

Information and Technology services

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



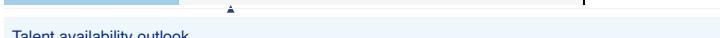
Lack of adequate data and technical infrastructure



Inability to attract talent to my firm



Outdated or inflexible regulatory framework



Talent availability outlook

Talent trend

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



Talent availability when hiring



Talent development of existing workforce



Talent retention of existing workforce



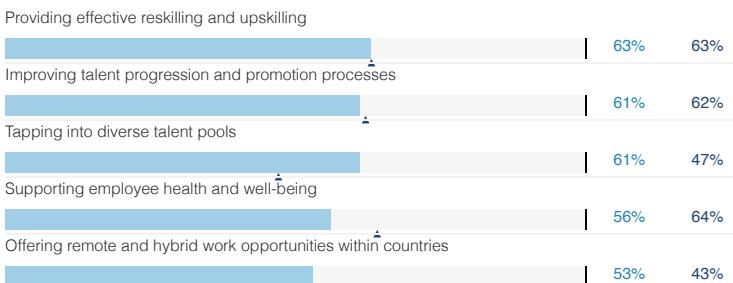
Business Practice

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 Global Declining Global



DEI Actions

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

59 | Global 51

Run comprehensive DEI training for managers and staff

54 | Global 42

Set DEI goals, targets or quotas

51 | 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

87 | Global 77

Reskilling and upskilling your existing workforce to better work alongside AI

79 | Global 69

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

73 | Global 62

Hiring new people with skills to better work alongside AI

Infrastructure

14% | Global 22%

Labour-market churn

Five-year structural labour-force churn

35% | Global 39%

Skill disruption

Shares of core skills which will change

81% | Global 83%

Organizations with DEI priorities

Share of organizations with DEI priorities

78% | Global 88%

AI exposure

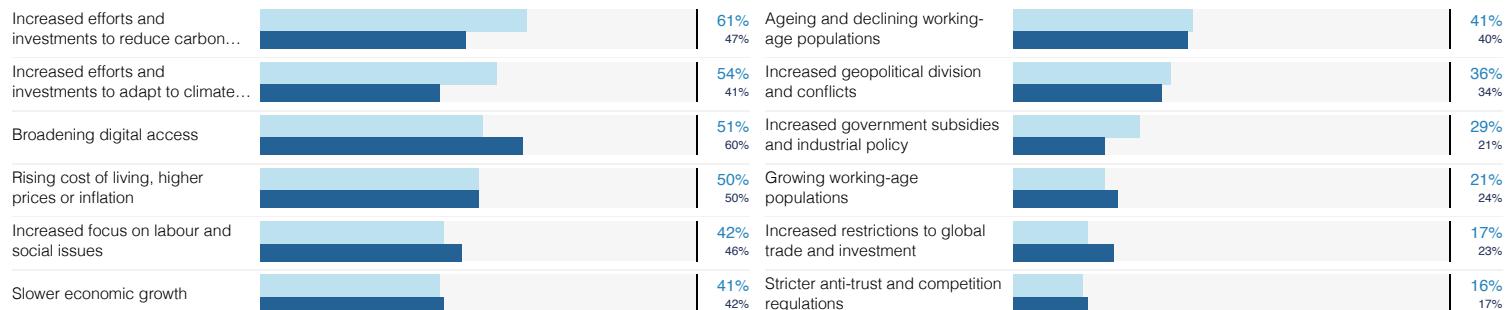
Share of organizations running AI programmes

