

TRENDS TOWARDS 2030

By Andreas Meinert

25
Years



ework GROUP



Foreword

The world of work is constantly changing and challenges our status quo every day. Just imagine how much we have been through in the past five years. No matter what, the pace of change will never be this slow again and we all need to embrace that. Technological breakthroughs, demographic developments and geopolitical challenges are some of the factors that will affect everyone and have a major impact on our Future of Work.

At Ework, we continuously look at insights and foresights to support our business development, growth and transformation. Taking the trends that affect us seriously is key to staying relevant, being competitive and avoid falling behind. This goes for any business. We therefore wanted to share this report with you – a Trends towards 2030 where we summarize some of the trends and scenarios that will prevail over the next five years and beyond.

Talent is undoubtedly one of the competitive advantages of the future. Even today, however, we must be aware that talent does not have to be human - talent can also be a robot, an AI application, or a code sequence. As the concept of talent expands and the workforce is becoming increasingly diverse, well-developed workforce strategies will become more crucial than ever. It will also require new ways of working and leading, both in terms of self-leadership and business and people leadership - that's what we call the Future of Leadership.

As we at Ework summarize our insights and foresights, we see a clear movement towards a new reality where not only talent, workforce and leadership will be redefined, but also the nature of work. In line with this, we are already seeing traditional job descriptions evolve to focus on:

Outcomes – What is the expected result we are looking for?

Accountabilities – What are the duties in scope?

Skills & Abilities – What is needed to succeed?

In an ever-changing world, embracing all aspects of talent and workforce development will be key to success. I hope this report sheds some light on trends and scenarios that will be helpful for your development and look forward to hearing your thoughts.

Karin Schreil, CEO, Ework Group

Executive summary

As we approach 2030, three powerful MEGA trends; the Future of Society, the Future of Business, and the Future of Work, are set to redefine our world. These trends are driving profound changes that will impact every aspect of how we live, work, and interact. This presentation delves into these mega trends to help you understand the key forces shaping the future and what they mean for the labor market, businesses, and society.

The **Future of Society** is shaped by demographic shifts, geopolitical realignments, and the increasing need for sustainable development. These changes will influence global power dynamics, social equity, and the overall structure of society. Understanding these societal shifts is essential for leaders, policymakers, and citizens as they navigate the challenges and opportunities of the next decade.

The **Future of Business** is being driven by technological innovation and a growing emphasis on sustainability. As new industries emerge and traditional ones evolve, businesses must adapt to new challenges and opportunities. From advancements in AI and robotics to the rise of the space economy and green industries, the business landscape is becoming more dynamic and interconnected. Companies that embrace these changes can unlock new growth potential and contribute to a more sustainable future.

The **Future of Work** is undergoing a transformation due to the rise of automation, artificial intelligence, and new work arrangements. Jobs are evolving rapidly, and the skills needed to succeed are shifting. Understanding these changes and preparing how to lead is crucial for both individuals and organizations aiming to stay competitive in a rapidly changing environment.

By understanding these mega trends and their implications, we can better prepare for the future. Whether it is adapting to new work models, leveraging technological advancements in business, or responding to societal changes, being proactive will allow us to thrive in a world of constant change. The time to prepare for this future is now, ensuring that we not only survive but also succeed in the years to come.

Introduction

This report presents key megatrends that are expected to significantly influence the future labor market, and in turn your talent management strategies. It provides a high-level overview, with certain trends omitted to focus on those predicted to have the greatest impact.

The three categories; **Future of Society**, **Future of Business**, and **Future of Work**, are not intended to be considered in isolation. They are interconnected and mutually dependent, with developments in one area (y or z) directly influencing outcomes in another (x). This interdependency is the foundation for the structure of the report.

The trends in the Future of Society set the stage, establishing the underlying conditions that drive acceleration in the Future of Business. Understanding how these two segments influence your organization will make it easier to address challenges and engage in effective scenario planning within the Future of Work. Furthermore, insights from the first two segments provide a clearer basis for anticipating trends in the latter.

I hope you enjoy the read.

Andreas Meinert, Market Insight and Strategy Lead Ework Group.

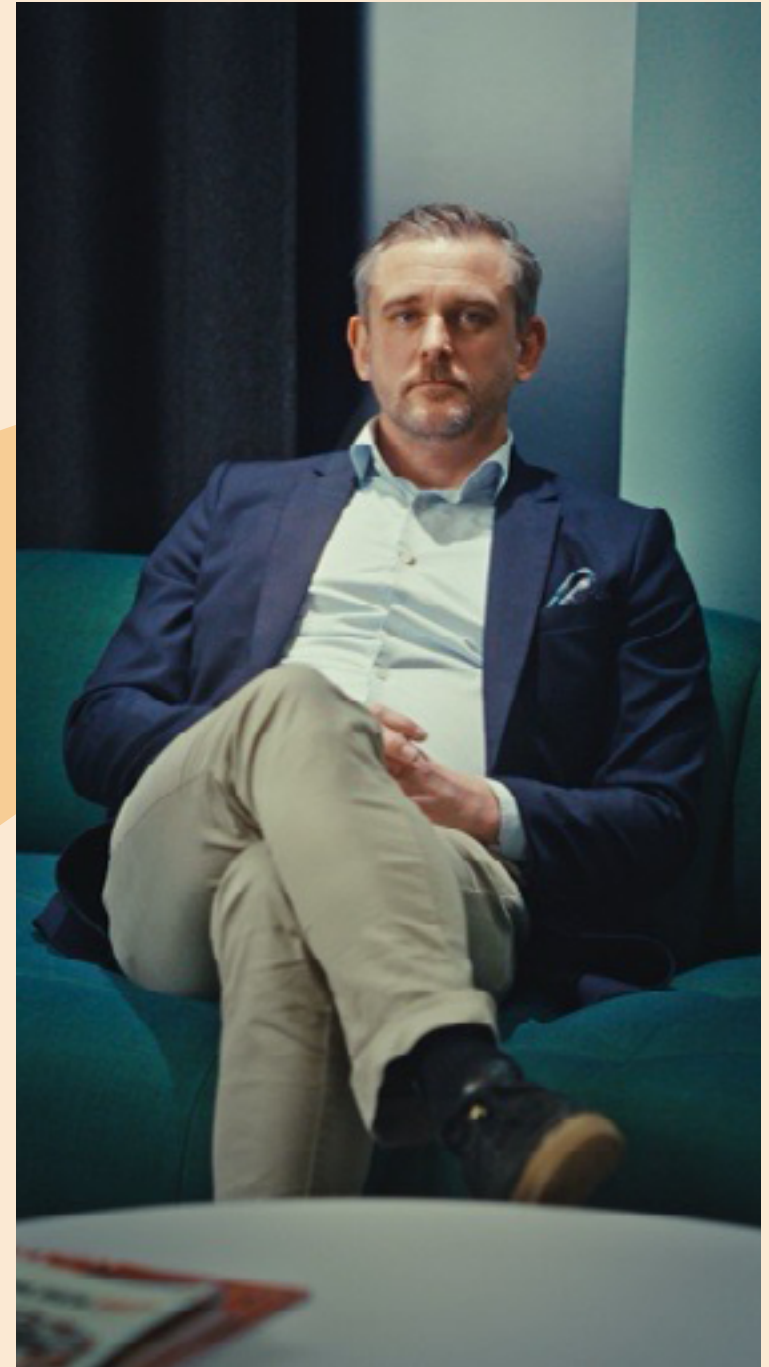


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Future of Society



The Future of Society is influenced by demographic changes, geopolitical shifts, and the urgent need for sustainable development. As populations age in some regions and grow younger in others, the global labor market will experience significant changes. Geopolitical tensions and the reevaluation of global supply chains will also play a crucial role in shaping society. Additionally, the push for sustainability will redefine social and economic priorities. This chapter examines how these societal trends will affect global power structures, social equity, and the broader societal framework, underscoring the importance of understanding and preparing for these changes.

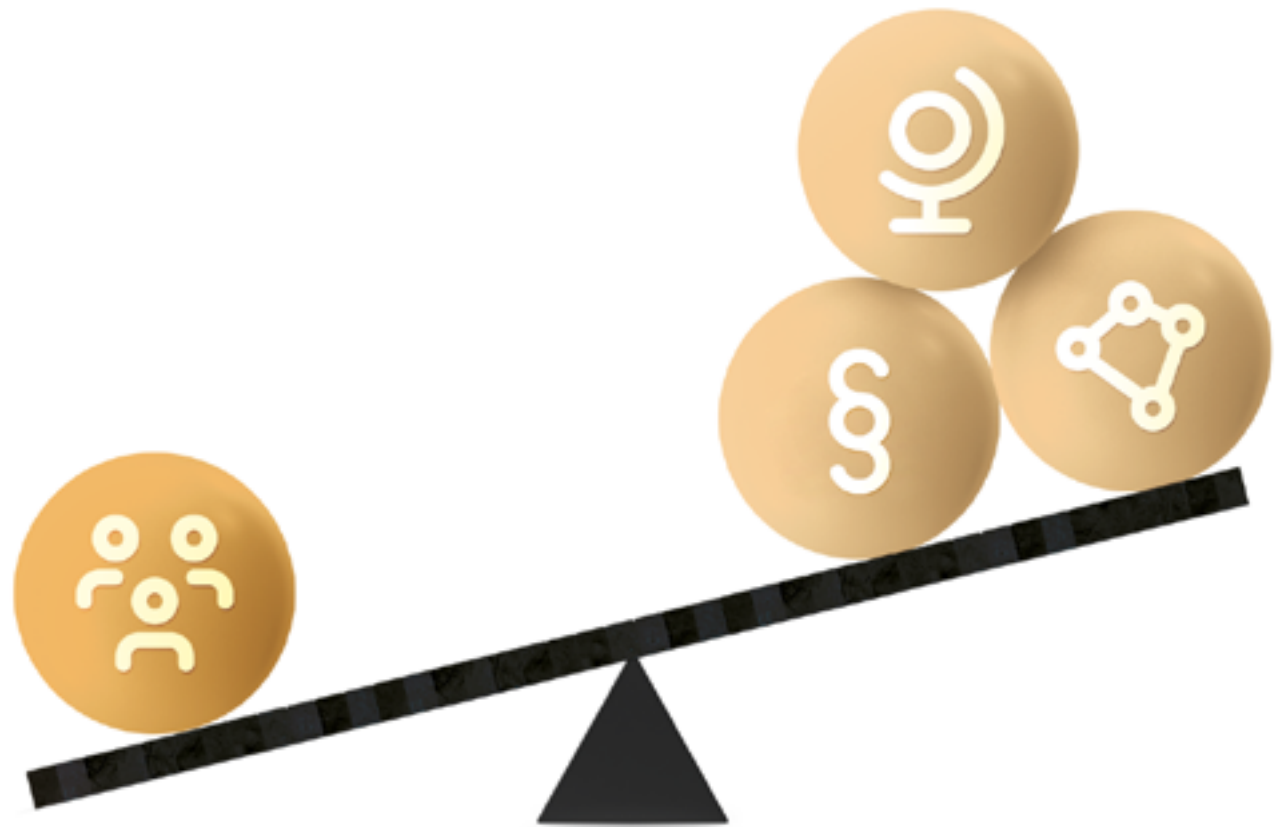
Future of Society - 2030

 **Demographics**

 **Flux**

 **Legislation and security**

 **Global power shifts**



Demographics

Aging population and lower fertility rates: The global aging population and declining fertility rates are creating significant economic and social challenges, including labor shortages and increased pressure on pension and healthcare systems. Countries must adapt quickly to maintain economic stability and social welfare.

Africa: Africa will have the world's largest working-age population by 2030, with a median age of 20. Substantial investment in education and infrastructure is crucial to capitalize on this demographic advantage.

Generation Z: Entering the workforce, Generation Z (GenZ) will prioritize remote work and corporate social responsibility. 75% of GenZ workers seek companies aligned with social and environmental values



Aging population

An urgent global and European challenge

Globally

Globally, the aging population is rapidly becoming one of the most pressing issues of the 21st century. By 2050, the United Nations predicts that 1 in 6 people worldwide will be over the age of 65, a significant increase from the current ratio of 1 in 11. This shift is driven by increased life expectancy and declining birth rates, leading to an older population that will soon outnumber the younger generations. Some key implications:

- **Economic strain:** Countries like Japan, which already has more than **30% of its population aged 65 or older**, exemplify the economic pressures an aging population can create. Japan's government is facing severe fiscal challenges as it struggles to fund pensions and healthcare for its elderly citizens, with public debt reaching nearly **240% of GDP**. This scenario is a preview of what many other nations might face as their populations age.
- **Healthcare challenges:** The demand for healthcare services is set to skyrocket. For example, the United States is expected to see a **75% increase** in the number of elderly patients requiring chronic care by 2030. This surge will necessitate massive investments in healthcare infrastructure, including long-term care facilities and advanced medical technologies to manage age-related conditions.
- **Opportunities for innovation:** Despite these challenges, there are significant opportunities for innovation. For instance, the rise of telemedicine and smart home technologies tailored for elderly care can not only improve quality of life but also reduce healthcare costs. Companies that can adapt to these needs will find themselves at the forefront of a growing market.

Europe

Europe is at the epicenter of the aging population crisis. Countries like Italy, Poland and Germany are already experiencing the severe effects of a shrinking workforce coupled with a rapidly aging population. By 2050, more than 30% of the European population will be over 65, a significant increase from today's 20%. Some key implications:

- **Pension system pressures:** In Italy, where the fertility rate is among the lowest in the world at **1.24 children per woman**, the working-age population is shrinking rapidly. This decline is putting enormous pressure on the country's pension system, with the ratio of workers to retirees projected to fall from **3:1 today to 1.5:1 by 2050**. This imbalance could lead to significant pension cuts or increased retirement ages, exacerbating social tensions.
- **Labor market changes:** Germany, with one of the oldest populations in Europe, is already experiencing labor shortages in key sectors like healthcare and engineering. The country is increasingly relying on immigration to fill these gaps, but this solution has its limits. Without significant policy changes, Germany could face a **5 million worker shortfall** by 2030, severely impacting its economy.
- **Urgency for reform:** The need for immediate action is critical. The European Commission has called for comprehensive pension reforms, investments in lifelong learning, and measures to boost labor force participation among older workers and women. Without these reforms, the economic and social fabric of Europe could be severely strained, leading to slower growth and reduced living standards.

Shrinking fertility rates

Labor market impact

General overview

- **Globally**, fertility rates are declining, with the United Nations projecting a drop from 2.3 births per woman today to 1.8 by 2050, and further to 1.6 by 2100. This decline, driven by factors like better access to contraception and greater educational and career opportunities for women, is leading to an aging population and shrinking labor force. This shift presents challenges for maintaining economic growth and supporting an increasing elderly population.
- In the **European Union**, the fertility rate is even lower, averaging 1.46 births per woman. Countries like Italy and Spain have some of the lowest rates, leading to labor shortages and pressure on public pension systems. To address these challenges, some EU countries (Germany for instance) are turning to immigration and family-friendly policies, but the long-term sustainability of these solutions remains uncertain.



Labor market challenges

- **Labor shortages:** Fewer young people entering the workforce means that there could be shortages in key industries, particularly those that rely on younger, physically capable workers.
- **Increased dependency ratios:** With fewer workers supporting more retirees, there is increased pressure on social welfare systems, potentially leading to higher taxes or reduced benefits.
- **Economic growth slowdown:** A smaller labor force can limit economic growth, as there are fewer workers to drive production and innovation.

Labor market opportunities

- **Increased automation:** Labor shortages may accelerate the adoption of automation and AI, which could boost productivity even with fewer workers.
- **Higher wages:** A tighter labor market could lead to higher wages as employers compete for a smaller pool of workers.
- **Policy innovation:** Governments may be compelled to implement innovative family policies, flexible work arrangements, and retirement reforms to better utilize the existing labor force and encourage higher fertility rates.

Fertility rates

The South Korean demographical crisis



South Korea currently holds the record for the world's lowest fertility rate, at just 0.72 births per woman in 2023 (2,1 is needed for equilibrium). This alarming trend suggests that the population could shrink rapidly, with each subsequent generation significantly smaller than the last.

Key implications to the South Korean economy

- **Population decline:** If the current fertility rate continues, South Korea could see only 36 children born out of 100 people in the next generation, and just 12 in the following generation.
- **Aging society:** A shrinking number of young people means a larger elderly population. This imbalance could strain healthcare systems and social services, as fewer workers will be available to support the growing number of retirees.
- **Economic challenges:** With fewer young people entering the workforce, South Korea may face labor shortages and slower economic growth. The country could also experience increased costs as businesses compete for a smaller pool of workers.

Despite government efforts to encourage higher birth rates through financial incentives and improved family policies, these measures have not yet reversed the trend. Similar challenges are seen globally, particularly in developed countries where fertility rates are also declining, leading to similar concerns about aging populations and economic sustainability.

The African continent

Home of the largest working age population in 2030

By 2030, Africa is projected to have the world's largest working-age population, with a median age of just 20 years. This presents a unique opportunity for economic growth and development across the continent. However, to fully capitalize on this demographic advantage, substantial investments in education, infrastructure, and economic diversification are essential.

- **Youthful workforce:** Africa's rapidly growing youth population could drive economic transformation. By 2050, the working-age population is expected to double, potentially leading to robust growth. However, this depends on significant investments in education, particularly in STEM fields, to equip the workforce with essential skills.
- **Infrastructure needs:** To support this workforce, Africa requires extensive infrastructure development. Current inadequacies cost the continent up to 2.6% of GDP annually. Improved transportation, energy, and digital connectivity will enhance productivity and attract foreign investment.
- **Diversifying economies:** To ensure sustainable growth, African nations must diversify away from commodity dependence. Expanding sectors like manufacturing, technology, and services is essential for creating stable, high-paying jobs



Challenges that needs to be solved

- **High unemployment:** Despite the large working-age population, Africa faces high unemployment rates, particularly among youth. This can lead to social unrest and economic instability if not addressed. Programs aimed at boosting entrepreneurship, vocational training, and job creation are essential to absorb the growing labor force.
- **Political and social stability:** Political instability and governance issues in some African regions pose significant challenges to economic growth. Stable governance and effective institutions are critical for creating an environment conducive to investment and development.
- **Climate change:** Africa is one of the most vulnerable continents to climate change, which threatens to undermine development gains. Climate-resilient infrastructure and sustainable practices are necessary to protect against the impacts of climate change while promoting green growth.

Generation Z

Shaping the workforce of 2030

By 2030, Generation Z (born between 1997 and 2012) will be a dominant force in the global workforce, accounting for nearly **one-third of all workers worldwide**. As the first generation of true digital natives, their influence on the workplace, economy, and societal norms will be profound. Understanding their evolving needs and expectations is critical for businesses and policymakers to stay ahead. What you should be aware of:

- **Tech-savvy workforce:** By 2030, Gen Z will have fully integrated digital tools and technologies into every aspect of their work lives. Their comfort with emerging technologies like AI, blockchain, and advanced analytics will drive workplace innovation. Businesses that invest in cutting-edge technologies and foster a culture of continuous learning will be the most successful in attracting and retaining Gen Z talent.
- **Sustainability focus:** Environmental concerns will be even more pressing by 2030, and Gen Z's commitment to sustainability will significantly influence corporate practices. Companies that prioritize green initiatives, carbon neutrality, and ethical practices will not only attract Gen Z employees but also gain loyalty from a consumer base increasingly driven by values.
- **Evolving education:** With traditional education models being challenged, by 2030, many in Gen Z will have pursued alternative education paths, such as micro-credentials, online certifications, and lifelong learning programs. This trend reflects their pragmatic approach to education, focusing on acquiring skills that are directly applicable to the rapidly changing job market.

What do they want?

