

Middle East and Northern Africa

197.7

Upskilling and reskilling outlook

51 | Global 41

Would not need training by 2030

26 | Global 29

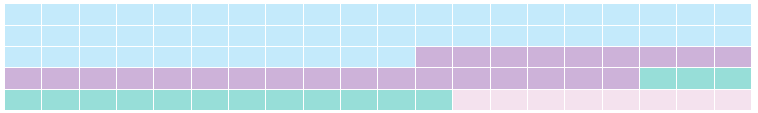
Would be upskilled in their current role

15 | Global 19

Would be upskilled and redeployed

9 | Global 11

Would be unlikely to upskill



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

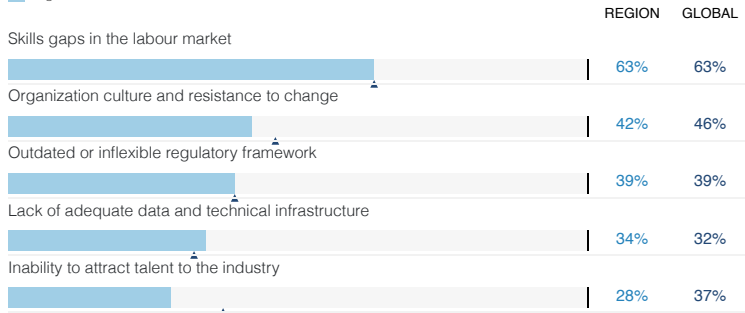


Key barriers for business transformation

Transformation barriers

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

Region 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

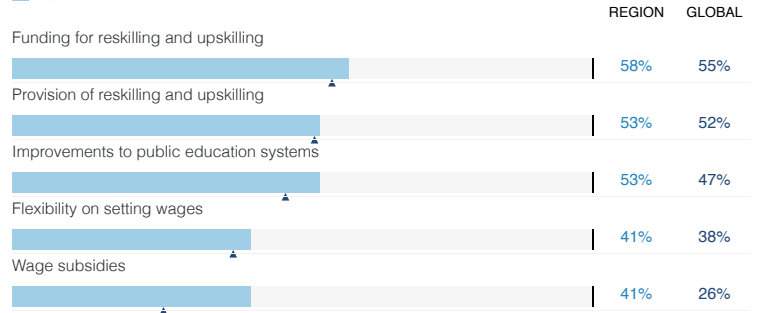


Public policy

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

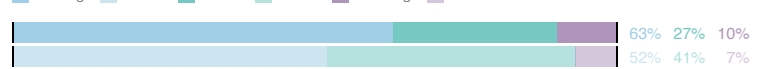


Wage outlook

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

36 | Global 42

Set DEI goals, targets or quotas

35 | Global 48

Targeted recruitment, retention and progression initiatives

34 | 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

73 | Global 77

Reskilling and upskilling your existing workforce to better work alongside AI

62 | Global 69

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

51 | Global 62

Hiring new people with skills to better work alongside AI

Northern America

255.5

21% | Global 22%

Labour-market churn

Five-year structural labour-force churn

37% | Global 39%

Skill disruption

Shares of core skills which will change

96% | Global 83%

Organizations with DEI priorities

Share of organizations with DEI priorities

94% | Global 88%

AI exposure

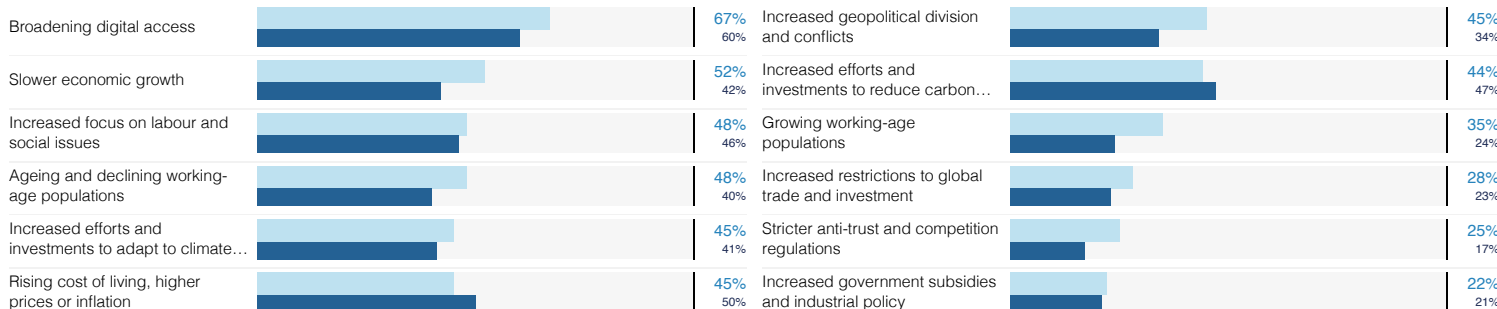
Share of organizations running AI programmes

