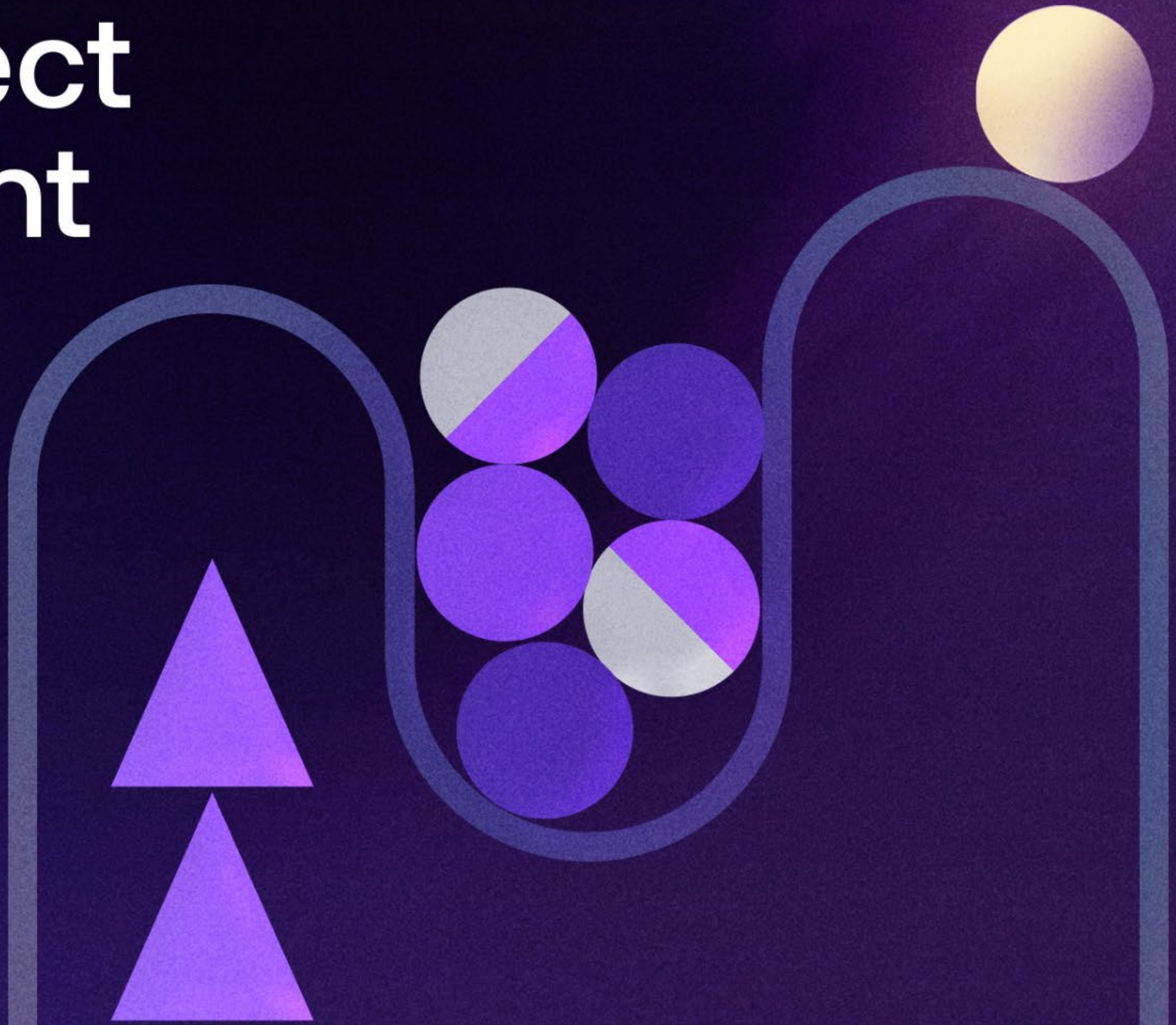
Global Project Management Talent Gap



Project Management Institute

Foreword



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President & CEO
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The world is an incredibly volatile place right now. Changes in the ways we work, technology-induced transformations, and shifts in the geopolitical order that have shaped our collective worldview for nearly a century are presenting daunting challenges for nations, businesses and individuals. It is our reality.

While many industry leaders need to rethink their way forward, the job for project professionals is clear — we need to double down on what we do best, to support organizations on their journeys. Regardless of what's happening in the external environment, organizations of all sizes and models must be able to tackle business model reinventions through successful transformations — and that means running successful projects. This has been the case for decades, and it remains the case today.

Project professionals — defined as individuals who currently spend most of their professional activity doing project work — are at the center of this shift.

The latest thought leadership report from Project Management Institute (PMI), *Global Project Management Talent Gap*, confirms this reality.

The report quantifies the current and future demand for project professionals, highlights the regions where the project profession is growing most rapidly, and identifies the forces transforming our field. In alignment with PMI's strategic focus outlined in *PMI:Next*, the report enumerates professionals who spend the majority of their workdays managing projects, applying a continuum of practices from predictive to agile.

There are nearly 40 million project professionals worldwide today, and by 2035, the talent gap could reach up to 30 million more. The annual increase in this gap is outpacing the average growth of the global economy. The report underscores the urgency of reskilling and upskilling to close this deficit.

This represents a massive opportunity. Not only does the world need more project professionals in these uncertain times, but project professionals are uniquely positioned to make extraordinary contributions.

In the short term, they can demonstrate agility, helping leaders navigate this new landscape. Over the long term, they can chart new paths to success, identify and mitigate risks, and keep the C-suite just far enough ahead to make a real difference.

Remember this: Successful projects — even small ones — can have a real impact on communities and economies. Skilled project professionals who take ownership beyond execution, align their work with strategy and earn the trust of executives can help shape the future of their organizations.

You are in demand. Your work matters. Now, more than ever.

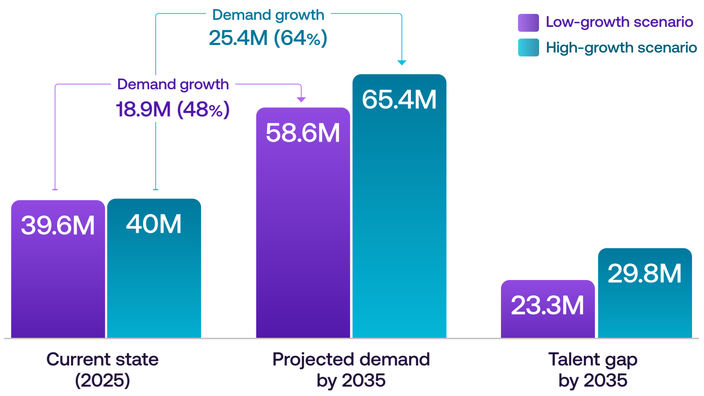
Executive Summary

In 2025, the estimated size of the project management profession is almost 40 million skilled professionals. To put this in perspective, the global workforce includes approximately 25 million software developers and around 30 million nurses — underscoring the scale and significance of the project management profession.

