



# Two Futures for Jobs in an AI era

2026 Global AI Jobs Barometer

Germany Analysis



# Key findings

## AI is driving productivity, accelerating skills change and starting to create a redesign of entry level work

### AI is strongly linked to significant productivity gains

Since 2022 when AI use soared, companies in the sectors most exposed to AI have tripled their lead in workforce productivity growth over the least AI-exposed companies.

### Companies achieving the biggest productivity gains are boosting wages and headcount

Rather than replacing jobs at scale, leading organisations are using AI to amplify human performance and create value.

### Harnessing AI is accelerating skills transformation

Skills required for the most AI exposed jobs are changing twice as fast as in least exposed roles - a 75% increase over last year's gap.

### Redesigned entry level pathways

AI exposed junior roles are 7x more likely (than the least AI exposed junior roles) to demand traditionally senior skills like leadership and strategic thinking.

### A two-track labour market

Jobs professionalised by AI – where AI does the basic work leaving more expert tasks for people (22% of advertised jobs) - are thriving while jobs democratised by AI – where AI takes on the complex work (52% of advertised jobs) - fall behind.

40%

Productivity growth is 40% higher at most vs least AI exposed companies.

52%

The most AI exposed companies see faster headcount growth than the least AI exposed (52% vs 36%) and higher wage growth (24% vs 17%).

2.5x

The most AI exposed jobs are adding tasks that rely on human-intensive skills like empathy, judgment and creativity 2.5x faster - than the least AI exposed roles.

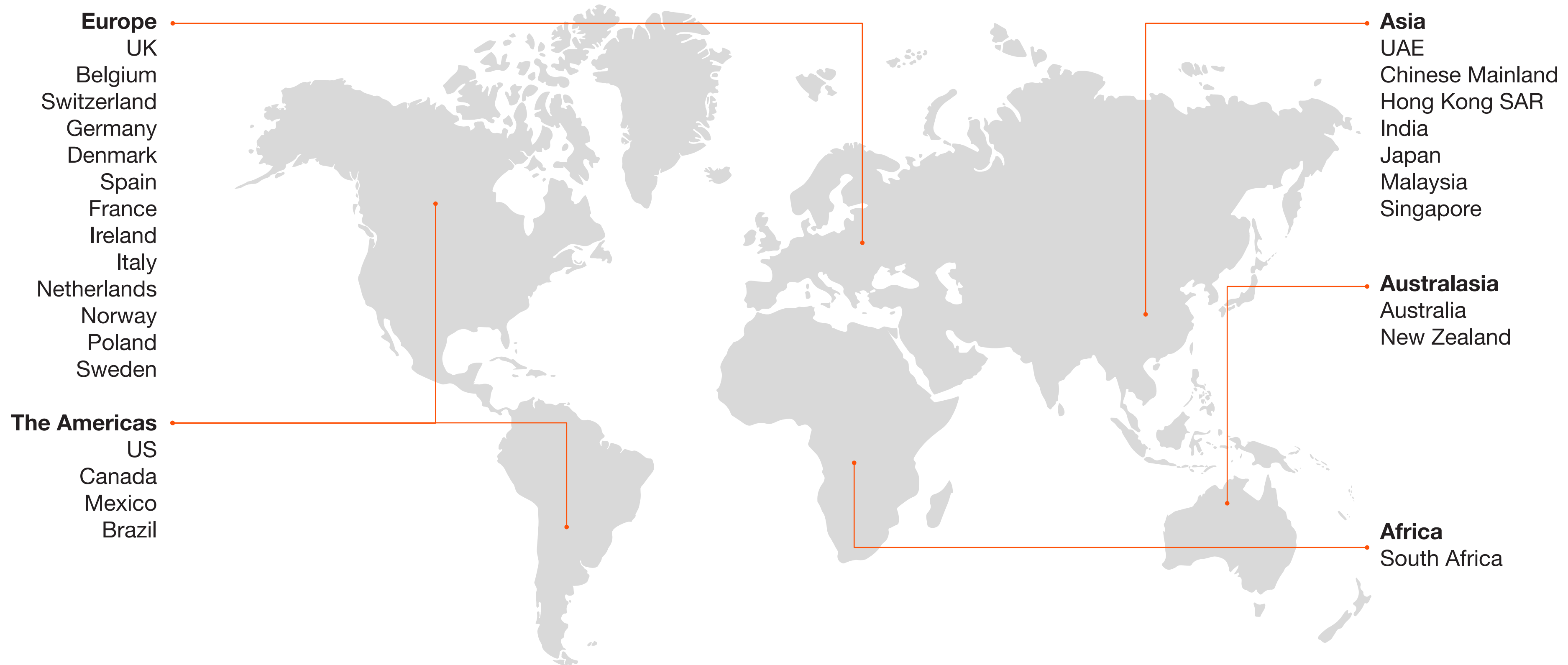
35%

AI-exposed 'seniorised' entry level roles are thriving with 35% growth since 2019 while other entry level roles decline in number.

42%

Professionalised jobs are growing twice as fast as Democratised jobs with 42% higher wage growth since 2021.

# The 2026 AI Jobs Barometer examines over one billion job ads from 6 continents to reveal how AI is affecting jobs, skills, wages, and labour productivity