- **Workplace evolution:** Gen Z will expect workplaces to offer flexibility, such as hybrid or fully remote work models, which will be the norm by 2030. They will also demand inclusive and diverse environments where they can see tangible paths for career growth. Companies that fail to provide these conditions may struggle with high turnover and disengagement.
- **Financial security:** Having experienced economic instability during their formative years, Gen Z will be highly focused on financial security by 2030. This focus will influence their job choices, spending habits, and investment strategies. Employers that offer robust financial wellness programs, including retirement planning and financial education, will be better positioned to retain this cautious yet ambitious generation.
- **Mental health priority:** The importance of mental health support will continue to grow. By 2030, workplaces that offer comprehensive mental health resources, including counseling services and stress management programs, will be seen as leaders in employee well-being. This focus will be crucial in maintaining productivity and job satisfaction among Gen Z employees.

77%

Of those who currently working in remote, or hybrid positions would likely consider seeking new employment if required to return to full-time, on-site work. Notably, about one in six (16% of Gen Z and 15% of millennials) would immediately begin searching for a new job under such circumstances.

Flux

Globalization: By 2030, digital trade is projected to account for 25% of global GDP, driving significant job creation in tech-driven sectors such as AI, cybersecurity, and digital services.

Deglobalization: Increasing geopolitical tensions and protectionist policies are causing a fragmentation of global markets. 70% of global companies are reevaluating their supply chains to reduce dependency on unstable regions.

Reglobalization: New forms of global integration are emerging, particularly in the digital economy and green technology sectors, fostering collaborations on digital infrastructure and sustainable development.

Globalization, Deglobalization, and Reglobalization Toward 2030

As we approach 2030, the global economy is undergoing significant changes, characterized by shifts in globalization, deglobalization, and reglobalization — collectively placing the global economic landscape in a state of **flux**. These shifts will profoundly impact labor markets, particularly in Europe, as the dynamics of global trade, investment, and production continue to evolve.

Globalization has been a dominant force for decades, driving interconnectedness across the world. However, the recent years have seen a rise in deglobalization, where nations and companies are rethinking their global dependencies due to factors like geopolitical tensions, the COVID-19 pandemic, and supply chain disruptions. For example, global trade growth has slowed, and there is a marked shift toward regionalization, with nations focusing on securing critical industries within their borders.

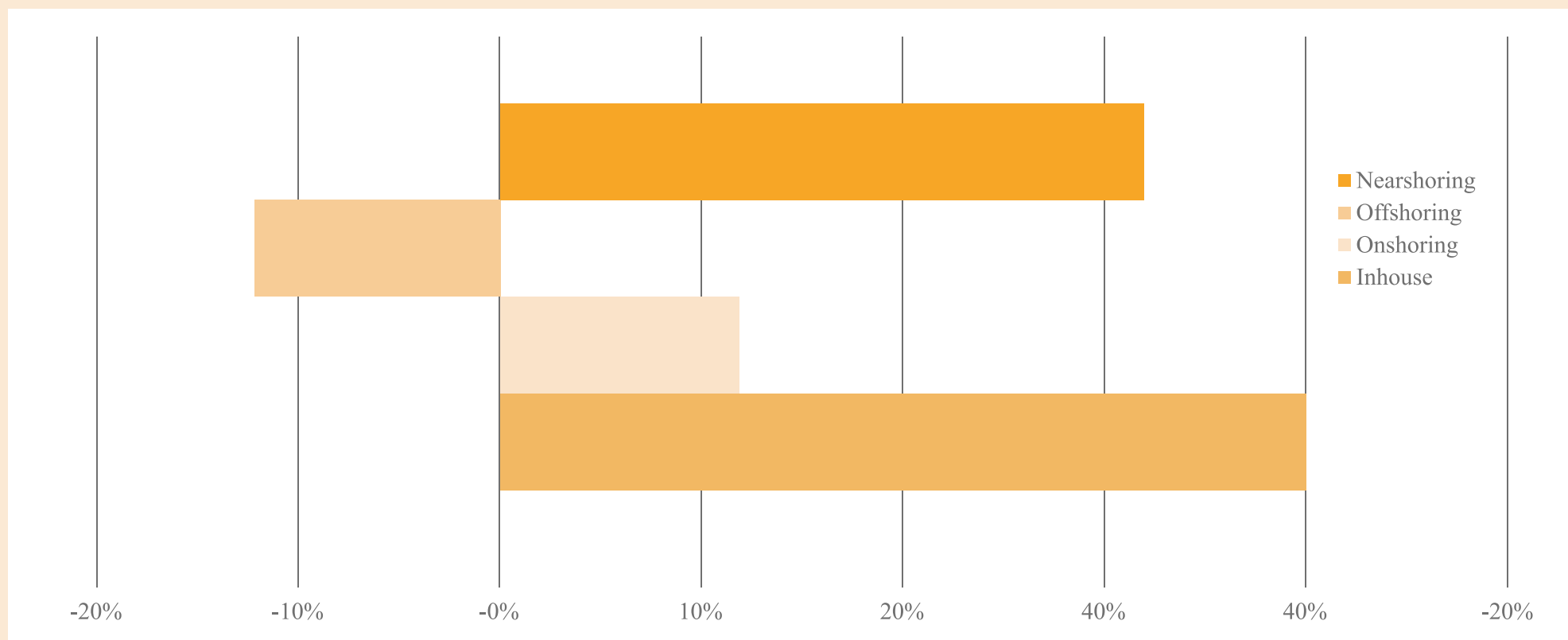
Looking forward, **reglobalization** will shape the next decade. This phase involves the strategic restructuring of global supply chains, making them more resilient and adaptable to future shocks. For instance, Europe is increasingly looking to reduce its dependency on external suppliers for critical technologies, such as semiconductors and renewable energy components, by investing heavily in local production and diversifying its supply sources. The European Chips Act aims to increase Europe's share of global semiconductor production to 20% by 2030, reflecting this trend.

The implications of this flux for the labor markets are significant, particularly in Europe:

- **Emergence of new job Sectors:** As supply chains are reconfigured, there will be a growing demand for skilled workers in sectors such as digital technologies, logistics, and advanced manufacturing. Europe is likely to see increased employment opportunities in these high-tech sectors, particularly as the region pushes for leadership in green technology and digital infrastructure. For example, the European Commission estimates that by 2030, the renewable energy sector alone could create over 1 million new jobs in the EU.
- **Reshoring and regionalization:** The trend toward reshoring, or bringing back manufacturing jobs from abroad, is expected to continue as European countries aim to secure supply chains. This could lead to the creation of new manufacturing jobs, particularly in countries like Germany, which has a strong industrial base. However, these jobs are likely to require higher skills due to the integration of automation and advanced manufacturing technologies.
- **Challenges for low-skilled workers:** On the flip side, the move toward higher-tech, more automated production could reduce opportunities for low-skilled workers, both within Europe and in regions that have traditionally supplied low-cost labor. This could exacerbate regional disparities within Europe, as areas that are less integrated into the new, high-tech economy may face higher unemployment.
- **Long-term strategic shifts:** By 2030, Europe's labor market will likely be shaped by its ability to adapt to these changes. Countries that invest in education, training, and infrastructure to support new industries will fare better in this evolving landscape. The push for sustainability and digitalization will require a workforce that is not only skilled but also adaptable to the rapid pace of technological change.

Resource allocation

The flux impact and change of behavior of shoring solutions



Legislations and security

Updating legal frameworks: By 2030, 30% of the global workforce will be in gig or freelance roles, requiring modernized labor laws to ensure fair wages, benefits, and job security for gig workers.

Social safety nets: Governments are advised to allocate at least 2% of GDP to social safety nets to support workers transitioning due to automation and technological change.

Cybersecurity: With the expansion of digitalization, cybersecurity becomes critical. By 2030, global spending on cybersecurity is expected to exceed \$200 billion annually to protect against evolving digital and physical threats.

Legal frameworks

Adapting labor laws for a flexible workforce

As the global workforce increasingly shifts toward gig and freelance roles, with estimates suggesting that up to 30% of workers globally will be in non-traditional employment by 2030, there is a pressing need to modernize labor laws. These workers often lack the protections afforded to full-time employees, such as healthcare, retirement benefits, and job security. For instance, a 2023 report by the International Labour Organization (ILO) highlighted that nearly 60% of gig workers do not have access to social protections, leaving them vulnerable to economic instability.

In response, the European Union and other regions are working to bridge this gap. The EU's "Directive on Transparent and Predictable Working Conditions," which aims to extend labor rights to all workers regardless of contract type, is a step in the right direction. This directive ensures that workers receive clear information about their employment conditions, including work hours and pay, and it also provides protections against unfair dismissal. Moreover, countries like France and Spain are introducing laws that require gig platforms to provide workers with minimum wage guarantees and contributions to social security.

However, these legislative efforts must continue to evolve. As the nature of work changes, governments worldwide will need to adopt more flexible and inclusive labor policies that accommodate the unique needs of gig workers, including access to collective bargaining and portable benefits that travel with workers across different jobs and contracts.

By 2030, an estimated 30% to 40% of the global workforce will be engaged in gig or freelance roles, driven by technological advancements, economic shifts, and evolving work patterns. This transformation requires a significant overhaul of existing labor laws to ensure that these workers receive fair wages, benefits, and job security, addressing the gaps left by traditional employment structures.

Impact on the Labor Market

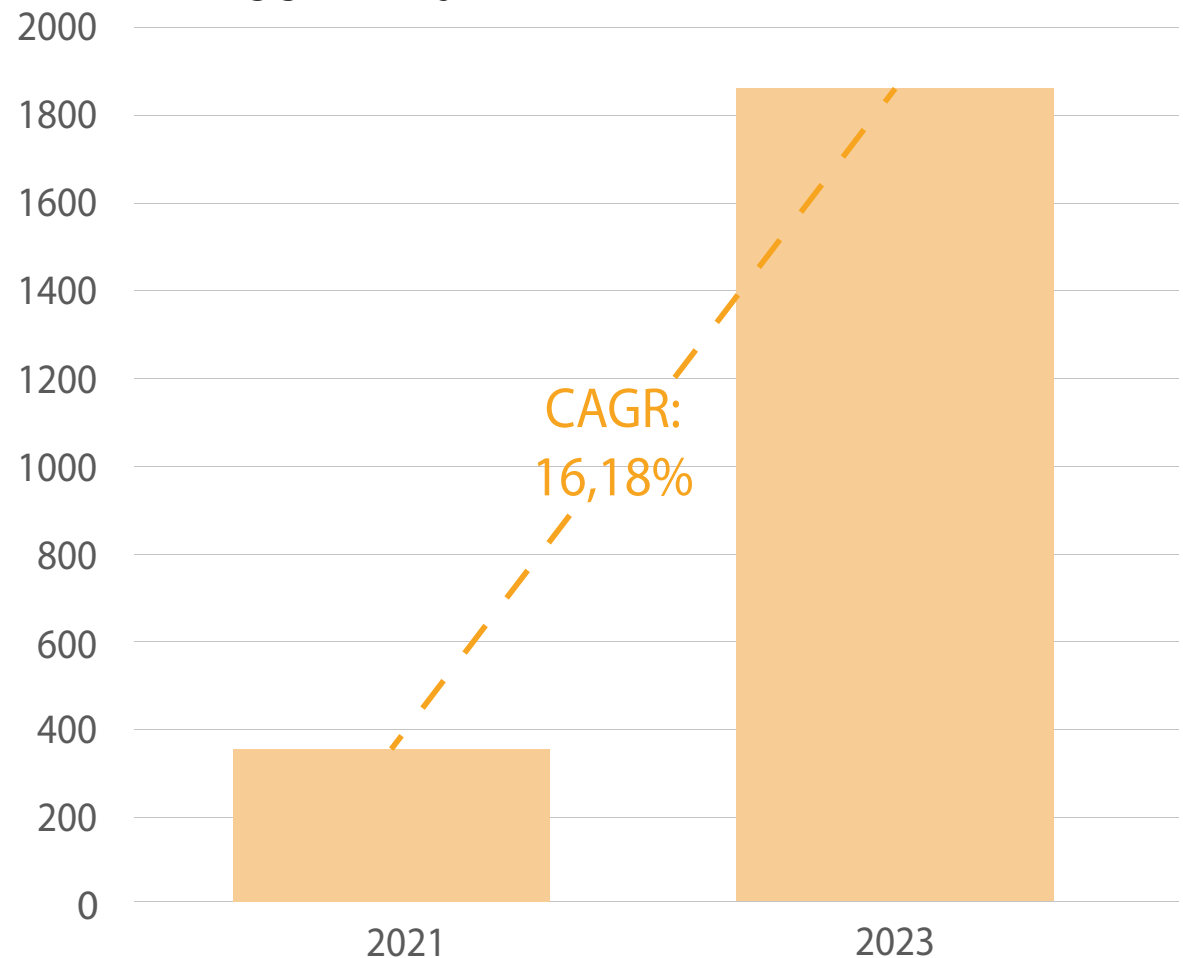
- **Increased protections for gig workers:** Modernizing labor laws will lead to improved conditions for gig workers, including access to social protections such as healthcare, retirement benefits, and unemployment insurance. This is essential as the current legal frameworks in many countries leave gig workers without these safety nets. For example, a 2023 ILO report found that nearly 60% of gig workers globally do not have access to basic social protections, which puts them at significant financial risk.
- **Rising demand for legal and regulatory expertise:** As governments worldwide introduce new regulations to cover non-traditional work, there will be a growing demand for legal professionals and regulators who specialize in gig economy labor law. This could lead to new job creation in legal, compliance, and human resources roles, particularly in regions like Europe where legislative efforts are more advanced.
- **Greater worker empowerment:** Updated legal frameworks are likely to empower gig workers through collective bargaining rights and the establishment of portable benefits that move with workers across jobs and contracts. This empowerment could lead to improved job satisfaction and stability within the gig economy.

Legal frameworks

Understanding the flexible workforce growth to update legal frameworks

- **Explosive market growth:** The global gig economy market, valued at approximately \$355 billion in 2021, is expected to skyrocket to \$1.86 trillion by 2031. This reflects a CAGR of around 16.88% over the decade, illustrating the rapid expansion of gig work across various sectors and regions.
- **Key drivers of growth:** The expansion is driven by increasing digitalization, the proliferation of online platforms connecting gig workers with employers, and the flexibility that gig work offers to both workers and companies. Moreover, the pandemic has accelerated the shift towards remote and freelance work, further fueling the growth of the gig economy.
- **Regional insights:** The Asia-Pacific region is expected to witness the highest growth rates, driven by rapid urbanization, increasing internet penetration, and the adoption of mobile technologies. In contrast, North America and Europe, while more mature markets, continue to see substantial growth due to the rising preference for flexible work arrangements.
- **Sectoral expansion:** The gig economy is expanding beyond traditional sectors like ride-sharing and food delivery. There is significant growth in professional services, creative industries, and technology sectors where freelance and contract work is becoming more prevalent.

Global gig economy market size, 2031 (USD billions)



Social safety nets

Securing workers' futures in an automated world

The rise of automation and technological disruption is expected to reshape the global workforce significantly by 2030. According to the World Economic Forum, up to 85 million jobs could be displaced by automation by 2025, with an additional 97 million new roles emerging that require different skill sets. This shift underscores the need for robust social safety nets to support workers during these transitions.

Governments are advised to allocate at least 2% of GDP to social safety nets to ensure that displaced workers have access to unemployment benefits, retraining programs, and income support. The European Union's "Just Transition Fund," which provides €17.5 billion to support regions and workers affected by the shift to a green economy, is an example of how targeted funding can help mitigate the impacts of economic transformation. This fund focuses on reskilling workers for new, sustainable industries, ensuring that no one is left behind in the transition.

Moreover, countries like Germany and Denmark have been at the forefront of implementing "flexicurity" models, which combine flexible labor markets with strong social protections. These models offer a blueprint for other nations seeking to balance economic flexibility with worker security in an era of rapid change. The success of such initiatives will be critical in maintaining social cohesion and preventing inequality from widening as the world moves toward 2030.

Automation and technological change are projected to significantly reshape the global workforce by 2030, with the potential to displace up to 14% of current jobs according to the OECD. This potential for widespread disruption underscores the critical need for robust social safety nets to support workers as they transition to new roles in an evolving job market.

Impact on the labor market

- **Job displacement and transition:** As industries become more automated, workers in traditional manufacturing, retail, and low-skilled service jobs are at risk of displacement. However, well-funded social safety nets, such as the EU's Just Transition Fund, will be crucial in providing these workers with the necessary support to retrain and transition into new sectors like renewable energy or advanced manufacturing.
- **Expansion of retraining programs:** Governments will need to invest heavily in retraining and upskilling programs to prepare workers for jobs in emerging sectors. The European Commission estimates that up to 70% of workers will need reskilling by 2030 due to the rapid pace of technological change. These programs will help mitigate the impact of job displacement and ensure that workers can adapt to new economic realities.
- **Reducing economic inequality:** Strengthened social safety nets will play a crucial role in reducing economic inequality by ensuring that all workers, particularly those in vulnerable sectors, have access to financial support and opportunities for career advancement. This will be especially important in regions with high levels of income disparity.

Cybersecurity

Safeguarding economies in an era of cyber threats

The rapid expansion of digitalization has made cybersecurity a top priority for governments and businesses alike. By 2030, global spending on cybersecurity is expected to surpass \$300 billion annually, reflecting the increasing sophistication and frequency of cyberattacks. In 2022 alone, cybercrime was estimated to cost the global economy over \$6 trillion, a figure that is projected to rise as digital infrastructure becomes more integral to daily life.

The European Union's "Cybersecurity Strategy" is designed to enhance the resilience of its member states against cyber threats. This strategy includes initiatives such as the establishment of the European Cybersecurity Industrial, Technology, and Research Competence Centre, which aims to foster innovation and cooperation in cybersecurity across the EU. Additionally, the EU is working on implementing the Network and Information Security (NIS2) Directive, which sets stricter cybersecurity requirements for companies in critical sectors such as energy, transportation, and finance.

Cybersecurity is not just about protecting data; it's about ensuring the stability of entire economies. As more critical infrastructure becomes digitized, the potential impact of a successful cyberattack grows exponentially. For instance, a major cyberattack on Europe's energy grid could disrupt power to millions, leading to significant economic and social consequences. Therefore, investments in cybersecurity are not just about safeguarding information but about protecting the very fabric of modern society.

The rapid expansion of digitalization has made cybersecurity a top priority for governments and businesses alike. By 2030, global spending on cybersecurity is expected to surpass \$300 billion annually, reflecting the increasing sophistication and frequency of cyberattacks. Ensuring the security of digital infrastructure is essential for maintaining economic stability and protecting sensitive data.

Impact on the Labor Market

- **Creation of high-skilled jobs:** The focus on cybersecurity will create millions of new, high-skilled job opportunities worldwide. In Europe alone, the cybersecurity sector is expected to add up to 1 million jobs by 2030, particularly in areas related to IT security, digital infrastructure, and technology innovation. These roles will require specialized skills, leading to a surge in demand for cybersecurity education and training programs.
- **Shifts in workforce demand:** As companies invest more in cybersecurity, there will be a shift in workforce demand towards roles that protect digital assets and ensure data integrity. This includes positions like cybersecurity analysts, ethical hackers, and data protection officers. The increasing complexity of cyber threats will also drive demand for continuous professional development in this field.
- **Impact on business operations:** As cybersecurity becomes more integral to business operations, companies will need to incorporate security considerations into every aspect of their work. This will lead to the creation of cross-functional teams that include cybersecurity professionals, engineers, and business strategists working together to ensure that digital security is integrated into all aspects of business planning and execution.

