

pontoon

Market Burst: Global workforce trends at a glance






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Pontoon's Market Burst:

Workforce resilience in a shifting world

The global workforce is at a pivotal moment. Labour markets are stabilising—but fragility remains, shaped by shifting demographics, economic uncertainty, and growing regulatory complexity.

In the US, cautious hiring and stagnant participation rates signal a need for smarter sourcing, retention, and workforce planning. EMEA continues to face uneven recovery and persistent skills shortages. Meanwhile, APAC must navigate the dual challenge of ageing populations and a surge in younger workers entering the labour market.

By 2030, digital transformation and generative AI are expected to be the most influential megatrends—yet many organisations are still unprepared to harness their full potential. A striking 34% of firms lack a formal AI policy, leaving employees to navigate its use independently.

Across all sectors, generative AI is no longer a disruptor-in-waiting—it's a force already reshaping work. Industries like life sciences, finance, tech, and manufacturing are rethinking talent models, with contingent and hybrid workforces emerging as key to agility and innovation. Yet many organisations remain underprepared to scale AI—particularly in talent strategy design.

What's next: From flexibility to foresight

Succeeding in 2025 and beyond requires more than resilience—it demands proactive alignment of workforce strategies with:

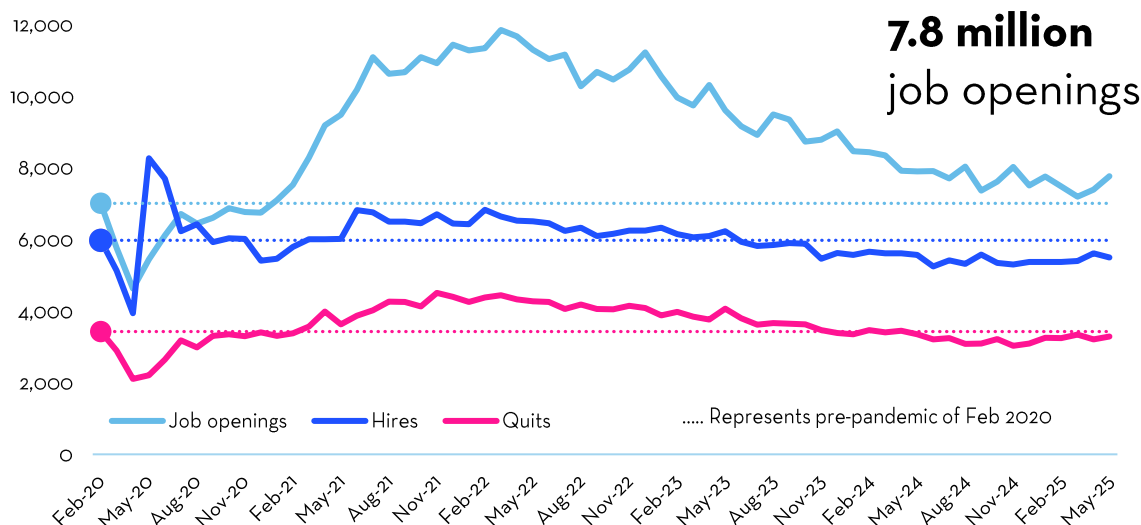
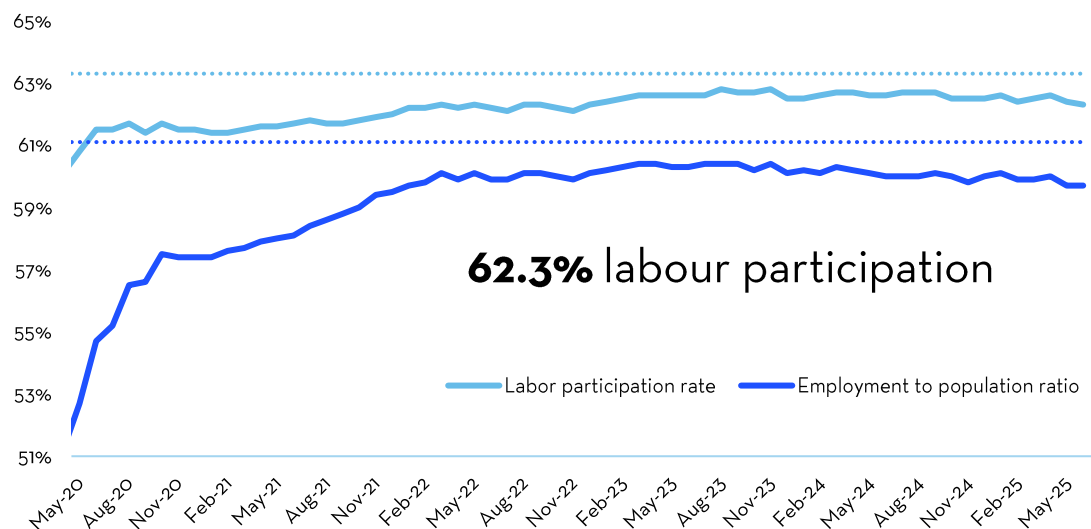
- Demographic realities
- AI adoption readiness
- Evolving compliance mandates