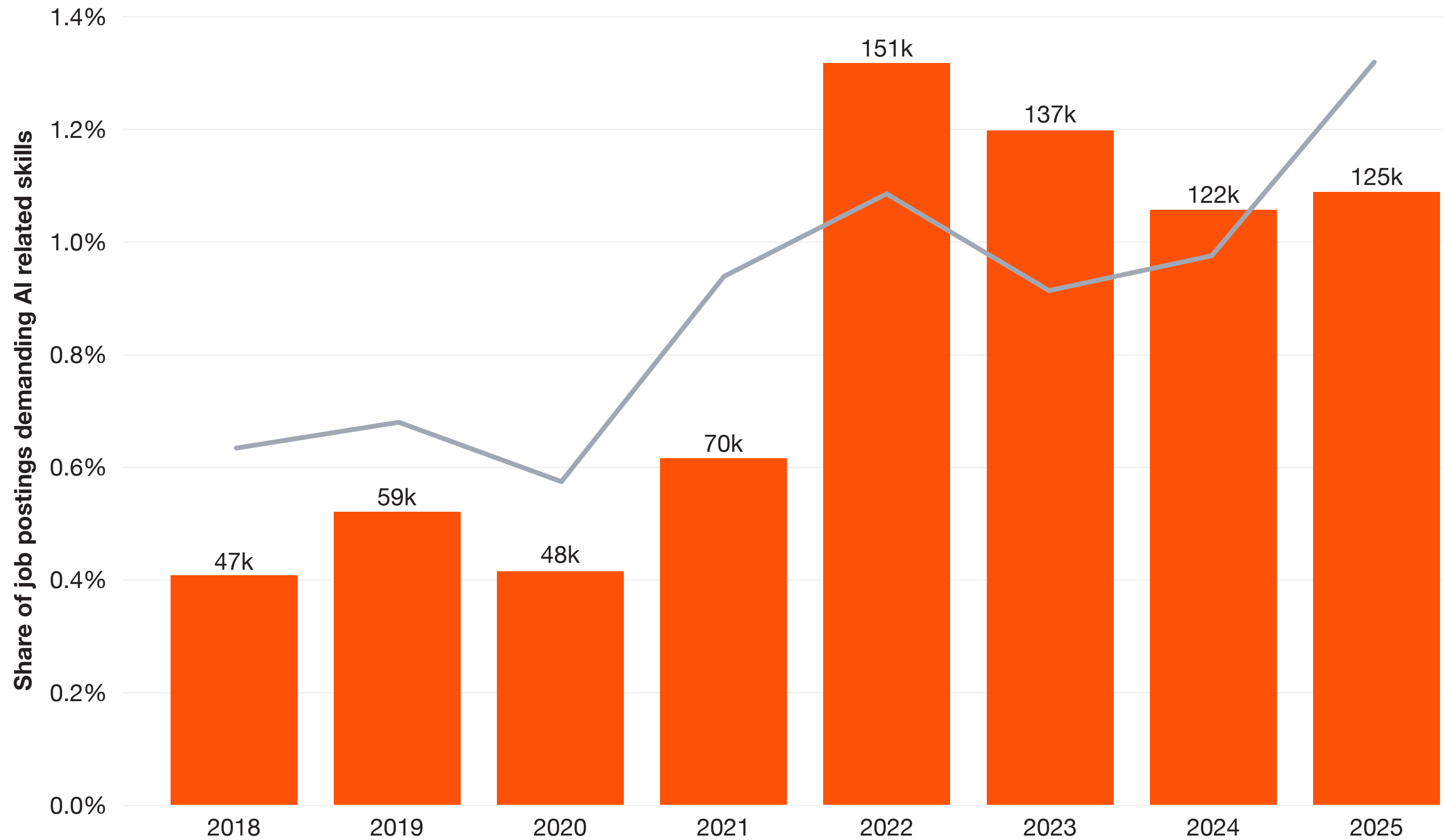


# Germany Insights



# While the volume of AI job postings in Germany has been declining in recent years, the share of AI job postings has continued to increase

**Total number and share of job postings requiring AI related skills, Germany, 2018-2025**



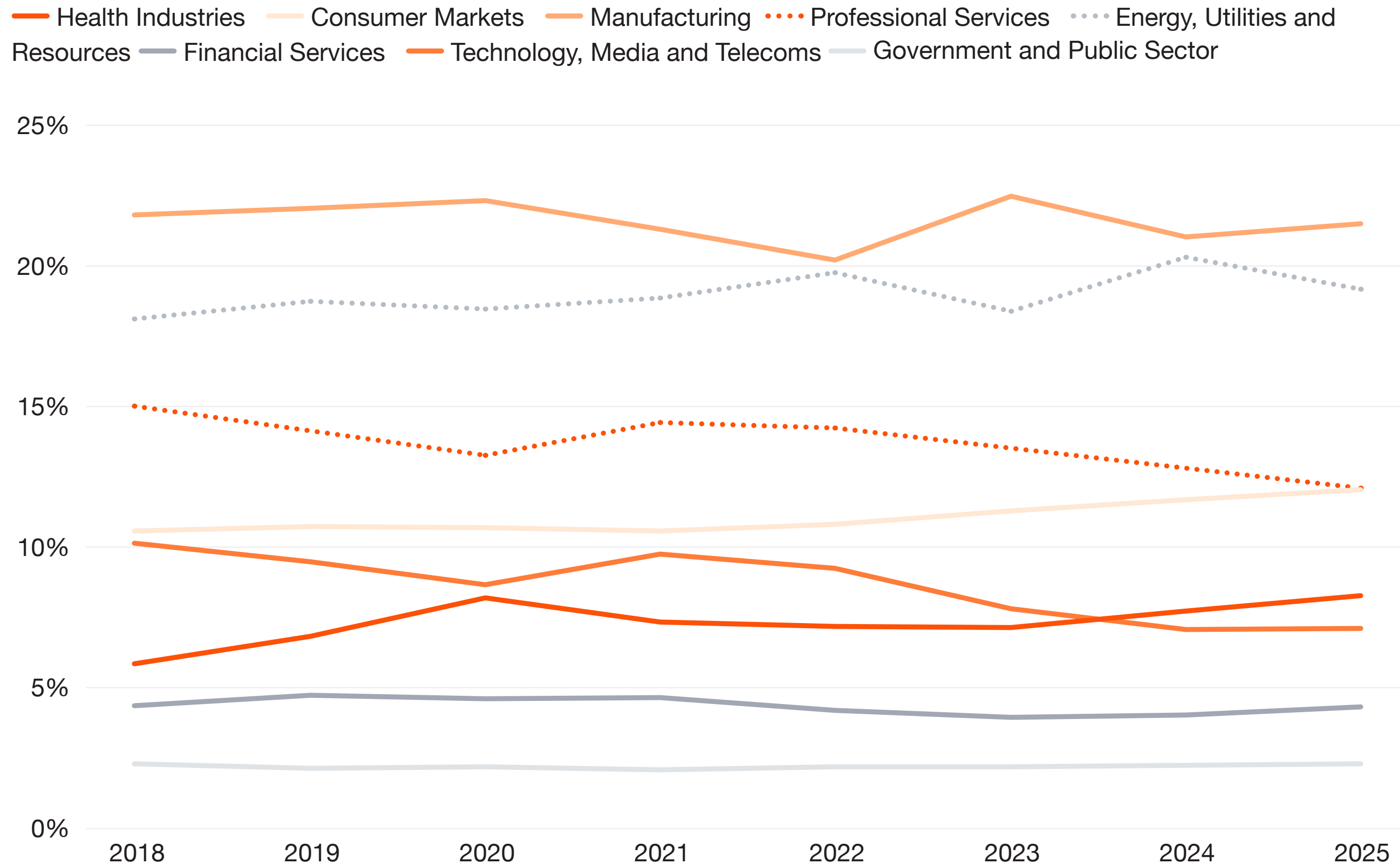
Source: PwC analysis, Lightcast data

## Findings

- The number of job postings requiring AI skills in Germany increased by around 3k in 2025, a relatively small change, with the more prominent trend being continued decline in volume in 2023 and 2024.
- While Germany remains lower in terms of volume of AI job postings compared to its 2022 peak, AI share of AI job postings has continued to edge upwards, with the share of AI job postings reaching 1.3% in 2025.