Cybersecurity

Regional breakdown of how geopolitical risk influences cybersecurity strategy

	Americas	APAC	EMEA
Adjust information-sharing practises	42%	25%	33%
Establish and engage with industry working groups	43%	13%	38%
No changes planned	9%	13%	2%
Re-evaluate the countries with which my organization does business	52%	63%	45%
Strengthen cotrols with 3rd parties who process data	63%	88%	67%
Strengthen policies and practices for engaging direct-connection 3rd parties with data acess	67%	88%	79%
Update terms and conditions for 3rd parties	46%	13%	33%

The table highlights critical insights into how organizations in different regions are responding to cybersecurity threats in the context of rising geopolitical risks, with a focus on awareness, investment, resilience, and the challenges faced by smaller entities.

- **High awareness of geopolitical risks:** 67% of organizations recognize geopolitical instability as a significant cyber risk driver, with awareness peaking at 88% in large enterprises. This reflects the critical importance of integrating geopolitical considerations into cybersecurity strategies.
- **Investment in cybersecurity:** 63% of organizations are increasing their cybersecurity investments in response to rising threats, with 88% of large enterprises leading this trend. The focus is shifting towards more robust defenses to counter increasingly sophisticated attacks.
- **Focus on resilience:** Resilience is a top priority for 79% of large organizations, indicating a strategic shift from merely preventing breaches to ensuring systems can withstand and recover from attacks.
- **Vulnerability among smaller entities:** Only 42% of smaller companies recognize the growing threat of cyberattacks, and an even smaller percentage are significantly enhancing their cybersecurity measures. This indicates a potential gap in global cybersecurity, as smaller entities may be underprepared for emerging threats.

Global power shifts

Geopolitics: As global tensions rise among the U.S., China, and Russia, the formation of regional blocs like BRICS and CRINK is reshaping global power dynamics. While the U.S. remains influential, it faces significant challenges from these alliances, particularly as the „America First” strategy and trade wars impact its global standing. The EU is expected to act as a stabilizing force, focusing on multilateralism, diplomacy, and economic innovation, particularly in green and digital technologies, to maintain its global influence and counterbalance the growing influence of non-Western powers.

Economic power: By 2030, Asia will drive over 50% of global GDP growth, with China and India leading the charge. Meanwhile, Africa’s economy is projected to grow at 5% annually. The EU, although experiencing slower growth, will leverage its technological leadership, sustainability initiatives, and strong trade relationships to remain a key player. The U.S. and EU must adapt strategically to the rising influence of BRICS and CRINK, reinforcing partnerships and recalibrating their positions to maintain global standing in an increasingly multipolar world.



Geopolitics

Emerging alliances and global influence

The geopolitical landscape is witnessing the rise of significant alliances such as BRICS (Brazil, Russia, India, China, and South Africa) and the newer CRINK (China, Russia, India, and North Korea.). These groups are positioning themselves as alternatives to Western-dominated institutions like the IMF and the World Bank, seeking to create a more multipolar world order.

BRICS expansion and influence

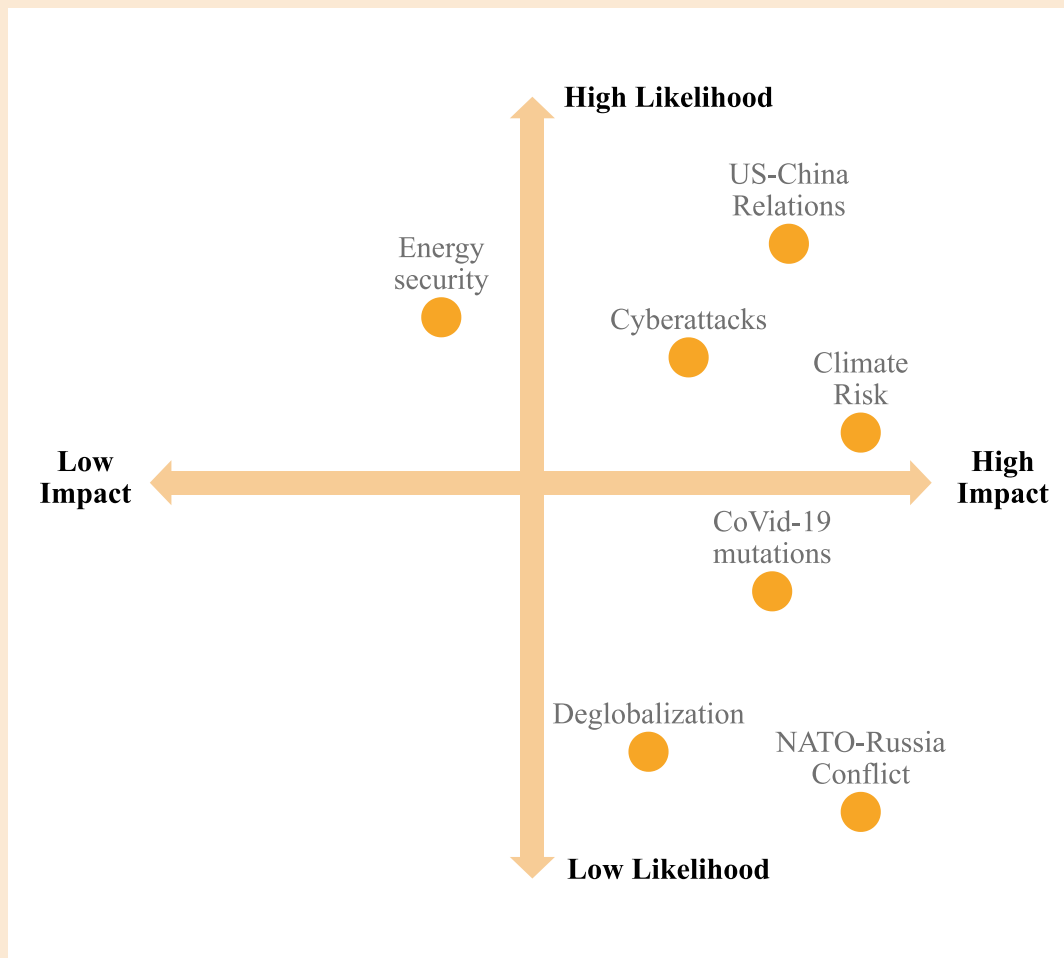
BRICS has grown from a primarily economic forum into a more politically cohesive group. With the recent inclusion of countries like Saudi Arabia, Egypt, and the UAE, BRICS now represents over **40% of the global population and nearly 25% of global GDP**. This expansion is strategically important as it enhances the bloc's influence in global trade, energy markets, and diplomatic arenas. By 2030, BRICS countries are expected to drive a significant portion of global economic growth, particularly through initiatives like the New Development Bank, which aims to finance infrastructure projects across member states. This growth will depend on the trajectory of U.S. policies under the "America First" agenda, which could push BRICS nations to strengthen their economic ties further and reduce reliance on traditional Western institutions.

Implications

- **Global governance:** The expansion of BRICS could lead to the formation of parallel global institutions that challenge the dominance of Western-led entities like the IMF and World Bank. This could result in a more fragmented global governance structure, with competing norms and standards.
- **Shift in trade patterns:** As BRICS strengthens its economic ties, there could be a shift in global trade patterns, with more trade occurring within the bloc and less reliance on Western markets. This could also lead to new trade routes and logistics hubs that bypass traditional Western-dominated channels.
- **Strategic shift toward regional blocs:** The shift towards regionalization is also evident in the growing influence of trade agreements such as the Regional Comprehensive Economic Partnership (RCEP) in Asia, which includes China, Japan, South Korea, and ASEAN countries. These alliances are set to dominate global trade flows by 2030, as they focus on reducing tariffs, enhancing supply chain integration, and investing in regional infrastructure. The shift to regional blocs is a response to the unpredictability of global supply chains, as seen during the COVID-19 pandemic and the ongoing geopolitical tensions, including trade wars and the restructuring of global alliances, further accelerating the push towards securing regional trade relationships for stability and resilience.
- **Regional dominance:** Regional blocs like RCEP will likely dominate global trade flows, reducing the influence of Western trade agreements like the Transatlantic Trade and Investment Partnership (TTIP). This shift could lead to a more fragmented global trade environment, with regions operating more independently from one another.
- **Supply chain resilience:** The focus on regional trade could lead to more resilient supply chains, as countries within these blocs invest in infrastructure and reduce their reliance on distant markets. However, this may also result in less diversification of supply chains, making regions more vulnerable to localized disruptions.

Geopolitics

Events that sets the tone for 2030



Crucial elections in Europe during 2024

- European Union, Austria, Belarus, Belgium, Finland, Germany, Ireland, Lithuania, Portugal, Romania, Russia, Slovakia, Turkey, United Kingdom.
- Expected ongoing government formations from 2023 elections in the Netherlands

High impact elections outside Europa during 2024

- Australia, India, South Korea, Taiwan, USA (*as per current insights)

Other key events and initiatives with impact on industries and markets

- The Russian war in Ukraine and the conflict between Iranian proxies, Hezbollah, Hamas and Israel has collateral impact on global trade, for instance the disturbance of maritime transport via the Suez-canal has negative consequences for our customers
- US presidency with its foreign policy's, trade tariffs and the US-China frosty relations.
- EU collective defense strategy and NATO
- The outcome of the UN Climate Change conference COP-28
- Besides the usual WEF annual meeting and the Munich Security Conference, the WTO Ministerial Conference and the UN Summit of the Future are expected to focus on Contingent Workforce, Talent Shortage and Competence Development issues.
- The AI arms race between companies, countries and continents

But the overall outcome and influence of the above remain unclear

- Matters to watch are budgeting in times of crises and war, public investment as a recovery instrument, fiscal and monetary policy mix and socio-economic tipping points
- Other items include the impact of fuel prices on transport & production, cyber-resilience, media freedom, the future of Russia, and geoeconomics.

Strategic alliances

A multipolar world

The creation of new trade blocs and strategic alliances is leading to a more multipolar world, where global power is distributed among several key players rather than dominated by a single superpower. This trend is redefining global trade, investment patterns, and diplomatic relationships.

Formation of trade blocs

The establishment of trade blocs such as RCEP in Asia and the African Continental Free Trade Area (AfCFTA) is indicative of a broader trend towards regionalism. These blocs are expected to account for a significant share of global trade by 2030, driven by the reduction of tariffs and the creation of integrated regional markets. For example, RCEP is projected to cover nearly 30% of the world's population and GDP, making it the largest trade bloc in history.



Implications

- **Fragmentation of global trade:** The rise of regional trade blocs could lead to a more fragmented global trade environment, with less reliance on global institutions like the WTO. This fragmentation could complicate international trade and investment, as companies navigate a more complex web of regional regulations and standards.
- **Increased regional influence:** Countries that are part of these powerful regional blocs will have increased influence in setting global trade rules and standards. This could shift the balance of power away from traditional Western-dominated trade agreements and institutions.
- **Impact on global labor markets:** The rise of these alliances and trade blocs will have significant implications for global labor markets. As these blocs prioritize intra-regional trade, there will be a growing demand for skilled labor within these regions, leading to job creation in sectors like manufacturing, technology, and services. However, this also poses challenges for workers in countries that are not part of these blocs, as they may face reduced opportunities due to shifting trade patterns and investment flows.
- **Job creation within blocs:** The focus on intra-regional trade will lead to significant job creation within these blocs, particularly in industries like manufacturing, logistics, and technology. Workers in these regions will benefit from increased employment opportunities and potentially higher wages.
- **Displacement and inequality:** Conversely, workers in countries outside these blocs may face job displacement and increased economic inequality. As trade and investment flows shift towards the blocs, regions that are not integrated into these networks may experience economic decline and reduced labor market opportunities.

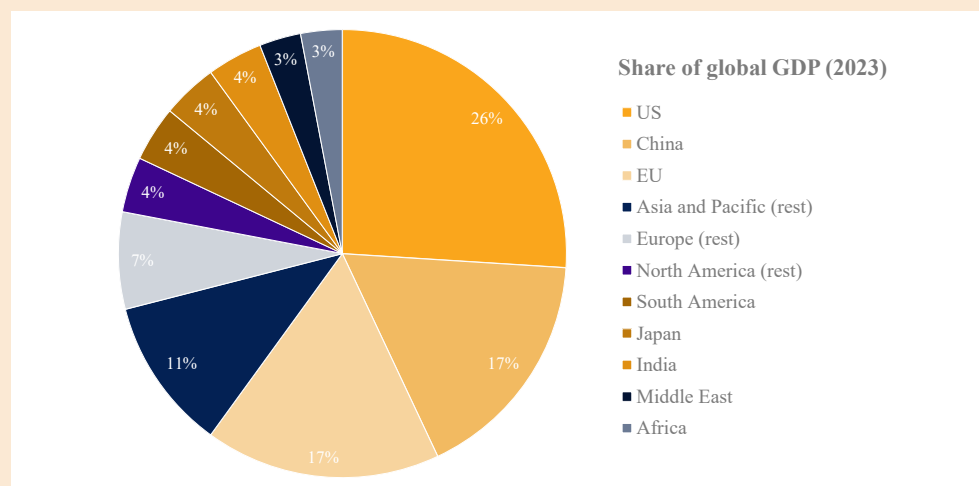
Economic power

The rise of Asia and strategic responses

Asia, led by China and India, is projected to dominate global economic growth through 2030. This shift in economic power is prompting strategic adjustments from the U.S., EU, and other traditional powers as they seek to maintain their influence in an increasingly multipolar world.

Asia's dominance in global growth

China and India are expected to contribute over 50% of global GDP growth by 2030. China's Belt and Road Initiative (BRI) continues to expand, with investments in infrastructure across Asia, Africa, and Europe. India, meanwhile, is capitalizing on its demographic dividend and is set to become the world's third-largest economy by the mid-2030s. However, the U.S.'s economic policies, especially under the „America First” agenda, could create headwinds for these growth projections, particularly through trade wars, tariffs, and competition for global influence. These policies may shift trade flows and investment, challenging China's dominance and potentially creating more fragmented trade relationships globally.



Implications

- **Shifts in global investment:** As Asia dominates global growth, there will be a significant shift in global investment flows towards Asian markets. Western companies and investors will increasingly focus on opportunities in Asia, which could lead to a decline in investment in traditional markets like Europe and North America.
- **Technological leadership:** Asia's focus on technological innovation, particularly in fields like AI, renewable energy, and digital infrastructure, could position the region as a global leader in technology. This shift may challenge the dominance of Silicon Valley and other Western tech hubs.
- **EU's strategic positioning:** In response to the rise of Asia and the expansion of BRICS, the European Union is reorienting its trade and diplomatic strategies. The EU is focusing on securing supply chains, particularly for critical technologies like semiconductors, and is enhancing partnerships with African nations to counterbalance the influence of China. The EU's Green Deal and Digital Strategy are central to this effort, aiming to position Europe as a leader in sustainability and digital innovation. By 2030, these initiatives are expected to not only boost the EU's internal cohesion but also strengthen its role in global governance.
- **Strategic autonomy:** The EU's efforts to secure supply chains and enhance its technological capabilities are aimed at achieving greater strategic autonomy. This means reducing dependence on external powers like the U.S. and China for critical resources and technologies, thereby enhancing Europe's ability to act independently on the global stage.
- **Global leadership in sustainability:** The EU's focus on sustainability through the Green Deal could position Europe as a global leader in environmental standards and green technologies. This leadership could influence global environmental policies and create new economic opportunities within the EU, particularly in green industries.

Future of Business

The Future of Business is being driven by rapid technological innovation and a growing commitment to sustainability. As industries evolve, businesses must navigate the rise of new sectors like the space economy, the transformative impact of AI and robotics, and the expanding importance of green technologies.

Companies that adapt to these shifts will find new growth opportunities, while those that do not may struggle to keep up. This chapter explores how businesses can thrive by embracing these changes, focusing on the skills and strategies needed to succeed in a more dynamic and interconnected global economy.

Future of Business - 2030



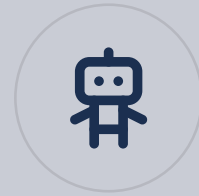
Space Economy



AI Technologies



Sustainability



Robotics



Biotechnology



Quantum computing



AR/VR



5G/6G

Space Economy

The use of technology to explore outer space, including launching satellites, sending missions to the Moon and Mars, and developing space tourism. It involves both government and private sector investments to improve connectivity, navigation, environmental monitoring, and address global challenges like climate change.

General

Space innovations goes beyond what is actually being tested

Investments and growth

The space economy is projected to drive significant global economic growth, with the space economy estimated to reach \$1.8 trillion by 2030. This growth is fueled by advancements in satellite technology, space tourism, and lunar exploration, with investments from government space agencies, private companies, and international collaborations.

- **Globally:** The global space industry is transforming through commercialization, increased private sector involvement, and international collaborations. Notable initiatives include NASA's Artemis program aiming for lunar and Mars missions, and private companies like SpaceX and Blue Origin revolutionizing space travel and logistics.
- **Europe:** Europe, led by the European Space Agency (ESA), is setting ambitious goals through the Terrae Novae 2030+ strategy for Moon and Mars missions. The European Space Law will create a unified regulatory framework to enhance Europe's competitiveness and ensure sustainable space activities.
- **Sweden:** Sweden actively participates in ESA, focusing on satellite technology and space science. Swedish companies and research institutions support ESA missions and the development of space technologies, aligning with broader European goals of sustainability and scientific discovery.

Technological advancements

The space economy drives technological innovation, advancing robotics, materials science, energy, healthcare, environmental monitoring, and emerging technologies like 3D printing, quantum technology, and IoT.

These advancements not only support space missions but also have significant applications on Earth, enhancing industrial capabilities (data centers in space?), improving quality of life, and promoting sustainable development.

Impact on the labor market

The growing space sector is expected to create numerous high-quality jobs across a range of fields such as engineering, data analysis, and project management, with a strong emphasis on STEM skills.

Innovations in space technologies not only drive advancements in related industries but also lead to the emergence of new sectors, generating a wide array of job opportunities.

Consequently, education and training in space-related disciplines are increasingly critical to prepare a skilled workforce capable of meeting the evolving demands of the industry. This development not only boosts industrial capabilities but also fosters innovation and economic growth.

Investments

Space innovations goes beyond what is actually being tested

Government vs. Commercial investments

2020 to 2025:

Government and commercial investments rise, with a larger boost in commercial spending. This period sees large-scale satellite launches, space tourism, and environmental monitoring. The graph shows a 69% growth in total investment, driven by connectivity, navigation, AI services, and sustainability efforts.

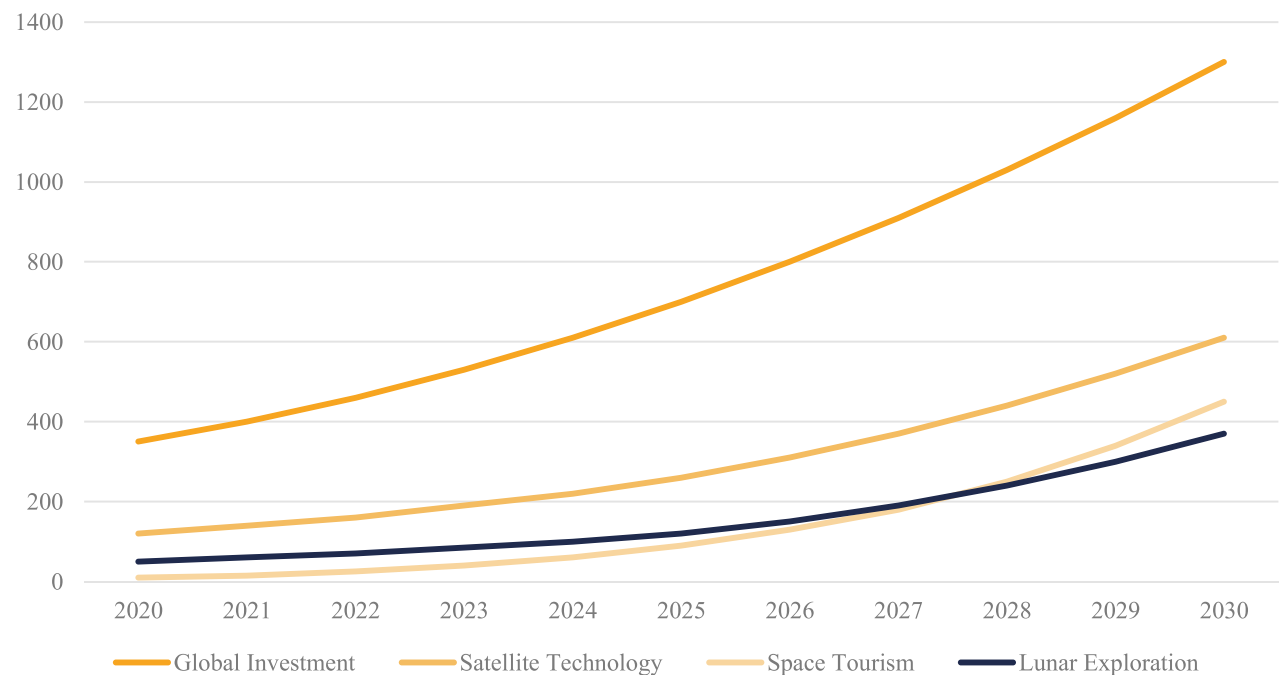
Investments enhance connectivity and practical applications like logistics and environmental monitoring, marking significant commercial expansion.

