

Oil and Gas

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

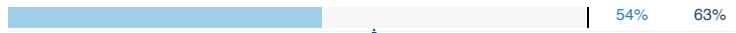
Transformation barriers

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

Industry Global

INDUSTRY GLOBAL

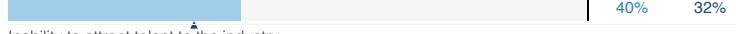
Skills gaps in the labour market



Organization culture and resistance to change



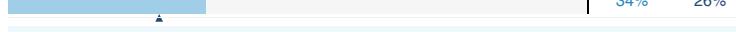
Lack of adequate data and technical infrastructure



Inability to attract talent to the industry



Shortage of investment capital



Talent availability outlook

Talent trend

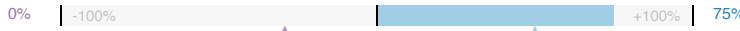
Share of respondents who expect their talent availability to improve or worsen in five years

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

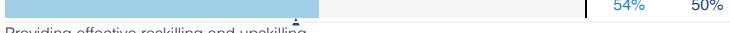
Supporting employee health and well-being



Improving talent progression and promotion processes



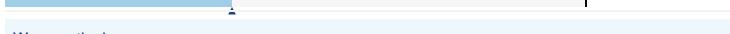
Offering higher wages



Providing effective reskilling and upskilling



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



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

43% 46% 11%

52% 41% 7%

DEI Actions

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

50 | Global 48

Targeted recruitment, retention and progression initiatives

43 | Global 27

Embed DEI goals and solutions across the supply chain

39 | 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

64 | Global 77

Reskilling and upskilling your existing workforce to better work alongside AI

61 | Global 69

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

54 | Global 62

Hiring new people with skills to better work alongside AI

Production of Consumer goods

18% | Global 22%

Labour-market churn

Five-year structural labour-force churn

40% | Global 39%

Skill disruption

Shares of core skills which will change

82% | 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

Industry Global

Rising cost of living, higher prices or inflation	61% 50%	Ageing and declining working-age populations	44% 40%
Increased efforts and investments to reduce carbon...	60% 47%	Increased geopolitical division and conflicts	31% 34%
Increased focus on labour and social issues	58% 46%	Increased restrictions to global trade and investment	29% 23%
Broadening digital access	53% 60%	Growing working-age populations	27% 24%
Increased efforts and investments to adapt to climate...	47% 41%	Increased government subsidies and industrial policy	15% 21%
Slower economic growth	46% 42%	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

Industry Global

AI and information processing technologies (big data, VR, AR...)	79% 86%	Semiconductors and computing technologies	19% 20%
Robots and autonomous systems	71% 58%	Biotechnology and gene technologies	14% 11%
New materials and composites	61% 30%	Satellites and space technologies	8% 9%
Energy generation, storage and distribution	60% 41%	Quantum and encryption	3% 12%
Sensing, laser and optical technologies	23% 18%		

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.

	-100%	0	100%	1.	2.	3.
Business Development Professionals				26	19	26
Supply Chain and Logistics Specialists				17	17	19
Managing Directors and Chief Executives				6	5	6
General and Operations Managers				4	4	9
Assembly and Factory Workers				-2	0	18
Administrative Assistants and Executive Secretaries				-25	-20	25

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

88% 85%

Accelerate the automation of processes and tasks

79% 73%

Hire staff with new skills to meet emerging business needs

72% 70%

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

Analytical thinking	69%	AI and big data	88%
Resilience, flexibility and agility	65%	Resilience, flexibility and agility	73%
Leadership and social influence	63%	Networks and cybersecurity	73%
Technological literacy	61%	Technological literacy	72%
Creative thinking	59%	Creative thinking	69%

Upskilling and reskilling outlook

41 | Global 41

Would not need training by 2030

31 | Global 29

Would be upskilled in their current role

18 | Global 19

Would be upskilled and redeployed

10 | Global 11

Would be unlikely to upskill

Production of Consumer goods

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

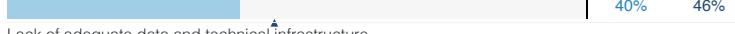
Skills gaps in the labour market



Inability to attract talent to the industry



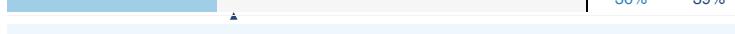
Organization culture and resistance to change