Trend outlook

Macrotrends driving business transformation

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

Region Global

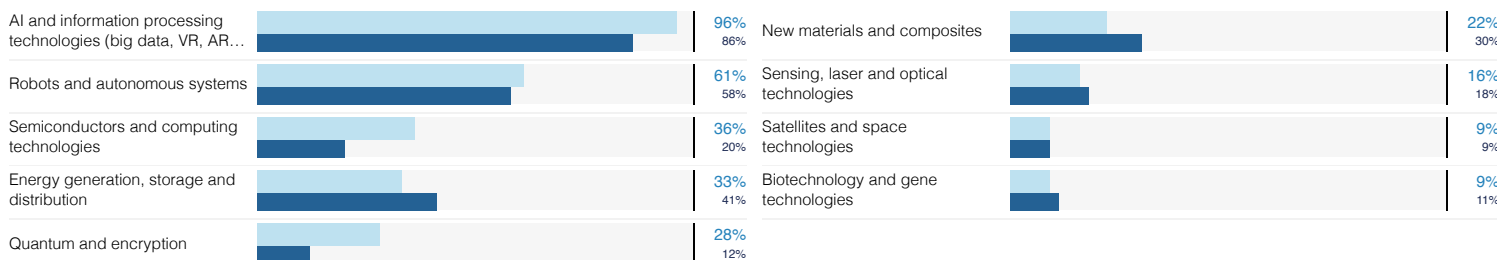


Technology trends

Technology trends driving business transformation

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

Region Global



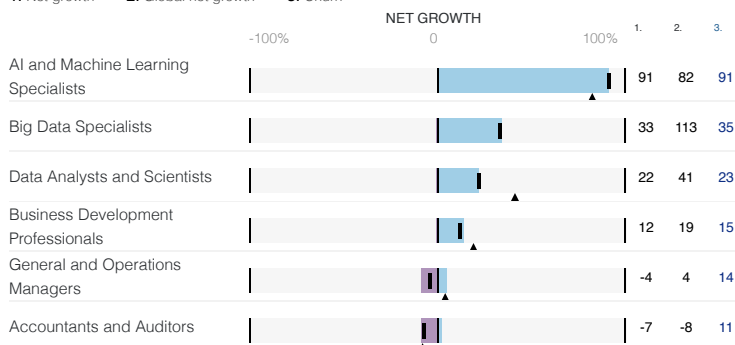
Jobs outlook

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

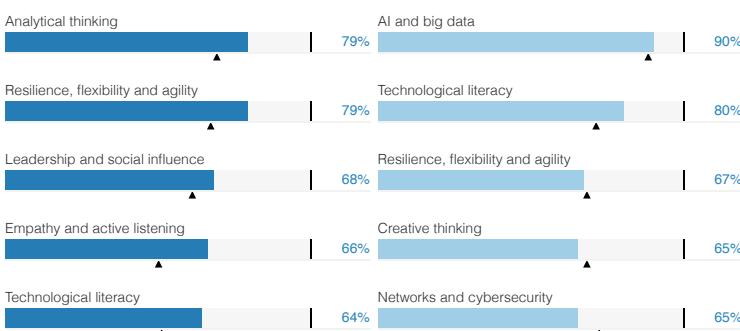
Skills of increasing use by 2030

Skills of the most increase in use by 2030

Region Global

CORE SKILLS OF 2025

SKILLS OF INCREASING USE BY 2030



Northern America

255.5

Upskilling and reskilling outlook

33 | Global 41

Would not need training by 2030

32 | Global 29

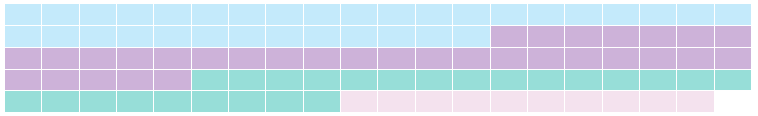
Would be upskilled in their current role

