

Germany

At 59 percent, Germany's technical automation potential is roughly in line with the European average, with manufacturing accounting for about a quarter of the estimated \$486 billion that could be unlocked through automation by 2030. Demand for AI-related skills is rising quickly: Since 2023, employer demand for AI fluency has increased sixfold—greater than the regional average—while demand for technical AI skills has grown more moderately.

59%

Share of current work hours technically automatable with existing technology

\$486 billion

Estimated economic value from automation adoption by 2030, midpoint scenario

86%

Share of human skills that will endure for people amid automation

6.1x

People in jobs requiring AI fluency in 2025 vs 2023

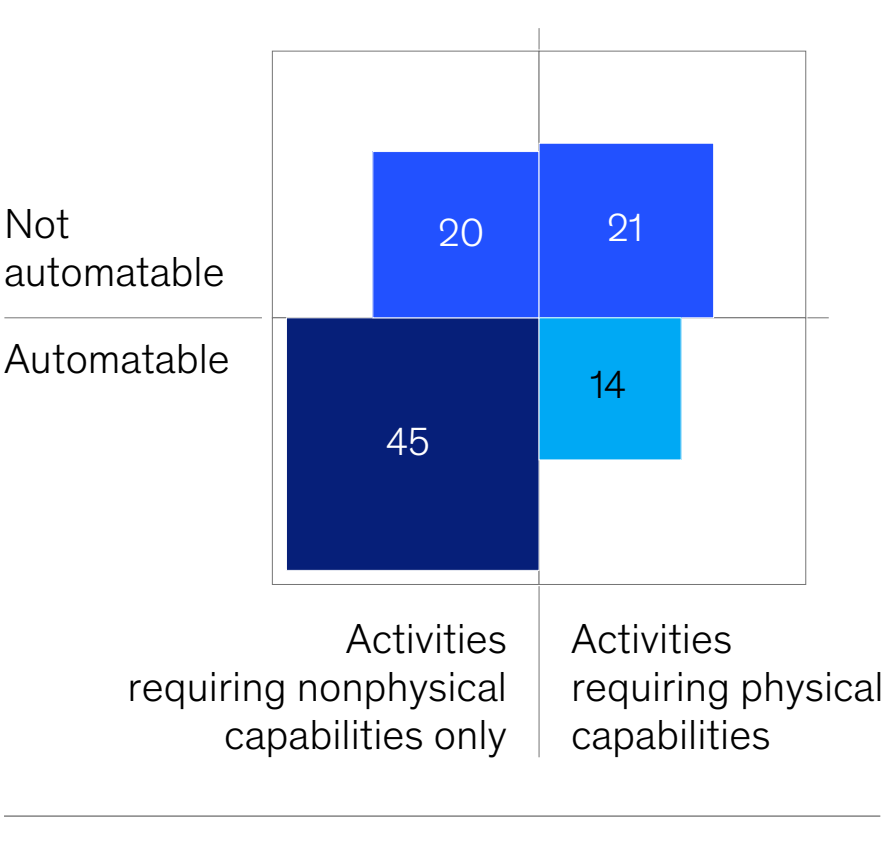
Automation could change how work gets done in Germany.

Distribution of work hours, 2024

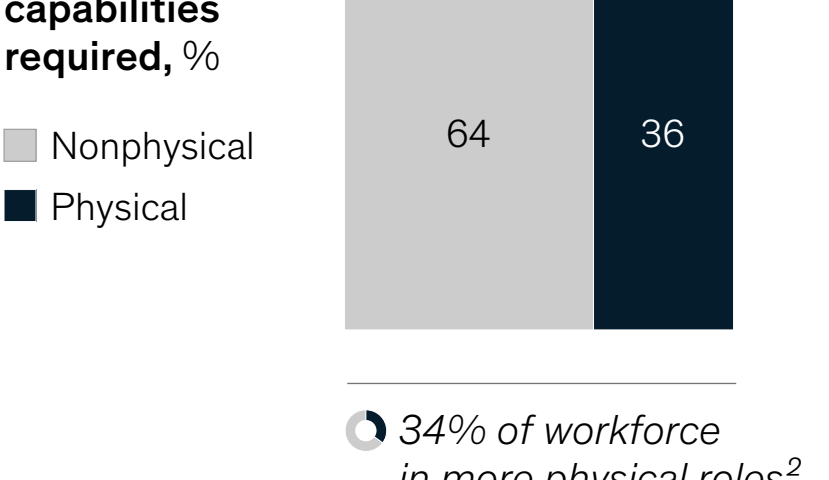
Share of work that could be done by:

- People
- Agents
- Robots

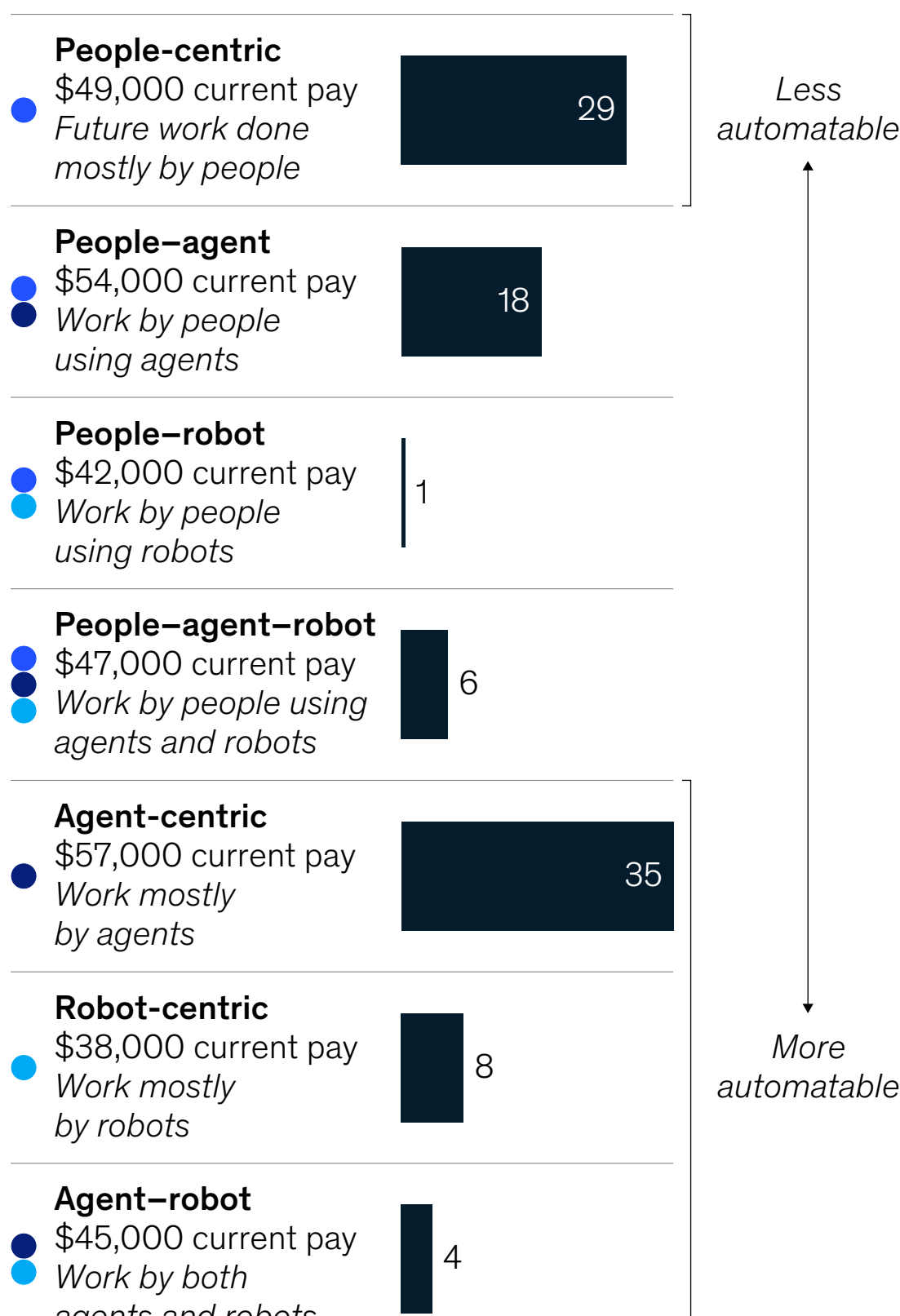
Hours by technical automation potential,¹%