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



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



Improving talent progression and promotion processes



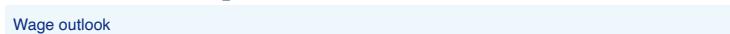
Providing effective reskilling and upskilling



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



INDUSTRY GLOBAL

Growing



Global



DEI Actions

1

53 | Global 51

Run comprehensive DEI training for managers and staff

46 | Global 48

Targeted recruitment, retention and progression initiatives

42 | 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

75 | Global 77

Reskilling and upskilling your existing workforce to better work alongside AI

70 | Global 69

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

55 | Global 62

Hiring new people with skills to better work alongside AI

Professional services

19% | Global 22%

Labour-market churn

Five-year structural labour-force churn

41% | Global 39%

Skill disruption

Shares of core skills which will change

90% | 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

Broadening digital access	67% 60%	Increased geopolitical division and conflicts	37% 34%
Increased focus on labour and social issues	52% 46%	Increased efforts and investments to adapt to climate...	26% 41%
Rising cost of living, higher prices or inflation	44% 50%	Growing working-age populations	26% 24%
Ageing and declining working-age populations	43% 40%	Increased restrictions to global trade and investment	20% 23%
Slower economic growth	41% 42%	Stricter anti-trust and competition regulations	17% 17%
Increased efforts and investments to reduce carbon...	37% 47%	Increased government subsidies and industrial policy	13% 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...)	91% 86%	Quantum and encryption	17% 12%
Robots and autonomous systems	50% 56%	Sensing, laser and optical technologies	17% 18%
Energy generation, storage and distribution	30% 41%	Biotechnology and gene technologies	7% 11%
New materials and composites	22% 30%	Satellites and space technologies	6% 9%
Semiconductors and computing technologies	22% 20%		

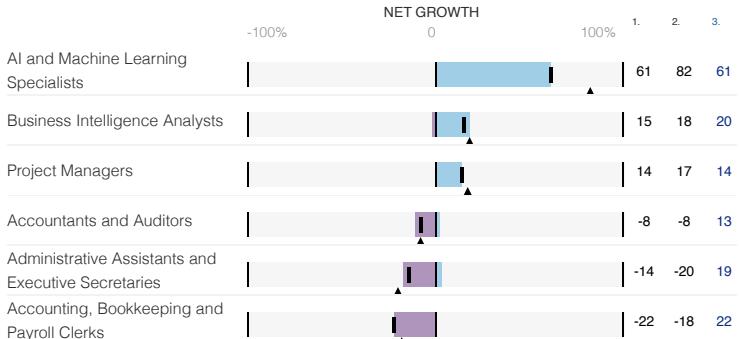
Jobs outlook

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



Workforce Strategy outlook

Key components of your workforce strategy by 2030

% surveyed organizations selecting the macrotrend to drive workforce transformation

■ Industry ▲ Global

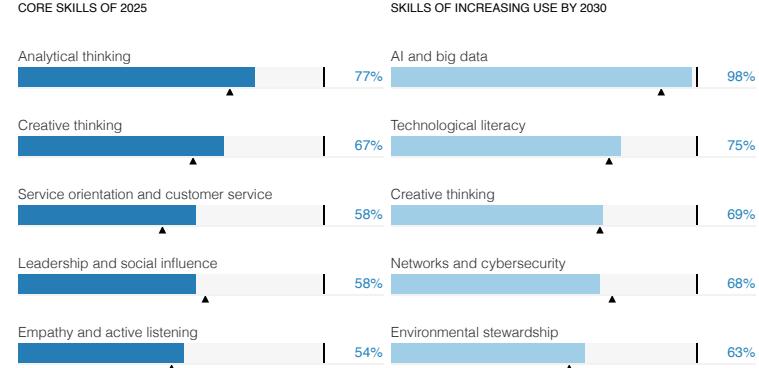
	INDUSTRY	GLOBAL
Upskill your workforce	88%	85%
Hire staff with new skills to meet emerging business needs	75%	70%
Complement and augment your workforce with new technologies	70%	63%