24 | Global 19

Would be upskilled and redeployed

10 | Global 11

Would be unlikely to upskill



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

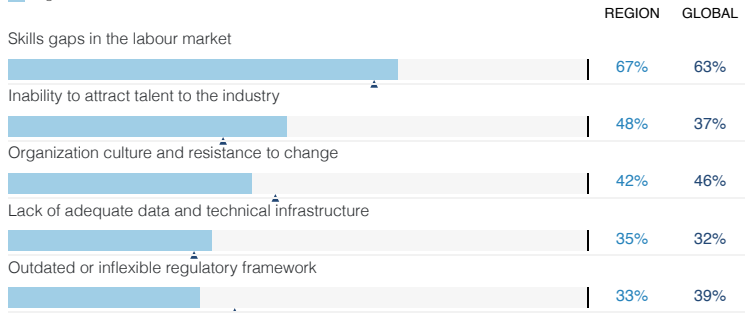


Key barriers for business transformation

Transformation barriers

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

Region Global

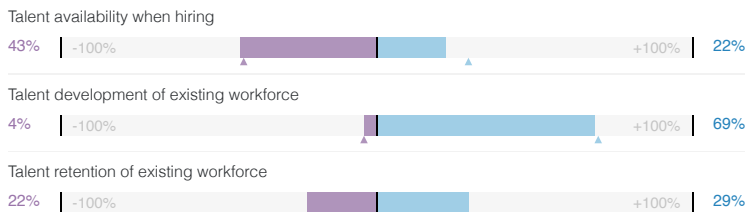


Talent availability outlook

Talent trend

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

Improving Global average Worsening Global average

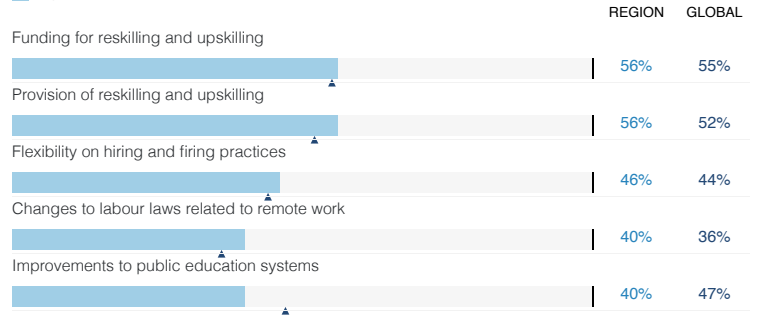


Public policy

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

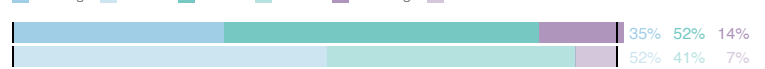


Wage outlook

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

79 | Global 48

Targeted recruitment, retention and progression initiatives

67 | Global 51

Run comprehensive DEI training for managers and staff

64 | 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

84 | Global 77

Reskilling and upskilling your existing workforce to better work alongside AI

82 | Global 69

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

66 | Global 62

Hiring new people with skills to better work alongside AI

South-eastern Asia

400.5

20% | Global 22%

Labour-market churn

Five-year structural labour-force churn

43% | Global 39%

Skill disruption

Shares of core skills which will change

86% | Global 83%

Organizations with DEI priorities

Share of organizations with DEI priorities

96% | Global 88%

AI exposure

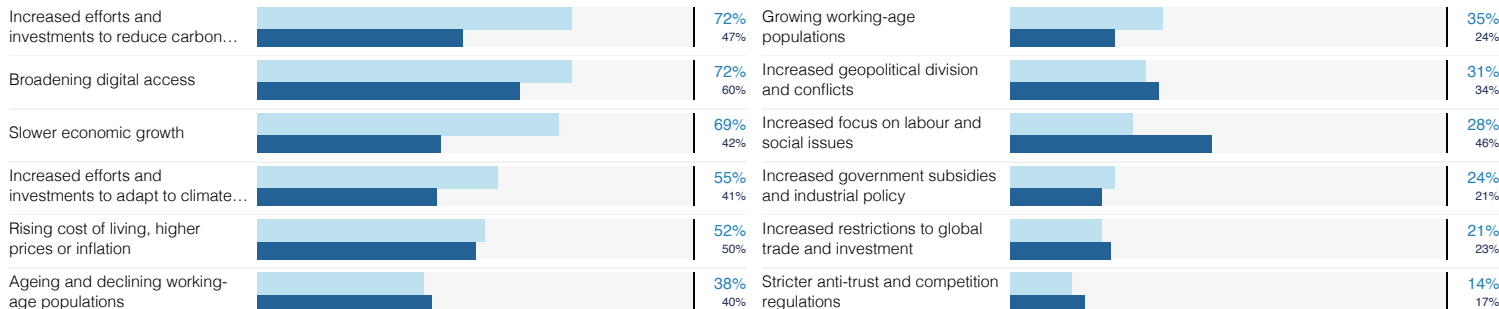
Share of organizations running AI programmes