Hours by capabilities required, %

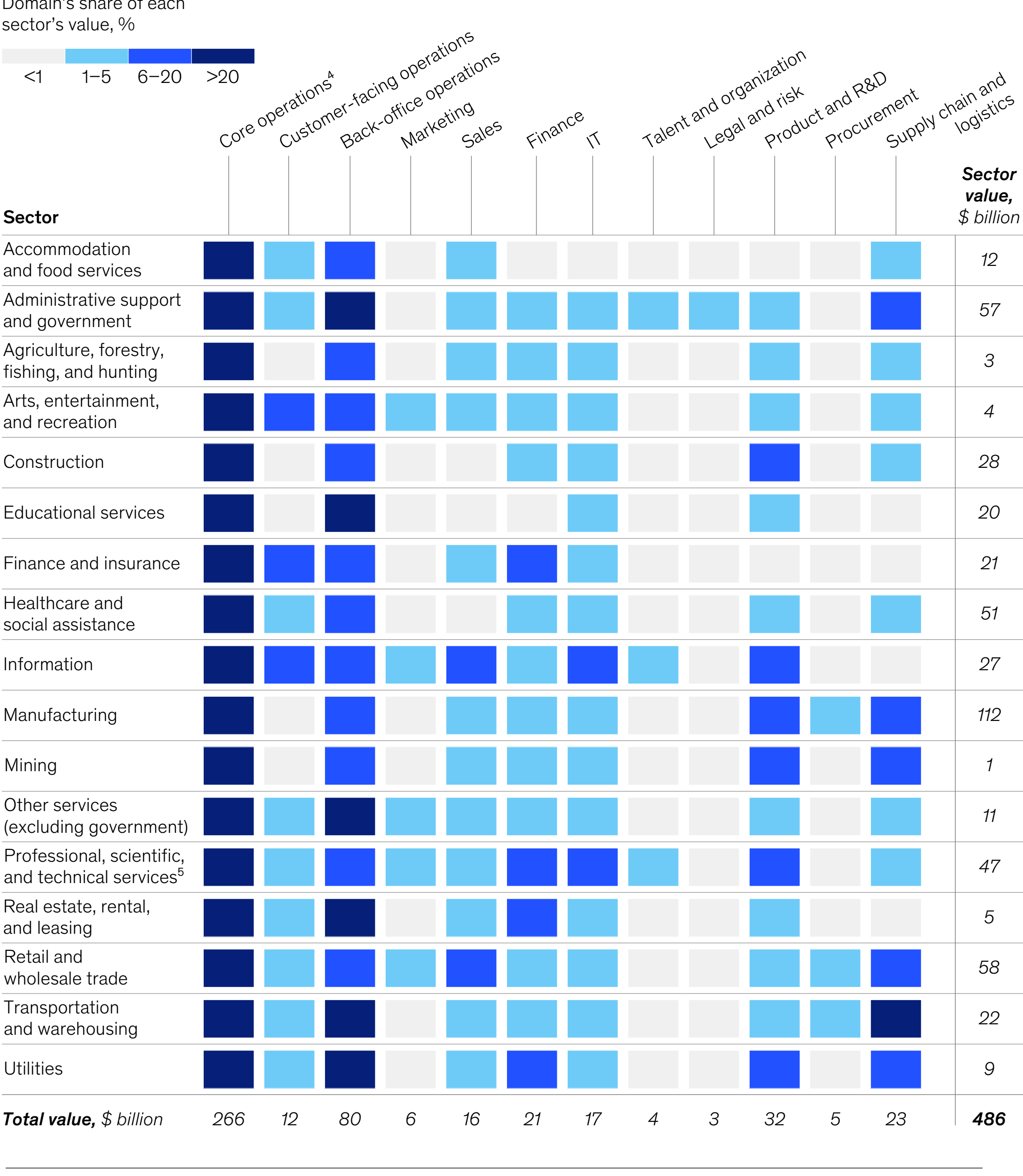


Distribution of workforce across occupation archetypes, 2024, %