Skill outlook

Skills of increasing use by 2030

Skills of the most increase in use by 2030

■ Industry ▲ Global



Upskilling and reskilling outlook

42 | 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

14 | Global 11

Would be unlikely to upskill

Professional 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

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2030



Key barriers for business transformation

Transformation barriers

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

Industry Global

INDUSTRY GLOBAL

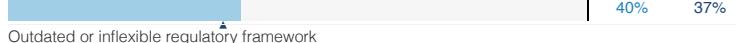
Skills gaps in the labour market



Organization culture and resistance to change



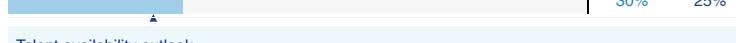
Inability to attract talent to the industry



Outdated or inflexible regulatory framework



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

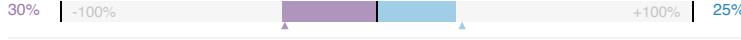
Talent availability when hiring



Talent development of existing workforce



Talent retention of existing workforce



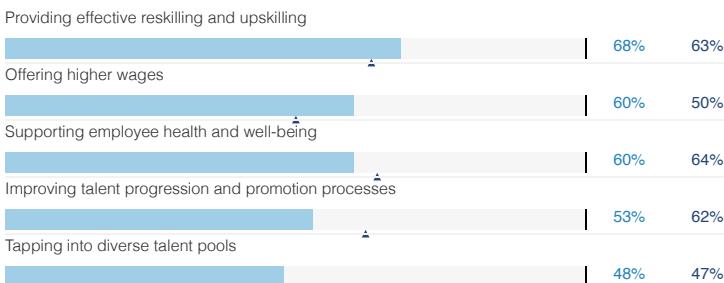
Business Practice

Business practices to improve talent availability

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

Industry Global

INDUSTRY GLOBAL



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

60% 35% 5%

52% 41% 7%

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

53 | Global 42

Set DEI goals, targets or quotas

53 | 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

83 | Global 77

Reskilling and upskilling your existing workforce to better work alongside AI

78 | 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

Real Estate

23% | Global 22%

Labour-market churn

Five-year structural labour-force churn

40% | Global 39%

Skill disruption

Shares of core skills which will change

95% | 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

■ Industry ■ Global

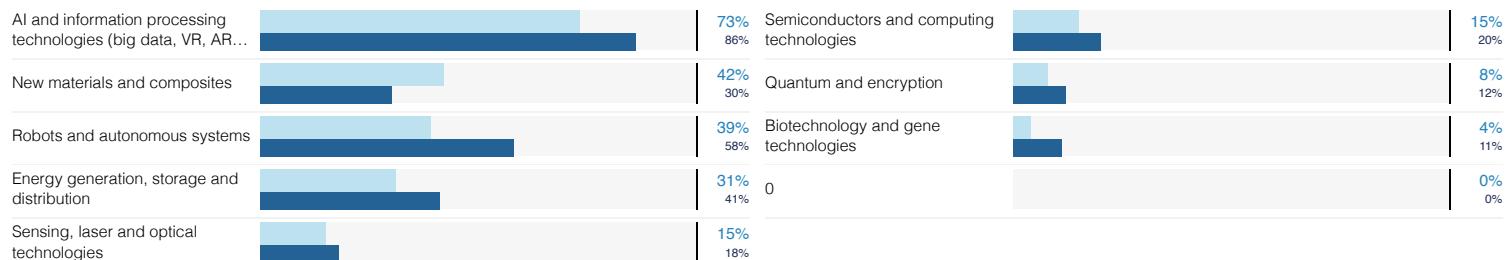


Technology trends

Technology trends driving business transformation

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

■ Industry ■ Global



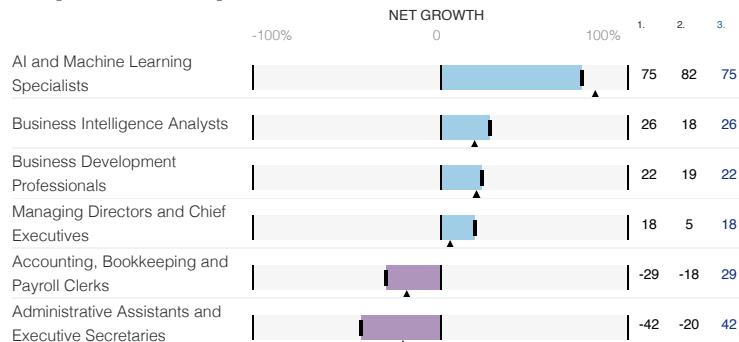
Jobs outlook

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

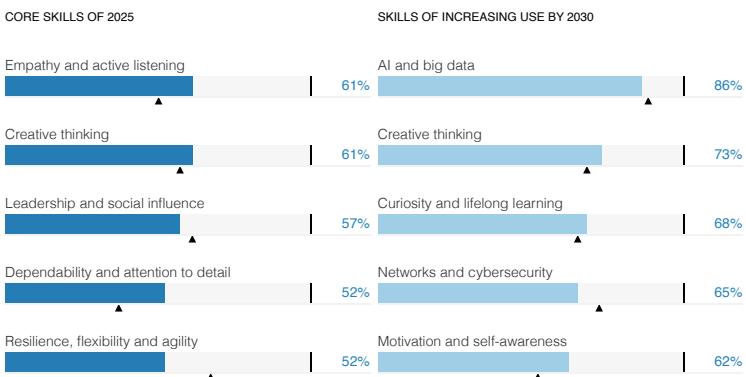


Skill outlook

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



46 | Global 41

Would not need training by 2030

21 | Global 29

Would be upskilled in their current role

20 | Global 19

Would be upskilled and redeployed

13 | Global 11

Would be unlikely to upskill

Real Estate

Human-machine frontier

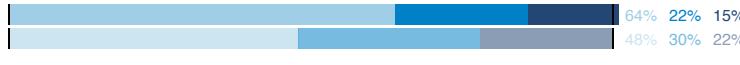
Human-machine frontier