2025 to 2030:

Investments continue to grow, with commercial spending outpacing government funding. The private sector leads in space tech and exploration, driven by improved satellite networks and AI, benefiting industries like environmental monitoring. The graph indicates a 59% growth in total investment, led by commercial sector investments focusing on environmental solutions.

Advanced satellite technology and AI drive growth, addressing global challenges like climate change, with the commercial sector leading the expansion.

Expected space investments, in billions USD



AI Technologies

AI technology refers to computer systems that can perform tasks requiring human intelligence, such as understanding language, recognizing patterns, and making decisions. It includes methods like machine learning, which enables systems to learn and improve from experience.

General

Job displacement and creation: AI expected to create 170M jobs, and displace 92M jobs by 2030, which is equal to an increase of 7% the global employment

AI technology investments

- Investments in AI technologies are expected to reach \$500 billion annually by 2030, with a CAGR of 15,7% within HR tech.
- The economic impact of AI technologies may potentially add up to \$15.7 trillion to the global economy by 2030

Labour market impact

- **Job growth:** AI specialist jobs has outpaced all jobs since 2016, with AI jobs growing 3.5 times faster than all jobs.
- **Job displacement and creation:** AI expected to create 170M jobs, and displace 92M jobs by 2030, which is equal to an increase of 7% the global employment.
- **Changes in jobs and skills:** The job market will shift towards roles requiring digital skills, creativity, and emotional intelligence, with high demand for AI and data specialists. Many workers may need to change occupations during the upcoming years, where a focus on up- and reskilling is needed.
- **Skills based hiring:** As AI and digital transformation evolve job roles, traditional hiring based on degrees and experience often falls short. Focusing on skills allows companies to adapt quickly to market changes and fill critical gaps..
- **Income inequalities and economic disparities:** AI could widen income inequalities by benefiting high-skill workers and tech-savvy industries while disadvantaging low-skill workers, necessitating policy interventions



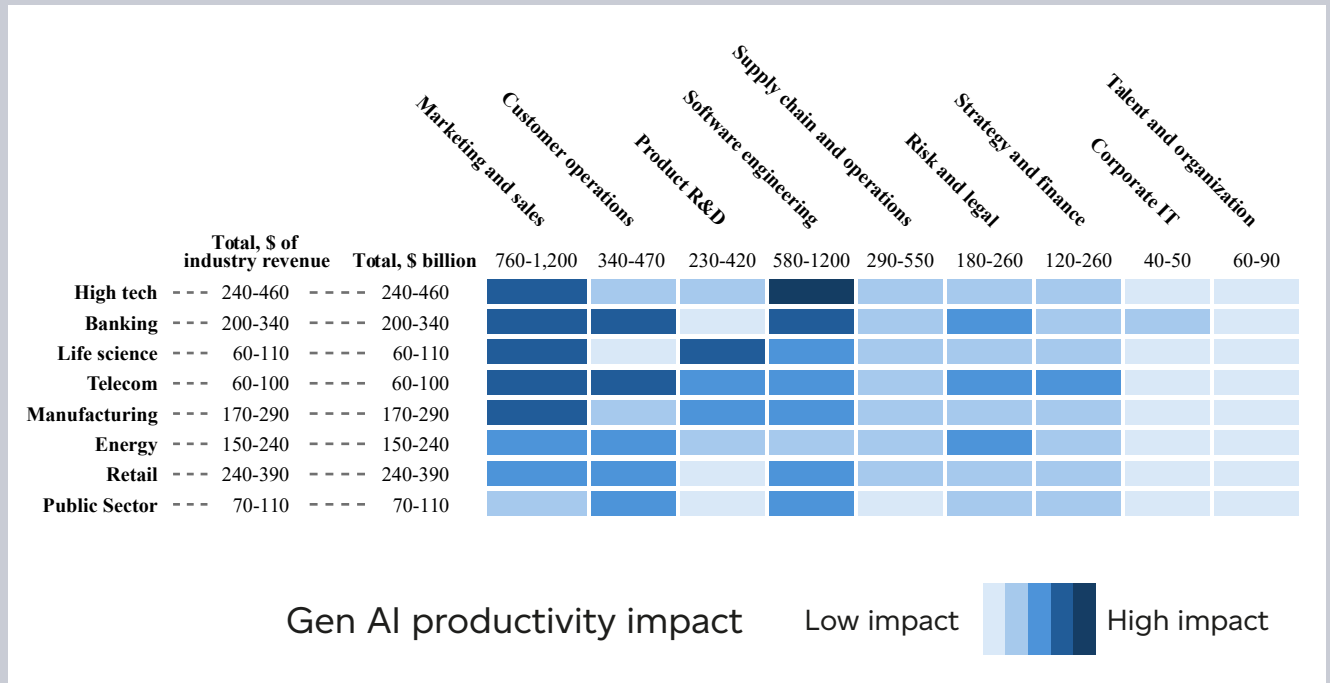
Recommendations to stay employable and competitive

- **Lifelong learning programs:** Investing in retraining programs to develop the necessary AI skills within the existing workforce is crucial, both hard- and soft skills.
- **Focus on data strategy:** Develop robust data infrastructure and governance policies to ensure quality and security in AI deployment
- **Encouraging innovation and entrepreneurship:** Experiment with and pioneer new uses of AI. Look beyond existing tasks to find innovative ways to create value and augment workers and processes.

Productivity

Gen AI impact on productivity for selected industries and its functions

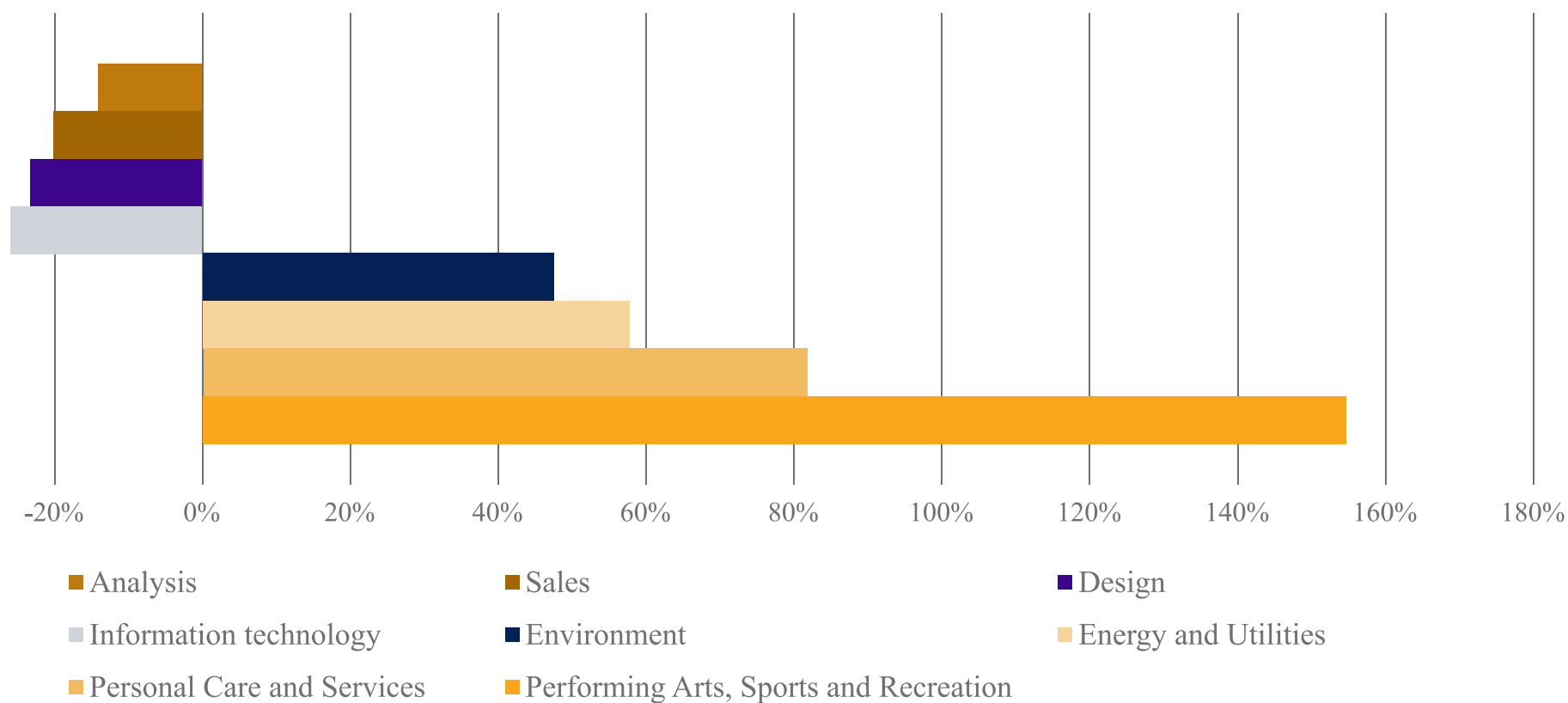
- **High impact industries:** Generative AI will have a substantial impact on high tech, banking, and life sciences, potentially contributing up to 9.3% of industry revenue.
- **Key functions:** Significant benefits will be seen in marketing and sales, customer operations, product R&D, and software engineering.
- **Economic potential:** The total economic potential of generative AI across these sectors ranges from \$760 billion to \$1,200 billion.
- **Productivity enhancement:** AI's transformative capacity will enhance efficiency, innovate processes, and drive significant economic value across diverse functions and industries.



Skills

Skills that AI cannot replicate (yet) are the fastest growing skills categories

Fastest vs Slowest growing skill categories



Sustainability

The practices that meet current needs without compromising the ability of future generations to meet their own needs, focusing on balancing environmental health, economic growth, and social well-being. It involves reducing resource consumption, minimizing waste, and ensuring long-term ecological balance.

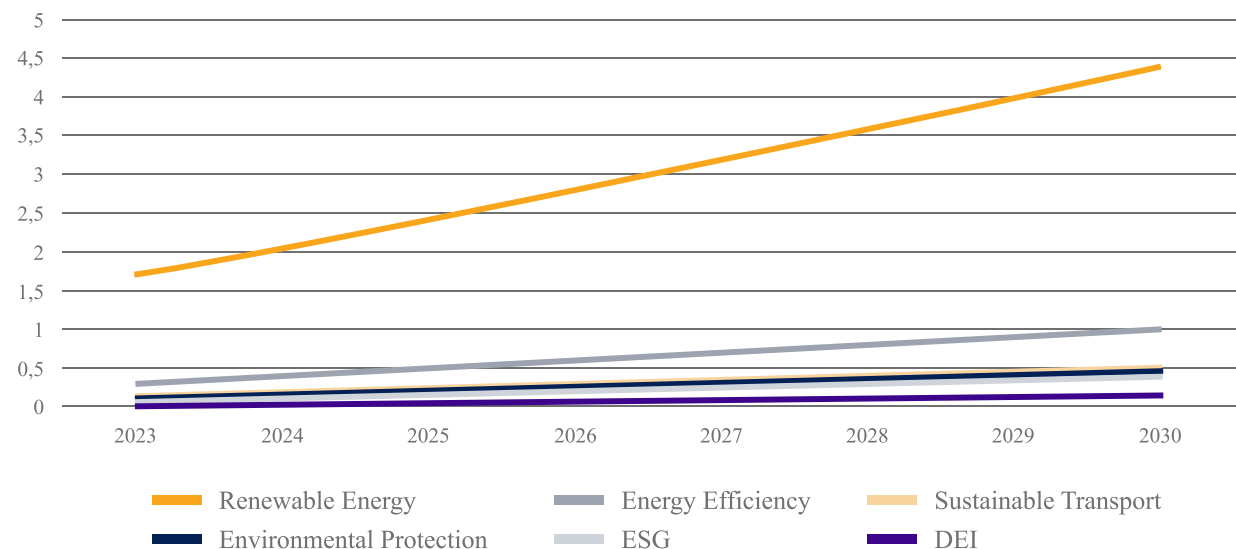
General

EU Commission to invest €1 trillion in sustainable investments until 2030 to meet the Green deal targets

Focus and investment areas

- **Renewable energy:** Expansion of solar, wind, and other renewable energy sources, with substantial job growth in these sectors.
- **Energy efficiency:** Development of skills and technologies to improve energy use across various industries.
- **Sustainable transport:** Growth in electric vehicle (EV) production and related infrastructure, creating demand for skills in EV technology and sustainable transport planning.
- **Environmental protection:** Increased roles in environmental auditing, ecosystem management, and sustainable procurement to ensure businesses adhere to environmental regulations and practices.
- **ESG (Environmental, Social, Governance):** Companies are integrating ESG criteria to attract investors and build customer loyalty, focusing on sustainability reporting and regulatory compliance. Growth in roles related to sustainability strategy, ESG reporting, and compliance is expected.
- **Diversity, Equity, and Inclusion (DEI):** DEI initiatives are essential to ESG strategies, promoting fair labor practices and diversity. Investment in DEI training and policy development is growing, emphasizing social sustainability

Investments in trillions USD



Green jobs

The green transitions is expected to create 4 million jobs in EU by 2050

Green jobs defined as jobs that:

- Protect ecosystems and biodiversity
- Reduce Energy, Materials, and Water Consumption
- Reduce Greenhouse Gas Emissions
- Minimize Waste and Pollution

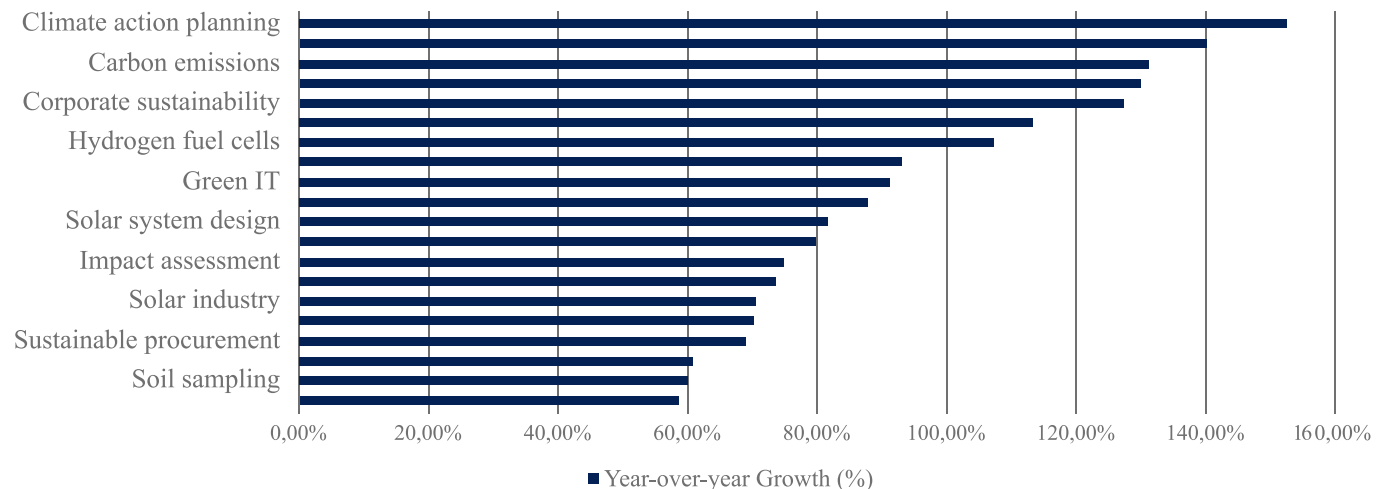
Reasons for growth:

- **Policy and Regulatory Drivers:** Ambitious targets for net-zero emissions by 2050 are pushing countries to implement policies that promote green jobs.
- **Economic incentives:** Trillions of dollars are being invested annually in sustainability and green initiatives, driving job creation in these areas.
- **Corporate strategies:** Businesses are integrating ESG criteria and transitioning to sustainable practices, further increasing the demand for green skills.

Green job challenges

- **Skills gap:** There is a significant shortage of workers with the necessary green skills, with job postings outpacing the number of qualified candidates.
- **Gender disparity:** Women are underrepresented in green jobs, with only 1 in 10 women possessing at least one green skill compared to 1 in 6 men.
- **Economic transitions:** The shift to a green economy involves complex transitions in labor markets, requiring substantial reskilling and upskilling initiatives.

Fastest growing green skills in EU (2022)



Robotics

Robotics involves designing and using machines, called robots, to perform tasks traditionally done by humans, from simple repetitive actions to complex, decision-based operations. These robots are often equipped with advanced technology like AI, allowing them to operate autonomously or semi-autonomously in various environments.

General

Driving efficiency, enabling growth and transforming work

Market size

The global robotics market size is projected to grow from \$27.73 billion in 2020 to \$74.1 billion by 2026, at a CAGR of 17.45%. Industry companies are expected to allocate around 25% of their spending on robotics and automation

Key growth drivers

- **Technological innovation:** Advances in AI, machine learning, and sensor technologies are driving robotics growth.
- **Economic efficiency:** Robotics adoption leads to cost reductions and increased efficiency, with potential savings of up to 30% in various processes.
- **Labor market dynamics:** Addressing labor shortages, particularly in regions with aging populations, is a significant driver for adopting robotic solutions.
- **Consumer Demand:** The growing demand for faster, more reliable, and personalized services propels the adoption of robotics, particularly in e-commerce.