# Manufacturing accounts for the largest share of hiring in Germany's labour market

## Share of all job postings by sector, Germany, 2018-2025



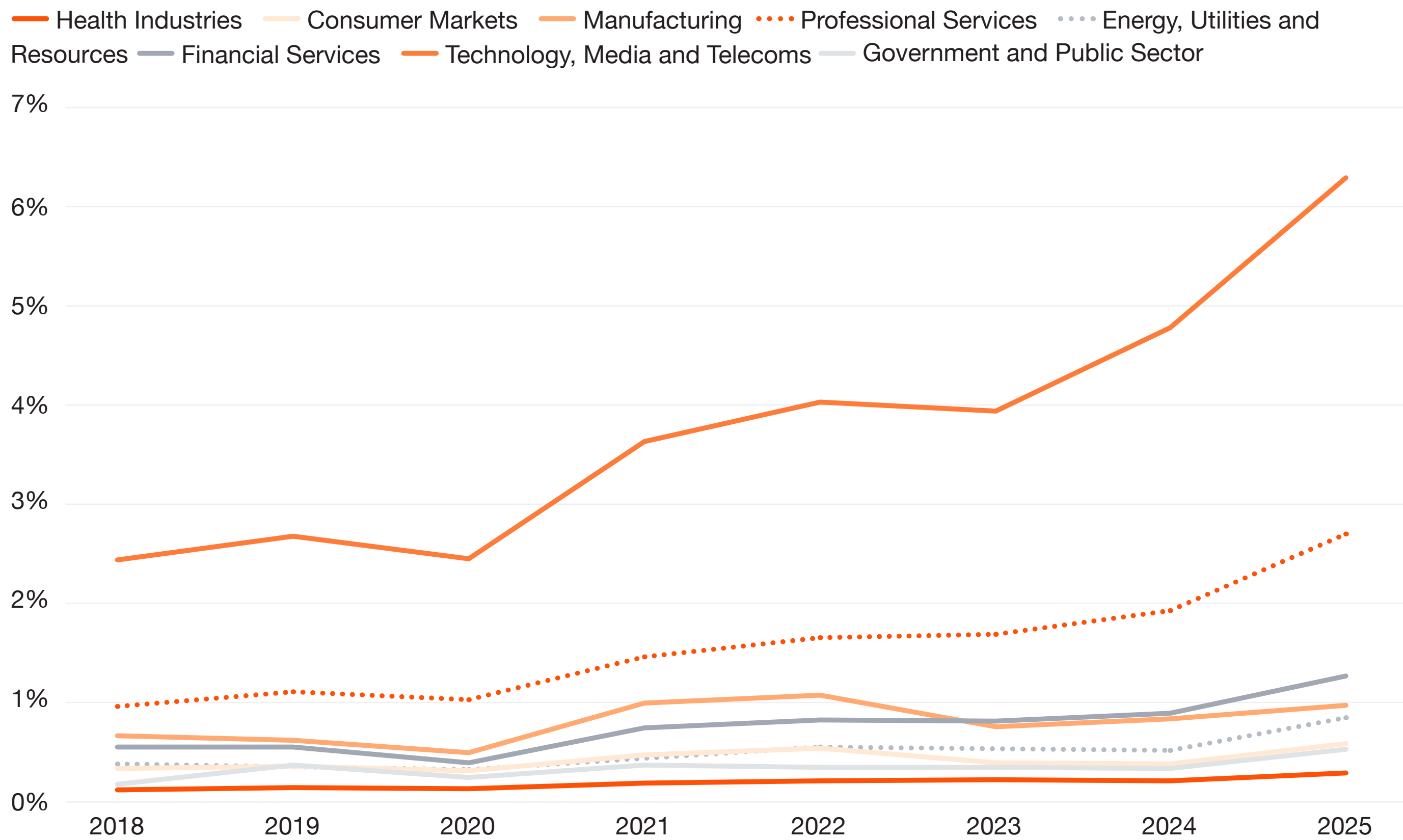
Source: PwC analysis, Lightcast data

## Findings

- Manufacturing is the largest source of labour demand in Germany, accounting for 21.2% of total job postings.
- Energy, Utilities and Resources (18.8%) also represents significant shares of hiring.
- Other sectors account for smaller shares but still contribute meaningfully to overall hiring across the economy, with Government and Public Sector seeing the smallest share of 0.7%.