By 2035, organizations could need up to 65 million project professionals to keep pace with growth and change. These projections show the supply of qualified talent falling short by as many as 29.8 million project professionals over the next decade. That gap presents not only a risk to business performance but a generational opportunity to professionalize and elevate project management as one of the most critical and impactful careers of the future.

The Global Talent Gap

Current global market size (2025) and projected demand (2035) for project professionals.



Note: An additional 4.4M project professionals are expected to leave the workforce by 2035 due to attrition and retirement. Percentages were rounded for easy reading.

Market Size and Talent Gap by Region

North America

Market size (2025): 4.1M
Projected demand: 4.9M–5.1M
% Demand Growth: 21%–26%
Talent Gap by 2035: 1.3M–1.6M

Europe

Market size (2025): 9.0M
Projected demand: 10.8M–11.3M
% Demand Growth: 20%–25%
Talent Gap by 2035: 2.9M–3.5M

Middle East/North Africa

Market size (2025): 1.3M
Projected demand: 1.7M–1.8M
% Demand Growth: 32%–42%
Talent Gap by 2035: 0.5M–0.6M

South Asia

Market size (2025): 4.4M–4.5M
Projected demand: 7.4M–8.5M
% Demand Growth: 68%–91%
Talent Gap by 2035: 3.4M–4.4M

Latin America

Market size (2025): 2.0M
Projected demand: 2.4M–2.6M
% Demand Growth: 22%–29%
Talent Gap by 2035: 0.6M–0.8M

Sub–Saharan Africa

Market size (2025): 2.6M
Projected demand: 4.1M–4.6M
% Demand Growth: 56%–75%
Talent Gap by 2035: 1.6M–2.1M

China

Market size (2025): 11.0M–11.1M
Projected demand: 19.9M–23.3M
% Demand Growth: 81%–109%
Talent Gap by 2035: 10.4M–13.6M

Asia–Pacific

Market size (2025): 5.3M
Projected demand: 7.3M–8.0M
% Demand Growth: 38%–50%
Talent Gap by 2035: 2.6M–3.2M

Note: Percentages were rounded for easy reading.

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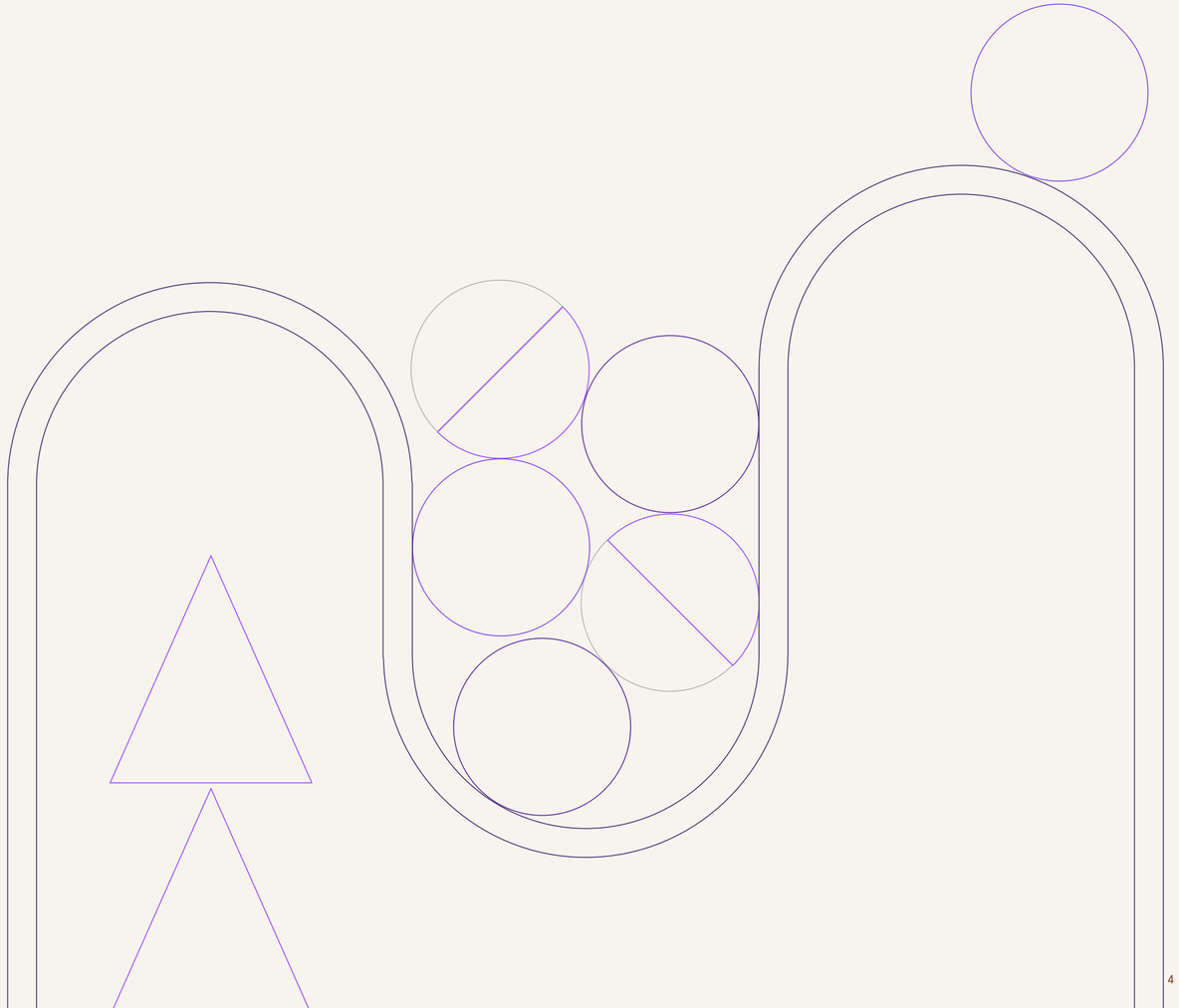
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Introduction

Project professionals have always been there for organizations in times of uncertainty, and this truth remains the same today. In our increasingly volatile global economy, the demand for skilled project professionals is not only rising — it's solidifying the project professional's critical role in business resilience and transformation.

As organizations navigate economic uncertainty, geopolitical tension and rapid technological change, the ability to pivot strategies and deliver successful projects has never been more essential. Project professionals are at the forefront of turning strategy into action, and in times where we could see an unprecedented level of transformation and disruption across all industries and verticals, they are more valuable to the C-suite and vital to the organization than ever. This creates an even stronger sense of urgency to close the widening talent deficit.

In 2025, the estimated size of the project management profession is almost 40 million skilled professionals. To put this in perspective, the global workforce includes approximately 25 million software developers and around 30 million nurses — underscoring the scale and significance of the project management profession.

By 2035, organizations could need up to 65 million project professionals to keep pace with growth and change. These projections show the supply of qualified talent falling short by as many as 29.8 million project professionals over the next decade. That gap presents not only a risk to business performance but a generational opportunity to professionalize and elevate project management as one of the most critical and impactful careers of the future.

This report also offers a data-rich look at the projected growth of the project profession, based on growth of capital investment, where most project work is done. The trajectory of that growth varies by geography and industry, as politics and populations shift, and as organizations and industries transform.