The message is clear: organisations that future-proof talent strategy now will be the ones that lead—not lag—in the next wave of workforce transformation.

Workforce trends across regions

US labour market update

Source: [Bureau of Labour Statistics](#)



US labour market conditions are softening but stable, with job openings at **7.8 million**, unemployment steady at **4.1%**, and labour force participation flat at **62.3%**. Hiring remains cautious amid economic uncertainty, tariff fluctuations, and cost pressures.

For US organisations with contingent workforces, the current environment demands incorporating **smarter sourcing strategies**, diversifying supplier networks, and adopting **scenario-based workforce planning**. As worker movement slows, companies should also invest in retention levers such as **project mobility**, and **contractor engagement practices** that mirror permanent workforce strategies while remaining regulatory compliant.

Workforce trends across regions

EMEA labour market update

Labour and skills shortages remain a top concern in Europe, driven by demographic shifts, green transition, and digitalisation. EU unemployment stood at **5.9%** in May 2025, with youth unemployment at **14.8%**. Source: [Europa.eu](#)

Germany reported **634,000 job vacancies** in May 2025 – **12,000 fewer** than the same month last year. The country’s job index – which measures demand based on reported and newly created roles – fell by 5 points in May compared to April, landing at **105 points**.

France faces a 'tipping point' in its job market, with high-growth companies **cutting staffing** due to faltering economic conditions. Early-careers employment is particularly affected. Only **31,000 net jobs** are projected to be created in 2025, a significant decrease compared to previous years.

The Swiss job market showed the **first signs of slight recovery** in the first quarter of 2025, despite ongoing economic uncertainty. The number of **vacancies is up 2%** with a proportion of job offers for young professionals on the rise.

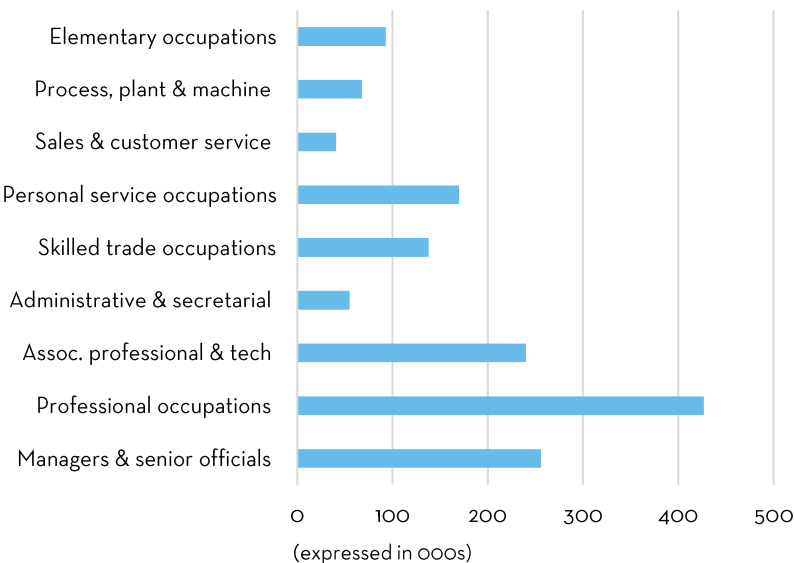
UK placement figures are starting to show signs of improvement, with **contract placements up 11%** month-on-month in March 2025. The data also showed a **2% increase in contract jobs** available between February and March.

A closer look at the UK market

According to Adecco’s latest report, employment growth in the UK is expected to be concentrated in higher-skilled occupations, typically requiring greater qualifications and experience.

Total employment is projected to rise by **0.7% in 2025**—equating to **240,000 new jobs**—with a further **1.1% increase** anticipated in 2026.

Expected employment demand in the UK by occupation, 2025-28



Source: [Adecco/Oxford Economics](#)

As the EMEA labour market continues to shift, businesses must take a more nuanced and strategic approach to contingent workforce planning.