% 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

Inability to attract talent to the industry



Skills gaps in the labour market

Organization culture and resistance to change

Insufficient understanding of opportunities

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

Supporting employee health and well-being



Providing effective reskilling and upskilling



Improving talent progression and promotion processes



Offering remote and hybrid work opportunities within countries



Articulate business purpose and impact



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

Growing



Similar



Declining



Global



DEI Actions

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

45 | Global 51

Run comprehensive DEI training for managers and staff

45 | Global 42

Set DEI goals, targets or quotas

40 | 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

74 | Global 77

Reskilling and upskilling your existing workforce to better work alongside AI

58 | Global 69

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

53 | Global 62

Hiring new people with skills to better work alongside AI

Retail and wholesale of consumer goods

28% | Global 22%

Labour-market churn

Five-year structural labour-force churn

38% | Global 39%

Skill disruption

Shares of core skills which will change

78% | Global 83%

Organizations with DEI priorities

Share of organizations with DEI priorities

87% | 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

Rising cost of living, higher prices or inflation	69% 50%	Increased efforts and investments to adapt to climate... 30% 41%
Increased focus on labour and social issues	64% 46%	Increased restrictions to global trade and investment 27% 23%
Broadening digital access	60% 60%	Increased geopolitical division and conflicts 25% 34%
Slower economic growth	47% 42%	Growing working-age populations 24% 24%
Ageing and declining working-age populations	43% 40%	Increased government subsidies and industrial policy 18% 21%
Increased efforts and investments to reduce carbon...	41% 47%	Stricter anti-trust and competition regulations 17% 17%

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...)	87% 86%	Semiconductors and computing technologies 13% 20%
Robots and autonomous systems	71% 58%	Quantum and encryption 7% 12%
Energy generation, storage and distribution	38% 41%	Biotechnology and gene technologies 6% 11%
New materials and composites	33% 30%	Satellites and space technologies 3% 9%
Sensing, laser and optical technologies	18% 18%	

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.