Trend outlook

Macrotrends driving business transformation

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

■ Industry ■ Global

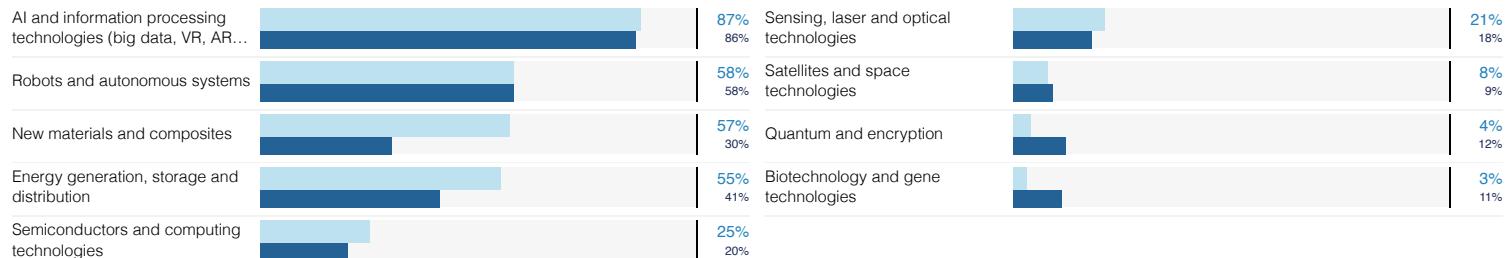


Technology trends

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.

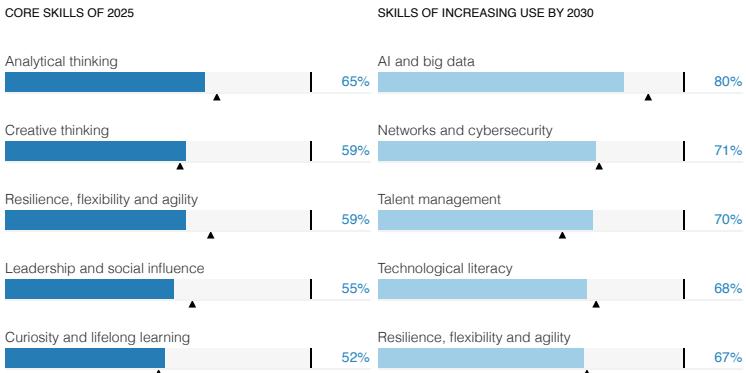
	1. Net growth	2. Global net growth	3. Churn	
AI and Machine Learning Specialists	82	50	50	
Sustainability Specialists	30	33	30	
Assembly and Factory Workers	20	0	25	
Civil Engineers	14	13	14	
Administrative Assistants and Executive Secretaries	-17	-20	18	
Accounting, Bookkeeping and Payroll Clerks	-21	-18	22	

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



44 | Global 41

Would not need training by 2030

27 | 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

Infrastructure

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

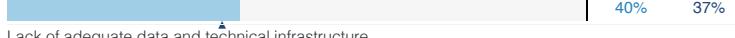
Skills gaps in the labour market



Organization culture and resistance to change



Inability to attract talent to the industry



Lack of adequate data and technical infrastructure



Outdated or inflexible regulatory framework



Talent availability outlook

Talent trend

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

Improving Global average Worsening Global average

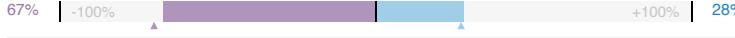
Talent availability when hiring



Talent development of existing workforce



Talent retention of existing workforce



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

Providing effective reskilling and upskilling



Improving talent progression and promotion processes



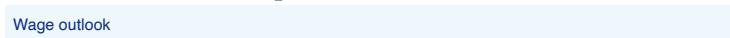
Supporting employee health and well-being



