



# CREATING A GLOBAL SKILLS PLATFORM FOR 10,000 PEOPLE

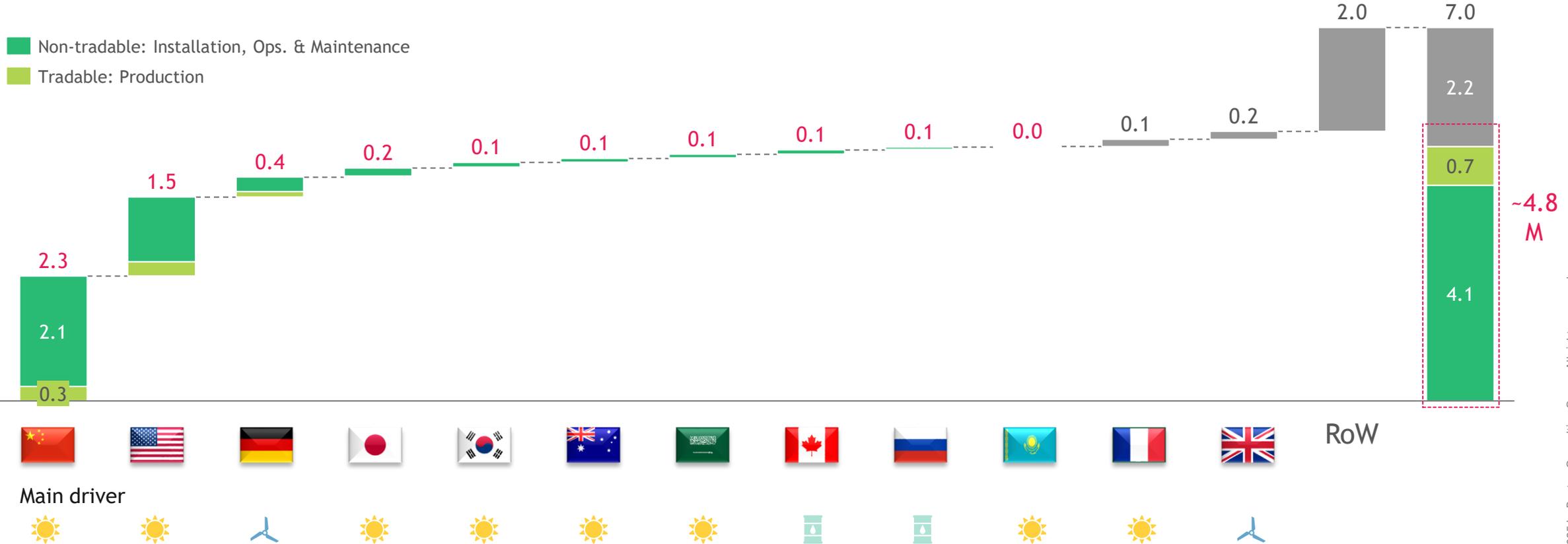
A new approach for displaced talent, employers,  
and private/public sector engagement