The data offers a view of how current and emerging trends could shape the future of the project profession.

First, growth is not distributed equally. Emerging economies are seeing a steep rise in demand for project talent, especially in South Asia and Sub-Saharan Africa. Many of these countries are in the midst of massive infrastructure expansion, digital transformation and industrial development, and will need a significant influx of project talent to make these ambitions reality.

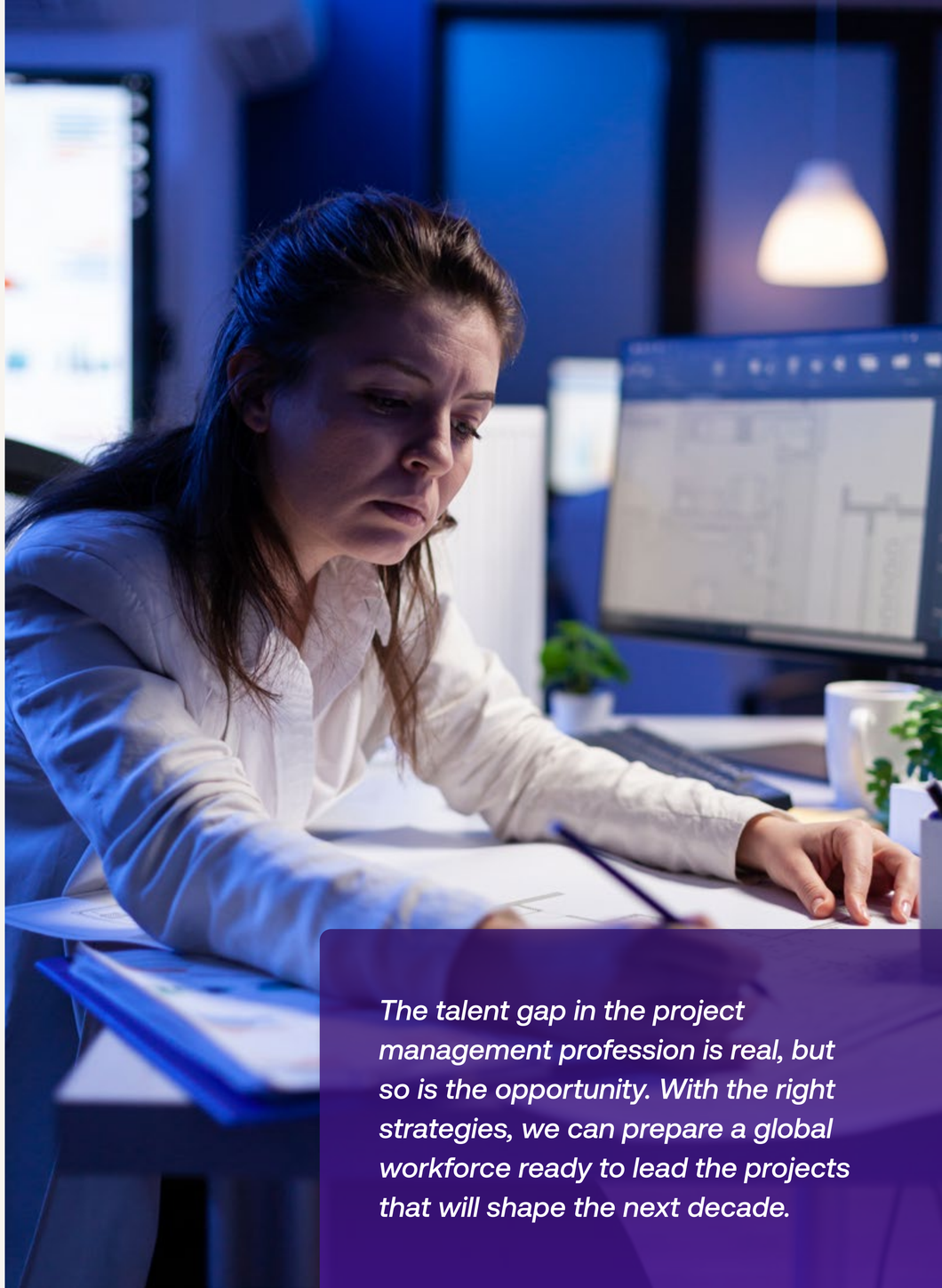
Second, increasing the number of workers in the labor force doesn't automatically equate to a project-ready talent pool. In several regions, particularly those with fast-growing populations, there are opportunities to strengthen foundational education and expand access to professional development. Many workers have the potential to thrive in project roles but may need additional support — such as targeted upskilling, credentialing pathways and career guidance — to make that transition. With the right investments, these growing labor markets could become powerful engines for meeting global demand.

Third, mature economies like North America and Europe are seeing slower but still significant demand growth — especially in industries like healthcare, energy and IT. Yet the supply of project professionals is barely keeping pace, and in some countries it's actually shrinking due to aging populations and shifting labor force dynamics. In these regions, the challenge lies in reskilling existing workers, attracting new entrants to the profession and modernizing project delivery models in response to artificial intelligence (AI), sustainability and digital disruption. We examined several of these trends around people, planet and innovation in our Global Megatrends 2024 report.

Rising to these challenges and taking advantage of these opportunities doesn't just require more project professionals — it needs professionals who do M.O.R.E. to drive project success that elevates our world.

Across all regions, there is growing recognition of the value project professionals bring. But closing the talent gap will require investing in education and training, removing barriers to entry and expanding access to career pathways — especially in high-growth regions where demand is surging but readiness is lagging. It also means supporting continuous learning and specialization in mature markets, where the challenge is less about awareness and more about evolution.

In short: The talent gap in the project management profession is real, but so is the opportunity. With the right strategies, we can prepare a global workforce ready to lead the projects that will shape the next decade.



The talent gap in the project management profession is real, but so is the opportunity. With the right strategies, we can prepare a global workforce ready to lead the projects that will shape the next decade.

The Project Management Talent Gap

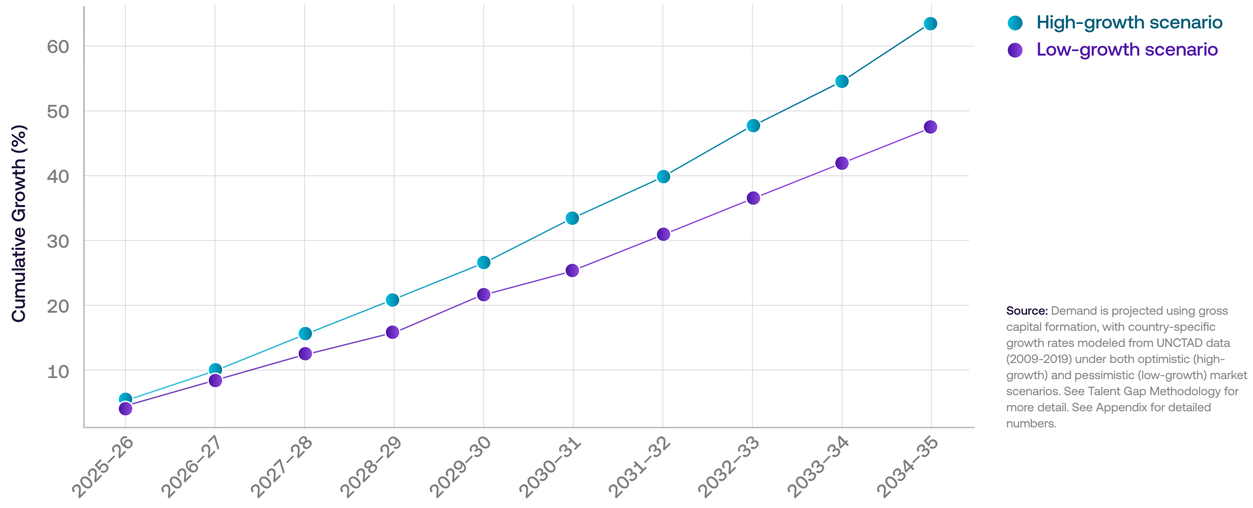
As the leading authority in project management, committed to advancing the project management profession, PMI routinely reviews research data to understand the current and projected market needs for project professionals.