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

58% 3% 39%

8% 52% 41%

DEI Actions

AI Strategy

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

58 | Global 42

Set DEI goals, targets or quotas

53 | Global 48

Targeted recruitment, retention and progression initiatives

48 | 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

74 | Global 77

Reskilling and upskilling your existing workforce to better work alongside AI

64 | Global 69

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

59 | Global 62

Hiring new people with skills to better work alongside AI

Insurance and Pensions management

19% | Global 22%

Labour-market churn

Five-year structural labour-force churn

47% | Global 39%

Skill disruption

Shares of core skills which will change

97% | Global 83%

Organizations with DEI priorities

Share of organizations with DEI priorities

0% | Global 0%

AI exposure

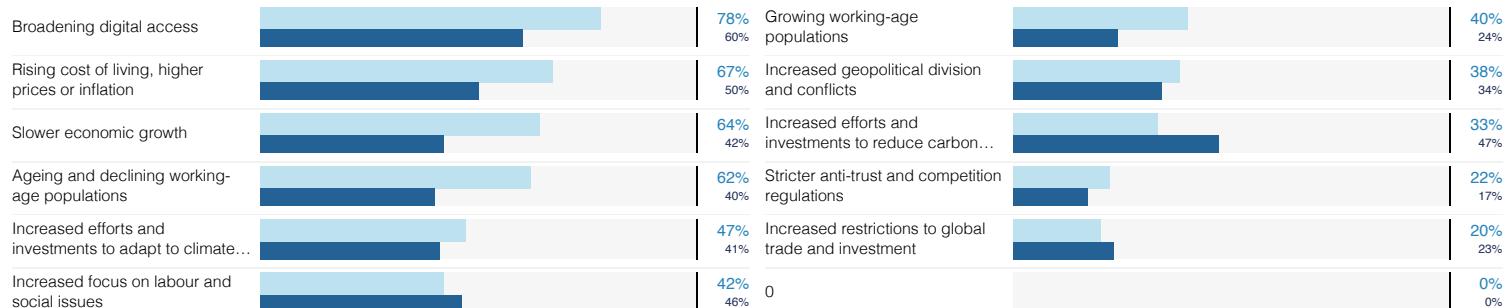
Share of organizations running AI programmes

