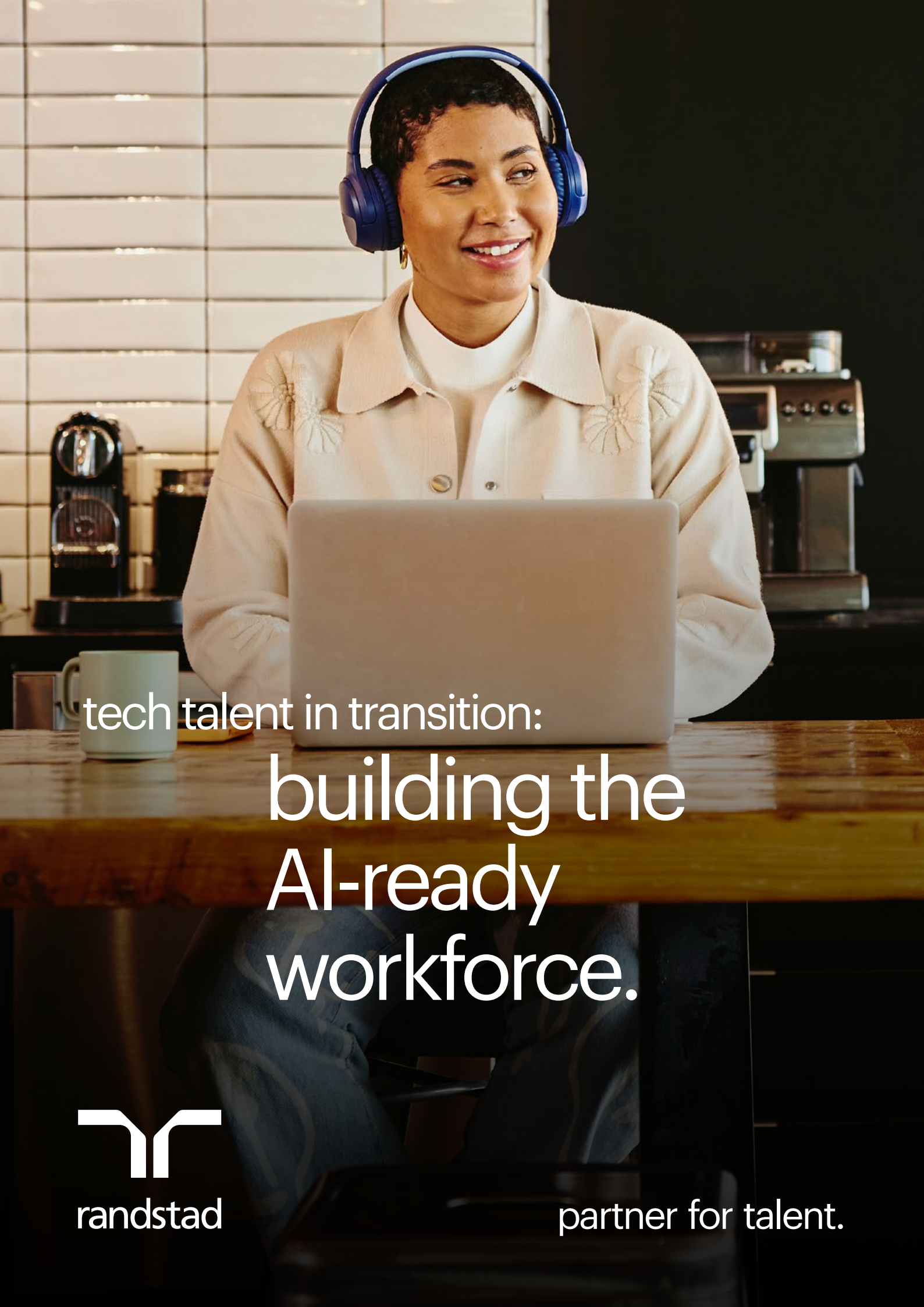


tech talent in transition:

building the AI-ready workforce.

randstad

partner for talent.

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executive summary.

Artificial Intelligence has driven a systemic shift in the global market for tech talent. This is not because AI is replacing the need for tech workers — quite the opposite. Instead, businesses are looking at how they can buy, borrow or build skills and secure talent to help drive transformation.