# While AI hiring intensity is growing across all sectors in Germany, TMT stands out as the clear leader

Share of AI job postings within each sector, Germany, 2018-2025



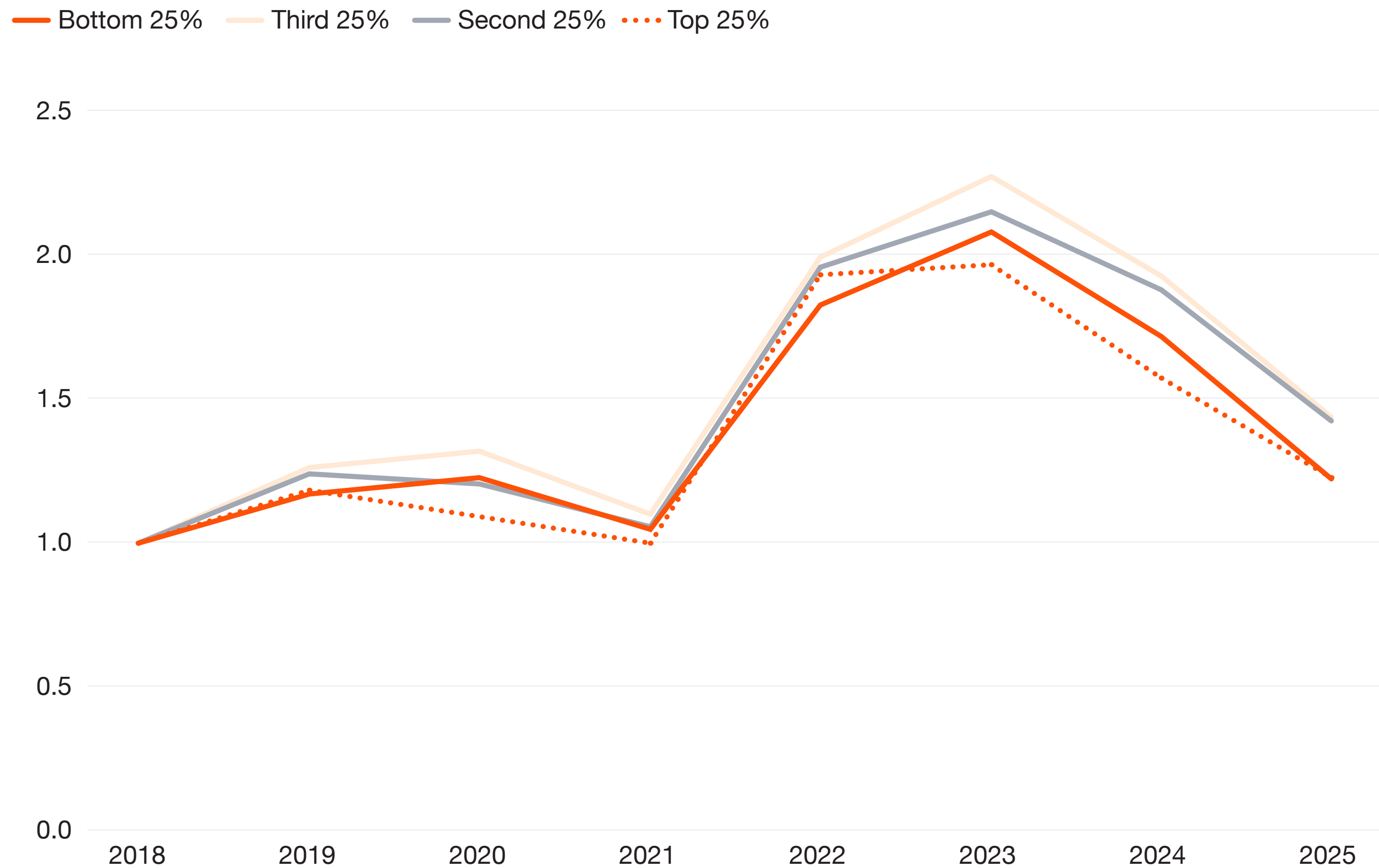
Source: PwC analysis, Lightcast data

## Findings

- Technology, Media and Telecoms (TMT) records the highest share of AI job postings in Germany, consistent with its role as the most digitally intensive sector.
- All sectors saw an increase in AI job share in 2025, pointing to broad-based growth in AI hiring.
- This suggests AI adoption in Germany is expanding across the economy, rather than being concentrated in a small set of industries.

# In Germany, the middle quartiles have seen stronger job postings growth since 2018 compared to the top and bottom exposure quartiles

Number of job postings relative to 2018 by AI exposure quartile, Germany, 2018-2025



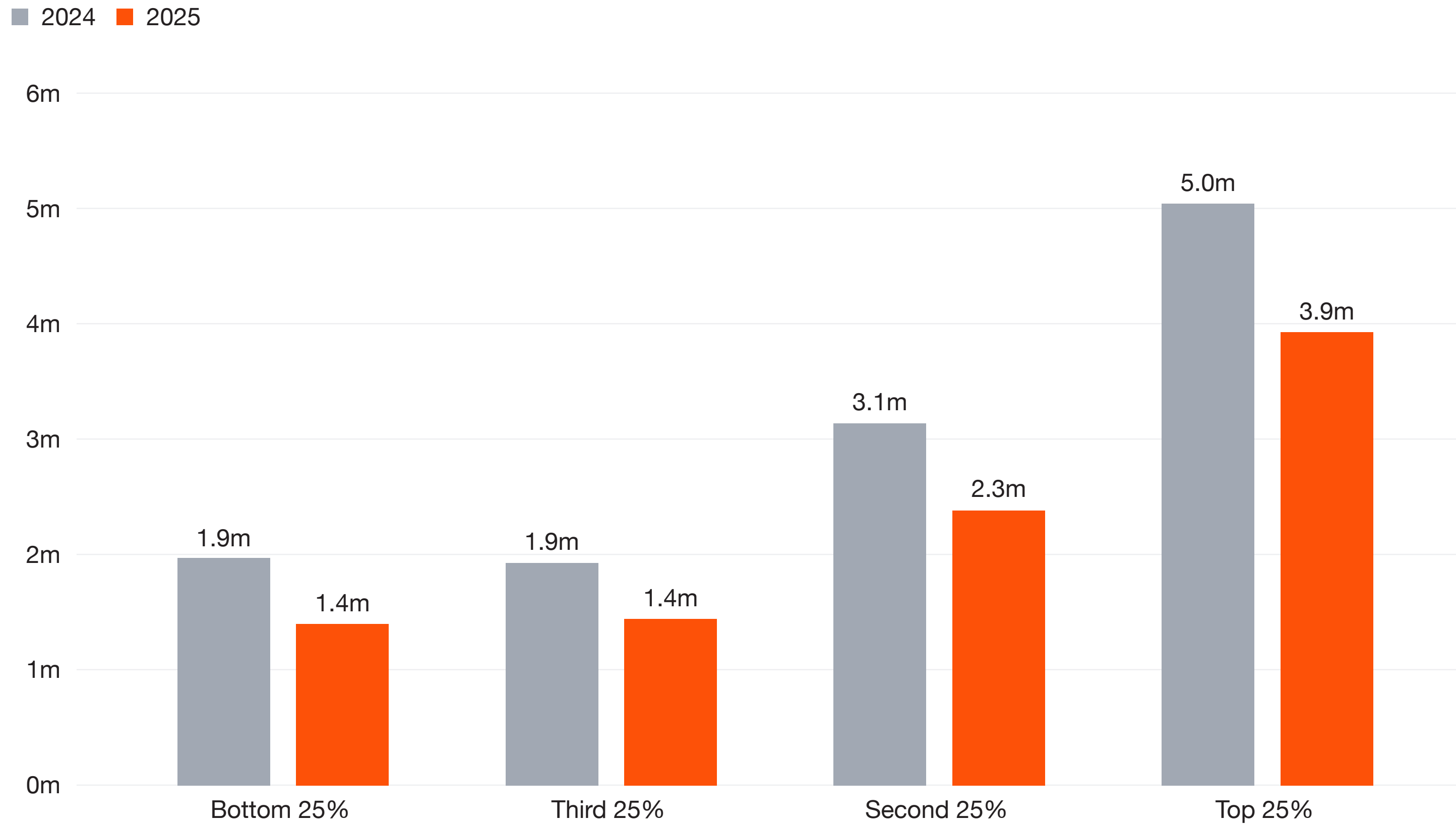
## Findings

- The top and bottom quartiles show similar, modest growth over the period, while the middle quartiles have grown at a slightly faster pace, suggesting factors beyond AI exposure are influencing demand.
- All quartiles have declined since 2023, pointing to broader economy-wide factors affecting job postings.