September 2025

# 7M green workers are needed by 2030 – about 5M of them in 10 countries

## Labor gap

# jobs where demand > supply, in M, 2030

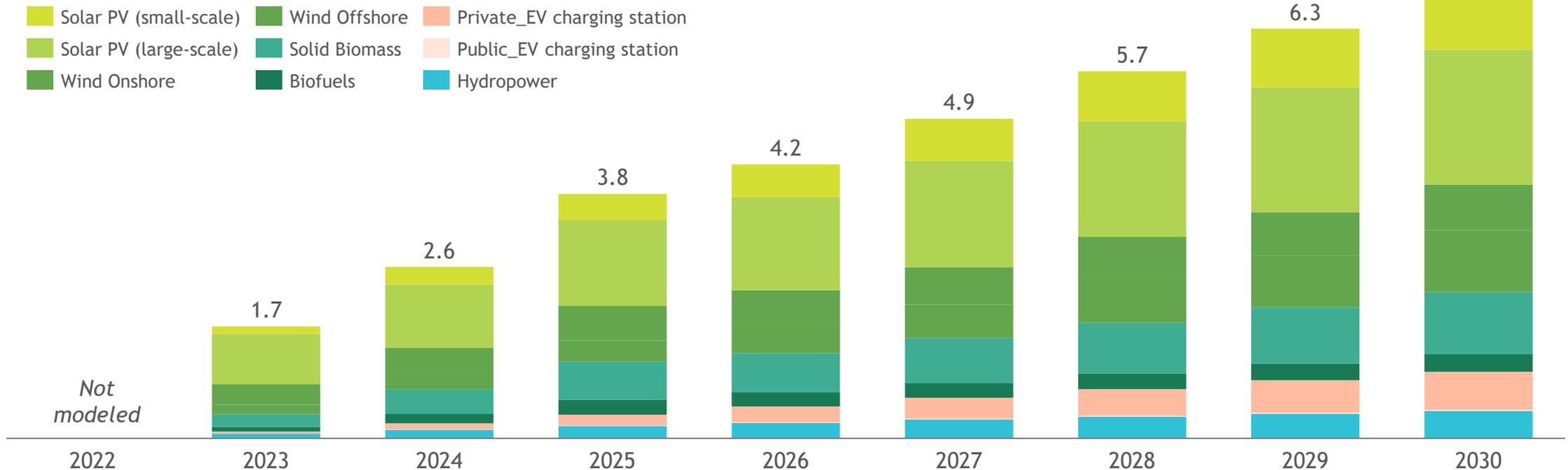


Note: Assumes no global trade, # jobs as driven by country's net zero buildout plans; Top emitters shown in red.  
 Source: Climate Migration Model; Data sources: IRENA, IEA, IPCC, World Energy Outlook 2023