Tapping into early-careers talent in recovery markets. Youth unemployment across the EU remains high (14.8%), yet countries like Switzerland and the UK are showing increasing demand for entry-level professionals. Firms should develop entry-level contingent roles and internship-to-contract pathways to attract untapped early-careers talent.

Aligning contingent hiring with high-skill sectoral demand. In the UK, employment growth is expected to concentrate in professional and technical occupations. To remain competitive, businesses should focus their contingent hiring strategy on STEM, digital, and other high-skill roles. Skills-based assessments, rather than reliance solely on formal qualifications, can help identify the best-fit talent for these positions.

Staying agile in volatile markets. Labour market conditions in France and Germany are softening, with declining vacancy rates and cautious employer sentiment. Here, contingent labour provides essential flexibility—short-term contracts and project-based roles can help organisations maintain capacity while limiting long-term risk exposure.

Expanding access to freelance talent. Freelancers are becoming an increasingly vital part of the talent ecosystem—offering specialised skills, speed to deployment, and cost flexibility. As organisations diversify their contingent strategies, integrating freelance platforms and networks can help fill critical gaps, especially in project-based and digital roles.

Workforce trends across regions

APAC labour market update

APAC is undergoing a dual demographic shift: ageing populations in countries like Japan and South Korea, contrasted with rapidly expanding young populations in nations such as India and Indonesia. The number of individuals aged 60 and above in the region is projected to more than double, reaching approximately [1.3 billion by 2050](#).

There is a need for dual-track workforce strategies in APAC: investing in **upskilling and redeployment** to retain and extend the contribution of older workers in ageing economies, while simultaneously building **scalable employment pathways** for entry-level workers in younger markets. This includes expanding **internship-to-contract models**, partnering with **educational institutions**, and leveraging **digital platforms** to match early careers talent with demand. Proactive **workforce planning** that accounts for both ends of the demographic spectrum will be essential to **securing talent resilience**.

Workforce trends across industries

Rethinking talent strategies in Life Sciences

Gen AI is reshaping multiple facets of life sciences – from drug discovery and clinical trials to personalised medicine – with the potential to dramatically accelerate innovation cycles and reduce costs.



Only **6%** of life sciences firms have assessed their talent needs for scaling Gen AI.

Source: [McKinsey](#)

How to build and scale Gen AI talent fast?

Build interdisciplinary teams with flexible, hybrid talent: encourage cross-functional collaboration by integrating contingent experts alongside internal teams to transfer knowledge and build fusion capabilities quickly.

Invest in targeted upskilling for both permanent and contingent staff: offer modular, on-demand learning resources focused on AI literacy and advanced Gen AI techniques tailored for scientific and technical roles.

Adopt an agile, experimental talent deployment model: form small, empowered Gen AI squads blending contingent and internal experts, with clear, business-driven objectives.

Leverage external ecosystems and flexible workforce models: use contractors, secondments, and innovation hubs strategically to fill skill gaps and accelerate Gen AI initiatives without long hiring cycles.

46%

of Life Sciences CEOs report their leadership struggles to align on AI strategies and next steps.

Source: [The Adecco Group](#)

34%

of Life Sciences firms are investing in data insights to better understand and build skills.

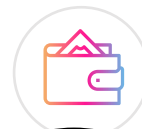
How is Gen AI impacting other segments?

Financial Services firms are using Gen AI to rapidly transform functions like sales, customer experience, risk management, and technology development.

Organisations prioritise tech-savvy talent, with growing emphasis on **data literacy, AI fluency, and prompt engineering**. Roles requiring hybrid skills—such as **financial analysts with machine learning knowledge**—are also in high demand.

The competition for AI talent is intensifying. Financial institutions need to explore non-traditional hiring pipelines, including **partnerships with AI startups, coding bootcamps, and universities with strong AI programmes**.

[9 in 10 of FS leaders](#) believe their firm must **significantly revamp reskilling strategies** to keep pace with AI advancements.



90%

In **Tech**, the AI boom is reshaping hiring strategies, with companies shifting away from entry-level recruitment toward experienced AI professionals.

While [7 in 10 of tech hiring leaders](#) are rushing to fill AI roles without sustainable talent pipelines—and **6 in 10** say AI talent is harder to hire than other tech roles—contingent talent is emerging as a promising solution. Yet, only **18%** of US HR professionals turn to freelancers, and just **14%** outsource AI-related work.

Flexible hiring models that encompass contingent talent can bridge urgent skill gaps, accelerate innovation, and reduce dependency on hard-to-find full-time hires.