AI and Machine Learning Specialists

General and Operations Managers

Business Development Professionals

Shop Salespersons

Accounting, Bookkeeping and Payroll Clerks

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

88% 85%

Accelerate the automation of processes and tasks

76% 73%

Hire staff with new skills to meet emerging business needs

70% 70%

Skill outlook

Skills of increasing use by 2030

Skills of the most increase in use by 2030

■ Industry ▲ Global

CORE SKILLS OF 2025

Leadership and social influence	73%	AI and big data	86%
Resilience, flexibility and agility	73%	Resilience, flexibility and agility	69%
Analytical thinking	71%	Technological literacy	69%
Empathy and active listening	68%	Networks and cybersecurity	68%
Motivation and self-awareness	64%	Curiosity and lifelong learning	67%

Upskilling and reskilling outlook

42 | Global 41

Would not need training by 2030

29 | Global 29

Would be upskilled in their current role

18 | Global 19

Would be upskilled and redeployed

10 | Global 11

Would be unlikely to upskill

Retail and wholesale of consumer goods

Human-machine frontier

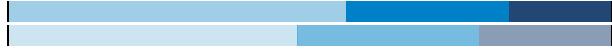
Human-machine frontier

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



ALL TASKS

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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



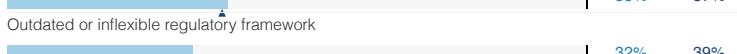
Organization culture and resistance to change



Lack of adequate data and technical infrastructure



Inability to attract talent to the industry



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

Supporting employee health and well-being



Providing effective reskilling and upskilling



Improving talent progression and promotion processes



Tapping into diverse talent pools



Offering higher 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



INDUSTRY GLOBAL

Growing Global Similar Global Global Declining Global

58% 38% 4% 8% 52% 41%

58% 38% 4% 8% 52% 41%

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

45 | Global 48

Targeted recruitment, retention and progression initiatives

38 | 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

70 | Global 77

Reskilling and upskilling your existing workforce 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

63 | Global 62

Hiring new people with skills to better work alongside AI

Supply-chain and transportation

35% | Global 22%

Labour-market churn

Five-year structural labour-force churn

37% | Global 39%

Skill disruption

Shares of core skills which will change

84% | Global 83%

Organizations with DEI priorities

Share of organizations with DEI priorities

88% | Global 88%

AI exposure

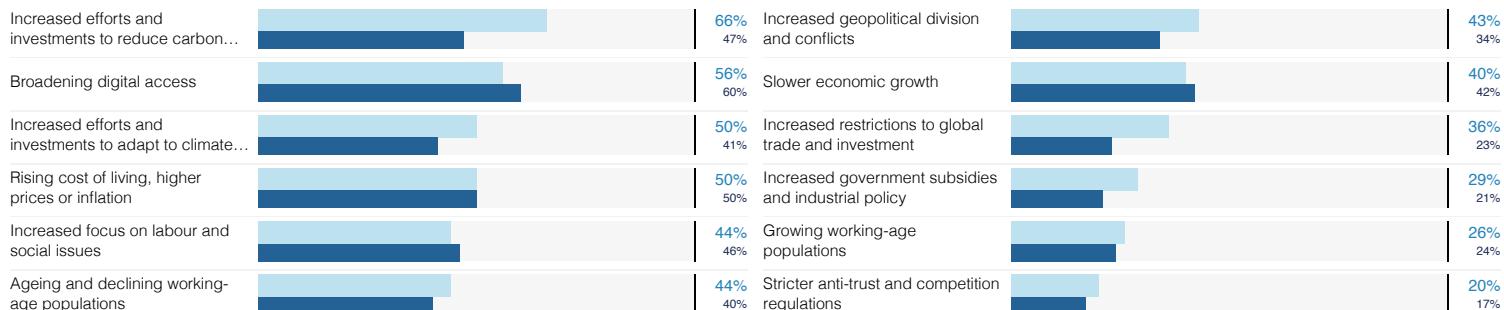
Share of organizations running AI programmes