# This 'green gap' is driven by 3 technologies: Solar, Wind & Biofuels

## Labor gap

# jobs where demand > supply, in M

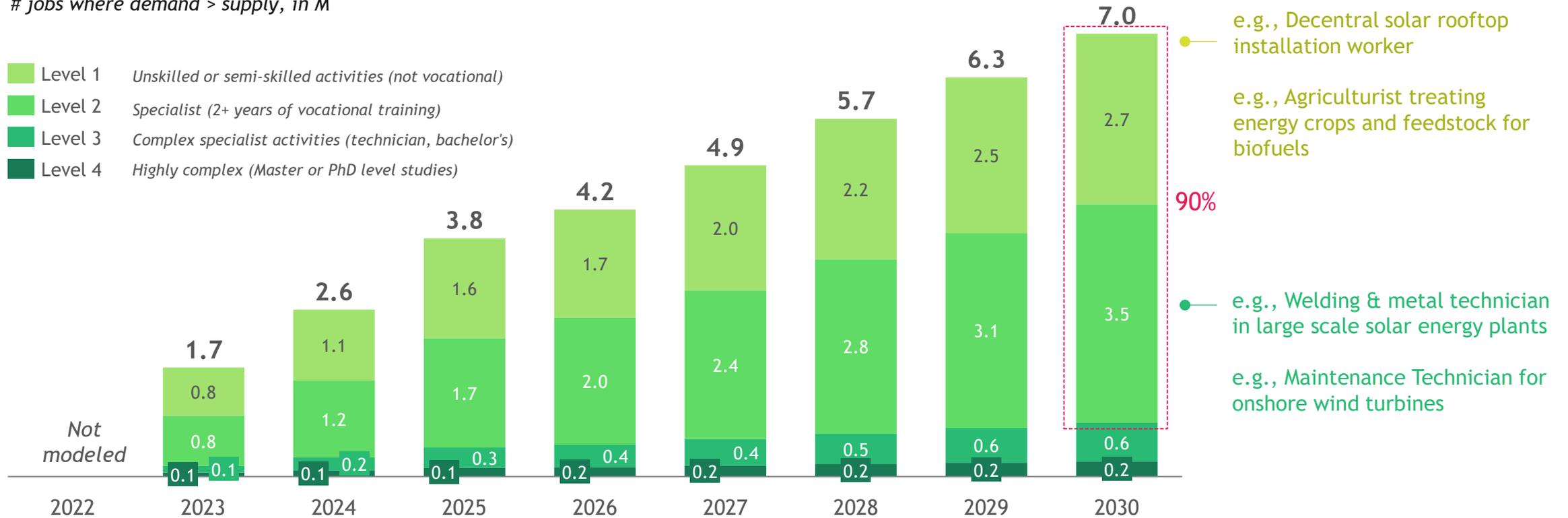


Note: Capacity for each category taken as APS (Announced Pledges Scenario). 1. In addition to available domestic supply of labor, calculated using age and occupation wise distribution of working population Model assumes the energy consumed is also produced in given country (no trade, no migration)  
 Source: Climate Migration Model; Data sources: IRENA, IEA, IPCC, World Energy Outlook 2023

# ~90% of the required new workers will need limited or vocational training

## Labor gap

# jobs where demand > supply, in M



Note: FTE requirements estimated for each value chain step (Production, Installation, Operation & Maintenance) and each asset class  
 Source: Climate Migration Model; Data sources: IRENA, IEA, IPCC, World Energy Outlook 2023

# In the year 2025, our societies face 4 big challenges – a thriving technical workforce is key to bringing them to citizens worldwide

## Affordable housing



~\$9T CAPEX<sup>1</sup> p.a.

- Residential construction & urban development
- Affordable & climate-resilient housing

## Better infrastructure



~\$3T CAPEX p.a.

- Public infrastructure (rail, road, air)
- Fiber optics, satellites

## Clean Energy



~\$2T CAPEX p.a.

- Decarbonization of energy generation
- (Smart) grids

## Responsible A.I.



~\$0.5T Spend p.a.

- Data centers
- LLMs
- Application layer

About ~250M people work in these industries worldwide, of which ~100M in OECD countries.  
At the core of the technical work force: **Skilled Technical Workers**

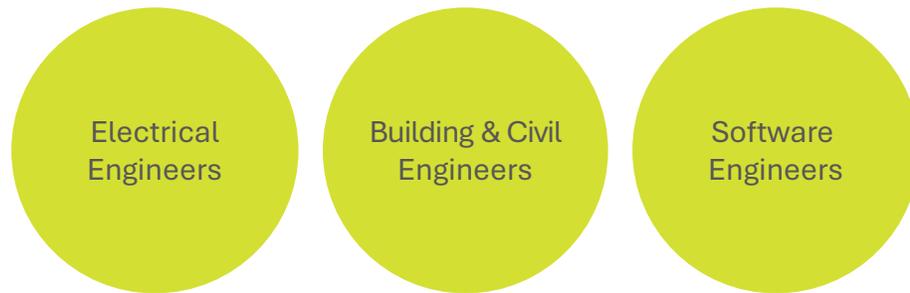
1. CAPEX = Capital Expenditure. All figures for OECD countries. Sources: IRENA, OECD, Brookings, IDC, PWC, NATO

# We focus on the hard edge of the labor markets: Not only STEM but STEP workers

## STEM talent: Science, Technology, Engineering, Math

Design, optimize, and engineer new technologies and systems.

Top 3 job clusters (volume, shortage)



## STEP workers: Skilled Technical Energy Professionals

Build, operate, and maintain systems, at scale.

Top 3 job clusters (volume, shortage)