Trend outlook

Macrotrends driving business transformation

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

Region Global

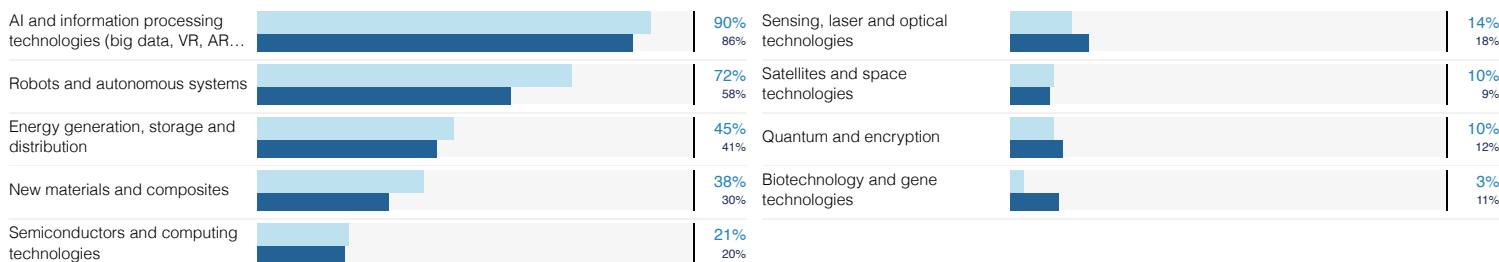


Technology trends

Technology trends driving business transformation

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

Region Global



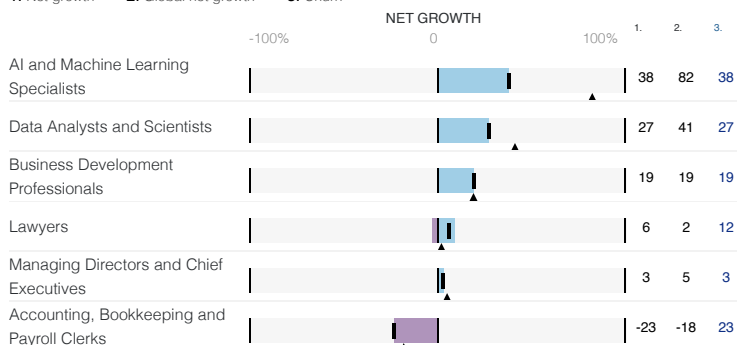
Jobs outlook

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

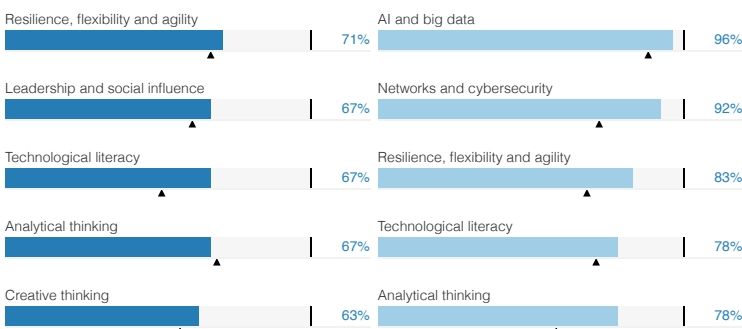
Skills of increasing use by 2030

Skills of the most increase in use by 2030

Region Global

CORE SKILLS OF 2025

SKILLS OF INCREASING USE BY 2030



South-eastern Asia

400.5

Upskilling and reskilling outlook

38 | Global 41

Would not need training by 2030

26 | Global 29

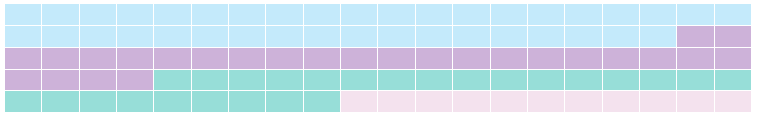
Would be upskilled in their current role

25 | Global 19

Would be upskilled and redeployed

11 | Global 11

Would be unlikely to upskill



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

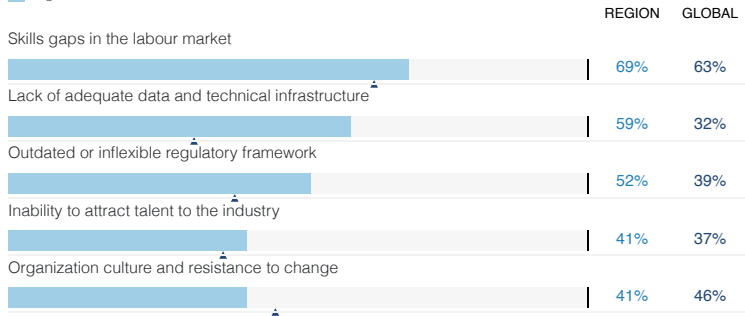


Key barriers for business transformation

Transformation barriers

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

Region Global



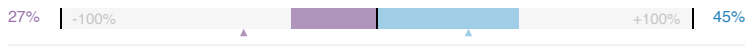
Talent availability outlook

Talent trend

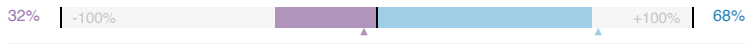
Share of respondents who expect their talent availability to improve or worsen in five years

Improving Global average Worsening Global average

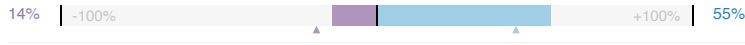
Talent availability when hiring



Talent development of existing workforce



Talent retention of existing workforce

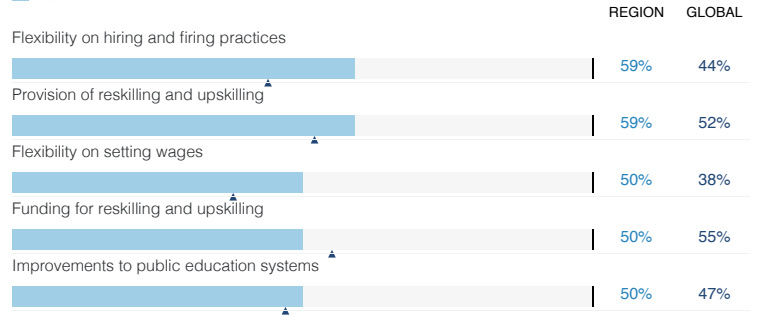


Public policy

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

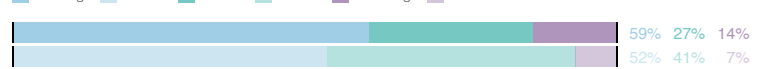


Wage outlook

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

59 | Global 42

Set DEI goals, targets or quotas

46 | Global 51

Run comprehensive DEI training for managers and staff

46 | 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 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

59 | Global 62

Hiring new people with skills to better work alongside AI

Southern Asia

873.8

28% | Global 22%

Labour-market churn

Five-year structural labour-force churn

52% | Global 39%

Skill disruption

Shares of core skills which will change

86% | Global 83%

Organizations with DEI priorities

Share of organizations with DEI priorities

92% | Global 88%

AI exposure

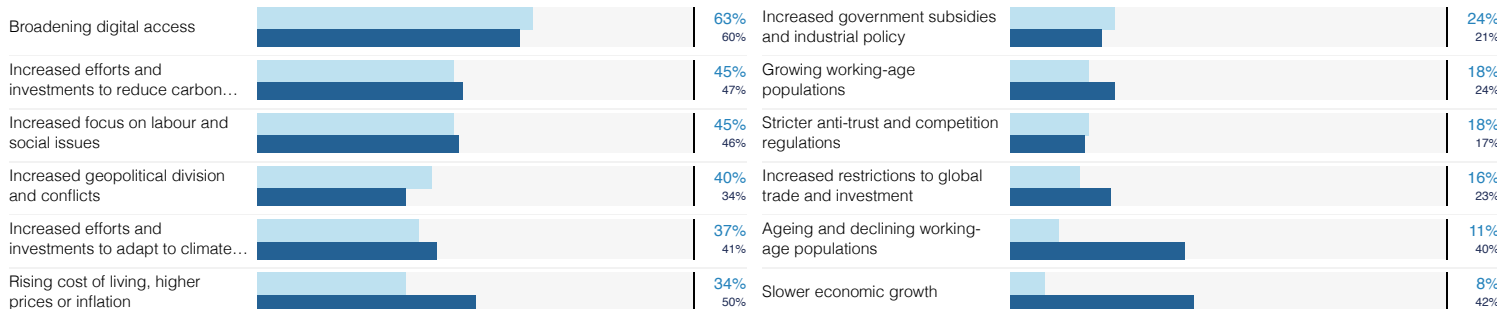
Share of organizations running AI programmes