Trend outlook

Macrotrends driving business transformation

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

■ Industry ■ Global

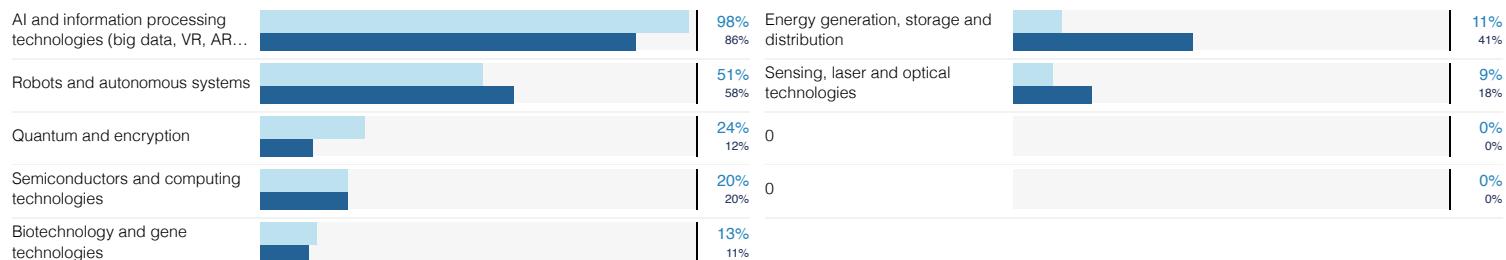


Technology trends

Technology trends driving business transformation

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

■ Industry ■ Global



Jobs outlook

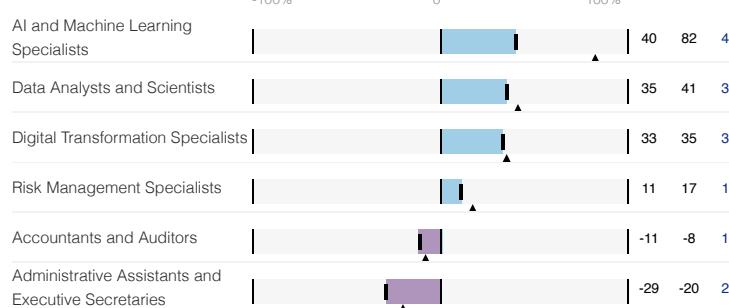
Key roles for business transformation

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

Accelerate the automation of processes and tasks

97% 73%

Upskill your workforce

91% 85%

Hire staff with new skills to meet emerging business needs

76% 70%

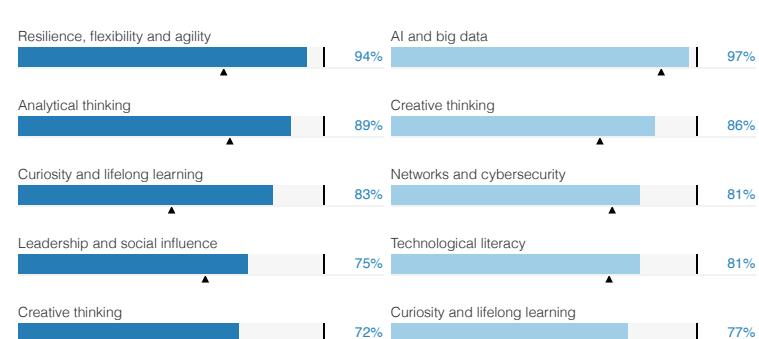
Skill outlook

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

29 | Global 29

Would be upskilled in their current role

22 | Global 19

Would be upskilled and redeployed

9 | Global 11

Would be unlikely to upskill

Insurance and Pensions management

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

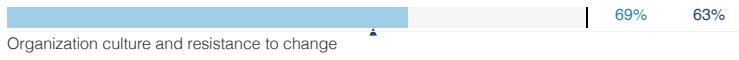
Transformation barriers

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

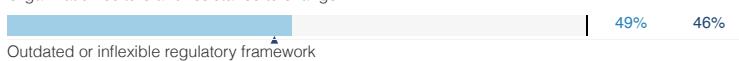


INDUSTRY GLOBAL

Skills gaps in the labour market



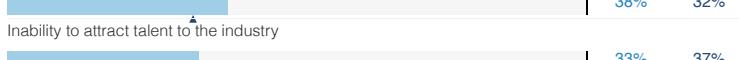
Organization culture and resistance to change



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

Supporting employee health and well-being	85%	64%
Improving talent progression and promotion processes	77%	62%
Offering remote and hybrid work opportunities within countries	74%	43%
Providing effective reskilling and upskilling	74%	63%
Tapping into diverse talent pools	74%	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 Global Declining Global

59%	32%	9%
8%	52%	41%

DEI Actions

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

65 | Global 51

Run comprehensive DEI training for managers and staff

59 | Global 39

Pay equity reviews and salary audits

50 | Global 48

Targeted recruitment, retention and progression initiatives

AI Strategy

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

91 | Global 62

Hiring new people with skills to better work alongside AI

85 | Global 77

Reskilling and upskilling your existing workforce to better work alongside AI

77 | Global 69

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

Medical and Healthcare services

19% | Global 22%

Labour-market churn

Five-year structural labour-force churn

39% | Global 39%

Skill disruption

Shares of core skills which will change

91% | 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

■ Industry ■ Global

Broadening digital access	61% 60%	Increased geopolitical division and conflicts	35% 34%
Ageing and declining working-age populations	59% 40%	Growing working-age populations	30% 24%
Rising cost of living, higher prices or inflation	50% 50%	Slower economic growth	30% 42%
Increased focus on labour and social issues	44% 46%	Stricter anti-trust and competition regulations	24% 17%
Increased efforts and investments to adapt to climate...	43% 41%	Increased government subsidies and industrial policy	20% 21%
Increased efforts and investments to reduce carbon...	41% 47%	Increased restrictions to global trade and investment	15% 23%

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...)	91% 86%	Energy generation, storage and distribution	24% 41%
Biotechnology and gene technologies	63% 11%	Semiconductors and computing technologies	20% 20%
Robots and autonomous systems	59% 58%	Quantum and encryption	11% 12%
Sensing, laser and optical technologies	32% 18%	Satellites and space technologies	7% 9%
New materials and composites	24% 30%		

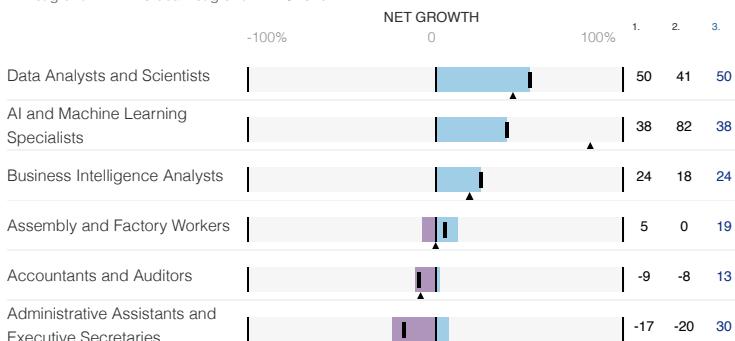
Jobs outlook

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



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	85%	85%
Complement and augment your workforce with new technologies	74%	63%
Accelerate the automation of processes and tasks	65%	73%