To ensure this report is focused on project professionals who spend the majority of their time delivering projects, we developed a new model to size the profession based on a curated set of job titles that align with project professionals (see Talent Gap Methodology for a detailed explanation).

Our analysis shows that the project management profession is poised for substantial growth over the next decade, with projections indicating a significant increase in demand under both conservative and aggressive scenarios (See Figure 1). We took this ranged approach — evaluating a conservative and aggressive scenario — to reflect the volatility of today's world.

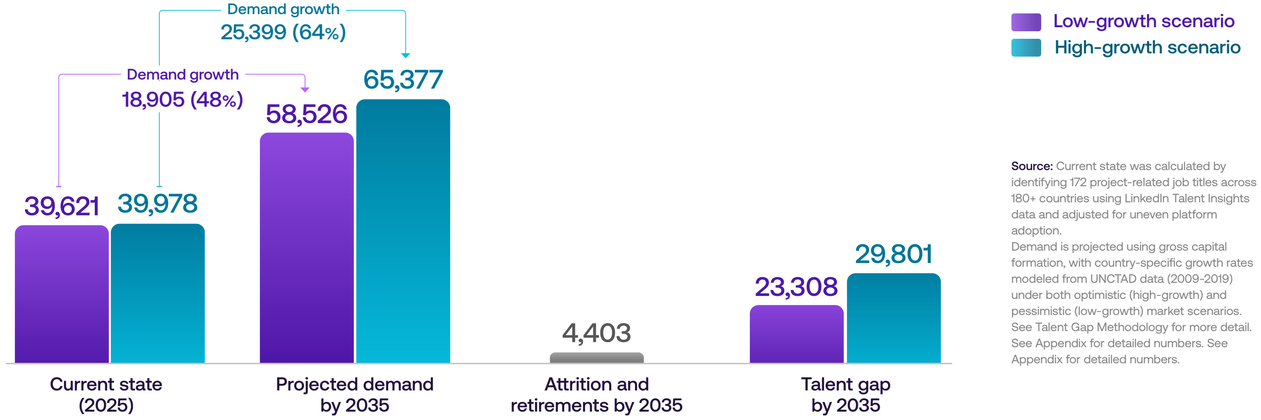
In the low-growth scenario, the needed global project management workforce is expected to grow from 39.6 million in 2025 to 58.5 million in 2035, a 48% increase. The high-growth scenario paints an even more ambitious picture, forecasting a talent gap of nearly 30 million project professionals by 2035 — representing a 64% increase in demand over 2025 (see Figure 2). These findings underscore both the resilience and rising strategic importance of project management capabilities in an increasingly complex, fast-moving global economy where organizations must transform to remain competitive.

Figure 1 – Projected Demand Growth 2025-2034



Source: Demand is projected using gross capital formation, with country-specific growth rates modeled from UNCTAD data (2009-2019) under both optimistic (high-growth) and pessimistic (low-growth) market scenarios. See Talent Gap Methodology for more detail. See Appendix for detailed numbers.

Figure 2 – Current Global Market Size (2025) and Projected Demand (2035) for Project Professionals (numbers shown in thousands)



Source: Current state was calculated by identifying 172 project-related job titles across 180+ countries using LinkedIn Talent Insights data and adjusted for uneven platform adoption.
Demand is projected using gross capital formation, with country-specific growth rates modeled from UNCTAD data (2009-2019) under both optimistic (high-growth) and pessimistic (low-growth) market scenarios. See Talent Gap Methodology for more detail. See Appendix for detailed numbers. See Appendix for detailed numbers.

Note: Percentages were rounded for easy reading.

Regionally, China, South Asia and Sub-Saharan Africa could all see dramatic gains (see Figure 3). In the high-growth scenario, China will need to more than double its already large project talent pool, from 11.1 million to 23.3 million.

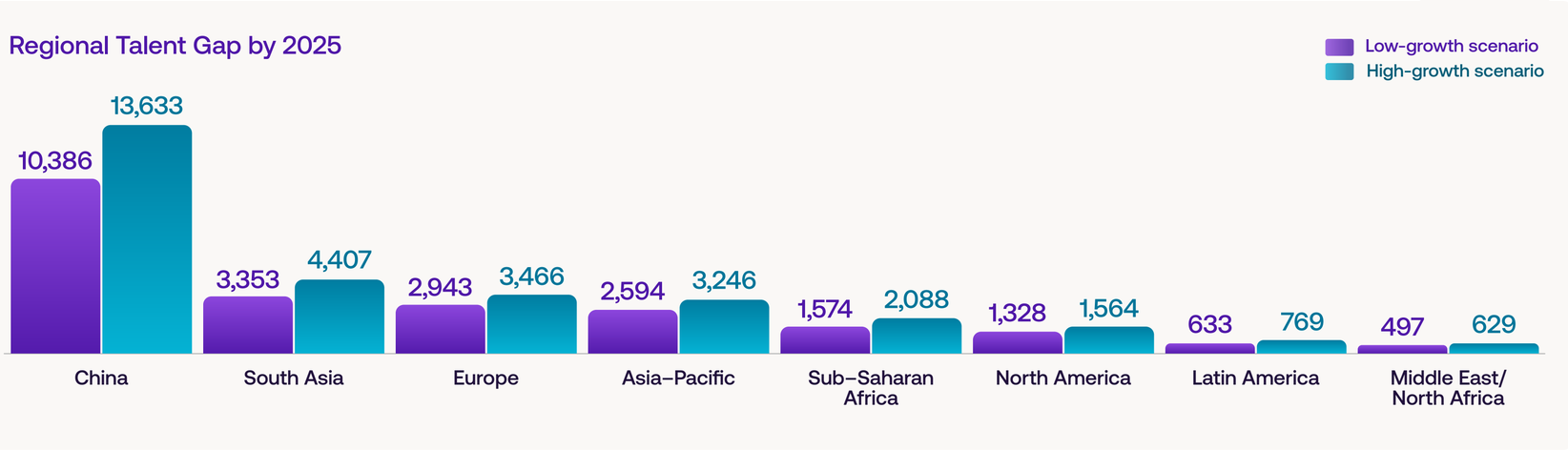
South Asia could also see significant demand growth of between 68 and 91%, and demand in Sub-Saharan Africa could increase by 56 to 75%.

