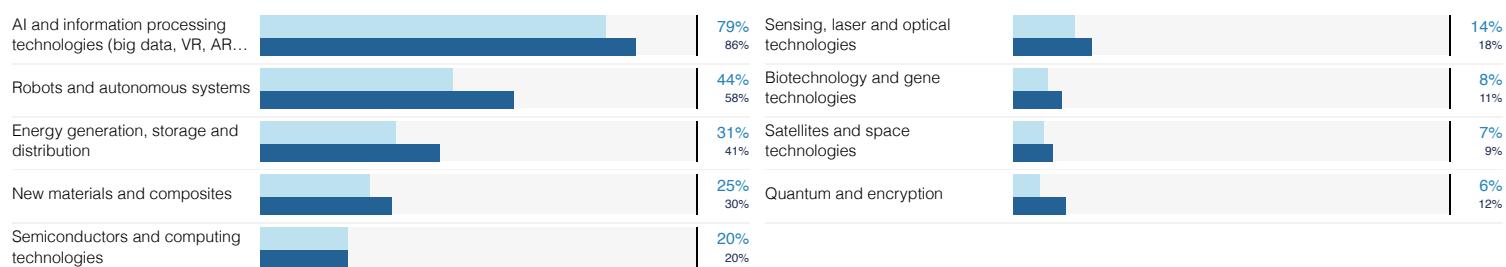


## Technology trends

Technology trends driving business transformation

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

Region Global



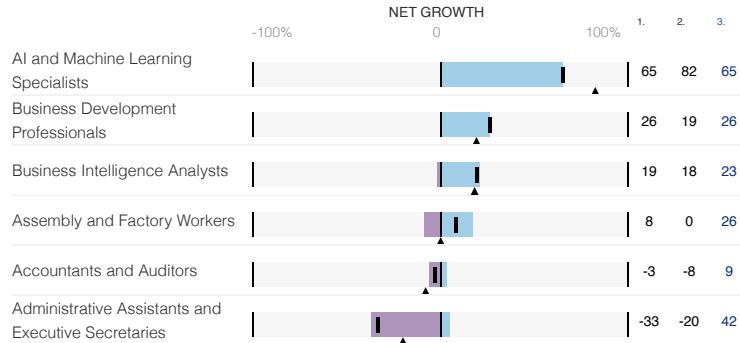
## Jobs outlook

## **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

1