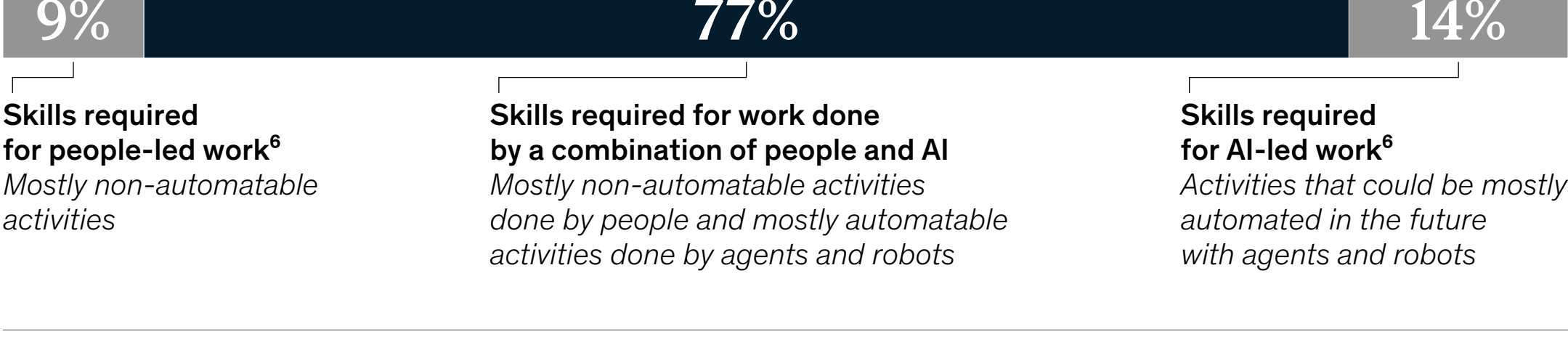
Economic value of sectors and domains, 2030 midpoint scenario of automation adoption³