Source: PwC analysis, Lightcast data

# The top quartile of AI exposed occupations account for the largest number of job postings in Germany

Total number of job postings by AI exposure quartile, Germany, 2024 and 2025



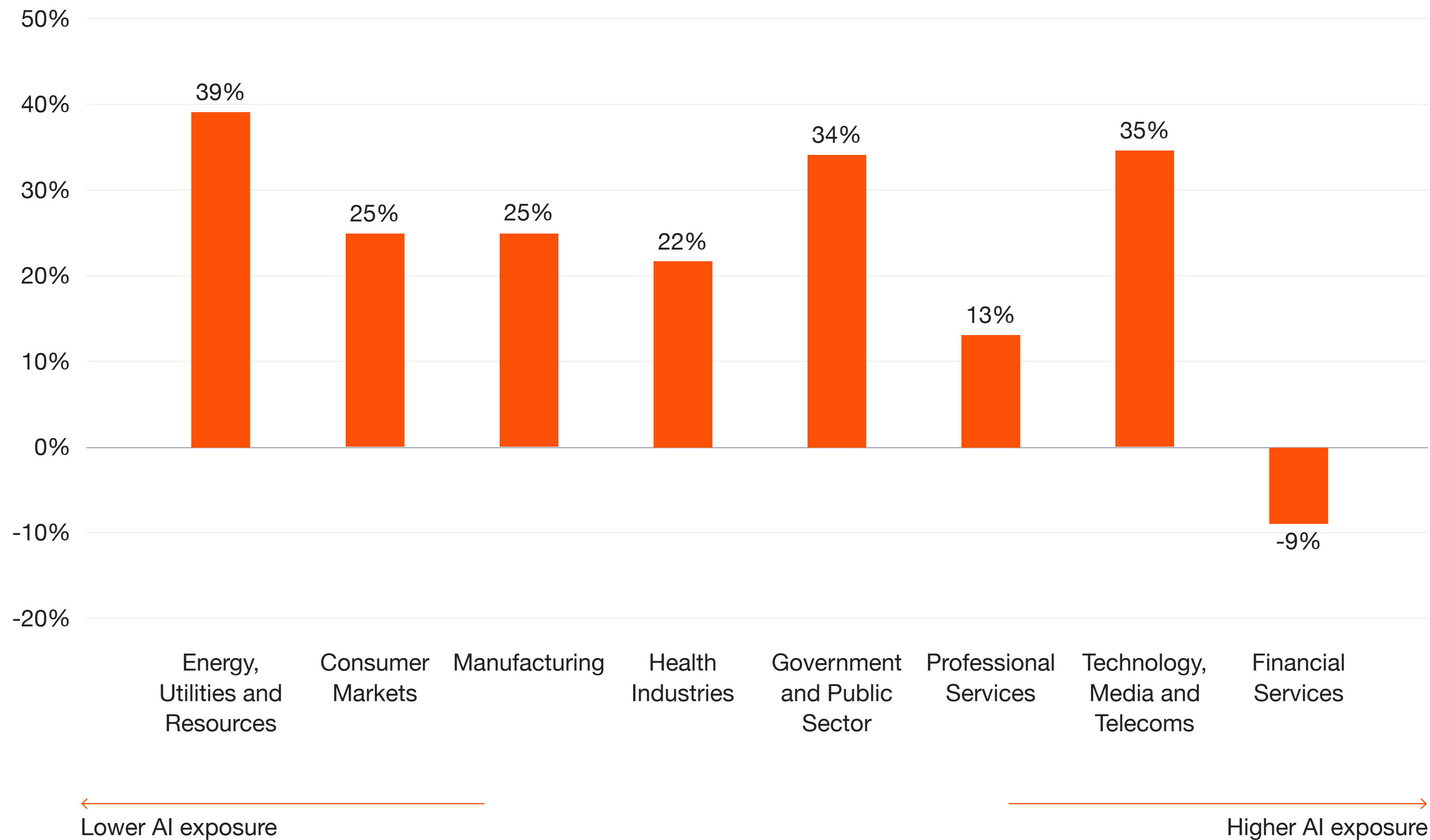
Source: PwC analysis, Lightcast data

## Findings

- While job postings have grown faster in less AI-exposed occupations, higher exposure quartiles still account for more postings in absolute terms.
- In 2025, the most AI-exposed quartile recorded around 3.9 million job postings, higher than lower exposure groups.
- Although the top two quartiles declined more than the lower quartiles in 2025, including a reduction of over one million postings in the highest exposure quartile, they continue to account for more postings overall.

# AI wage premiums in Germany are high across most sectors, with Financial Services as the notable exception

## Wage premium by sector, Germany, 2025



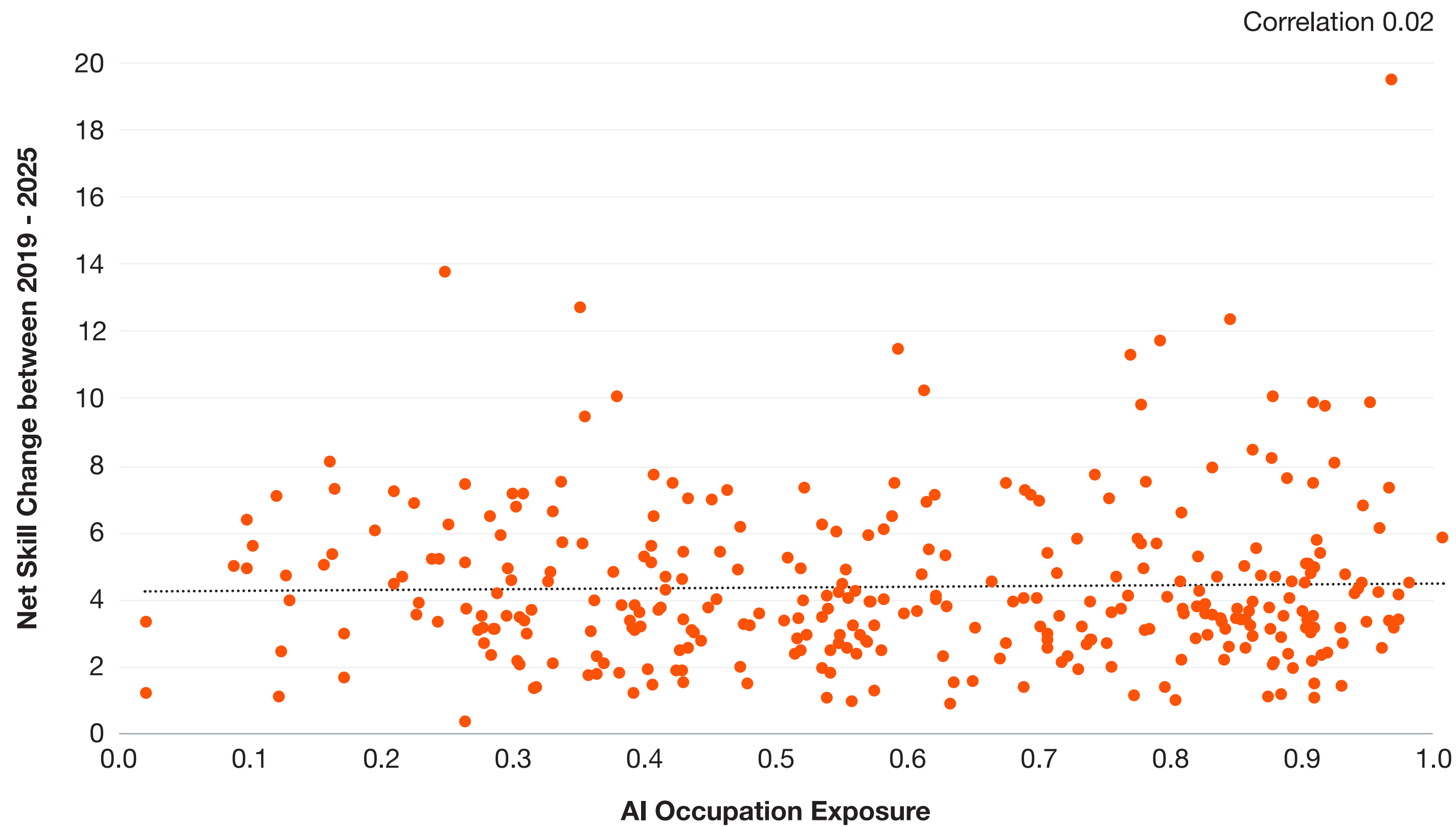
### Findings

- AI wage premiums are high across most sectors in Germany, indicating strong demand for AI skills across the labour market.
- However, Professional Services shows a comparatively lower premium despite higher AI exposure, suggesting that demand for AI skills within roles is still developing.
- Financial Services records a negative premium, pointing to a lag in demand for AI skills despite relatively high exposure.