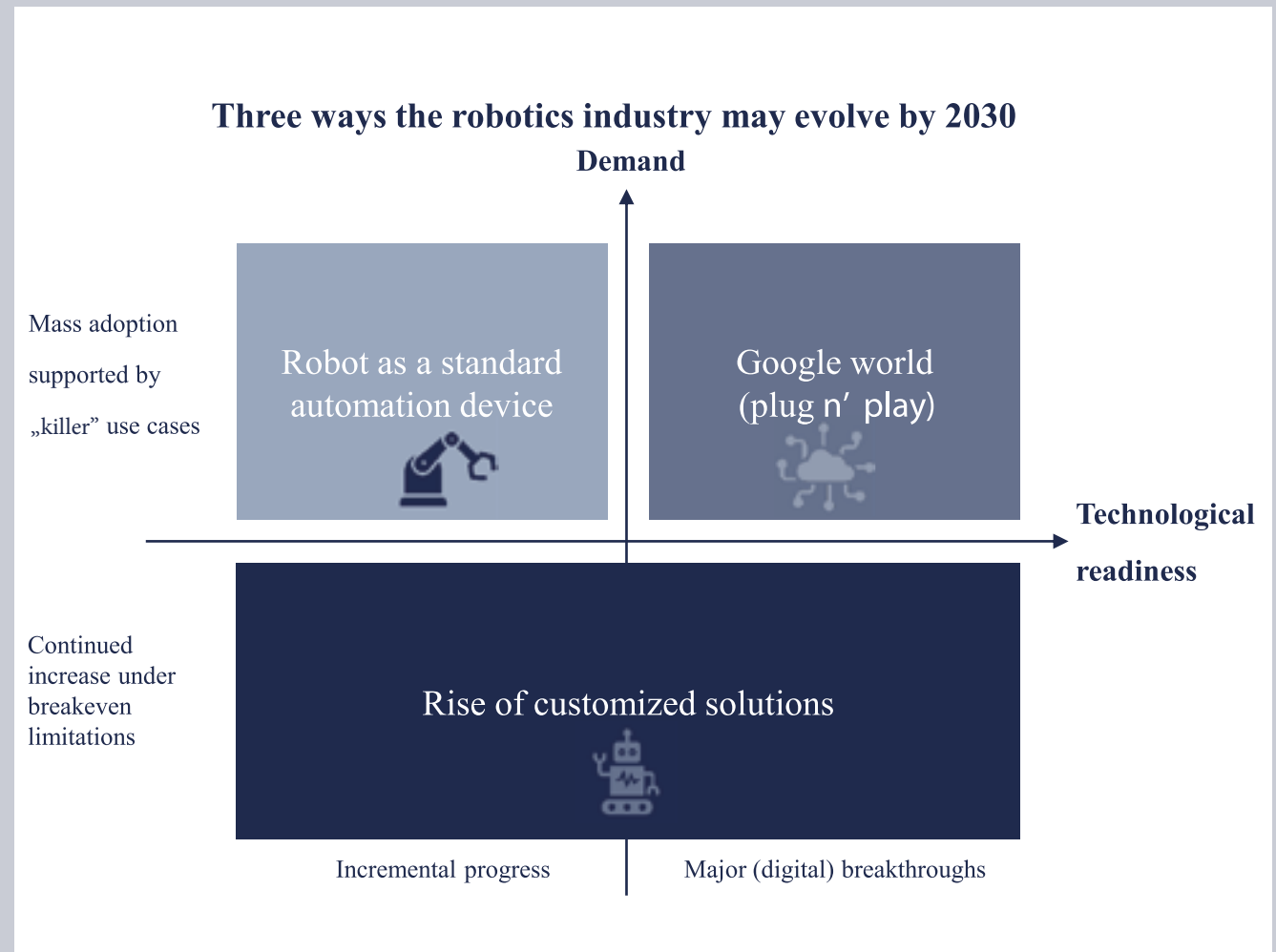
Labor market impact

- **Job displacement and creation:** Robotics will displace repetitive and hazardous jobs but create new roles in maintenance, programming, and oversight. Upskilling will be essential.
- **Enhanced productivity:** Robotics boosts productivity by performing tasks more efficiently, leading to cost savings and scalable operations.
- **Safety improvements:** Robots can perform dangerous tasks, reducing workplace injuries by up to 20%, enhancing worker safety, and lowering healthcare costs.
- **Workforce demands:** The demand for STEM-skilled workers will grow, necessitating a 25% increase in STEM graduates by 2030.

Use cases

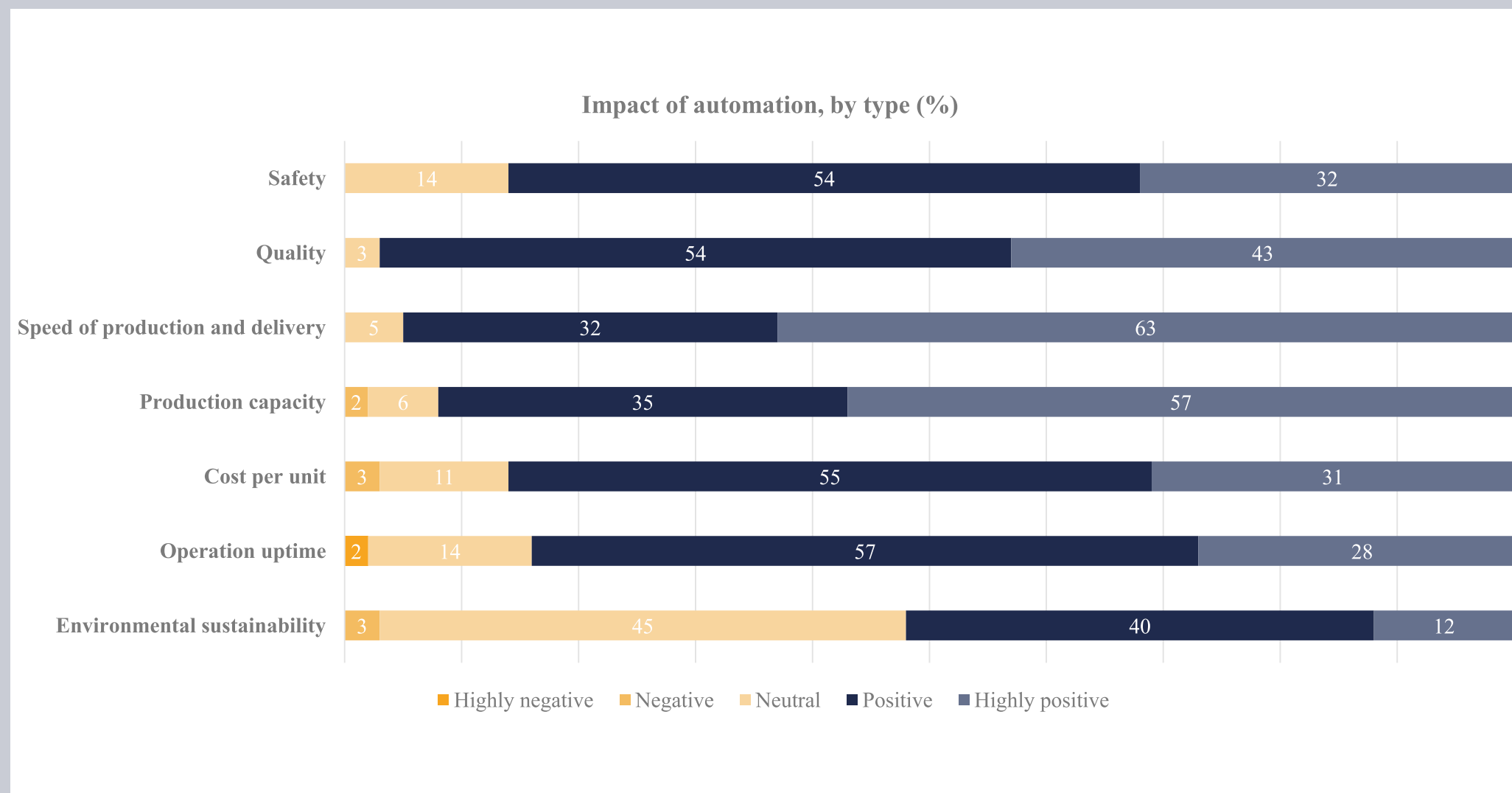
From customized precision to universal tools

- **The rise of customized solutions:** Robotics will see an increase in tailored solutions, allowing robots to be adapted for specific tasks and industries, enhancing efficiency and effectiveness in niche applications.
- **Google world:** The integration of robots into interconnected systems will enable seamless communication and data sharing, similar to how Google integrates various services, creating a more intelligent and responsive robotic ecosystem.
- **The robot as a standard automation device:** Robots will become standard automation tools across industries, much like computers and smartphones, streamlining operations and reducing costs universally.



Impact

Automation drives significant gains in safety, quality, and operational efficiency



Biotechnology

Biotechnology is the use of living organisms, cells, and biological systems to develop products and technologies that improve health, agriculture, and industry. It involves techniques like genetic engineering, bioengineering, and the application of artificial intelligence to create innovative solutions for real-world problems.

General

Biotechnology is set to significantly change the future of work and society by 2030

Growth potential

The global biotechnology market was valued at USD 1.55 trillion in 2023 and is expected to grow at a compound annual growth rate (CAGR) of 13.96% from 2024 to 2030 to USD 3.88 trillion. This is driven by innovations in nanobiotechnology, tissue engineering, and regenerative medicine, synthetic biology and genome editing (personalized medicine).

Key growth drivers

Nanobiotechnology and synthetic biology and genome editing

- Nanobiotechnology is growing quickly due to advancements in nanomedicine for diagnostics and treatment.
- Innovations like CRISPR has the potential to improve treatments in healthcare and increasing food production in agriculture

Integration of AI and data analytics (the combination that drives the need for strategic planning in human skills)

- AI revolutionizing biotechnology: AI enhances research, speeds up drug discovery, aids organ transplants, and improves precision medicine and biotech operations.
- Data analytics is essential for streamlining research, building predictive models, and gaining insights for efficient goal achievement.

Impact on the labor market and society

Job Creation and Skill Requirements:

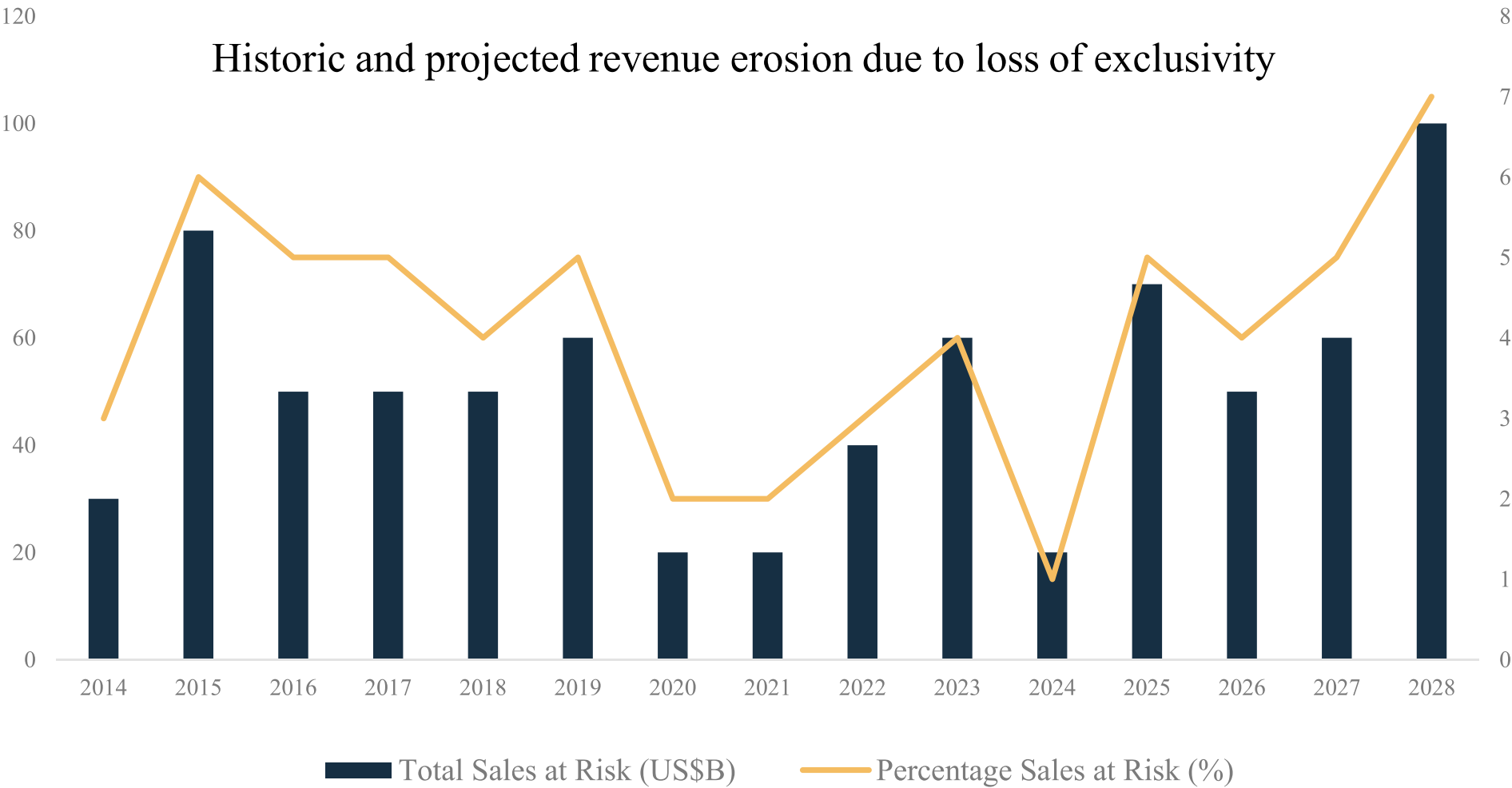
- **High-skilled workers needed:** There is a growing need for workers with advanced skills in science, technology, engineering, and mathematics (STEM) fields, including bioinformatics, genetic counseling, and biomanufacturing.
- **Education and training:** Robust education and training programs are essential to provide the workforce with the necessary skills.
- **Interdisciplinary knowledge:** Workers need to combine knowledge of biology with computational and engineering skills.

Economic and Social Impacts:

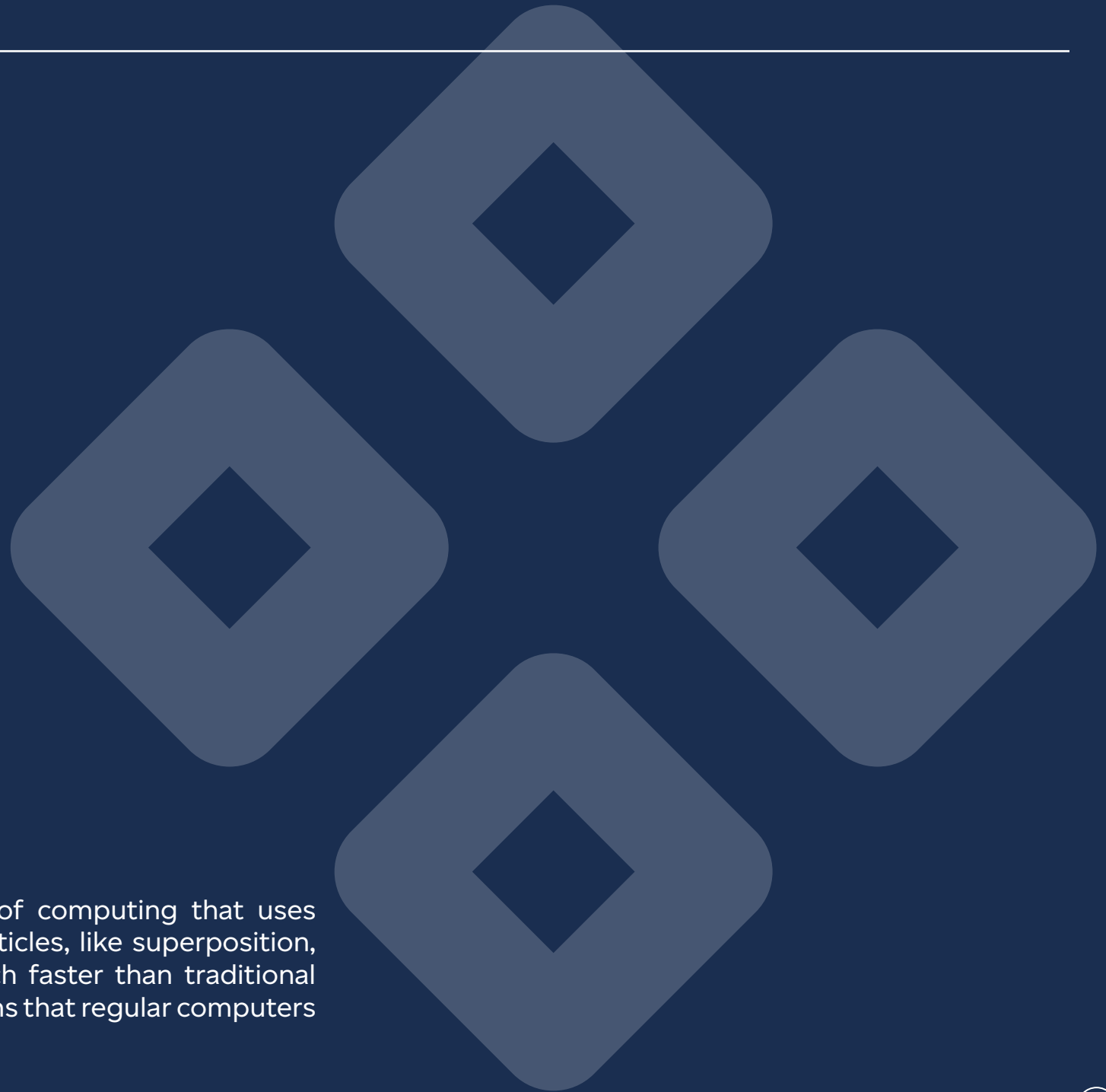
- **Global challenges:** Biotechnology can help address major global issues like climate change, food security, and public health.
- **Agricultural advancements:** Improvements in agricultural biotechnology can boost crop yields and nutritional quality, enhancing global food security.
- **Healthcare innovations:** Developments such as immunotherapy and personalized medicine are leading to more effective treatments and better public health outcomes.

Market competitiveness

Market challenges and revenue shifts in the pharma industry



Quantum Computing



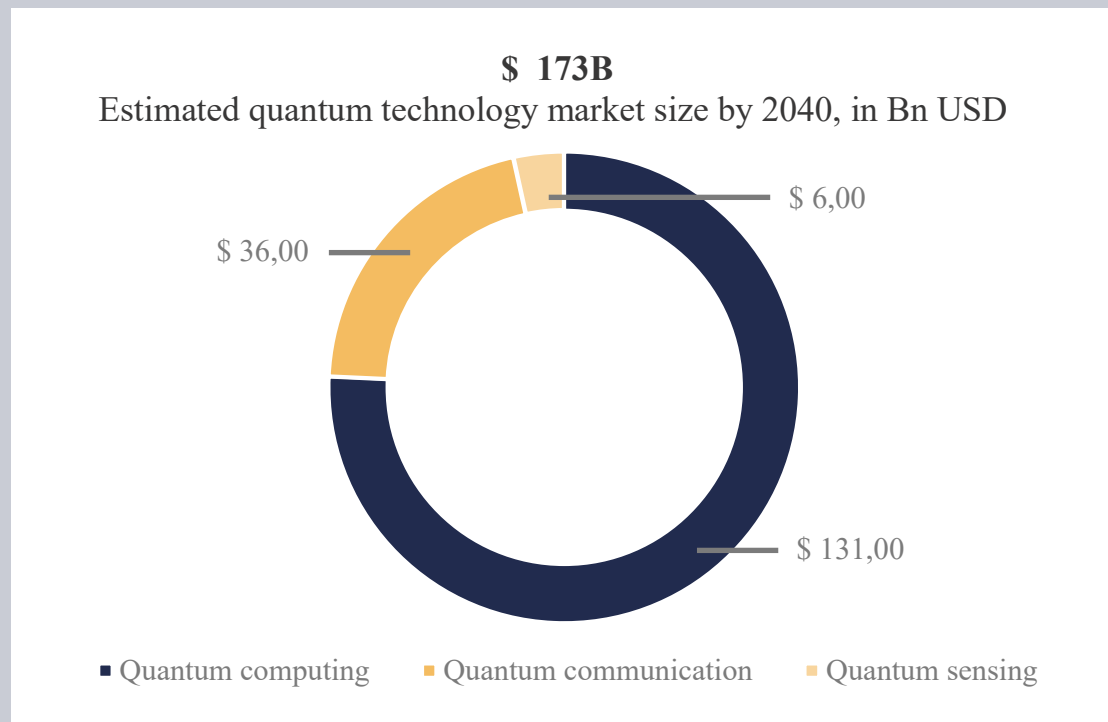
Quantum computing is a new type of computing that uses the unique behaviors of quantum particles, like superposition, to perform complex calculations much faster than traditional computers. It can solve certain problems that regular computers can't handle efficiently.