Domain's share of each sector's value, %

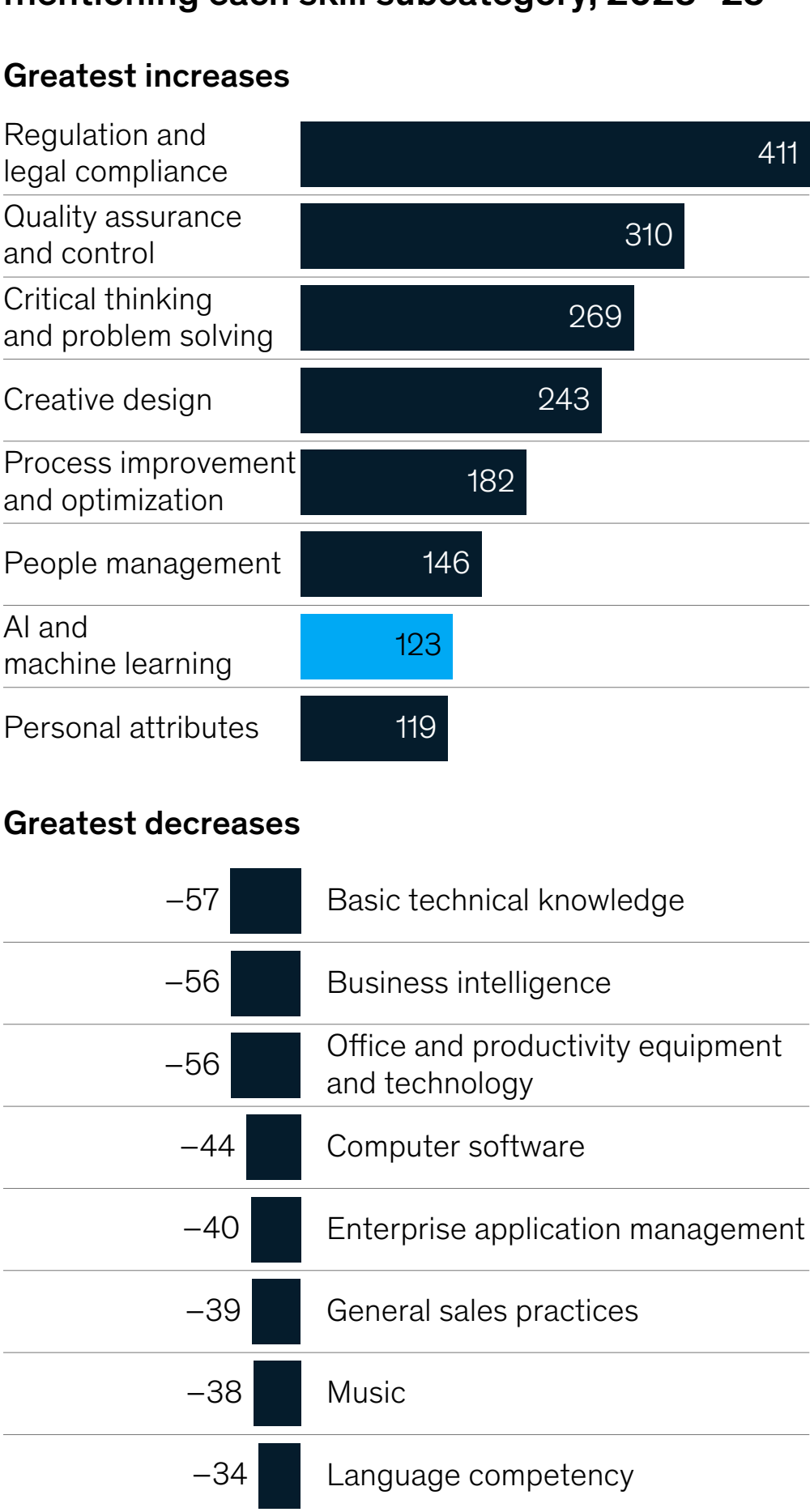


AI will reshape skills in Germany's workforce.