### State of play

- High awareness, high investment, high global mobility

- Growing awareness, lower investment, lower global mobility

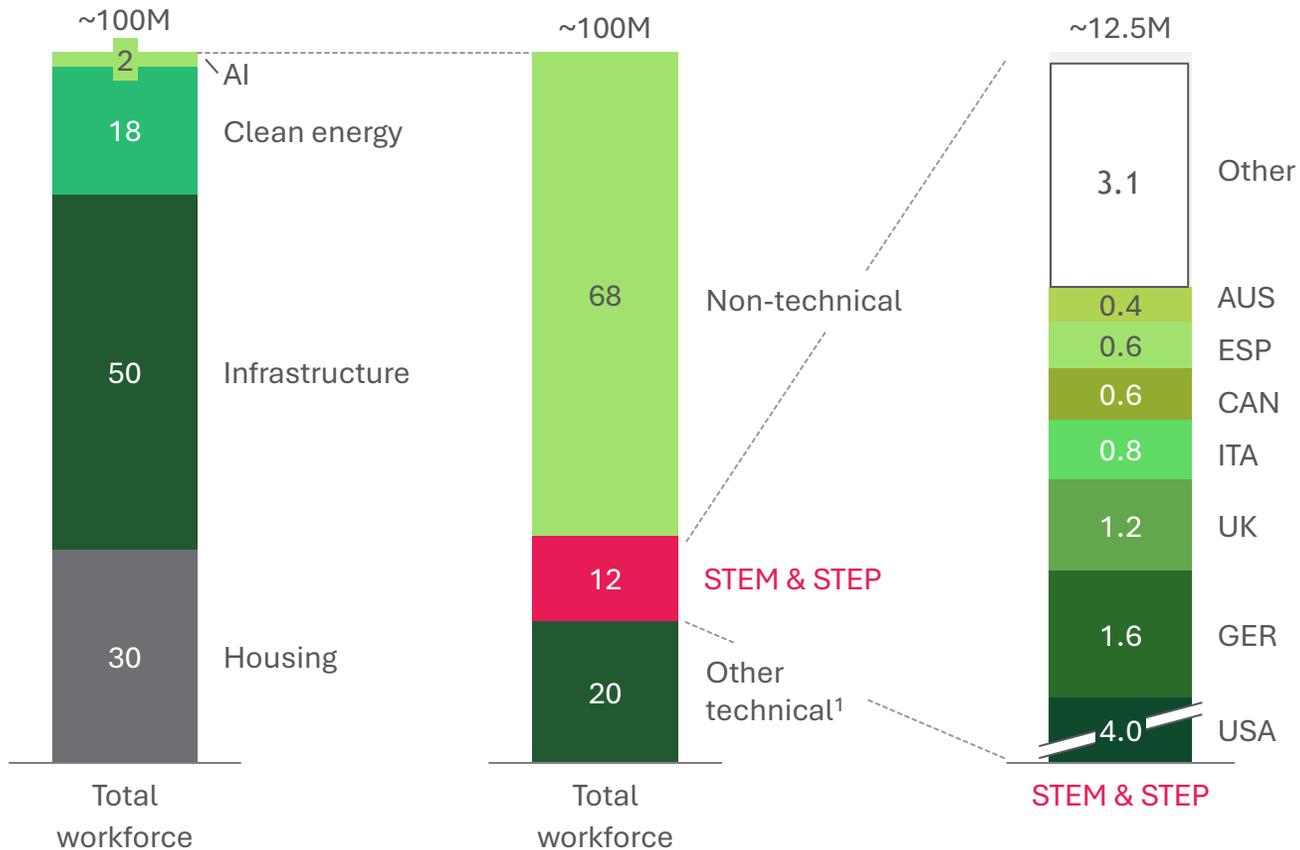
### Market size: # workers, growth (gross)

- High & growing: 4.7M workers, +1.3M new jobs until 2030
- ...But cyclical & potentially impacted by Gen AI

- Very high & growing: 7.8M workers, +1M new jobs until 2030
- Less cyclical and hard to automate

# At least 2M more STEM and STEP workers will be needed in OECD countries by 2030

Workforce in 4 arenas #M, OECD, 2025



... is experiencing various pressure points

- ! Demography**  
 ~2M people will leave this workforce in the next 5 years (in the OECD), leaving jobs unfilled & capability gaps in key base technologies
- ! Digitalization**  
 Systems increasingly connect via digital platforms and data protocols, enabling AI and other technologies to more autonomously steer & optimize assets
- ! Domestic upskilling**  
 Filling this workforce demand & closing skill gaps via local workers *only* is challenging, as jobs are often in remote locations and require physical presence

*'Three D' make it necessary to complement domestic efforts with targeted global mobility – going beyond STEM*

1. Includes all other technical workers in other civil, metal, chemical engineering fields as well as supporting workers (no vocational skills).

Sources: BLS (USA), StatCan (CAN), ONS (UK), BA (GER), ISTAT (ITA), INE (ESP), ABS (AUS), OECD/Eurostat/NatStats (Other OECD), team analysis