Trend outlook

Macrotrends driving business transformation

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

Region Global

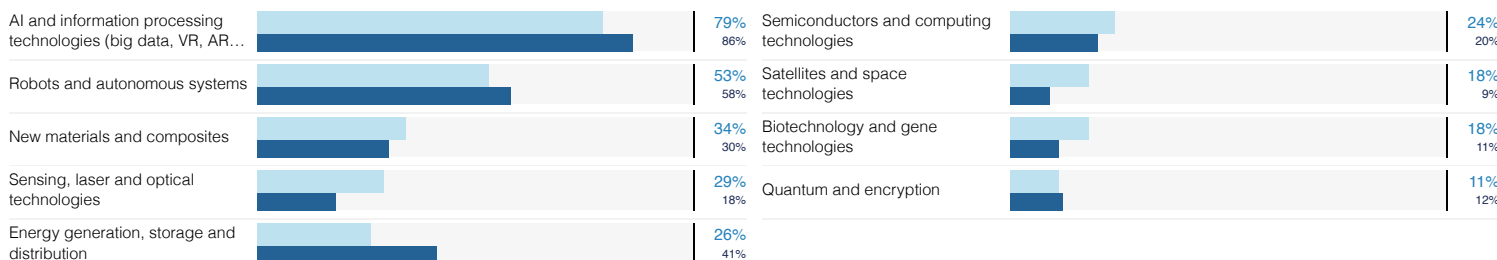


Technology trends

Technology trends driving business transformation

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

Region Global



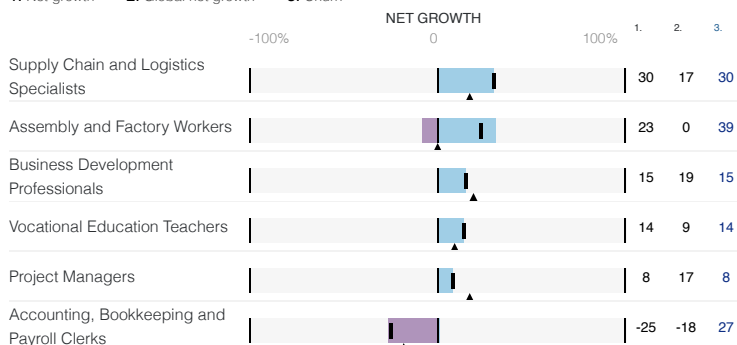
Jobs outlook

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

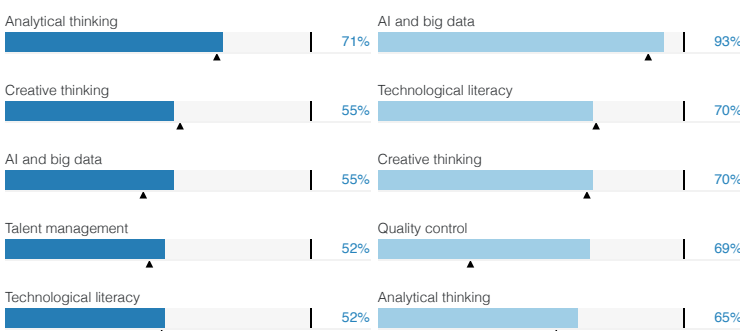
Skills of increasing use by 2030

Skills of the most increase in use by 2030

Region Global

CORE SKILLS OF 2025

SKILLS OF INCREASING USE BY 2030



Southern Asia

873.8

Upskilling and reskilling outlook

44 | Global 41

Would not need training by 2030

24 | Global 29

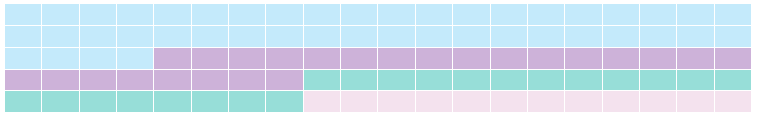
Would be upskilled in their current role