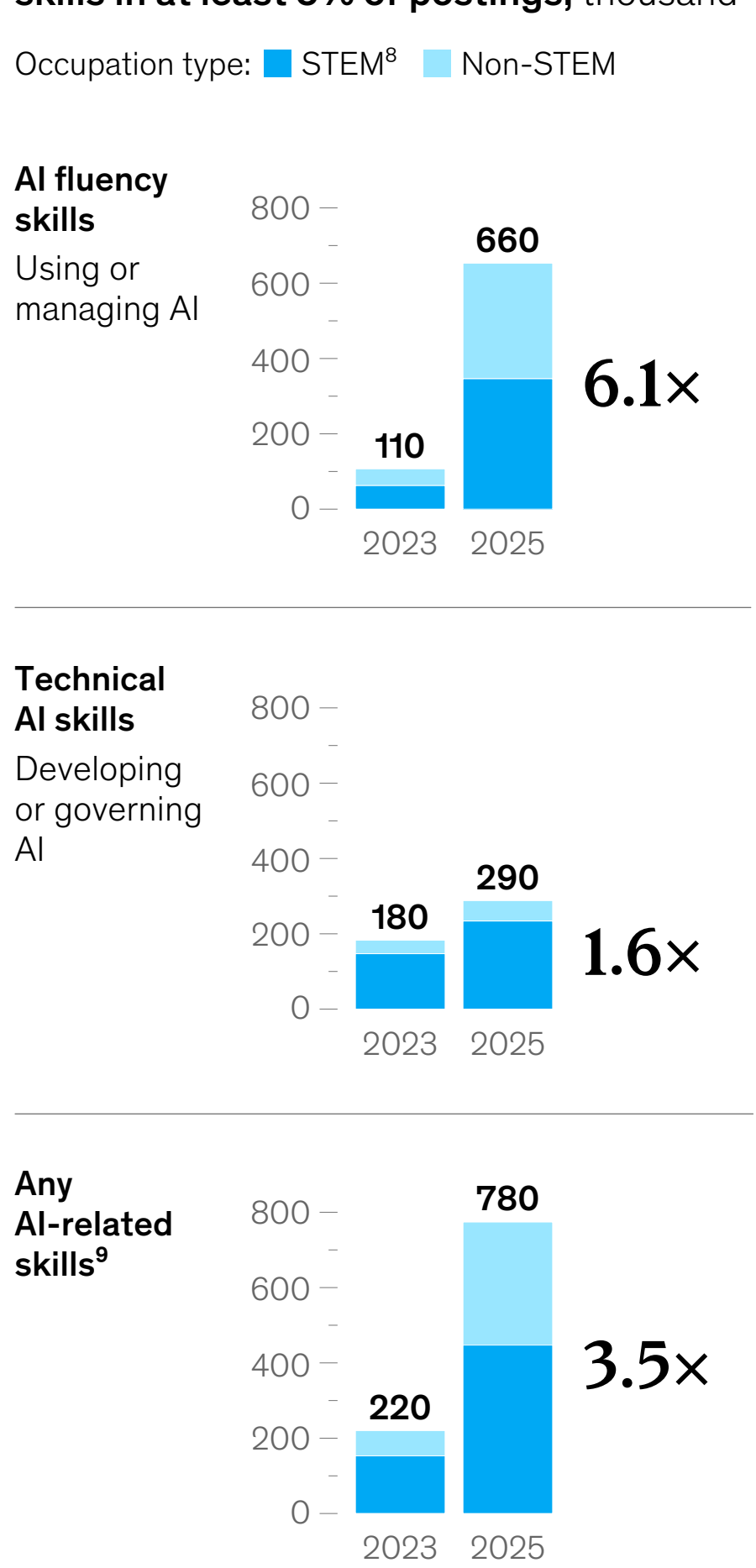
Distribution of ~3,900 skills by technical automation potential, 2024