General

Superpositions: 1 and 0 at the same time

Market growth

The quantum computing market is expected to grow rapidly, potentially reaching \$65 billion by 2030, and \$173 by 2040 (with \$42B from government investments). The quantum field may potentially revolutionize industries like pharmaceuticals, materials science, and finance, while it create high-tech jobs.



Quantum technology areas

- **Quantum computing (QC):** Quantum computing uses the principles of quantum mechanics, like superposition, to perform complex calculations much faster than traditional computers. This new type of computing can solve problems that regular computers can't handle efficiently, opening up new possibilities in various fields such as drug discovery and encryption.
- **Quantum communications (QComms):** Quantum communications involve the secure transfer of information using quantum mechanics. This technology ensures that data can be transmitted safely across distances, as it can detect any eavesdropping attempts. Quantum cryptography, a key part of this field, promises to make communications theoretically tamper-proof.
- **Quantum sensing (QS):** Quantum sensing uses quantum systems to build highly sensitive sensors. These sensors can measure things like gravity, time, and electromagnetic fields with much greater accuracy than traditional sensors, making them useful in fields like navigation and medical imaging.

Industry benefit

The finance and life-science sector may experience the highest value from quantum computing



Problem archetype	Finance	Life science	Aerospace and defense	Chemicals	Travel, transport and logistics	Automotive and assembly	Electric power and natural gas
Factorization	Disruptive impact	Significant impact	Disruptive impact	Significant impact	Incremental impact	Significant impact	Significant impact
Quantum simulation	Incremental impact	Disruptive impact	Incremental impact	Disruptive impact	Incremental impact	Incremental impact	Incremental impact
Optimization	Disruptive impact	Disruptive impact	Incremental impact	Significant impact	Disruptive impact	Incremental impact	Incremental impact
Quantum ML and AI	Disruptive impact	Incremental impact	Significant impact	Incremental impact	Incremental impact	Incremental impact	Incremental impact
Sampling and search	Disruptive impact	Significant impact	Significant impact	Significant impact	Incremental impact	Incremental impact	Significant impact

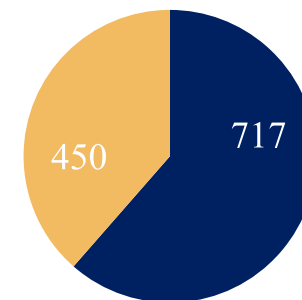
Skills

Demand for quantum skills outpace the quantum skills supply by 2/3

Changes in skills needed to fulfill the needs within

- **Quantum mechanics:** Understanding the principles of quantum mechanics is essential for developing and working with quantum computers.
- **Quantum programming:** Proficiency in quantum programming languages such as Qiskit, Cirq, and Q# will be crucial. These languages are used to write algorithms that run on quantum computers.
- **Cryptography:** Knowledge of quantum-resistant cryptographic methods will be vital to protect data against quantum threats.
- **Advanced computer science:** Skills in areas such as algorithm design, data structures, and parallel computing will be necessary to develop quantum software and applications.

Upskilling is needed to close the quantum technology gaps



■ Number of active job postings as of Dec 2022

■ Number of quantum technology master's-level graduates yearly

Upskilling the annually ~350 000 quantum technology relevant field graduates are needed. EU has the most available quantum computing talents.

AR/VR

AR (Augmented Reality) and VR (Virtual Reality) are technologies that create immersive experiences: AR overlays digital content onto the real world using devices like smartphones or AR glasses, while VR completely replaces the real world with a simulated environment using VR headsets. These technologies are used in various fields such as gaming, education, healthcare, and retail to enhance interaction and engagement.

General

AR sees the biggest growth

Investments and growth

Investments in 5G and edge computing are crucial for enhancing AR/VR capabilities by providing the necessary bandwidth and low latency for real-time applications. Continued advancements in AI will also drive the development of more intelligent and interactive AR/VR applications.

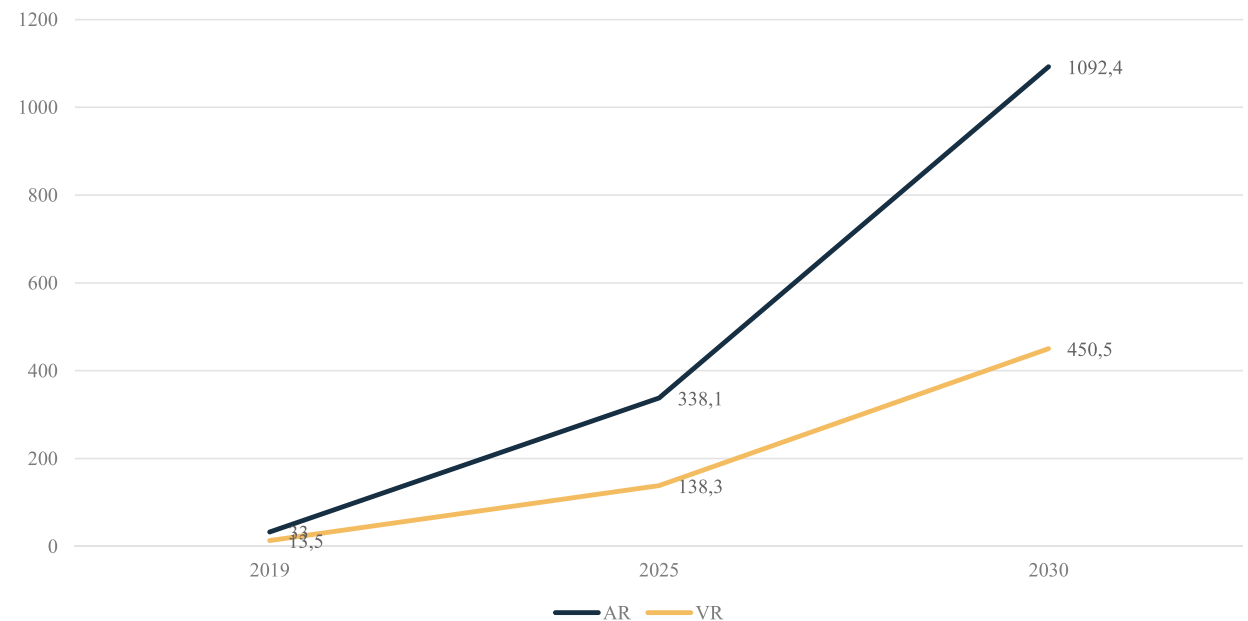
Economic impact

The AR/VR market is projected to grow substantially, contributing significantly to global GDP and transforming various industries by improving efficiencies and creating new business models.

Societal benefits

AR/VR has the potential to enhance quality of life through improvements in healthcare, education, and general accessibility. These technologies provide immersive experiences that were previously unattainable, broadening horizons for learning and interaction.

Estimated growth in billion USD



AR is expected to grow faster than VR because it enhances the real world rather than replacing it, making it more practical for everyday use and accessible with common devices like smartphones.

Job enhancements

Enhancing 23 360 639 jobs globally

Job transformation and creation

The rise of AR/VR will lead to the creation of new job roles such as AR/VR developers, designers, and content creators. Traditional roles will also evolve, requiring new skill sets to work with these technologies. For instance, roles like XR Immersion Counselors and Metaverse Architects will become prevalent, reflecting the shift towards immersive and virtual environments.

Skills Evolution

There will be a heightened demand for digital skills, particularly in programming, 3D modeling, and understanding AR/VR hardware and software.

Soft skills such as creativity, problem-solving, and adaptability will become increasingly important as these technologies permeate different sectors.



Professions expected to be enhanced by AR/VR

- Manufacturing workers
- Healthcare professionals
- Field service technicians
- Retail associates
- Architects and construction workers
- Educators and trainers
- Sales and marketing professionals

5G/6G

5G is the fifth generation of mobile network technology that delivers significantly faster speeds, lower latency, and the capacity to connect many more devices simultaneously, enabling innovations like smart cities, autonomous vehicles, and telemedicine. 6G is the next generation expected to enhance these capabilities further by integrating advanced technologies like artificial intelligence and edge computing for even more sophisticated applications.

General

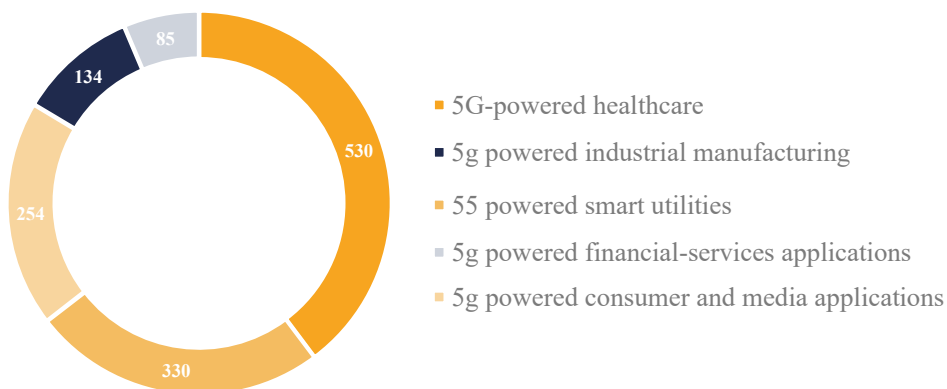
5G the backbone industrial Internet

Growth potential

Expected to contribute \$1.3 trillion (1% GDP uplift) to global GDP by 2030. Significant investments are being made in infrastructure and application development:

- **Vodafone and Ericsson:** Collaborating on 5G network deployment across Europe, aiming to enhance industrial IoT, smart grids, and healthcare services
- **Deutsche Telekom:** Investing in 5G infrastructure to improve connectivity and support innovations in autonomous driving and smart cities

5g boost to global GDP by industry by 2030 (Bn USD, 2019 values)



The importance of 5G and 6G

5G

- **Technology enhanced connectivity:** 5G offers significantly higher data transfer speeds, reduced latency, and the ability to connect a vast number of devices simultaneously. This is crucial for enabling new applications such as autonomous vehicles, smart cities, and telemedicine.
- **Economic growth:** By improving efficiency and productivity across various sectors, 5G is expected to contribute significantly to global GDP growth. Industries like healthcare, manufacturing, and utilities will benefit from 5G-enabled innovations.
- **Innovation catalyst:** 5G serves as a foundational technology that supports the advancement of other emerging technologies such as AI, IoT, and edge computing. This integration allows for more sophisticated and responsive applications.

6G (still in R&D phase, expected rollout by 2030)

- **Speed and latency:** 6G is expected to significantly outperform 5G in terms of speed and latency, enabling more instantaneous data transmission and real-time processing.
- **Technological integration:** 6G may integrate more advanced technologies like AI, edge computing, and enhanced IoT capabilities, allowing for more complex and autonomous systems

General

5G the backbone industrial Internet

Job creation examples



Technology sector: The rollout of 5G will create numerous jobs in network management, software development, and cybersecurity. For example, network engineers will be in high demand to manage and maintain the new infrastructure.



Manufacturing: Increased demand for IoT devices and smart manufacturing systems will drive job growth in these areas. For instance, technicians and engineers will be needed to install and maintain these advanced systems.



Service sector: Enhanced connectivity will lead to new opportunities in telemedicine, smart city management, and digital marketing. For example, telehealth platforms will require technical support and software developers to improve service delivery.

Skills needed



- **Network engineers:** architecture, network performance and security
- **Software development:** mobile apps, cloud, API and IoT
- **Cybersecurity:** Strategies, network, architecture



- **IoT specialists:** API, sensor technologies, data analytics and wireless communications
- **Automation technicians:** automated systems and robotics, programming, maintenance and troubleshooting



- **Telemedicine professionals:** advanced telemedicine platforms, and wearable health tech
- **Smart city planners:** Urban planning, intelligent traffic systems, data analytics and IoT integration
- **Digital marketers:** utilization of real-time data, AI and AR/VR for personalized marketing campaigns

Other important skills

Artificial Intelligence, Edge Computing, Data Analytics

Future of Work



The Future of Work is being reshaped by technological advancements like automation and AI, which are fundamentally changing job roles, and the skills required to perform them. Flexible work arrangements are becoming the norm, and the emphasis on employee well-being is increasing as companies recognize its importance for productivity and job satisfaction.

Lifelong learning is critical as workers need to continuously adapt to keep pace with these rapid changes. This chapter highlights the necessity for both individuals and organizations to stay ahead of these trends to remain competitive and resilient.

Future of Work 2030



Lifelong learning

In a world where skills expire every 2.5 years, 30% of work automates, and 16 million EU jobs await by 2030, standing still means falling behind. This is not about education; it is about survival in the technological age. The future belongs to those who learn, unlearn, and relearn continuously.



Human Skills > Tools

Human skills more important than ever when up to 30% of hours worked may be automatized

As automation and AI reshape industries, tasks that require creativity, critical thinking, and emotional intelligence are becoming increasingly valuable. AI solutions are more likely to augment human abilities rather than replace them.

High-demand sectors will need advanced human skills

The largest expected job growth in health and STEM roles is connected to the increasing demand for creative and analytical skills. These sectors are evolving due to technology, and human skills will complement AI and automation.

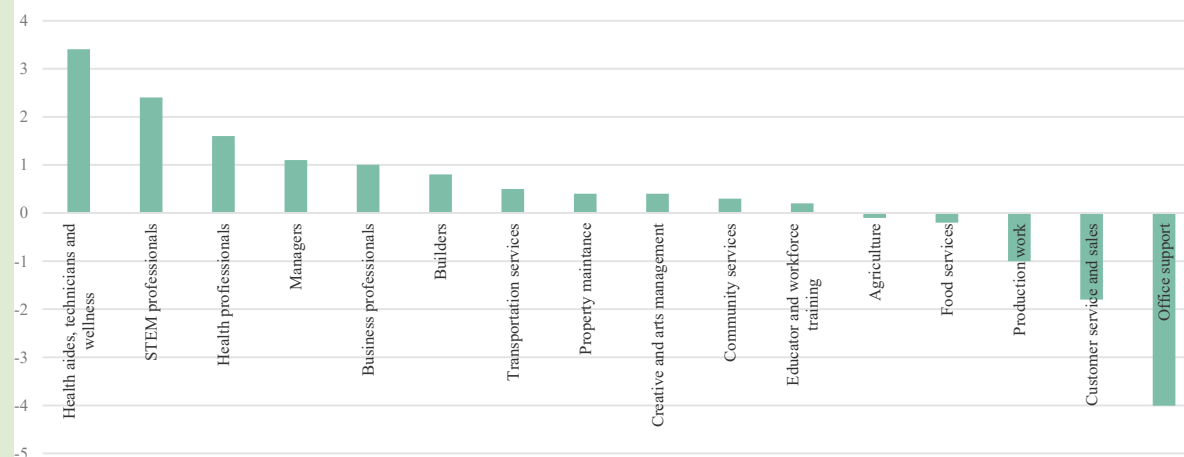
Manual and routine jobs are declining

The decline in office support and production work emphasizes the need for reskilling and upskilling to move workers into growing sectors where creativity, adaptability, and leadership are critical.

Adaptability will be crucial in slower-growth sectors

Fields with stable demand, such as community services and education, will still require strong human skills like flexibility, critical thinking, and customer service, as they continue to evolve with AI integration.

Net expected change in labor demand Europe 2022-2030
Employment change vs 2022 in millions



Transversal skills, such as critical thinking, leadership, and communication, are increasingly important because they cannot be replaced by technology. Humans will still need to make final decisions, especially in contexts where emotional intelligence, creativity, and ethics play a large role (e.g., legal professionals, educators).

Lifelong learning

Thrive and adapt: Lifelong learning for an ever-changing world

Technological advancements: Automation, AI, and generative AI are transforming industries, creating demand for continuous skill development. It is predicted that 22% of global jobs will change by 2030, with roles like AI specialists and data analysts experiencing the fastest growth.

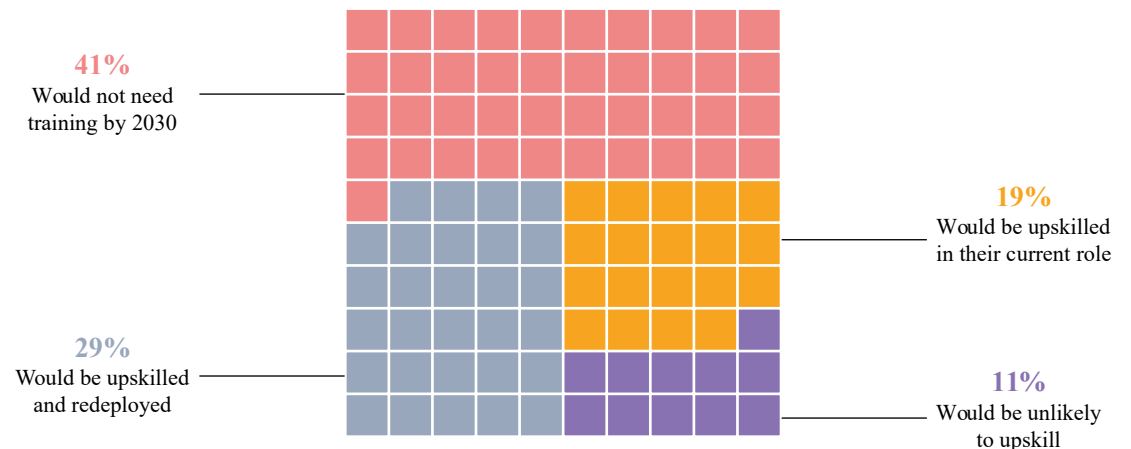
Collaboration with AI requires humans to complement technology with creativity, problem-solving, and adaptability. Training must focus on understanding AI's capabilities, limitations, and ethical implications to ensure responsible and effective AI integration.

Growing skills gap: A widening gap between worker skills and employer needs remains a critical challenge. Job requirements are increasing by 10% annually, and more than 30% of skills from three years ago are now obsolete.

Half-life of skills: Skills rapidly become outdated (as low as 2,5 years) necessitating continuous learning to maintain career relevance.

Economic shifts: Green transitions and sustainable practices are driving demand for skills in renewable energy and climate adaptation. AI's have significant impact on job creation and displacement, emphasizing the need for adaptability.

Demographical changes: Aging populations are increasing demand for healthcare and caregiving roles. At the same time, growing working-age populations in emerging markets highlight the need for scalable learning solutions to equip new entrants with relevant skills.



A critical imperative for EU Competitiveness

Closing the skills gap

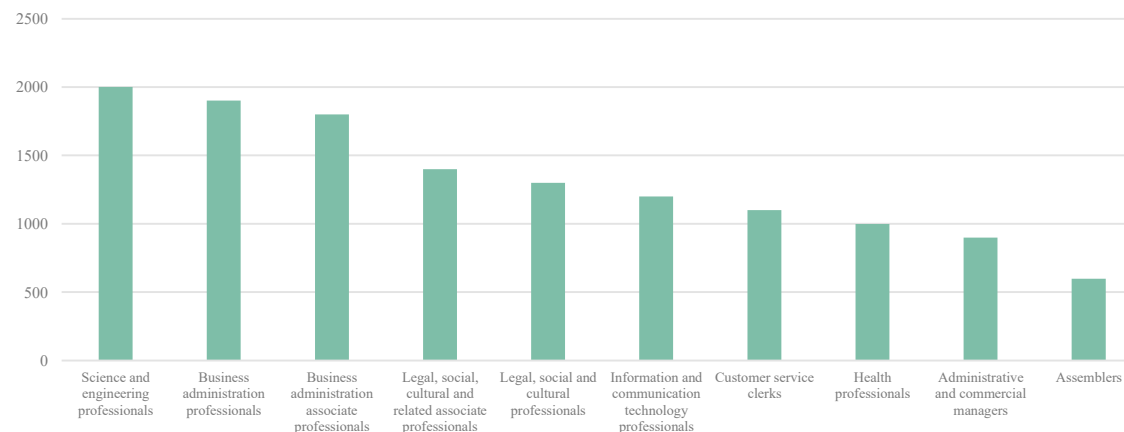
The following five strategies focus on aligning education with market needs and preparing the workforce for the digital and green economies ahead, to close the EU skills gap and boost competitiveness.