While these three geographies are diverse in context, they share several key economic development trends that are expected drivers of this increasing demand. All three regions are leveraging demographic advantages — particularly South Asia and Sub-Saharan Africa, which have young, growing populations — to fuel economic expansion. They are investing heavily in infrastructure and modernization and digital transformation, and new business growth is enabling digital-first, technology-driven organizations to leapfrog past traditional models. Projects — and project professionals — will drive this evolution.

Figure 3 – Current Market Size (2025) and Projected Demand (2035) for Project Professionals by Region (numbers shown in thousands)

	Current state (2025)		Projected demand by 2035		Gap from demand growth		% Demand growth		Attrition and retirements by 2035	Talent gap by 2035	
Country	Low	High	Low	High	Low	High	Low	High		Low	High
China	10,981	11,139	19,918	23,324	8,937	12,184	81%	109%	1,449	10,386	13,633
South Asia	4,415	4,471	7,438	8,547	3,022	4,076	68%	91%	331	3,353	4,407
Europe	8,980	9,018	10,753	11,314	1,773	2,296	20%	26%	1,170	2,943	3,466
Asia–Pacific	5,277	5,317	7,291	7,983	2,014	2,666	38%	50%	580	2,594	3,246
Sub–Saharan Africa	2,615	2,642	4,078	4,620	1,463	1,978	56%	75%	110	1,574	2,088
North America	4,058	4,077	4,892	5,148	834	1,071	21%	26%	494	1,328	1,564
Latin America	2,001	2,011	2,448	2,594	447	583	22%	29%	186	633	769
Middle East/North Africa	1,293	1,302	1,707	1,848	414	546	32%	42%	83	497	629

Note: Displayed as a range between low-growth and high-growth scenarios. Percentages were rounded for easy reading.



Source: Current state was calculated by identifying 172 project-related job titles across 180+ countries using LinkedIn Talent Insights data and adjusted for uneven platform adoption.
Demand is projected using gross capital formation, with country-specific growth rates modeled from UNCTAD data (2009-2019) under both optimistic (high-growth) and pessimistic (low-growth) market scenarios.
See Talent Gap Methodology for more detail. See Appendix for detailed numbers.

Growth Leaders

While growth is expected across every region globally, several countries stand out in their growing need for project professionals over the next decade. For this analysis at the country level, we present only the low-growth projections to provide a conservative and stable foundation for evaluation. Projections at a national scale are inherently more sensitive to short-term disruptions — such as policy shifts, economic volatility or localized instability.

Figure 4 shows the countries where demand is expected to grow fastest based on our research. Across all these markets, large-scale infrastructure projects, industrialization, urbanization and integration into global trade networks are creating a surge in project-based work — driving strong demand for project professionals to deliver and manage increasingly complex initiatives.

Figure 5 shows countries that will need the highest number of additional project professionals in absolute numbers. Growth will be fueled by various factors, including rapid economic development, infrastructure expansion and industrial transformation. Across these diverse contexts and geographies, the common thread is a rising volume of complex, capital-intensive projects that require skilled professionals to deliver strategic outcomes.

A full list of every country analyzed for this report, along with projections of demand growth and the project professional talent gap by 2035, is available in the Appendix.

Figure 4 – Top 10 Countries: Highest Demand Growth (numbers shown in thousands)

Country	Current state (2025)*	Projected demand by 2035*	% Demand growth	Attrition and retirements by 2035	Talent gap by 2035*
Ethiopia	365	775	112%	15	425
Côte d'Ivoire	66	137	108%	2	73
Bangladesh	362	671	86%	23	332
China	10,981	19,918	81%	1,449	10,386
Vietnam	430	746	74%	42	358
Cambodia	72	124	73%	5	58
Uzbekistan	107	182	70%	8	83
Ghana	74	126	70%	4	56
Tanzania	206	345	68%	7	146
India	3,905	6,545	68%	298	2,939

*Based on low-growth scenario.
Note: Percentages were rounded for easy reading.

Source: To ensure this analysis focuses on markets with significant impact and growth potential, we excluded countries with a current project professional population under 50,000. These smaller markets may not offer meaningful insight into global or regional trends due to their limited scale. Current state was calculated by identifying 172 project-related job titles across 180+ countries using LinkedIn Talent Insights data and adjusted for uneven platform adoption. Demand is projected using gross capital formation, with country-specific growth rates modeled from UNCTAD data (2009-2019) under both optimistic (high-growth) and pessimistic (low-growth) market scenarios. See Talent Gap Methodology for more detail. See Appendix for detailed numbers.

Figure 5 – Top 10 Countries: Number of Project Professionals Needed (numbers shown in thousands)

Country	Current state (2025)*	Projected demand by 2035*	% Demand growth	Attrition and retirements by 2035	Talent gap by 2035*
China	10,981	19,918	81%	1,449	10,386
India	3,905	6,545	68%	298	2,939
United States	3,585	4,330	21%	433	1,178
Indonesia	872	1,333	53%	79	540
Germany	1,593	1,861	17%	249	517
Ethiopia	365	775	112%	15	425
Vietnam	430	746	74%	42	358
Bangladesh	362	671	86%	23	332
Russian Federation	1,123	1,315	17%	139	331
Poland	517	692	34%	59	234

*Based on low-growth scenario.
Note: Percentages were rounded for easy reading.

Source: Current state was calculated by identifying 172 project-related job titles across 180+ countries using LinkedIn Talent Insights data and adjusted for uneven platform adoption. Demand is projected using gross capital formation, with country-specific growth rates modeled from UNCTAD data (2009-2019) under both optimistic (high-growth) and pessimistic (low-growth) market scenarios. See Talent Gap Methodology for more detail. See Appendix for detailed numbers.

Market Size and Talent Gap by Industry

Every project-focused industry will see demand grow between 37% and 66% based on PMI projections (see Figure 6). Demand growth is projected to be highest in construction and manufacturing, indicating that sectors that traditionally rely on project professionals will continue to see this need increase.

This surge in demand will likely be driven by a combination of large-scale infrastructure investment, global supply chain shifts and rapid technological transformation. In construction, urbanization, government stimulus and climate-resilient development are driving complex projects that require strong project management skills. Meanwhile, manufacturing is undergoing a major evolution, with reshoring, automation and emerging technologies reshaping how and where goods are produced.

Figure 6 – Current Market Size (2025) and Projected Demand (2035) for Project Professionals by Industry (numbers shown in thousands)

	Current state (2025)		Projected demand by 2035		Gap from demand growth		% Demand growth		Attrition and retirements by 2035	Talent gap by 2035	
Industry	Low	High	Low	High	Low	High	Low	High		Low	High
Construction	3,675	3,710	5,500	6,163	1,825	2,453	50%	66%	398	2,222	2,851
Manufacturing	6,984	7,048	10,407	11,654	3,424	4,606	49%	65%	831	4,255	5,437
Professional services	4,751	4,794	6,987	7,797	2,236	3,003	47%	63%	531	2,767	3,535
Financial services	3,327	3,357	4,886	5,449	1,559	2,093	47%	62%	366	1,925	2,458
IT services	4,871	4,914	7,129	7,940	2,258	3,026	46%	62%	522	2,780	3,548
Energy and utilities	1,305	1,315	1,819	2,001	514	685	39%	52%	138	652	823
Healthcare	1,363	1,373	1,887	2,071	524	698	38%	51%	145	670	844
Government	1,681	1,694	2,308	2,528	626	834	37%	49%	172	798	1,006
Other	11,663	11,774	17,603	19,774	5,941	8,000	51%	68%	1,299	7,240	9,300

Note: Displayed as a range between low-growth and high-growth scenarios. Percentages were rounded for easy reading.