Skill outlook

Skills of increasing use by 2030

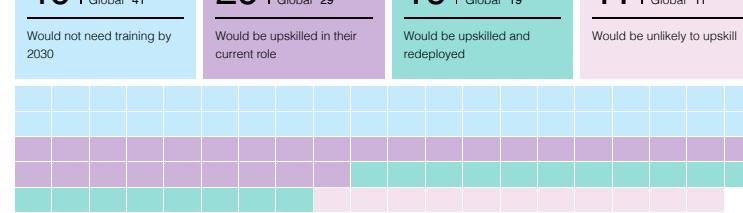
Skills of the most increase in use by 2030

■ Industry ▲ Global

CORE SKILLS OF 2025	SKILLS OF INCREASING USE BY 2030
Resilience, flexibility and agility	AI and big data
Analytical thinking	Technological literacy
Systems thinking	Networks and cybersecurity
Empathy and active listening	Creative thinking
Leadership and social influence	Resilience, flexibility and agility

Upskilling and reskilling outlook

40 | Global 41 29 | Global 29 19 | Global 19 11 | Global 11



Medical and Healthcare services

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



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

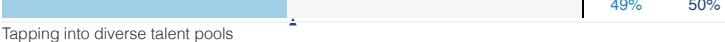
Providing effective reskilling and upskilling



Supporting employee health and well-being



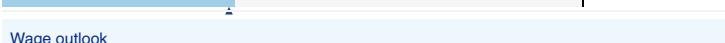
Offering higher wages



Tapping into diverse talent pools



Offering diversity, equity and inclusion (DEI) policies and programmes



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

INDUSTRY GLOBAL

Growing Global Similar Global Declining Global

41% 47% 12%



Skills gaps in the labour market



Outdated or inflexible regulatory framework



Lack of adequate data and technical infrastructure



Insufficient understanding of opportunities



Talent availability outlook

Talent trend

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

Improving Global average Worsening Global average

Talent availability when hiring



Talent development of existing workforce



Talent retention of existing workforce



DEI Actions

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

51 | Global 51

Run comprehensive DEI training for managers and staff

40 | Global 48

Targeted recruitment, retention and progression initiatives

34 | 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

88 | Global 77

Reskilling and upskilling your existing workforce to better work alongside AI

59 | Global 69

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

56 | Global 62

Hiring new people with skills to better work alongside AI

Mining and metals

14% | Global 22%

Labour-market churn

Five-year structural labour-force churn

35% | Global 39%

Skill disruption

Shares of core skills which will change

89% | Global 83%

Organizations with DEI priorities

Share of organizations with DEI priorities

79% | Global 88%

AI exposure

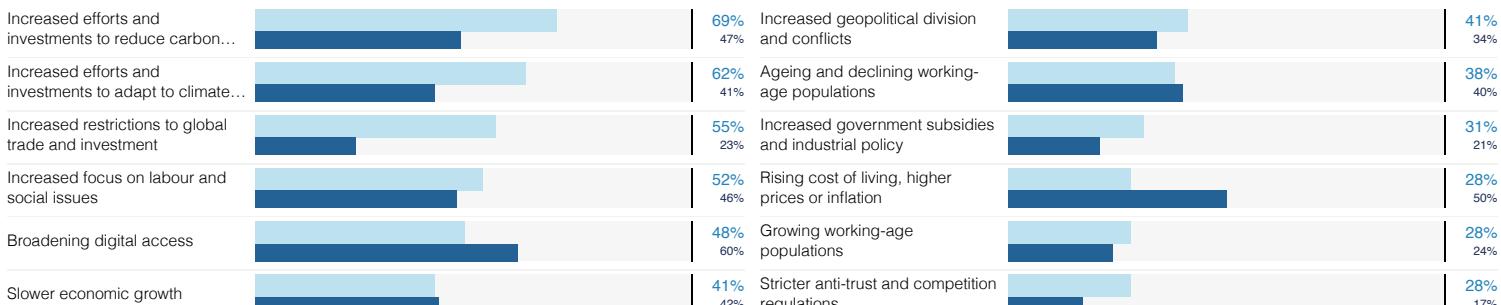
Share of organizations running AI programmes