Source: PwC analysis, Lightcast data

# In Germany, the relationship between AI exposure and the rate of skills transformation appears weak

Net skill change from 2019 to 2025 for 4-digit ISCO code occupations by AI occupation exposure, Germany



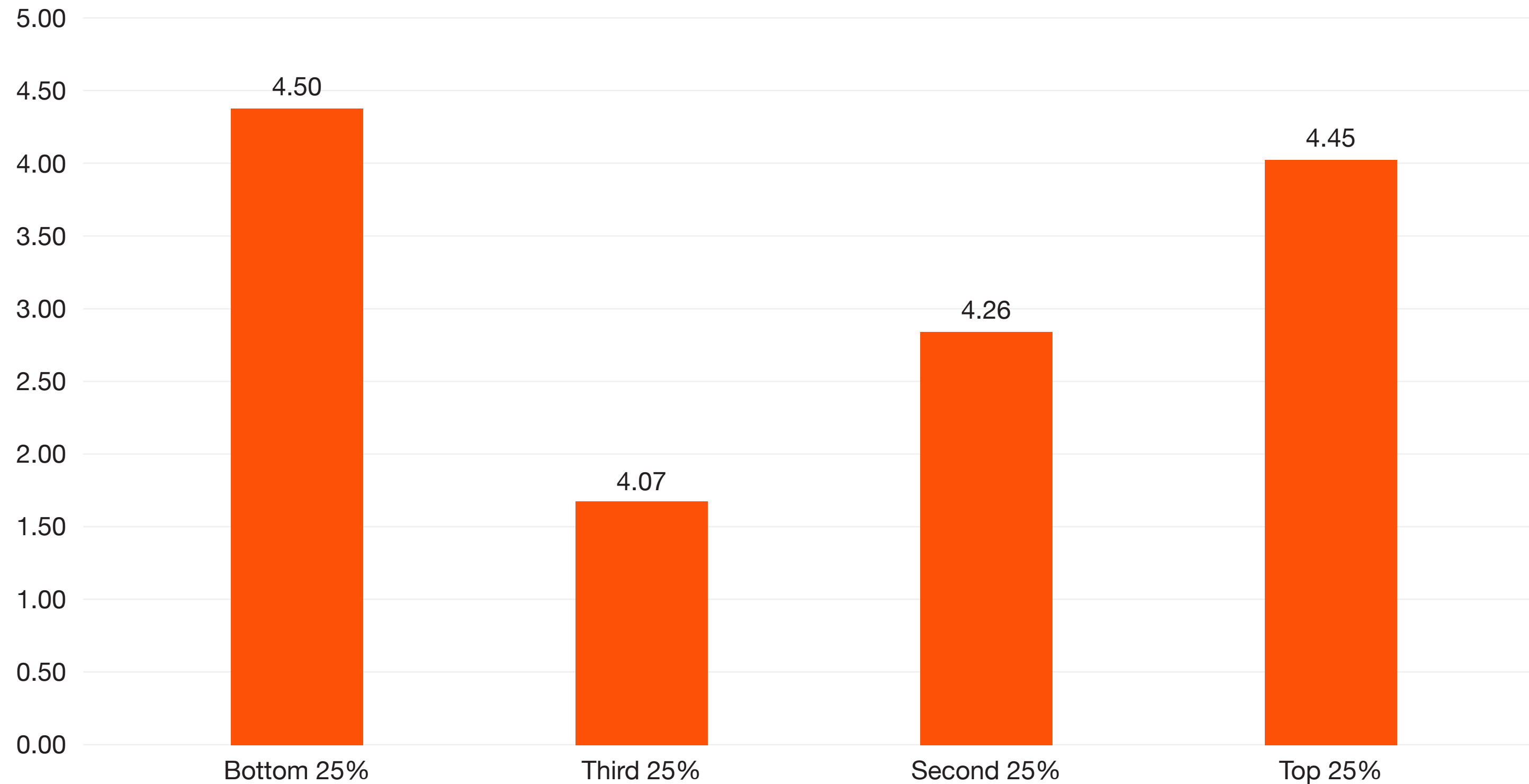
## Findings

- There is a weak positive correlation of 0.02 between AI exposure and net skills change between 2019 and 2025, indicating that skill transformation in occupations in Germany are likely to be driven by non-AI factors.
- Compared with other markets, Germany stands out as having one of the weakest relationships between AI exposure and skills transformation, suggesting AI exposure is a much less important predictor of skill change here.

Source: PwC analysis, Lightcast data

# In line with this, looking at exposure quartiles, the relationship remains uneven, with relatively high skill transformation in the bottom quartile

**Average net skill change from 2019 to 2025 for 4-digit ISCO code occupations by AI occupation exposure quartile, Germany**