Our research shows nearly 9 in 10 business leaders are expanding their tech headcount to leverage AI to scale services and increase revenue. Meanwhile, the skills needed are changing. Job postings for developers with Generative AI (GenAI) skills grew 135% in 2025, and by a further 119% in the first half of 2026 compared with the same period in 2025.

AI's impact now extends beyond tech, sparking a cross-industry talent race. When comparing H1 2026 with H1 2025, sectors such as Manufacturing (43% tech talent growth), Healthcare & Life Sciences (29%), and Banking, Financial Services and Insurance (25%) are attracting 2–3 times more talent from tech than vice versa.

Despite this, talent scarcity is rising. While AI agent skills in job candidates' profiles have risen 300%, job listings requiring these skills have increased by over 1,300%. Employers must therefore adapt how they build their tech teams to bridge this significant gap.

the new way to structure tech teams

The impact of AI on jobs — from reducing headcount to expanding tech roles — begins at the junior level, particularly for developers. Over half of employers say junior tech hiring isn't in decline, with entry-level GenAI developers earning up to 79% more than non-specialists.

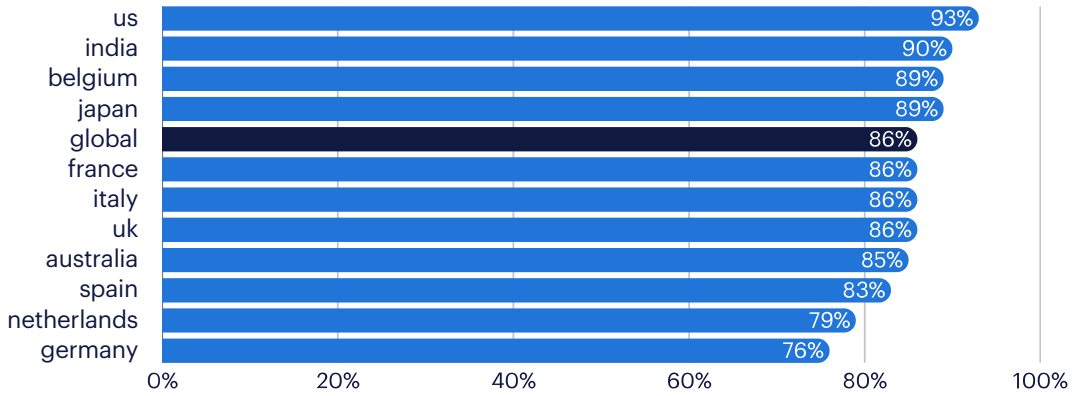
With skills shortages persisting, agile hiring is essential to meet changing business needs and accelerate digital transformation.

For many, this includes 'borrowing' the specialist skills need through flexible talent (temporary workers, freelancers, contractors) and fractional talent (working for multiple companies part-time).

At the same time, hiring standards are evolving to address skills gaps faster. Specialized AI micro-credentials and vendor certifications are now increasingly recognized alongside university degrees, creating new entry points into high-value roles.

tech talent in demand

% of employers increasing their overall tech headcount



sourcing the right talent

The traditional model of retaining all tech talent in-house is outdated. As companies continue their digital transformation, they face skill shortages and geographic limits.

This has shifted employers' focus to flexible work models, sourcing talent specifically to meet immediate business needs. Digital talent marketplaces (DMPs) have emerged as vital enablers for scaling tech teams on demand.

Organizations are also increasingly looking beyond national borders, with nearshoring — sourcing flexible talent from nearby markets — and offshoring to global talent hubs both on the rise.

navigating the human premium

Alongside this, role requirements are maturing from building AI applications to orchestrating and governing them. Job postings for AI orchestration and governance roles have quadrupled since 2022, and 2026 volumes to-date already exceed the whole of 2025.