Trend outlook

Macrotrends driving business transformation

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

■ Industry ■ Global

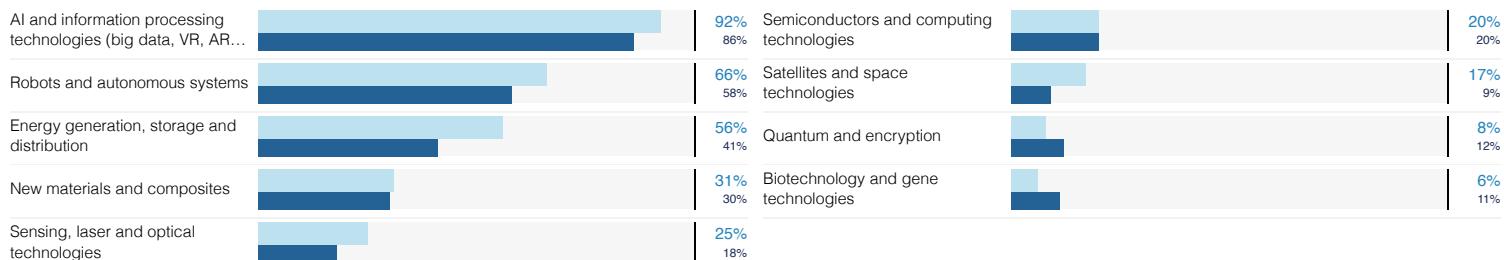


Technology trends

Technology trends driving business transformation

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

■ Industry ■ Global



Jobs outlook

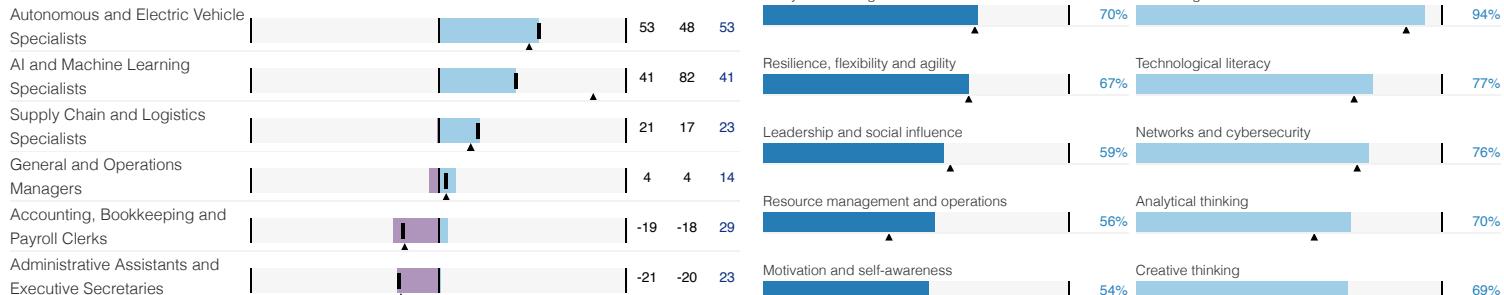
Key roles for business transformation

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

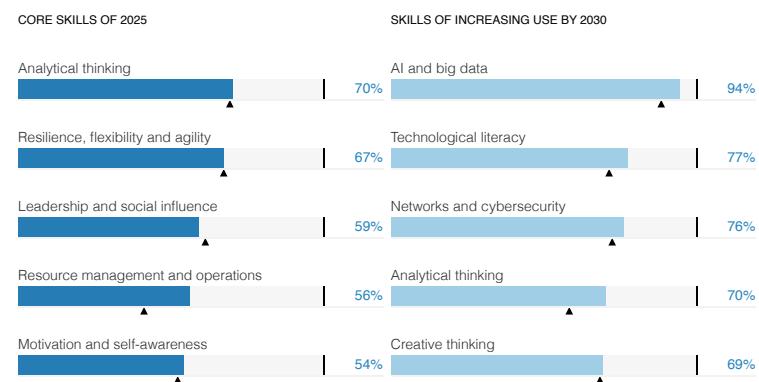


Skill outlook

Skills of increasing use by 2030

Skills of the most increase in use by 2030

■ Industry ▲ Global



Upskilling and reskilling outlook

42 | Global 41

Would not need training by 2030

30 | 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