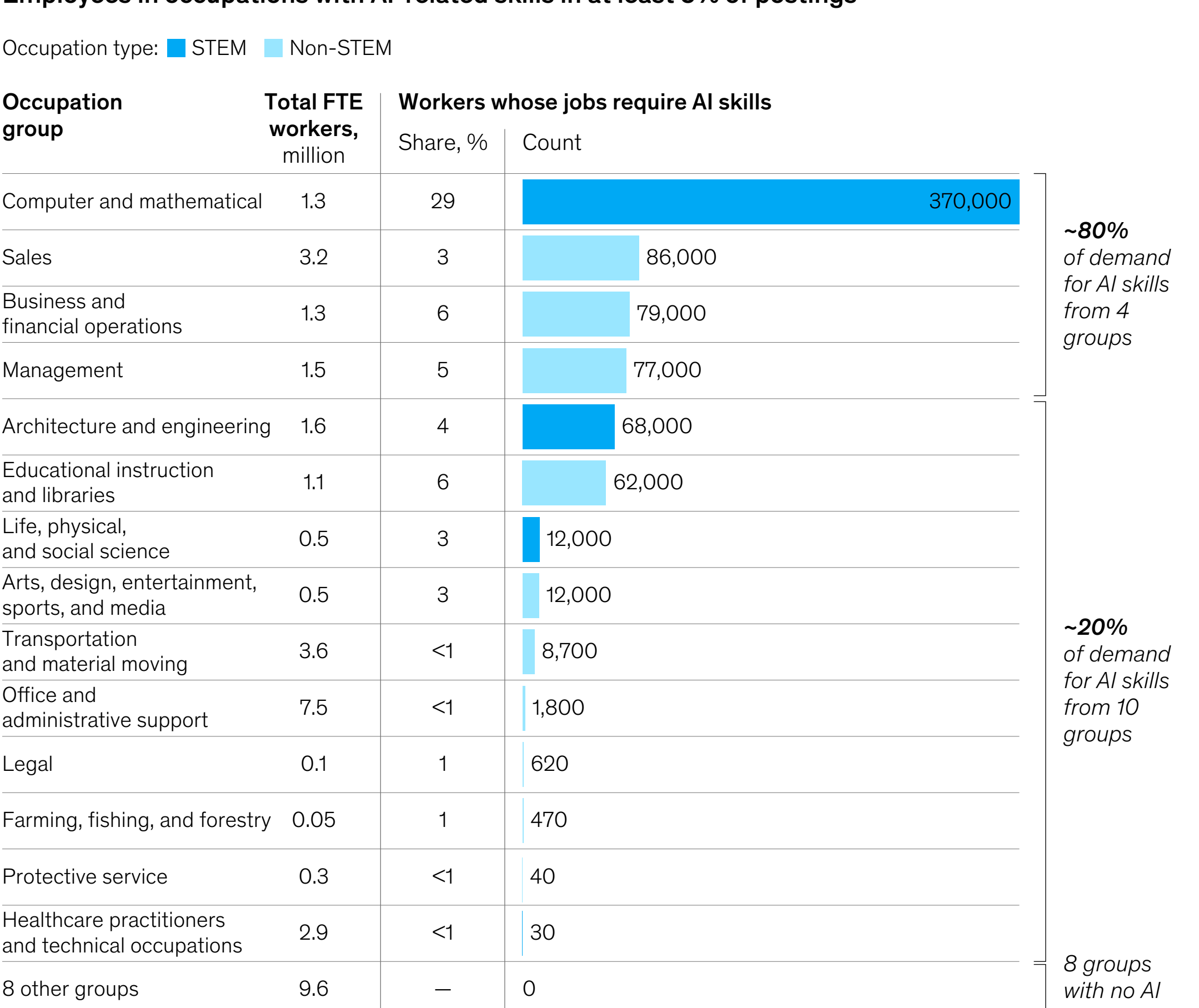
Change in occupations with postings mentioning each skill subcategory, 2023–25⁷