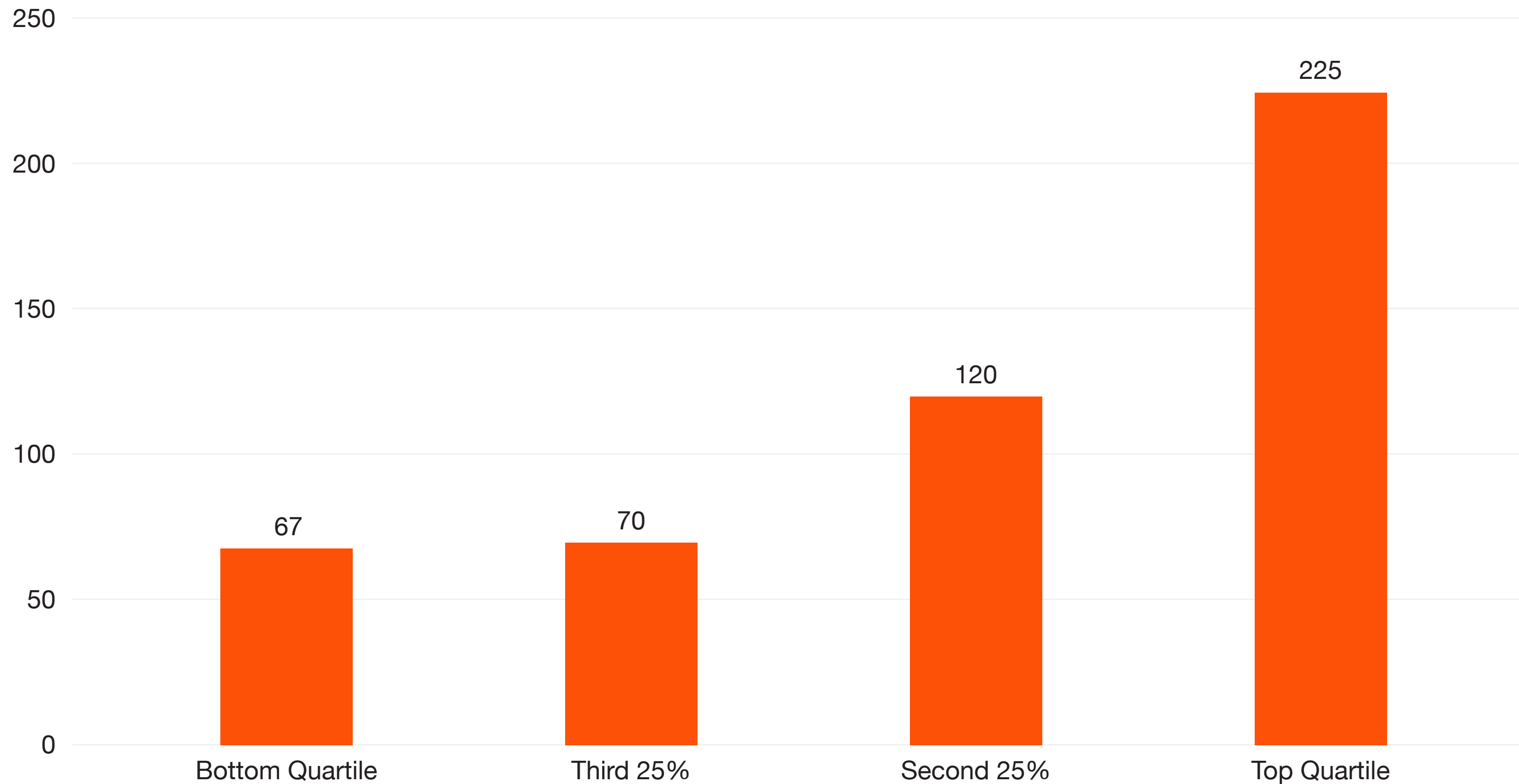
Source: PwC analysis, Lightcast data

## Findings

- Across exposure quartiles, there is a clear upward gradient from the third quartile onwards, with more exposed occupations showing higher rates of skills transformation.
- However, the bottom quartile stands out with an unusually high level of skills change, above all other groups. This is largely driven by lower-exposure, more manual or physically oriented roles such as messengers, package deliverers and bricklayers, which have seen relatively high net skill change despite low AI exposure.
- This suggests the overall pattern is partly influenced by these occupation-specific dynamics, rather than a fully consistent relationship across all exposure levels.

# Meanwhile, the most AI-exposed occupations see greater expansion in the average number of new skills per occupation

Average number of “new” skills per occupation, by AI exposure quartile, Germany, 2025 relative to 2019



Source: PwC analysis, PwC AI Occupational Exposure Index, Lightcast data

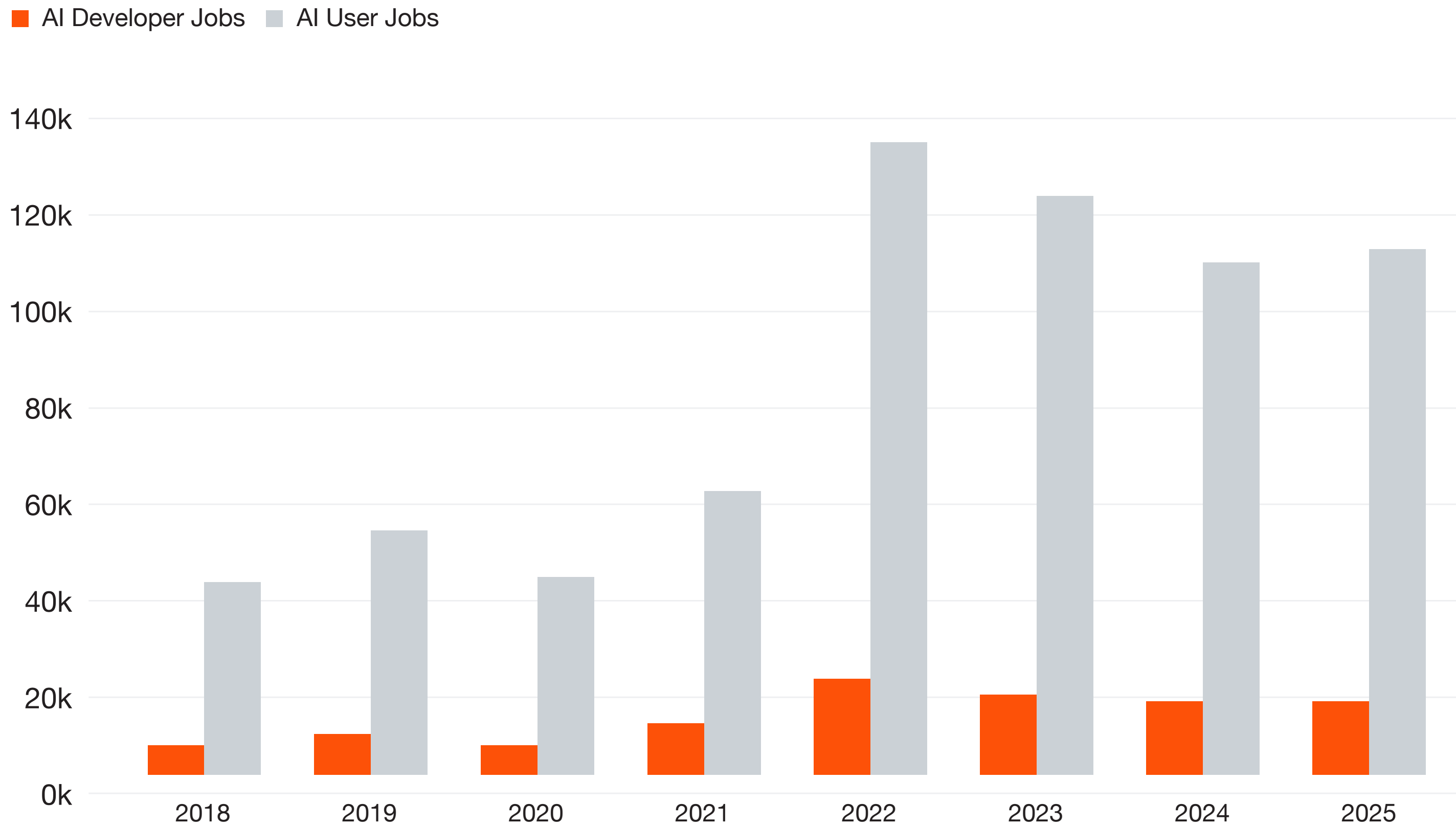
Notes: We define a ‘new skill’ as any skill that has greater than 10 mentions in an occupation in 2025, but five or less mentions in that same occupation in 2019. Across all postings for an occupation in a given country, we count the number of ‘new skills’ required for that occupation.