Trend outlook

Macrotrends driving business transformation

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

■ Industry ■ Global

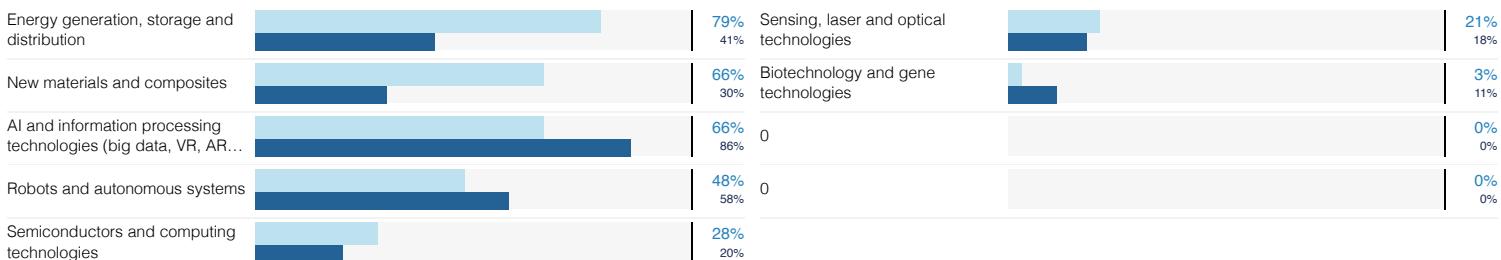


Technology trends

Technology trends driving business transformation

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

■ Industry ■ Global



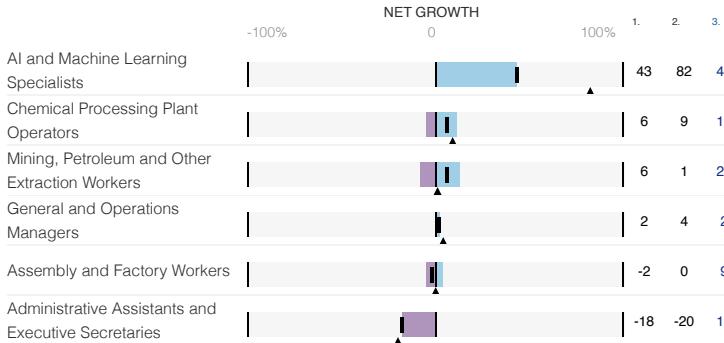
Jobs outlook

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

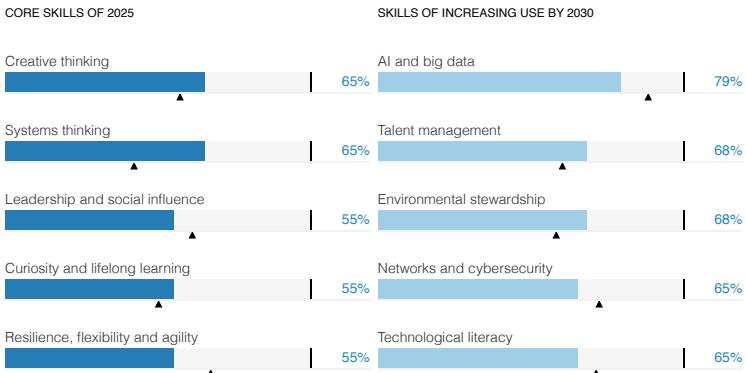


Skill outlook

Skills of increasing use by 2030

Skills of the most increase in use by 2030

■ Industry ▲ Global



Upskilling and reskilling outlook



Mining and metals

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

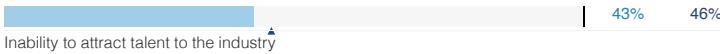


INDUSTRY GLOBAL

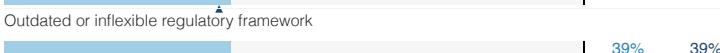
Skills gaps in the labour market



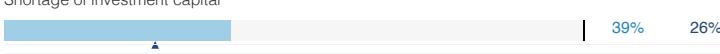
Organization culture and resistance to change