Source: Current state was calculated by identifying 172 project-related job titles across 180+ countries using LinkedIn Talent Insights data and adjusted for uneven platform adoption. Demand is projected using gross capital formation, with country-specific growth rates modeled from UNCTAD data (2009-2019) under both optimistic (high-growth) and pessimistic (low-growth) market scenarios. See Talent Gap Methodology for more detail. See Appendix for detailed numbers.



Closing the Talent Gap

Many factors will impact the course of the global economy over the next decade, and while we can account for many variables, the future is, by nature, uncertain. However, even our conservative estimates, which anticipate economic retraction in the coming years, still project that the world will need as many as 23 million more project professionals by 2035.

As the leading authority in project management, PMI is committed to help fill that gap to ensure the world has an ample supply of project professionals who can maximize project success to elevate our world. How can we do so?

- Project professionals can raise visibility for the profession by embracing a strategic mindset and stepping up to become trusted partners within the organization who help drive outcomes and deliver value. By demonstrating this mindset — which we refer to as M.O.R.E. — project professionals can bolster the perception of project management and demonstrate that it is a critical and desirable career path.
- Organizations can offer upskilling and reskilling initiatives that provide fundamental project management skills to their workforce, and create career pathways that enable those with interest and talent to move into project management roles. In doing so, organizations can meet their own needs and ensure they have an adequate supply of project talent to drive their projects.
- PMI supports professionals and organizations in closing the talent gap by investing across the full career journey. We introduce project management skills to young people through our philanthropic arm, the PMI Educational Foundation (PMIEF); partner with academic institutions to teach project management at the undergraduate and graduate levels; and offer career-long learning and certification opportunities for working professionals. Through volunteer opportunities and a network of over 300 chapters worldwide, we strengthen local communities and advance the project management profession.

The world is made and changed through projects. Filling the talent gap with professionals with the right skills and mindset is how we, as a community, can elevate our world.



Talent Gap Methodology

This year's report adopts a new methodology to provide a more accurate estimate of the global project professional workforce. We leveraged LinkedIn's Talent Insights (LTI) platform, which aggregates professional data from over one billion users worldwide.

By focusing on aggregated job title data, we were able to capture a broader and more representative picture of the project professional workforce across established and emerging markets while mitigating potential biases related to recruitment-driven profiles.

Workforce Estimation and Adjustments

Researchers began by identifying 172 job titles related to project professionals (including project, program and portfolio managers, Agile professionals, product managers and product owners) across 180+ countries via the LinkedIn Talent Insights platform. To correct for uneven LinkedIn adoption (especially in Northeast Asia), we adjusted estimates based on the proportion of project professionals among LinkedIn users, extrapolated to the educated workforce (those with at least lower-secondary education). This ensured estimates reflected the qualifications typically needed in project roles.

Demand Projections

Future demand was modeled using gross capital formation as a stand-in for economic growth. Using UN Trade and Development (UNCTAD) data (2009–2019), country-specific growth rates were calculated with both high (assuming optimal capital market conditions) and low (in the event of a global recession or unforeseen geopolitical developments) estimates based on market conditions. These rates were mapped to key industries employing project professionals to estimate future workforce demand linked to capital investment trends.

Talent Gap Projections

The shortfall projection was determined by taking the projected 2035 demand for project professionals, then subtracting the current state of project professionals from the projected demand in each country plus the estimated attrition.[3]

Key Assumptions and Limitations

The analysis assumes a steady attrition rate, uses capital investment as a proxy for labor market growth, and relies on education-based workforce segmentation. However, it doesn't fully account for regional differences in professional development, training, or shifts in how the project profession is evolving.

Appendix

Figure 13 – Current Market Size, Projected Demand, Talent Gap, and % Demand Growth by Country (Low-Growth and High-Growth Scenarios)
(numbers shown in thousands)

	Current state (2025)		Projected demand by 2035		Attrition and retirements by 2035	Total Talent Gap		% Demand growth	
Country	Low	High	Low	High		Low	High	Low	High
Afghanistan	44	45	62	67	1	19	24	39.4%	51.2%
Albania	14	14	17	18	2	5	6	22.7%	29.1%
Algeria	50	50	61	65	4	16	19	23.7%	30.3%
Angola	61	61	73	76	2	14	18	19.3%	24.7%
Argentina	121	121	134	138	11	24	28	11.0%	13.9%
Armenia	25	25	36	39	3	14	17	41.8%	54.5%
Australia	360	361	433	456	41	114	135	20.5%	26.2%
Austria	144	145	163	169	22	40	45	12.9%	16.3%
Azerbaijan	56	56	64	67	6	15	17	14.9%	19.0%
Bahamas, The	2	2	2	2	0	0	0	7.4%	9.4%
Bahrain	13	13	17	19	1	5	6	31.2%	40.2%
Bangladesh	362	367	671	790	23	332	446	85.5%	115.2%
Barbados	1	1	1	1	0	0	0	0.1%	0.1%
Belarus	79	79	91	95	11	23	26	15.4%	19.6%
Belgium	144	145	164	170	19	39	45	13.8%	17.5%
Belize	1	1	1	2	0	0	0	16.8%	21.3%
Benin	30	31	44	49	1	15	19	45.3%	59.2%
Bhutan	3	3	4	5	0	2	3	68.9%	91.7%
Bolivia	25	26	37	40	2	13	16	44.0%	57.4%
Bosnia and Herzegovina	19	19	22	24	3	6	7	19.0%	24.2%
Botswana	10	10	14	15	0	5	6	43.9%	57.2%
Brazil	411	412	460	474	43	92	105	11.8%	14.9%
Brunei Darussalam	3	3	4	4	0	0	0	3.9%	4.8%
Bulgaria	65	65	76	80	9	20	23	17.8%	22.6%
Burkina Faso	30	31	45	49	1	15	20	46.9%	61.3%
Burundi	30	31	41	45	1	12	15	35.9%	46.5%
Cabo Verde	1	1	1	1	0	0	0	25.8%	33.2%
Cambodia	72	73	124	144	5	58	76	72.8%	97.2%
Cameroon	67	67	94	103	2	29	38	40.0%	52.0%
Canada	451	453	540	567	58	146	171	19.6%	25.0%
Central African Republic	16	16	15	14	1	-1	-1	-8.9%	-11.0%
Chad	26	27	41	46	1	15	20	53.7%	70.7%

Figure 13 – Current Market Size, Projected Demand, Talent Gap, and % Demand Growth by Country (Low-Growth and High-Growth Scenarios)
(numbers shown in thousands)