Skills intelligence and data collection: Develop a robust system to track real-time labor market needs. According to CEDEFOP, the EU could see 16 million job openings by 2030, but only if skills are aligned with industry demands. Enhanced skills data will enable more targeted educational programs and policies.

Reforming education and vocational training: Modernize curricula with a focus on STEM, digital skills, and sustainability. The European Commission estimates that 45% of all new jobs will require high-level STEM qualifications by 2030. Expanding VET programs can help meet the projected demand for 900,000 additional ICT specialists by 2035.

Boosting adult learning participation: Encourage lifelong learning through incentives, subsidies & flexible training. Currently only 11% of adults in the EU participate in regular upskilling, far below the target of 25% by 2030. Increasing this rate is crucial to meet evolving digital & green job needs.

Additional jobs created by 2035
1 000s, compared to 2022



Attracting and retaining global talent: Fast-track visas, scholarships, and global partnerships to attract skilled workers. Europe faces a 40% shortage of STEM professionals, and demand for ICT specialists is outstripping supply, with 63% of companies struggling to fill these roles. International recruitment is key to bridging this gap.

Strengthening public-private partnerships: Align industry needs with education outcomes by fostering collaboration. Currently, 54% of companies report a mismatch between available skills and labor market needs. Public-private initiatives, such as the Digital Skills and Jobs Coalition, can help bridge this gap and support more relevant training.

What does it mean in reality

Professional challenges

Career Generalists

Broad skill set without deep specialization

Key Challenges:

- Increasing demand for specialists
- Difficulty demonstrating unique value
- Career progression challenges
- Salary ceiling
- Job security concerns



High competition



Experienced professionals (45+)

White-collar professionals with extensive experience

Key Challenges:

- Roles are condensing or being eliminated
- Age discrimination concerns
- Technology rapid evolution
- Salary expectations vs. market reality
- Competition from younger, lower-cost talent

Low specialization

High specialization

Mid-career specialists

Skilled in finance, marketing, admin, or similar

Key Challenges:

- AI replacing routine specialized tasks
- Rapid skill obsolescence
- Reduced mid-level positions
- Increased competition
- Need for continuous upskilling



Entrepreneurs & Self-employed

Independent business owners and freelancers

Key Challenges:

- Reduced corporate risk appetite
- Increasing compliance requirements
- Platform economy competition
- Access to benefits and security
- Market consolidation

Low competition

Flexible work and Employee experience

Organizations that successfully implement flexible work policies and prioritize employee experience will gain significant advantages in terms of talent attraction, employee satisfaction, productivity, and overall business performance. The key lies in creating a holistic approach that addresses the multifaceted nature of employee experience, from workplace flexibility to growth opportunities and social connections.



Flexible work and Employee experience

Performance and output rather than place and time in focus

Full-time employment: Expected to decline slightly by 10-15% as flexibility becomes more important, leading workers to seek alternative arrangements.

Part-time employment: Projected to grow by 20-25%, particularly in sectors like healthcare, education, and retail, driven by the desire for better work-life balance.

Freelance and gig work: Significant expansion anticipated, with 30-40% of the workforce expected to engage in these flexible, project-based roles.

Contract and project-based work: Expected to grow by 25-30%, especially in technology and construction sectors, as companies seek specialized skills on a temporary basis.

Temporary work: Moderate growth of 10-15%, continuing to play a role in seasonal industries but growing slower than other flexible work options.

Hybrid work: Predicted to become the norm, with 70-80% of companies likely to adopt hybrid models, combining the benefits of remote and in-office work.

Remote work: Significant growth expected, with 25-30% of the workforce working remotely several days a week, particularly in Northern Europe.

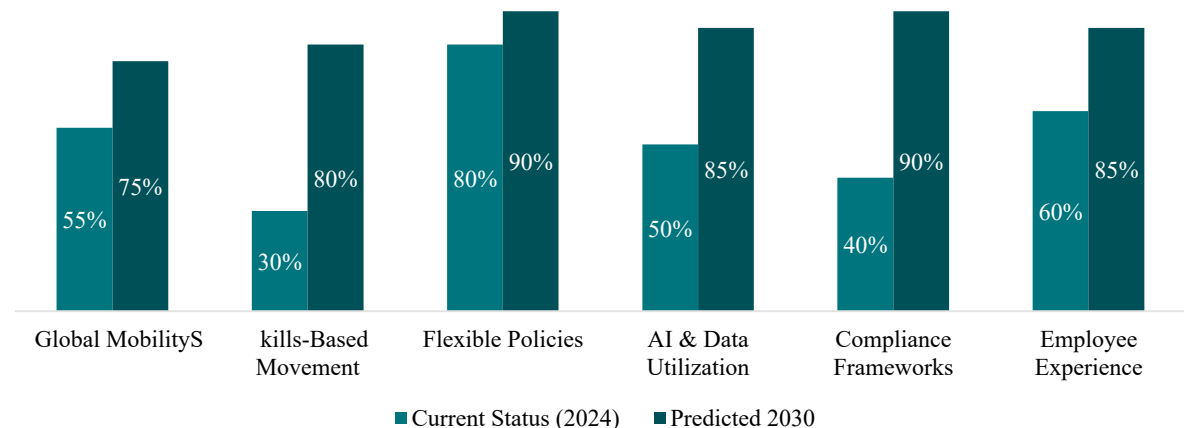
Job sharing: Moderate growth of 10-15%, particularly in sectors like public administration and education, driven by strong social policies supporting work flexibility.

Flexible Work and Employee experience

Talent mobility

- **Increased global mobility:** With the continued adoption of hybrid and remote work, companies are expected to embrace a “borderless talent market” approach. By 2030, more than 70% of companies are likely to actively seek talent beyond geographic constraints to fill skill gaps and enhance team diversity. This trend will reduce recruitment costs and attract diverse talent.
- **Focus on skills:** Organizations will move away from filling job positions based on geography and instead emphasize skills. By 2030, 80% of companies are expected to use a skills-based marketplace for hiring talent. This will be driven by the need for specialized talent, the rise of internal talent marketplaces, and the use of cross-functional gig opportunities within organizations.
- **Adaptation to remote work:** Flexible work policies that encourage hybrid and remote work models will be the primary driver of talent mobility. Currently, 80% of organizations allow some form of hybrid work, and this percentage is expected to increase, making talent movement seamless across locations.
- **AI and data utilization:** Organizations will increasingly use AI and centralized data insights to identify talent needs, skills gaps, and employee development opportunities. By 2030, more than 85% of companies will leverage real-time analytics to guide mobility strategies, enhance talent experience, and ensure cost-effective employee deployment.
- **Managing risk in a borderless workforce:** Global talent mobility will require new approaches to managing compliance, including dealing with taxation, legal, and regulatory aspects. By 2030, about 90% of global organizations will have dedicated compliance frameworks that address the needs of a distributed workforce and ensure safe and efficient talent movement.
- **Prioritizing employee well-being:** Employee experience will play a key role in talent mobility strategies, with a focus on offering personalized career paths and development opportunities. Organizations will place a greater emphasis on aligning employee well-being with talent movement to enhance retention and reduce attrition.

Talent mobility trends



Flexible Work and Employee experience

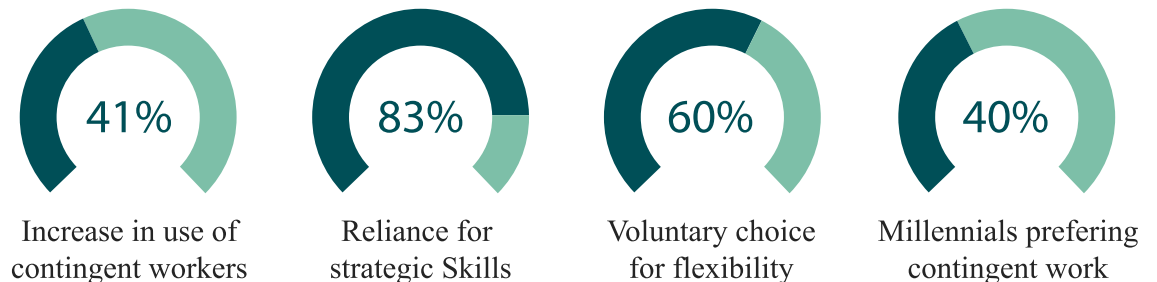
Contingent workers as a strategic workforce component

41% of companies forecast to increase their use of contingent workers:

- Contingent labour allows organizations to scale quickly without the long-term commitments associated with permanent hires
- Companies are increasingly relying on contingent workers for strategic thinking and specialized skills, with **83%** of executives reporting increased reliance on this workforce for such needs
- **60%** of contingent workers choose flexible work arrangements voluntarily, indicating a growing preference for this type of work, especially among younger generations.
- **40%** of Millennials prefer contingent work arrangements.

- Considering economic uncertainties, many companies are focusing on cost savings, time to hire and flexibility, from contingent workers
- AI and other technologies are making it easier to manage and integrate contingent workers efficiently
- Work is increasingly defined in terms of skills rather than traditional roles, aligning well with the project-based nature of contingent work
- The rise of digital nomads and remote-first companies is expanding the pool of available contingent talent globally
- **90%** of corporations cite flexibility as the key benefit of hiring contingent workers, which is crucial for adapting to market changes

Key statistics on contingent workforce trends



Flexible work and Employee experience

Drive Engagement, Productivity and Loyalty

Personalization and flexibility

- Offer customized work arrangements, schedules, and benefits to meet individual employee needs and preferences
- Provide flexibility in when, where, and how work gets done to accommodate different work styles and life circumstances
- Use technology to deliver personalized employee experiences and communications

Focus on wellbeing

- Prioritize employee mental health and work-life balance
- Offer comprehensive wellness programs addressing physical, mental, and financial wellbeing
- Culture that destigmatizes mental health issues & encourages self-care

Purpose and meaningful work

- Clearly communicate company mission and values
- Let employees understand how they contribute to larger goals
- Provide opportunities to engage in purpose-driven initiatives

Technology-enabled experiences

- Leverage AI, VR/AR, and other emerging tech to enhance the employee experience
- Provide seamless, consumer-grade digital tools and interfaces
- Use data and analytics to personalize and optimize experiences

Holistic employee experience

- Consider the entire employee journey from recruitment to retirement
- Create seamless, integrated experiences across physical and digital touchpoints
- Regularly gather feedback to continuously improve the employee experience

Other areas to consider are:

- Focus on diversity
- Equity and inclusion
- Empowering leadership
- Workspace
- Company culture and Social connections

Leadership

Yesterday, leaders managed change. Tomorrow's leaders must embody it. Between AI integration, workforce transformation, and evolving cultural demands, leadership is not just about guiding through change anymore: it is about thriving in it.



Leadership - Wellbeing & Culture

Enhancing workforce wellbeing:

A path to a balanced and productive value alignment

As the future of work evolves, prioritizing employee wellbeing is crucial for productivity and job satisfaction. Here are a few key elements to further explore to boost employee wellbeing:

Mental health and psychological safety: Prioritize mental health programs & create a psychologically safe environment

Physical health and wellness programs: Implement health screenings, fitness challenges, and ergonomic workplaces

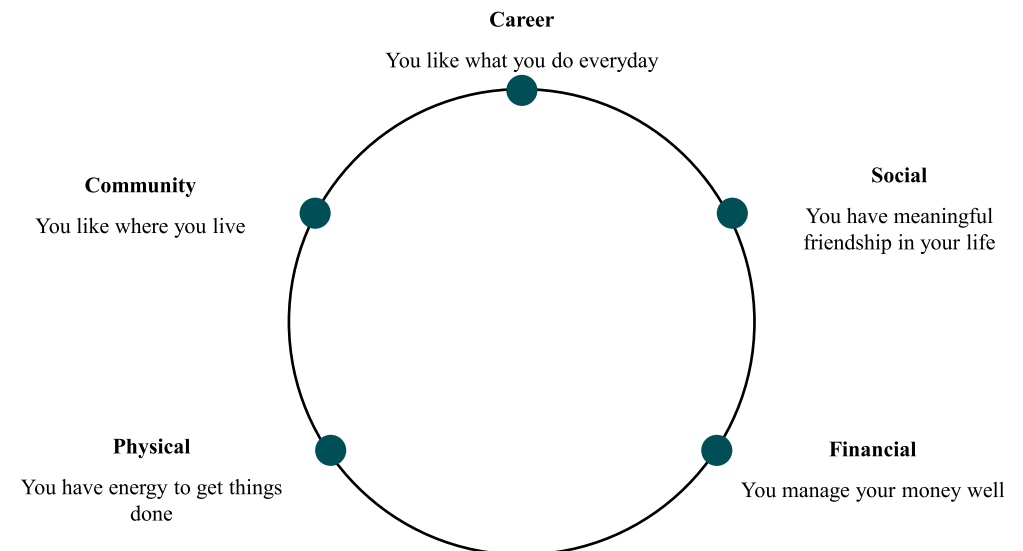
Employee experience and engagement: Provide career development opportunities & robust recognition systems

Leadership and management:

- **Inclusive leadership:** Developing leaders who promote inclusivity and value diverse perspectives is crucial for a positive work environment.
- **Employee involvement:** Encouraging participation in decision-making processes builds a sense of ownership and commitment to organizational goals

Work-Life balance

- **Flexible work arrangements:** Offering remote work options, flexible schedules, and generous leave policies helps employees achieve a better work-life balance, reducing burnout and boosting morale.
- **Time management support:** Providing tools and training on effective time management helps employees manage workloads more efficiently, reducing stress .
- **Four-day workweek:** Transitioning to a four-day workweek enhances work-life balance, reduces stress, & increases productivity due to more employee-centered work arrangements.



2016

2020

2023

2025

2030E

Leadership – Understand what may lie ahead of us

Drivers, focus areas and the key skills of tomorrow

Key skills:

- Complex problem-solving
- Critical thinking
- Creativity

Focus areas:

- Cognitive skills due to automation and digital technologies

Drivers:

- Automation
- Digital transformation

Key skills:

- Adaptability
- Emotional intelligence
- Technological proficiency

Focus areas:

- Reskilling and upskilling for remote work and digital collaboration

Drivers:

- COVID-19 pandemic
- Remote work
- Digital tools

Key skills:

- Analytical thinking
- Creative thinking
- AI and big data
- Resilience
- Flexibility
- Lifelong learning

Focus areas:

- Technological literacy
- Socio-emotional skills
- Integration of AI

Drivers:

- Post-pandemic recovery
- AI and big data
- Technological advancements

Key skills:

- Analytical thinking
- Creative thinking
- Resilience and flexibility
- Lifelong learning
- AI and big data literacy
- Leadership and social influence
- Technology use, monitoring, and control

Focus areas:

- AI adoption and governance
- Green economy and environmental stewardship
- Reskilling for digital transformation
- Diversity, equity, and inclusion
- Cybersecurity and data privacy

Drivers:

- Generative AI
- Technological advancements
- Geoeconomic fragmentation
- Rising cost of living
- Demographic shifts

Key skills:

- Advanced digital literacy
- Critical thinking and complex problem-solving
- Creativity and innovation
- Emotional and social intelligence
- Adaptability and resilience
- Lifelong learning and cognitive flexibility
- Data literacy and analytical skills
- Ethical judgment and decision-making
- Leadership and social influence
- Interdisciplinary knowledge
- AI and cybersecurity expertise

Focus areas:

- Human-AI collaboration
- Sustainable development and green economy
- Digital transformation
- Globalization and cultural competence
- Health and well-being
- Cybersecurity and data privacy
- Inclusive work environments
- Lifelong learning ecosystems
- Ethical technology use
- Remote and hybrid work models

Drivers:

- Globalization
- Cybersecurity needs
- Changing work models
- Rising cost of living
- Geoeconomic fragmentation
- Cybersecurity needs
- Changing work models

Inclusive leadership

Make sure to have all onboard

Traditional leadership development is expanding to incorporate DEI&A principles. Leaders are now expected to not only possess skills like conflict resolution and problem-solving, but also to apply these skills through a DEI lens:

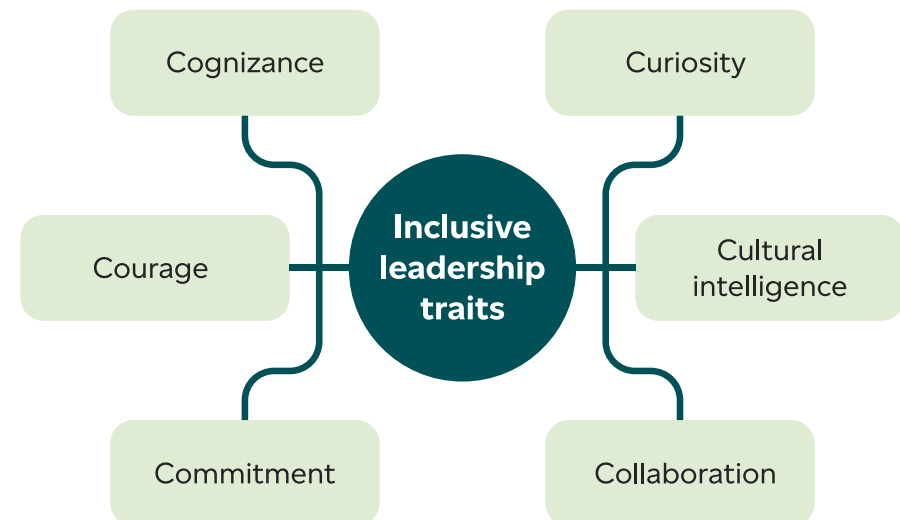
- Being able to navigate diverse perspectives in conflict resolution
- Finding inclusive solutions that consider all team members' needs
- Building trust across diverse group
- Optimizing performance while recognizing individual differences

Several key competences are essential for effective DEI&A leadership:

- Being able to navigate diverse perspectives in conflict resolution
- Finding inclusive solutions that consider all team members' needs
- Building trust across diverse group
- Optimizing performance while recognizing individual differences

Leadership to integrate DEI&A strategically includes:

- Incorporate DEI&A goals into the overall organizational vision
- Align business strategies with DEI&A principles
- Mobilize employees around DEI&A initiatives
- Set and achieve specific DEI&A-related targets with a systematic approach to track progress:
 - Establish a quantitative baseline before implementing initiatives.
 - Aspirations should be linked to specific, measurable, and forward-looking objectives.
 - Establishing routines for ongoing monitoring progress over time, allowing leaders to hold people accountable for desired outcomes.



The skills and styles

Essential skills and styles to lead in constant change

The most dramatic growth is needed in AI Integration, where leaders must advance from a current proficiency of 30% to a target of 95% by 2030. Digital fluency follows closely, requiring an increase from 40% to 90%, reflecting the accelerating pace of technological advancement in leadership roles.