20 | Global 19

Would be upskilled and redeployed

12 | Global 11

Would be unlikely to upskill



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

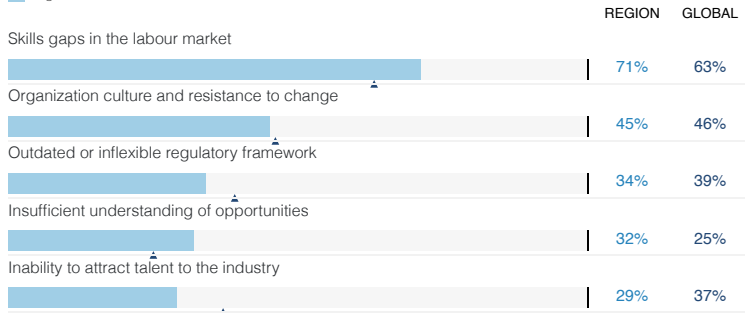


Key barriers for business transformation

Transformation barriers

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

Region Global

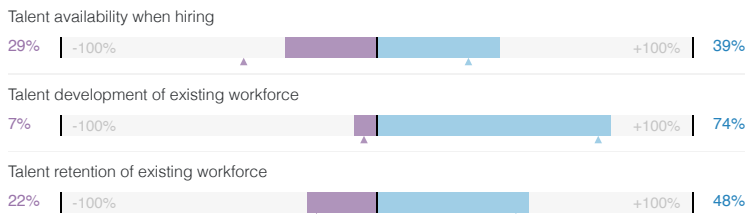


Talent availability outlook

Talent trend

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

Improving Global average Worsening Global average

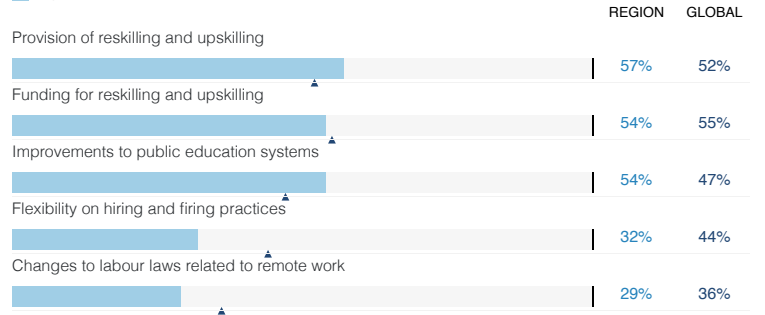


Public policy

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



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

61 | Global 51

Run comprehensive DEI training for managers and staff

57 | Global 42

Set DEI goals, targets or quotas

54 | 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

73 | Global 77

Reskilling and upskilling your existing workforce to better work alongside AI

62 | Global 69

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

58 | Global 62

Hiring new people with skills to better work alongside AI

Sub-Saharan Africa

341.2

31% | Global 22%

Labour-market churn

Five-year structural labour-force churn

40% | Global 39%

Skill disruption

Shares of core skills which will change

96% | Global 83%

Organizations with DEI priorities

Share of organizations with DEI priorities

89% | Global 88%

AI exposure

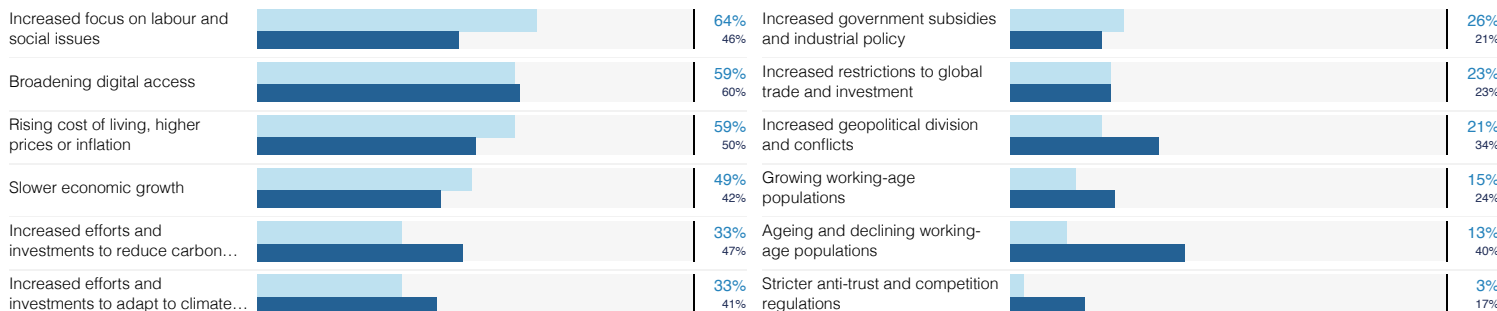
Share of organizations running AI programmes