	Current state (2025)		Projected demand by 2035		Attrition and retirements by 2035	Total Talent Gap		% Demand growth	
Country	Low	High	Low	High		Low	High	Low	High
Chile	131	131	169	181	15	53	64	29.3%	37.8%
China	10,981	11,139	19,918	23,324	1,449	10,386	13,633	81.4%	109.4%
Colombia	207	208	277	299	21	91	112	33.9%	43.8%
Comoros	1	1	2	2	0	1	1	45.4%	59.4%
Congo, Dem. Rep.	166	168	269	306	6	109	145	62.4%	82.6%
Congo, Rep.	13	13	15	15	1	2	2	9.4%	11.9%
Costa Rica	27	27	36	39	3	12	15	34.6%	44.8%
Côte d'Ivoire	66	67	137	166	2	73	101	107.7%	147.4%
Croatia	41	41	45	46	6	10	11	9.2%	11.6%
Cuba	44	44	52	54	7	15	17	17.9%	22.8%
Cyprus	10	10	12	12	1	3	3	14.4%	18.2%
Czechia	154	154	187	197	18	51	61	21.7%	27.8%
Denmark	96	97	111	116	13	27	31	15.2%	19.3%
Djibouti	1	2	3	4	0	2	2	97.5%	132.5%
Dominican Republic	37	37	57	64	3	23	30	55.3%	72.9%
Ecuador	42	43	53	56	3	14	17	24.8%	31.7%
Egypt	167	168	225	244	11	69	87	34.8%	45.1%
El Salvador	24	24	29	31	2	7	8	21.6%	27.6%
Equatorial Guinea	5	5	4	3	0	-1	-1	-24.7%	-29.9%
Eritrea	7	7	10	11	0	3	4	38.4%	49.9%
Estonia	30	31	40	43	4	14	17	32.4%	41.9%
Eswatini	2	2	3	3	0	1	1	23.4%	29.9%
Ethiopia	365	372	775	944	15	425	587	112.3%	154.1%
Fiji	3	3	4	4	0	1	2	29.6%	38.1%
Finland	98	98	108	110	13	22	25	9.9%	12.5%
France	721	723	807	832	90	176	200	11.9%	15.1%
French Polynesia	1	1	1	1	0	0	0	6.0%	7.6%
Gabon	5	5	7	8	0	2	3	37.4%	48.5%
Gambia	3	3	4	4	0	1	1	24.6%	31.5%
Georgia	32	33	48	53	4	19	24	46.4%	60.7%
Germany	1,593	1,599	1,861	1,941	249	517	591	16.8%	21.4%
Ghana	74	75	126	145	4	56	74	69.8%	93.0%

Figure 13 – Current Market Size, Projected Demand, Talent Gap, and % Demand Growth by Country (Low-Growth and High-Growth Scenarios)
(numbers shown in thousands)

	Current state (2025)		Projected demand by 2035		Attrition and retirements by 2035	Total Talent Gap		% Demand growth	
Country	Low	High	Low	High		Low	High	Low	High
Greece	67	66	56	53	10	-1	-3	-16.0%	-19.6%
Guam	2	2	2	2	0	1	1	17.9%	22.8%
Guatemala	63	63	83	89	3	23	29	32.2%	41.6%
Guinea	25	26	40	46	1	16	21	60.6%	80.2%
Guinea-Bissau	3	3	4	4	0	1	2	38.5%	50.1%
Guyana	3	3	4	4	0	1	1	34.8%	45.0%
Haiti	32	33	37	38	2	6	7	13.0%	16.5%
Honduras	25	26	34	37	1	10	12	33.5%	43.3%
Hong Kong	87	88	109	116	14	36	42	25.3%	32.4%
Hungary	184	185	229	244	22	67	80	24.8%	31.7%
Iceland	8	8	10	11	1	3	3	24.5%	31.4%
India	3,905	3,954	6,545	7,511	298	2,939	3,855	67.6%	90.0%
Indonesia	872	881	1,333	1,493	79	540	691	52.8%	69.4%
Iran, Islamic Rep.	195	196	220	227	17	41	48	12.5%	15.8%
Iraq	72	73	115	131	3	47	61	60.3%	79.7%
Ireland	56	57	90	102	6	40	51	59.8%	79.1%
Israel	145	146	200	218	12	66	83	37.7%	48.9%
Italy	348	349	356	358	54	62	63	2.1%	2.7%
Jamaica	9	9	10	10	1	1	2	5.7%	7.1%
Japan	984	986	1,082	1,110	125	224	250	10.0%	12.6%
Jordan	17	17	20	22	1	5	6	21.0%	26.9%
Kazakhstan	125	127	184	203	11	69	88	46.4%	60.6%
Kenya	150	151	223	247	6	79	102	48.3%	63.3%
Korea, Dem. Rep.	32	32	32	32	4	4	4	-0.8%	-1.1%
Korea, Rep.	395	398	514	551	63	181	217	30.0%	38.7%
Kuwait	38	38	43	44	3	8	9	13.1%	16.6%
Kyrgyz Republic	23	23	32	35	2	11	13	38.3%	49.8%
Lao PDR	31	32	55	64	2	26	34	75.8%	101.5%
Latvia	39	39	46	49	5	13	15	19.8%	25.3%
Lebanon	12	12	13	14	1	2	3	9.3%	11.8%
Lesotho	6	6	7	7	0	1	2	17.2%	21.9%
Liberia	13	14	19	21	1	6	8	43.5%	56.8%

Appendix

Figure 13 – Current Market Size, Projected Demand, Talent Gap, and % Demand Growth by Country (Low-Growth and High-Growth Scenarios)
(numbers shown in thousands)

	Current state (2025)		Projected demand by 2035		Attrition and retirements by 2035	Total Talent Gap		% Demand growth	
Country	Low	High	Low	High		Low	High	Low	High
Libya	16	15	13	12	1	-2	-2	-19.4%	-23.7%
Lithuania	64	65	85	92	9	30	36	32.9%	42.5%
Luxembourg	11	12	14	15	1	4	5	21.8%	27.9%
Macao	6	6	9	10	1	4	5	46.0%	60.1%
Madagascar	73	73	92	98	3	22	28	26.2%	33.7%
Malawi	40	40	74	88	1	36	49	87.4%	118.0%
Malaysia	195	197	297	332	15	117	150	52.0%	68.4%
Maldives	2	2	3	3	0	1	2	67.2%	89.4%
Mali	34	34	63	75	1	30	41	87.0%	117.3%
Malta	4	4	7	8	0	3	4	61.2%	81.1%
Mauritania	8	8	11	12	0	3	4	39.8%	51.7%
Mauritius	6	6	8	9	1	3	3	35.8%	46.4%
Mexico	548	550	659	693	47	158	190	20.3%	25.9%
Moldova	24	24	33	36	3	12	15	38.9%	50.6%
Mongolia	12	12	22	26	1	11	14	80.7%	108.5%
Montenegro	4	4	5	6	1	2	2	25.3%	32.5%
Morocco	73	73	106	117	6	40	50	46.1%	60.3%
Mozambique	49	50	77	86	2	29	38	55.5%	73.1%
Myanmar	163	165	271	310	14	122	159	65.9%	87.5%
Namibia	8	8	10	11	0	3	3	27.8%	35.7%
Nepal	47	47	71	79	3	27	35	50.8%	66.7%
Netherlands	290	291	326	336	40	75	85	12.2%	15.5%
New Caledonia	2	2	2	2	0	0	0	15.2%	19.3%
New Zealand	74	74	94	100	9	29	35	27.5%	35.3%
Nicaragua	17	17	23	24	1	6	8	30.9%	39.8%
Niger	52	52	86	98	2	36	48	66.5%	88.4%
Nigeria	450	453	598	646	18	166	211	32.9%	42.6%
North Macedonia	12	12	15	16	2	4	5	23.1%	29.6%
Norway	101	102	114	118	12	25	29	12.8%	16.2%
Oman	41	41	52	56	2	13	16	27.7%	35.6%
Pakistan	362	365	531	589	19	188	242	46.7%	61.1%
Panama	25	25	41	47	2	18	24	66.0%	87.7%