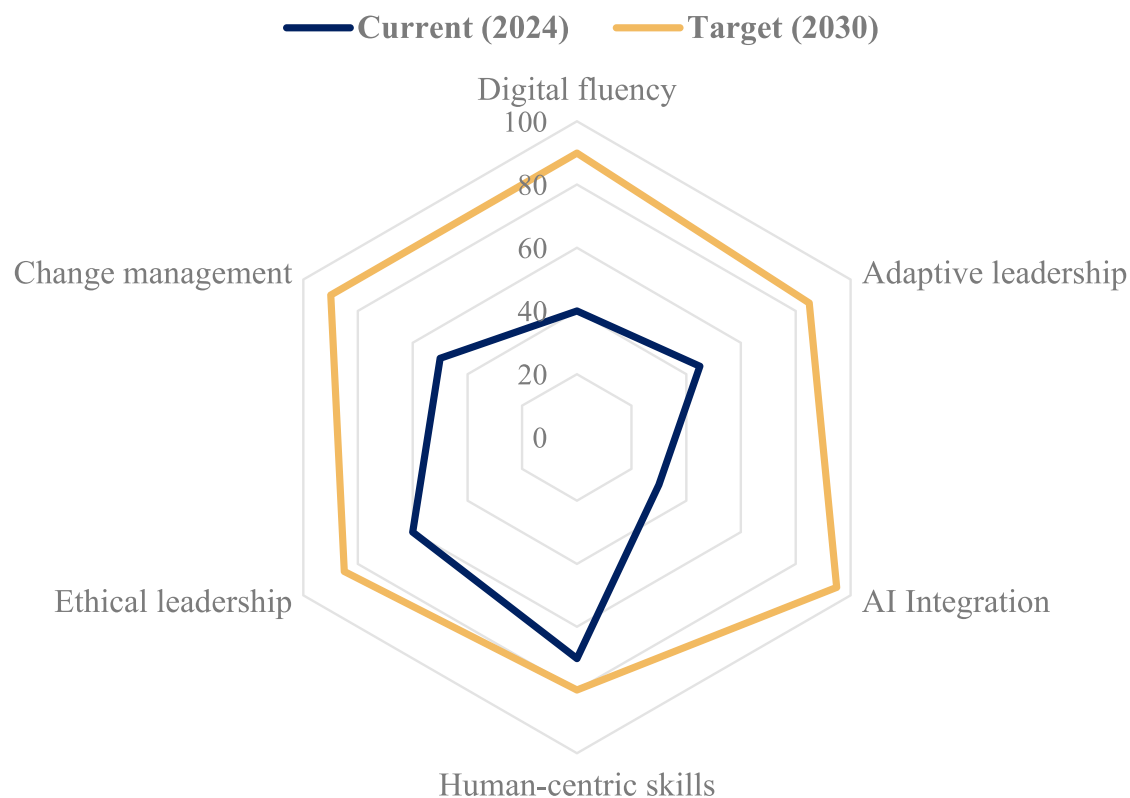
Human-centric skills show the smallest gap, moving from 70% to 80%, indicating that while technology adoption is crucial, the fundamentals of people leadership remain vital. This aligns with the growing recognition that successful future leaders must balance technological proficiency with emotional intelligence.

Ethical leadership and change management both target 85-90% proficiency by 2030, up from current levels of 60% and 50% respectively. This emphasizes the increasing importance of principled, adaptable leadership in an AI-enhanced business environment.

Strategic implications

- Learning & Development teams must prioritize AI and digital skill development
- Organizations should foster ethical decision-making frameworks for AI-integrated leadership
- Change management capabilities need significant enhancement to navigate ongoing disruption

Leadership skills evolution



The skills and styles

Essential skills and styles to lead in constant change

Digital fluency (Current: 40% → Target: 90%)

- Master digital transformation and emerging technologies
- Lead innovation in digital business models
- Harness data analytics for decision-making
- Guide virtual and hybrid team collaboration
- Drive digital strategy and execution

Adaptive leadership (Current: 45% → Target: 85%)

- Navigate through uncertainty and complexity
- Lead agile transformation
- Foster innovation and experimentation
- Build organizational resilience
- Scale change across the organization

AI integration (Current: 30% → Target: 95%)

- Develop AI strategy and implementation roadmaps
- Balance AI automation with human workforce
- Ensure responsible AI deployment
- Leverage AI for strategic advantage
- Foster AI-human collaboration

Human-centric skills (Current: 70% → Target: 80%)

- Practice high emotional intelligence
- Build inclusive team environments
- Enable personal growth and development
- Foster psychological safety
- Lead with empathy and authenticity

Ethical leadership (Current: 60% → Target: 85%)

- Ensure AI governance and ethics
- Champion sustainable practices
- Drive responsible innovation
- Maintain transparency and trust
- Balance stakeholder interests

Change management (Current: 50% → Target: 90%)

- Lead digital transformation initiatives
- Build change-ready cultures
- Manage resistance effectively
- Drive organizational agility
- Enable continuous adaptation

AI integration

Augmented leadership

Enhanced capabilities

Data-driven decisions Global studies reveal a 33% acceleration in decision-making processes where AI is effectively implemented. Leaders are leveraging real-time data processing and experiencing reduced cognitive bias in their strategic choices.

Automated tasks By 2025, we can expect a 40% reduction in administrative tasks like reporting, documentation, meeting scheduling and basic data analysis and presentation

Predictive analytics Organizations show a 25% improvement in risk management through AI-augmented leadership from:

- Advanced pattern recognition
- Sophisticated scenario modeling
- Trend prediction and analysis

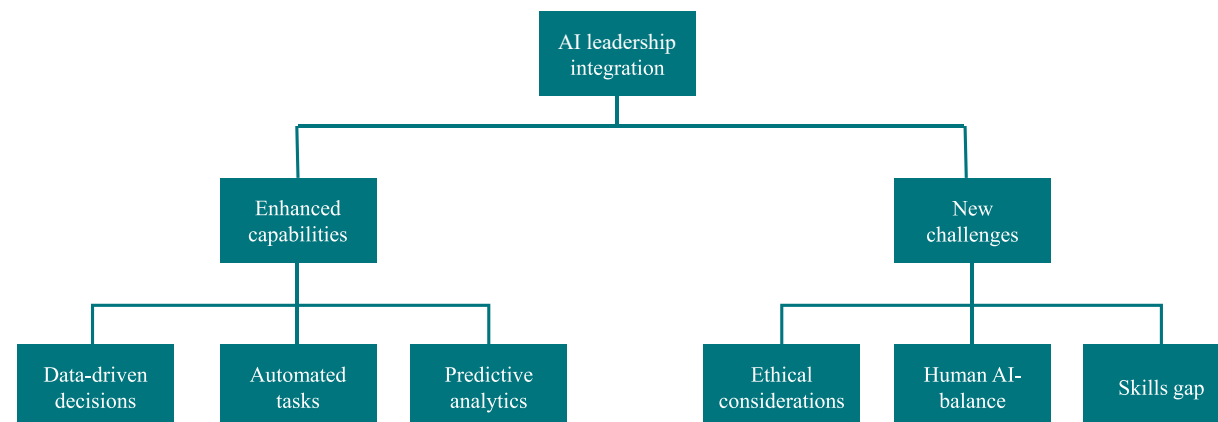
New challenges

Ethical considerations Research indicates that 71% of organizations are actively developing formal AI ethics guidelines including Data privacy protection, algorithmic bias and accountability in AI-driven decisions

Human-AI balance Current trends show 65% of organizations adopting hybrid human-AI leadership models between 2024-2027 including appropriate AI-use boundaries, human judgment for critical decisions and team trust in AI-enhanced leadership

Skill gaps Industry analysis reveals a 55% average increase in leadership development budgets, primarily focused on

- Digital literacy and AI competency
- Emotional intelligence in human-AI collaboration
- Ethical decision-making in an AI context



Trends for 2030 affecting your organization

Future of Society

Which geopolitical events affects your organization the most?

How does organization work with succession planning?

Future of Business

Which technologies are in focus?

What is your green transition strategy?

How has your business models changed?

How has the need for skills changed?

Future of Work

What is work?

What do we need to work?

How do we work?

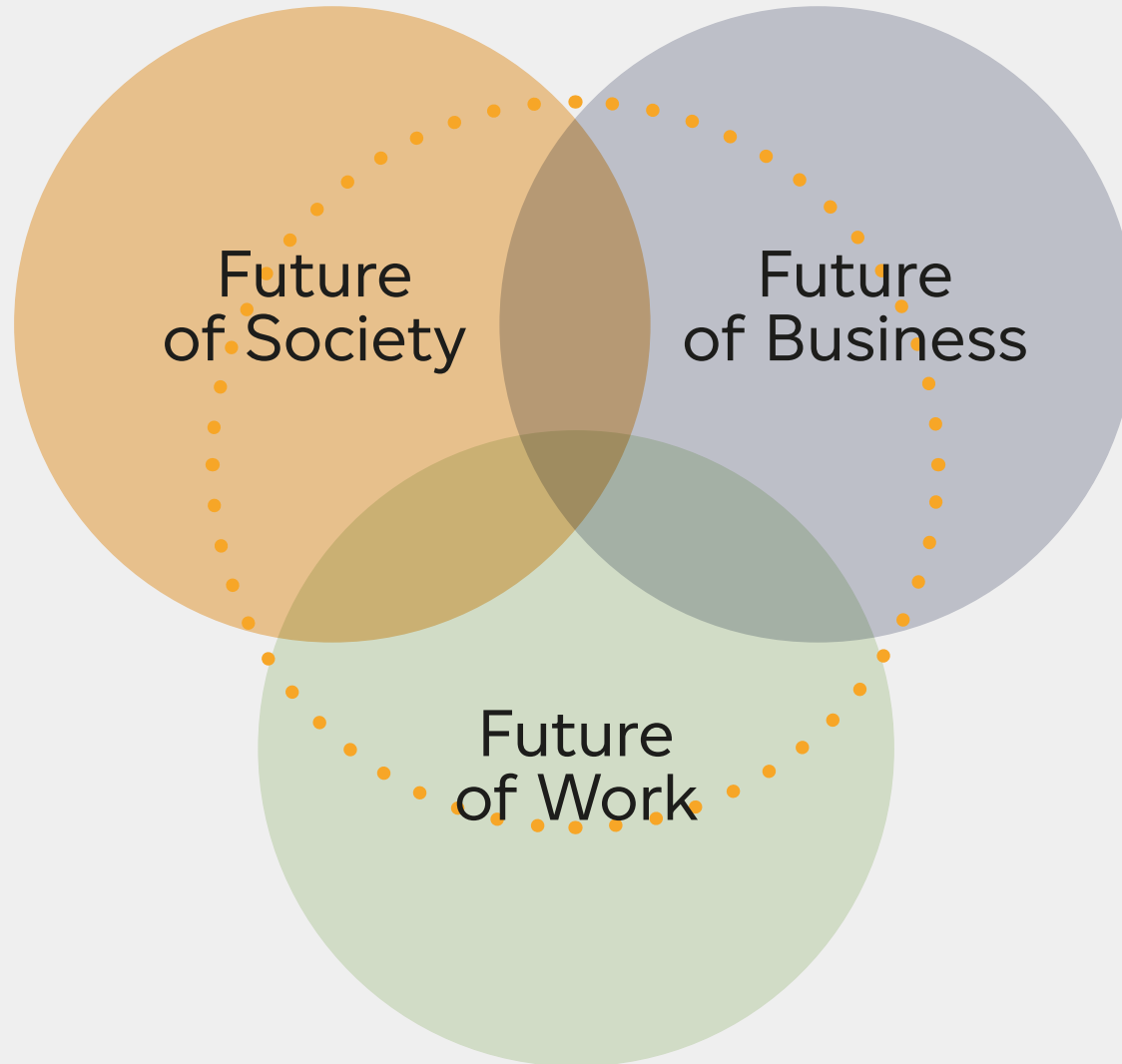
Where is work?

When is work?

Why is work?

How do we lead?

How do these trends shape your Talent Management strategies?



Appendix I - Acknowledgements

This research project has been a journey since June 2024, and I could not have done it without the incredible support and patience I have received along the way. I want to take a moment to thank everyone who has encouraged me, shared kind words, and contributed in big or small ways.

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Karin, this all started when you asked me for just three slides on some trends for 2030 to support our business strategy. I know you did not expect it to turn into this full report, but your trust in me to explore this topic further made all the difference. Thank you for the opportunity and for inspiring me to go beyond what was asked.

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To everyone who has been a part of this project, thank you. Your support has made this journey incredibly rewarding.

Andreas Meinert

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AI Technologies

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About the author

Andreas Meinert

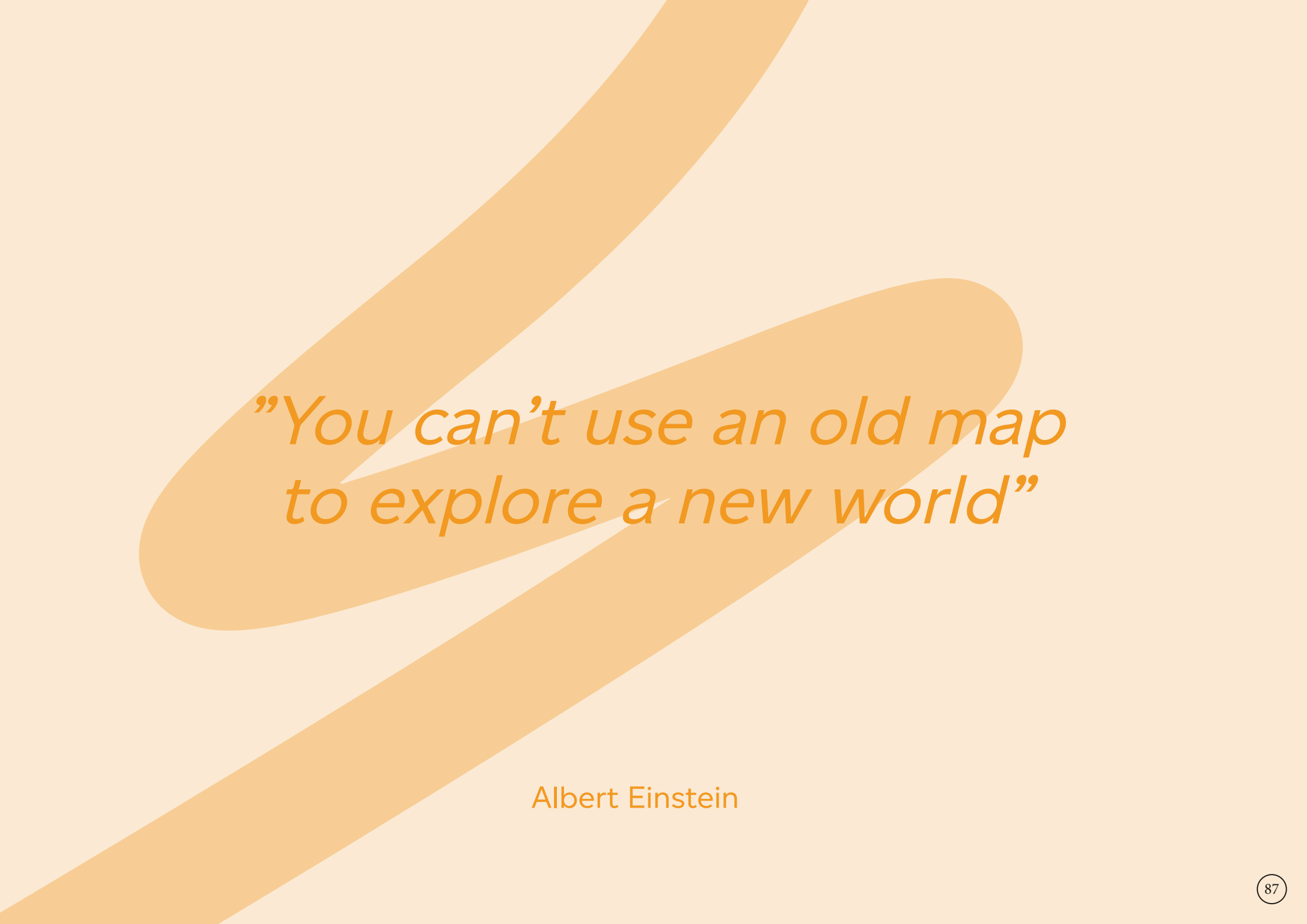
Market Insight
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Andreas is a forward-thinking leader specializing in transforming market trends into actionable business insights, with expertise in VMS (Vendor Management Systems), MSP, and Total Talent Solutions.

For the past eight years, Andreas has been a Future of Work enthusiast, consistently staying ahead of trends and turning them into valuable insights.

Andreas has an extensive background within solution selling from Lime Technologies, and holds a BSc in International Management from Jönköping International Business School.

When Andreas isn't trying to figure out what's next, he's balancing functional fitness, boxing, and, of course, chocolate, which he sees as a zero-sum game to balance the chocolate.



*“You can’t use an old map
to explore a new world”*

Albert Einstein

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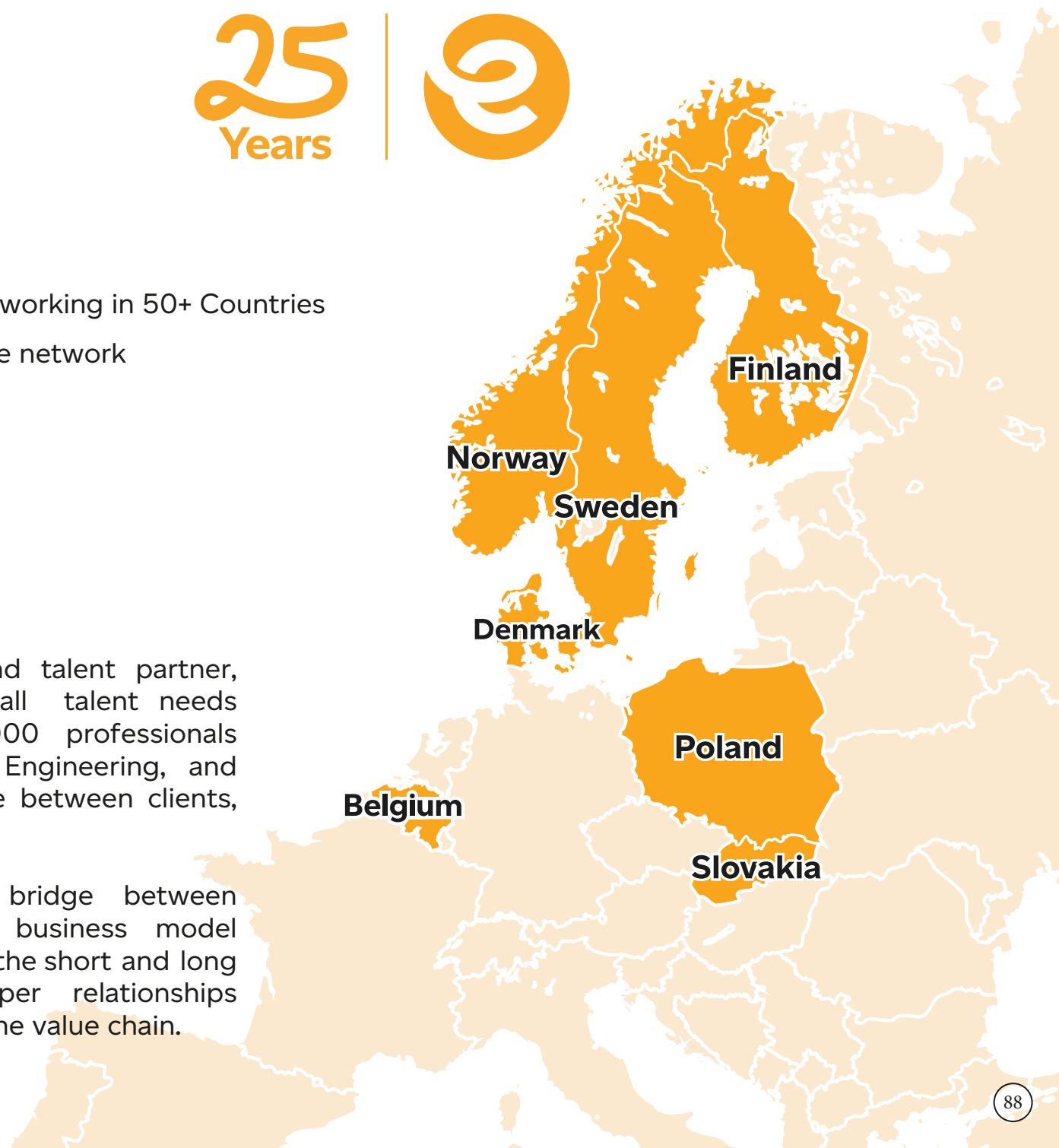
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