Trend outlook

Macrotrends driving business transformation

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

Region Global

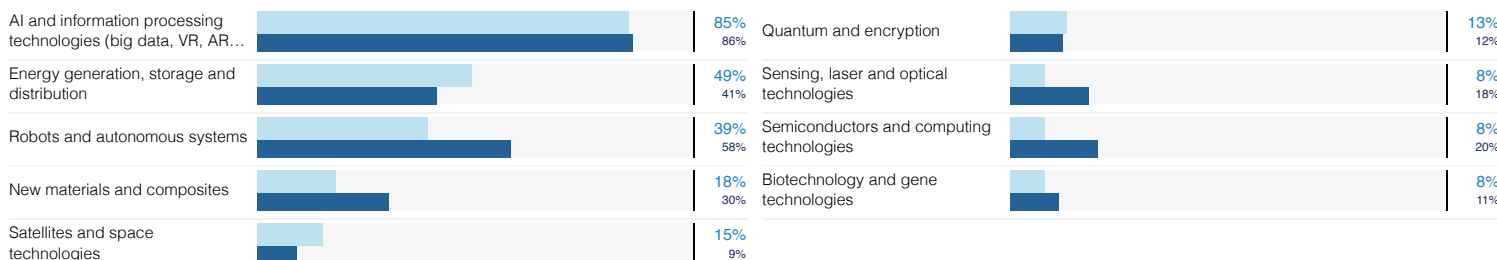


Technology trends

Technology trends driving business transformation

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

Region Global



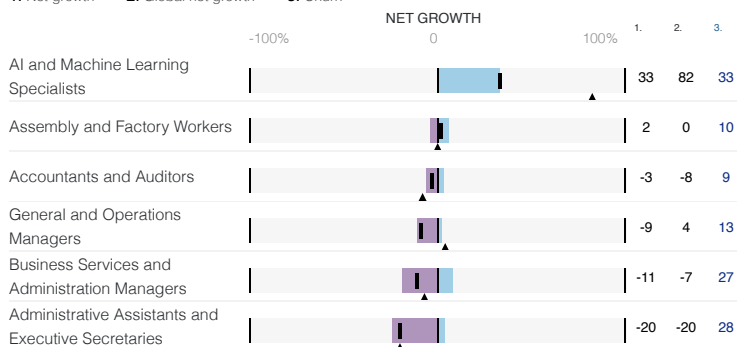
Jobs outlook

Key roles for business transformation

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

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Skill outlook

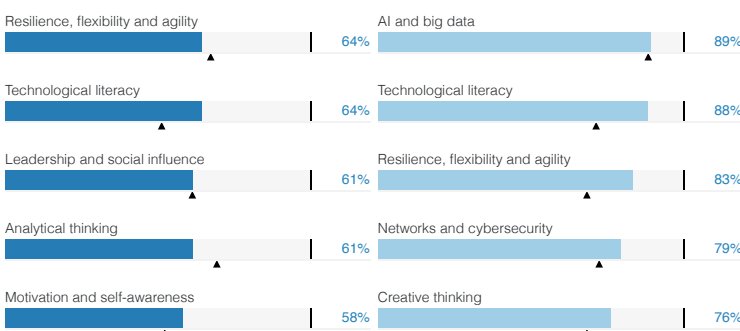
Skills of increasing use by 2030

Skills of the most increase in use by 2030

Region Global

CORE SKILLS OF 2025

SKILLS OF INCREASING USE BY 2030



Sub-Saharan Africa

341.2

Upskilling and reskilling outlook

46 | Global 41

Would not need training by 2030

25 | Global 29

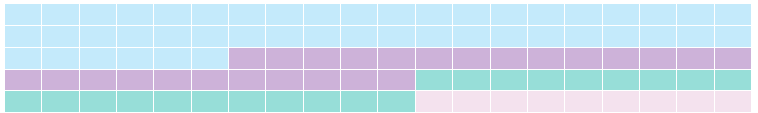
Would be upskilled in their current role