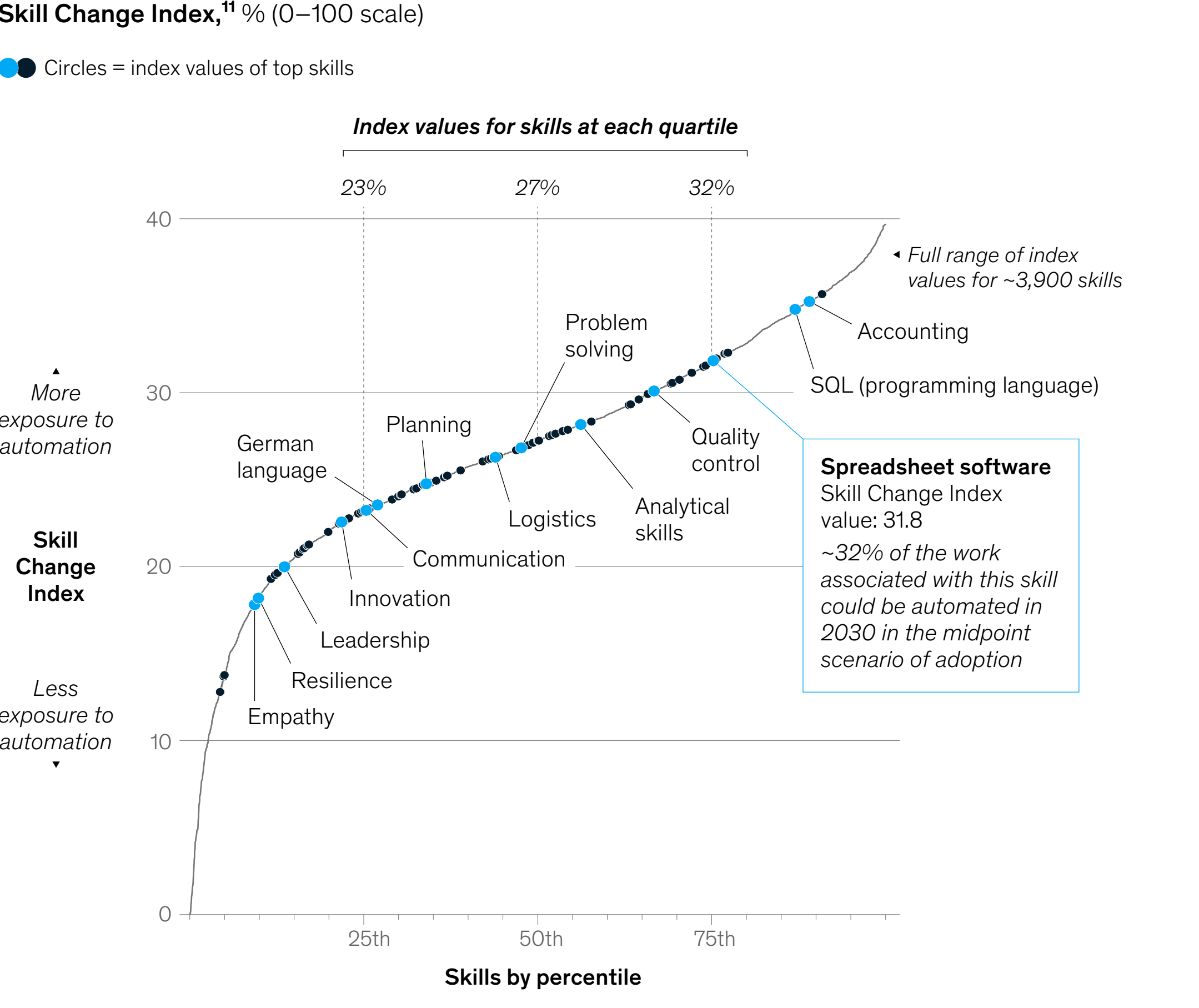
Employees in occupations with AI-related skills in at least 5% of postings, thousand



Employees in occupations with AI-related skills in at least 5% of postings¹⁰



Skill Change Index, % (0–100 scale)



Note: Figures may not sum to 100% due to rounding. Exhibits analyzing AI-related skills demand include only occupations with 30 or more job postings in Q4 2025. ¹Automation potential reflects technological capabilities to perform work. Estimates shown represent the late scenario of expert assessments. In an early scenario, global technical automation potential ranges from 60% to 70% of current work hours. ²Defined as occupations in which at least 40% of work hours require physical capabilities. ³Estimated by multiplying occupation-level automation adoption in the 2030 midpoint scenario by full-time equivalents and 2024 wages. ⁴Includes customer-facing operations directly involved in delivering products or services. Excludes support domains, except where these constitute core operations within a given sector, for example, finance professionals in the finance and insurance industry. ⁵Includes management of companies and enterprises. ⁶"People-led" and "AI-led" skills are defined as those used in more than 80% of time spent on associated work activities. ⁷At least 1 skill in the subcategory appears in ≥25% of job postings for a given occupation. ⁸STEM roles include computer and mathematical architecture and engineering; life, physical, and social science; and healthcare occupations. ⁹STEM roles include computer and mathematical architecture and engineering; life, physical, and social science; and healthcare occupations. ¹⁰Includes only skills Lightcast categorizes as "artificial intelligence and machine learning" or "natural language processing." ¹¹Based on the projected 2030 midpoint scenario of automation adoption, aggregated across occupations using employment-based weighting. We exclude skills that could not be linked to work activities within occupations. Source: Lightcast; Eurostat; Germany's Federal Statistical Office; O*NET; McKinsey Global Institute analysis