Inability to attract talent to the industry



Outdated or inflexible regulatory framework



Shortage of investment capital



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)

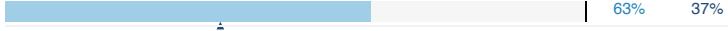


INDUSTRY GLOBAL

Supporting employee health and well-being



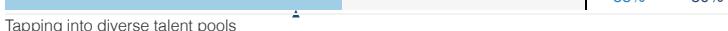
Articulate business purpose and impact



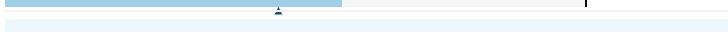
Improving talent progression and promotion processes



Offering higher wages



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

47% 47% 6% 8% 41% 0%

DEI Actions

DEI Actions

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

67 | Global 51

Run comprehensive DEI training for managers and staff

56 | Global 39

Pay equity reviews and salary audits

56 | Global 48

Targeted recruitment, retention and progression initiatives

AI Strategy

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

74 | Global 77

Reskilling and upskilling your existing workforce to better work alongside AI

74 | Global 47

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

63 | Global 69

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

Oil and Gas

22% | Global 22%

Labour-market churn

Five-year structural labour-force churn

28% | Global 39%

Skill disruption

Shares of core skills which will change

75% | Global 83%

Organizations with DEI priorities

Share of organizations with DEI priorities

82% | 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

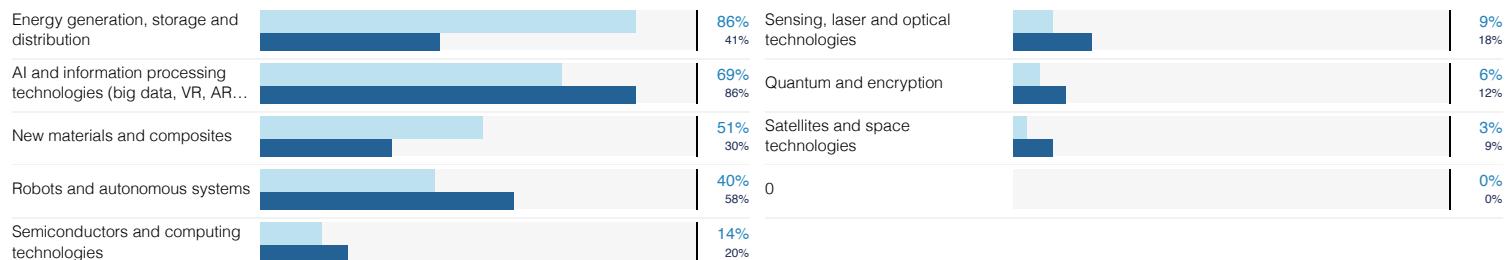


Technology trends

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)

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

AI and Machine Learning Specialists

Project Managers

Mining, Petroleum and Other Extraction Workers

Accounting, Bookkeeping and Payroll Clerks

Administrative Assistants and Executive Secretaries

Data Entry Clerks

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

Accelerate the automation of processes and tasks

Complement and augment your workforce with new technologies

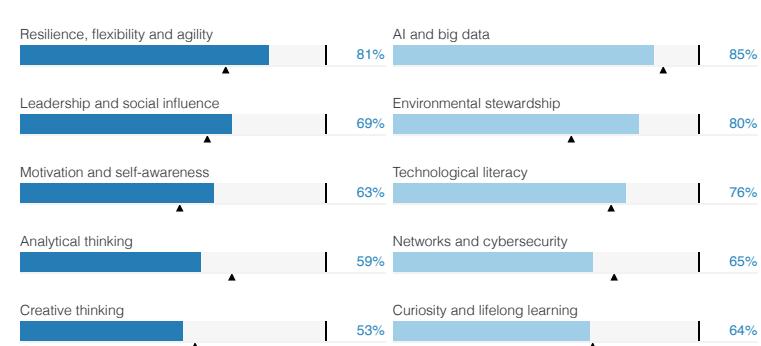
Skill outlook

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

44 | Global 41

Would not need training by 2030

27 | Global 29

Would be upskilled in their current role

19 | Global 19

Would be upskilled and redeployed

9 | Global 11

Would be unlikely to upskill