20 | Global 19

Would be upskilled and redeployed

9 | Global 11

Would be unlikely to upskill



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

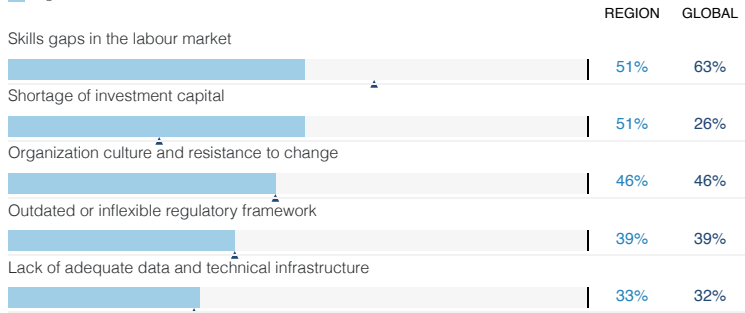


Key barriers for business transformation

Transformation barriers

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

Region Global

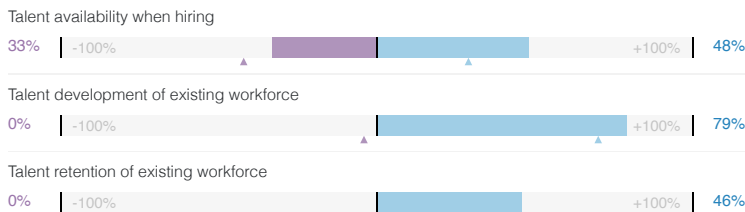


Talent availability outlook

Talent trend

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

Improving Global average Worsening Global average

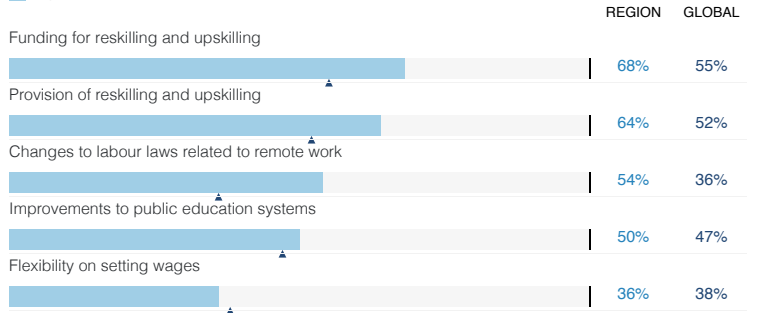


Public policy

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

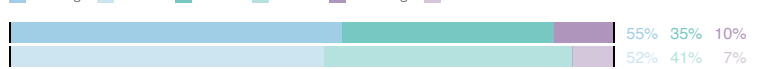


Wage outlook

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

71 | Global 48

Targeted recruitment, retention and progression initiatives

57 | Global 51

Run comprehensive DEI training for managers and staff

39 | 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

89 | 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

61 | Global 49

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

Accommodation, Food, and Leisure

24% | Global 22%**Labour-market churn**

Five-year structural labour-force churn

42% | Global 39%**Skill disruption**

Shares of core skills which will change

80% | Global 83%**Organizations with DEI priorities**

Share of organizations with DEI priorities

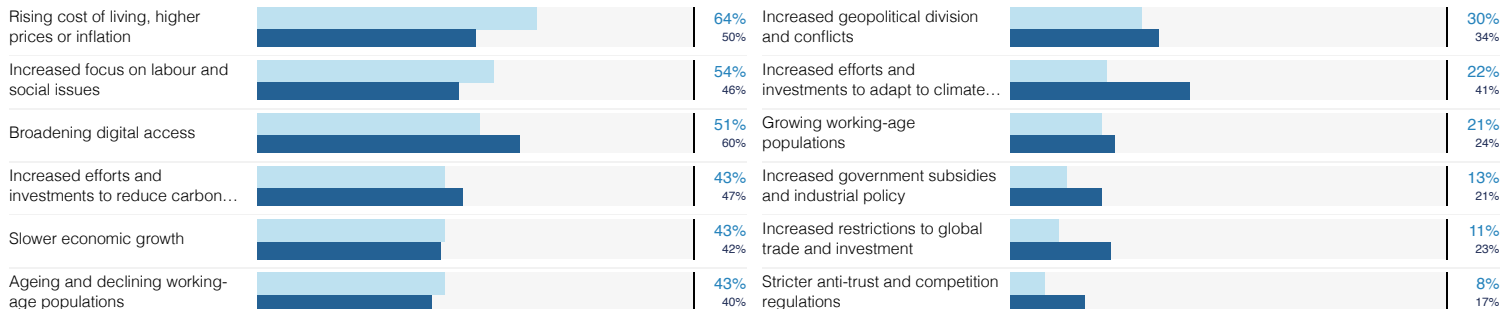
77% | Global 88%**AI exposure**

Share of organizations running AI programmes

Trend outlook**Macrotrends driving business transformation**

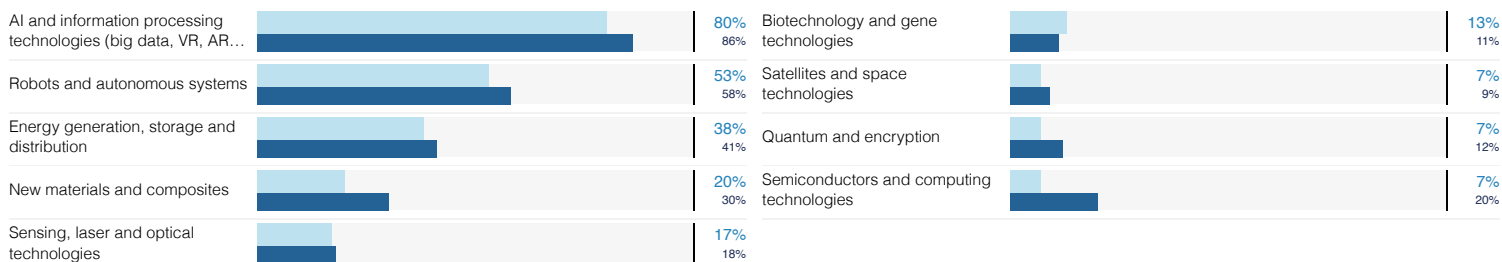
Share of organizations surveyed that identified this trend as likely to drive transformation in their organization

■ Industry ■ Global

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

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

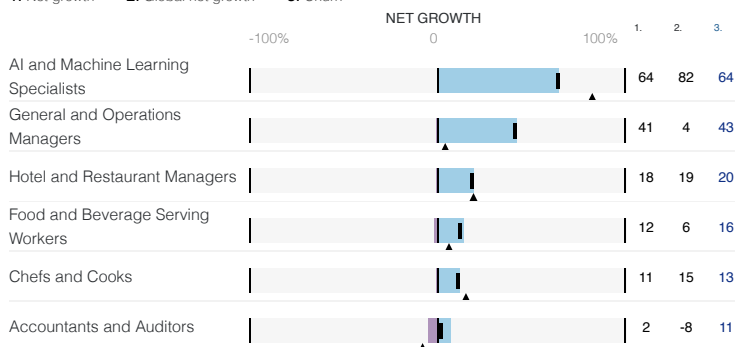
■ Industry ■ Global

**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)

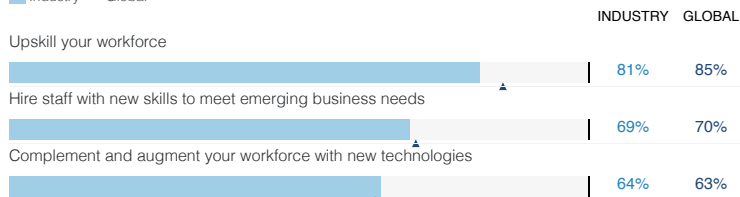
Net growth ■ Job Growth ■ Job displacement ■ Net Growth ▲ Global net growth

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

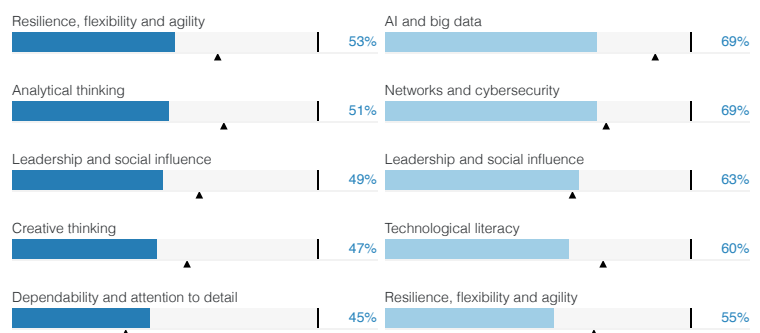
**Skill outlook****Skills of increasing use by 2030**

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

31 | Global 29

Would be upskilled in their current role

19 | Global 19

Would be upskilled and redeployed

12 | Global 11

Would be unlikely to upskill