## Findings

- We find that occupations in the highest AI exposure quartile exhibit a substantially greater average number of newly emerging skills between 2019 and 2025 than lower exposure groups.
- Importantly, this metric reflects the average number of new skills per occupation within each exposure quartile, rather than the total number of new skills observed.
- Unlike the weaker and more uneven relationship seen in overall net skill change, the pattern here becomes much clearer at higher exposure levels, with the second and top quartiles recording notably higher averages, and the top quartile reaching 225 new skills per occupation.
- Some of this increase may reflect higher posting volumes in more exposed occupations, but it is also consistent with underlying job growth and evolution, as expanding roles require a broader and more diverse set of skills.

# AI job demand in Germany is dominated by user roles, with both categories stabilising below their 2022 peak but above earlier levels

Total number of AI user and AI developer job roles, Germany, 2018-2025



Source: PwC analysis, Lightcast data

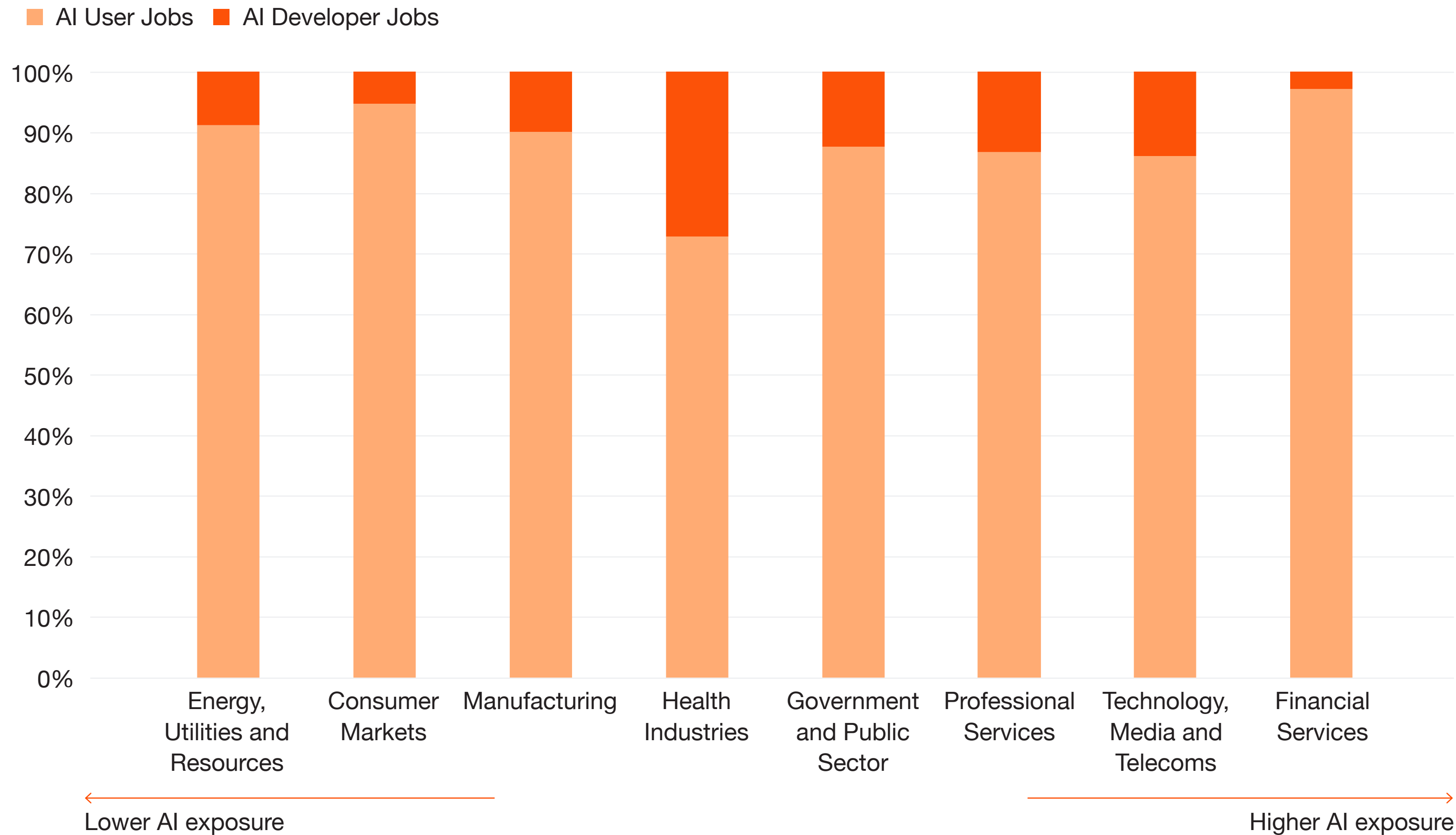
Notes: AI user and AI developer job roles are determined as jobs requiring Tier 0 or 1 skills (AI literacy and applied AI skills) for AI user jobs and Tier 2 skills (advanced AI skills) for AI developer jobs. AI developer jobs are tagged as such if there are any skills in the job postings data requiring Tier 2 skills for a specific job role.

## Findings

- AI user roles account for the majority of AI-related jobs and continue to drive overall demand, increasing by around **2.8k** roles in 2025, though remaining below their 2022 peak.
- In contrast, AI developer roles remain lower but stable, growing by around **339** roles in 2025, while also remaining below their 2022 peak.
- Overall, this points to a more stable pattern across both categories in the last year, with AI user roles increasing by **2.6%** and AI developer roles by **2.2%**, while demand across both remains well above earlier levels.

# Across sectors, AI job postings in Germany remain concentrated in capabilities related to the use of AI rather than its development

Within sector shares of AI user and AI developer job roles of all AI related roles, Germany, 2025



## Findings

- AI user roles account for the largest share across most sectors, indicating a strong focus on deploying and integrating AI into existing workflows.
- **Health Industries** shows the highest share of **AI developer** roles (**27.1%**), indicating greater focus in the development of sector specific advanced AI tools.
- **Financial Services** records the highest share of **AI user** roles (**97.3%**), reflecting broad-based adoption of AI across operational roles rather than in-house development.

Source: PwC analysis, Lightcast data

Notes: AI user and AI developer job roles are determined as jobs requiring Tier 0 or 1 skills (AI literacy and applied AI skills) for AI user jobs and Tier 2 skills (advanced AI skills) for AI developer jobs. AI developer jobs are tagged as such if there are any skills in the job postings data requiring Tier 2 skills for a specific job role.

# Contacts



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