75%



The Adecco Group has just launched r.Potential – the first enterprise platform that **optimises workforce configurations between humans and digital workers** – [Discover more](#).



How is Gen AI impacting other segments?

AI is transforming manufacturing roles from manual execution to strategic oversight and orchestration. AI agents—both virtual and embodied—are enabling autonomous decision-making, reducing the need for repetitive human tasks.

This shift calls for a **reskilled workforce** ready to manage and collaborate with AI. Manufacturers should start by **upskilling teams** in AI literacy and data interpretation, then **redesign roles** to promote human-AI collaboration—positioning technology as a tool for augmentation, not replacement. Finally, building **cross-functional teams** that connect engineering, data science, and operations ensures AI solutions are both practical and scalable, accelerating adoption and innovation.

Gen AI is also reshaping automotive roles in design, testing, and maintenance. This evolution requires a workforce that can interpret AI outputs, train models, and ensure ethical deployment.

To keep pace, companies must **retrain engineers** in emerging tools like simulation software and machine learning. At the same time, **AI ethics training** is essential to ensure responsible deployment, especially in safety-critical systems. Finally, fostering a culture of **continuous learning** through micro-credentialing programmes and hands-on AI labs will help teams stay adaptable as technologies evolve.

The **energy sector** is adopting AI for grid optimisation, predictive maintenance, and emissions reduction—but a **talent bottleneck** is slowing progress. There's rising demand for professionals who combine **AI expertise with sustainability insight**.

To close this gap, firms should **develop hybrid talent**—e.g. equipping data scientists with energy domain knowledge. Partnering with academia to **build targeted AI curricula** is another option, so is adopting **skills-based hiring** to widen the talent pool and support more agile workforce planning.



39%

of Mfg and Auto CEOs see outdated workforce strategies as their top talent challenge amid disruption

Source: [The Adecco Group](#)



33%

of Mfg and Auto firms don't have a policy on AI, with workers deciding how to use it

Source: [The Adecco Group](#)



55%

of Energy firms is shifting to a skills-based approach to workforce planning

Source: [The Adecco Group](#)



Optimising workforce management with AI and automation at Pontoon

AI, analytics, and automation enhance decision-making, improve efficiency, and reduce risks, enabling organisations to streamline the development of a blended workforce.

Empowering decision-making with AI-powered analytics

AI-powered business intelligence tools transform vast amounts of operational, market, and regulatory data into actionable insights. With intuitive natural language assistants and user-friendly interactive dashboards, AI-driven analytics empower organisations to make faster, data-backed decisions while staying ahead in a dynamic talent landscape. Other areas where AI can add significant value include: skills mapping, talent matching, forecasting workforce demand, and more.

Automating onboarding

Leveraging technology to streamline hiring and onboarding creates a smoother candidate journey by reducing manual errors, speeding up start times, and ensuring clear communication at every step. This minimises frustration and confusion, making the process faster, more transparent, and more predictable.

A global client struggled with **inefficient and inconsistent remote onboarding**, hindering compliance.

We implemented **Pontoon ON**, our **digital onboarding tool** tailored to the client's needs.

Onboarding time improved by 150%, enhancing candidate experience and compliance in a fully remote setup.

Hiring smarter with AI

AI-powered tools optimise the screening process and enhance hiring efficiency. By leveraging data-driven analysis, they accurately identify top candidates while offering applicants the flexibility to complete assessments at their convenience. These tools also play a crucial role in minimising human bias, ensuring a fairer selection process. Additionally, they strengthen security by detecting and preventing fraudulent behaviour, ultimately improving the quality of candidates progressing through the hiring process.

Our global client faced a **surge in unqualified candidates** reaching manager interviews.

We deployed an **AI screening tool** to detect fraudulent behaviours early in the process.

The AI **flagged 25% of candidates for red flags**, removing them from the hiring process.

Tech and AI-powered Services Procurement. Our solution puts data, automation, and insight at the core—helping leaders buy smarter, reduce risk, and drive better business outcomes - [Discover more](#).

About Pontoon

At Pontoon, we lead the way in outsourced workforce solutions.

As a trusted partner across industries, we deliver scalable, data-driven, AI-powered talent strategies that help our clients meet their business goals.

We deliver tech-enabled Managed Service Provider (MSP), Services Procurement, and Direct Sourcing solutions.



As part of the Adecco Group, we combine global reach with local expertise in over 60 countries—placing more than 2 million associates in meaningful work every day.

At Pontoon, our mission is simple: to delight our customers, continually innovate, deliver deep insights to make the future work for everyone.

Smart. Scalable. Innovative.

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www.pontoonsolutions.com