Figure 13 – Current Market Size, Projected Demand, Talent Gap, and % Demand Growth by Country (Low-Growth and High-Growth Scenarios)
(numbers shown in thousands)

	Current state (2025)		Projected demand by 2035		Attrition and retirements by 2035	Total Talent Gap		% Demand growth	
Country	Low	High	Low	High		Low	High	Low	High
Papua New Guinea	23	23	34	38	1	13	16	50.8%	66.6%
Paraguay	18	18	25	27	1	8	10	39.8%	51.7%
Peru	132	133	188	206	11	66	84	42.2%	55.0%
Philippines	234	237	386	441	16	168	220	64.8%	86.0%
Poland	517	520	692	748	59	234	287	33.8%	43.8%
Portugal	68	68	73	74	10	14	16	7.0%	8.8%
Puerto Rico	13	13	12	12	2	1	1	-7.9%	-9.8%
Qatar	40	40	60	67	2	22	29	50.7%	66.5%
Romania	177	179	226	241	22	70	85	27.3%	35.1%
Russian Federation	1,123	1,127	1,315	1,372	139	331	385	17.1%	21.7%
Rwanda	24	24	41	48	1	19	25	74.4%	99.5%
Samoa	1	1	1	1	0	0	0	17.4%	22.2%
São Tomé and Príncipe	0	0	0	1	0	0	0	39.8%	51.7%
Saudi Arabia	298	300	404	438	16	122	154	35.5%	45.9%
Senegal	29	29	42	46	1	14	19	45.9%	60.0%
Serbia	57	57	66	69	8	17	20	16.5%	21.0%
Sierra Leone	15	15	21	23	1	7	9	42.6%	55.6%
Singapore	96	97	141	157	10	56	70	47.4%	62.0%
Slovak Republic	99	99	126	134	12	39	47	27.2%	35.0%
Slovenia	35	35	41	43	5	11	12	16.5%	21.0%
Solomon Islands	5	5	6	7	0	2	2	37.6%	48.7%
Somalia	16	16	31	37	1	16	21	96.4%	130.9%
South Africa	261	262	300	312	19	58	69	14.8%	18.9%
South Sudan	36	36	73	88	2	39	53	103.2%	140.8%
Spain	329	330	358	366	48	76	84	8.5%	10.8%
Sri Lanka	53	54	81	91	5	33	42	52.5%	69.0%
St. Lucia	1	1	1	1	0	0	0	11.1%	14.0%
St. Vincent and the Grenadines	0	0	0	0	0	0	0	9.8%	12.4%
Sudan	44	44	62	68	2	20	25	40.2%	52.3%
Suriname	2	2	3	3	0	1	1	18.0%	23.0%
Sweden	193	194	236	249	23	66	78	22.2%	28.4%
Switzerland	150	150	175	182	21	46	53	16.7%	21.2%

Appendix

Figure 13 – Current Market Size, Projected Demand, Talent Gap, and % Demand Growth by Country (Low-Growth and High-Growth Scenarios)
(numbers shown in thousands)

	Current state (2025)		Projected demand by 2035		Attrition and retirements by 2035	Total Talent Gap		% Demand growth	
Country	Low	High	Low	High		Low	High	Low	High
Syrian Arab Republic	10	10	6	5	1	-4	-5	-44.0%	-51.9%
Taiwan	335	336	395	413	51	111	127	17.9%	22.8%
Tajikistan	29	30	49	56	2	21	28	66.6%	88.6%
Tanzania	206	208	345	396	7	146	195	67.9%	90.4%
Thailand	487	490	647	699	66	226	275	33.0%	42.6%
Timor-Leste	8	8	13	14	0	5	6	49.9%	65.5%
Togo	10	10	16	17	0	6	8	53.0%	69.8%
Tonga	0	0	0	1	0	0	0	19.5%	24.9%
Trinidad and Tobago	7	7	7	7	1	1	1	-1.6%	-2.0%
Tunisia	26	26	33	35	3	10	12	27.6%	35.5%
Türkiye	271	274	427	482	26	182	235	57.6%	76.0%
Turkmenistan	26	27	37	40	2	12	15	38.4%	49.9%
Uganda	90	91	146	166	3	59	78	62.7%	83.1%
Ukraine	196	196	196	196	28	28	28	0.1%	0.1%
United Arab Emirates	112	112	148	159	6	42	53	32.2%	41.6%
United Kingdom	771	774	901	940	96	226	262	16.9%	21.6%
United States	3,585	3,602	4,330	4,558	433	1,178	1,390	20.8%	26.6%
Uruguay	14	14	19	20	1	6	8	34.7%	44.9%
Uzbekistan	107	108	182	209	8	83	109	69.9%	93.1%
Vanuatu	1	1	1	1	0	0	0	20.0%	25.5%
Venezuela	40	40	20	16	4	-16	-19	-51.4%	-59.8%
Vietnam	430	435	746	863	42	358	470	73.5%	98.3%
Virgin Islands (U.S.)	1	1	1	1	0	0	0	17.9%	22.8%
West Bank and Gaza	14	14	19	21	1	6	8	39.3%	51.1%
Yemen	13	13	6	5	1	-6	-7	-51.7%	-60.1%
Zambia	38	38	56	62	1	19	25	46.5%	60.8%
Zimbabwe	38	38	59	67	1	23	30	57.4%	75.7%

Endnotes

1. Gnanasambandam, C. (2024, May 1). Can software developer productivity really be measured? McKinsey & Company. https://www.mckinsey.com/~/media/mckinsey/email/rethink/2024/05/2024-05-01d.html

2. World Health Organization (WHO). (2024, May 3). Nursing and midwifery. https://www.who.int/news-room/fact-sheets/detail/nursing-and-midwifery

3. The gap from attrition and retirement by 2035 is calculated as a percentage of the 2025 project professionals who are currently between the ages of 55-64 and will be assumed to have aged out of the working population by 2035 at ages 65+. United Nations population data used to determine the percentage of population by country in the 55-64 age bracket. This percentage is multiplied against 2025 Current State Project Professionals

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