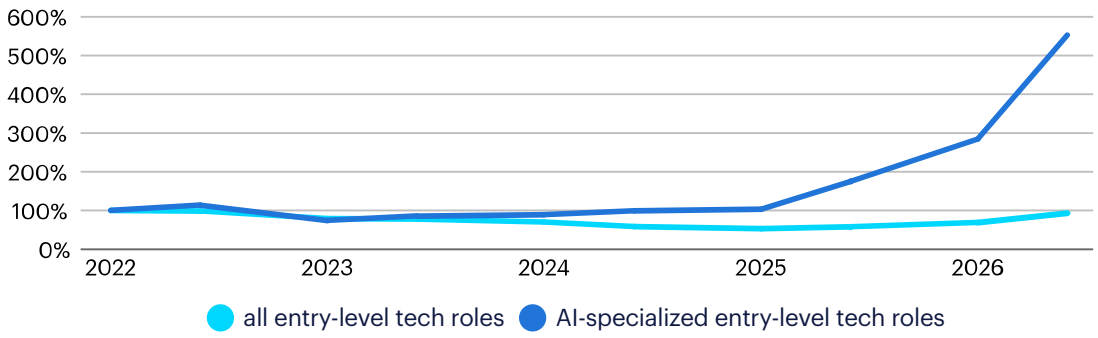
However, uniquely human skills like critical thinking and problem-solving are hardest to source. To address this, employers must invest in building talent skills and ensuring equitable access to development opportunities.

Despite high demand, a persistent equity gap exists. Women's representation in AI is lower than in traditional tech, with less female participation in upskilling, especially at senior levels. This may stem from access disparities, as our AI & equity research shows men reporting more AI skilling opportunities from employers than women.

Employers who streamline recruitment, stay agile and tap into diverse talent pools will be best placed to seize AI opportunities.

the rising demand for AI talent

relative growth of junior tech job postings (indexed to 2022 baseline = 100%)



about the report

The 2026 Tech Talent research draws on both primary and secondary data. The primary research was conducted in the first half of August 2026 across 11 markets (Australia, Belgium, France, Germany, India, Italy, Japan, the Netherlands, Spain, the UK, and the US). The survey comprised 1,100 interviews, with 100 respondents per market, among senior business and technology decision-makers responsible for workforce planning and digital talent strategy. Evalueserve was used for sampling purposes.

The secondary research, compiled by Randstad Market Intelligence in August 2026, incorporates data from over 20 million job postings and approximately 100 million candidate profiles.

1.0

buying tech skills:

AI is driving headcount growth, not reducing it.

growth and flexibility.

As AI adoption accelerates, the need for specialized tech talent rises, with supply lagging behind demand. In response, enterprises are reshaping early-career roles, prioritizing baseline AI proficiency and adopting flexible hiring models to rapidly capitalize on AI-driven business opportunities.

14%
year-over-year growth in tech hiring in 2025

435%
increase in job posts for juniors with AI skills since 2025





79%
salary premium for AI skills in junior tech roles

4x
more postings for AI orchestration & governance since 2022

rising demand for AI-enabled tech talent

AI is moving from a simple productivity tool to a primary catalyst for growth. 86% of leaders we surveyed agree that, because AI enables them to scale services and drive new revenue, they are increasing overall tech headcount.

At the same time, the types of tech roles most in demand continue to shift.

Postings for legacy, hands-on IT roles (manual QA, sysadmin, tech support) grew by only 10% in 2025. Yet, AI orchestration and governance roles grew 121% year-over-year. This gap was even greater in the first half of 2026, with legacy posting growth reaching 57% against a 228% spike in unfilled AI positions.

These figures also reinforce that organizations are looking beyond individual AI tools to orchestrating agentic AI workflows at scale.

Our research underlines that concerns over AI displacing junior roles do not extend to tech talent. More than half of organizations we surveyed (54%) disagree that AI is replacing junior developers, stating their hiring has not decreased compared to two years ago.

However, what they are hiring for is very different: entry-level postings explicitly requiring AI skills have increased more than fivefold since the start of 2025. In fact, juniors with general AI or GenAI skills have the potential to earn 79% more than those with a traditional skill set. In the UK and India, the gap is even greater, with AI-qualified developers able to command more than double the entry-level rate for traditional developers.

Overall, these statistics suggest that organizations have moved beyond the early days of GenAI. Rather than prioritizing technical experts who can set up and maintain AI technology, they are now putting a premium on talent who can apply AI skills to business challenges and generate growth opportunities across the organization.

toward a mix of talent sourcing

Talent sourcing in the age of AI requires unprecedented agility. Rather than absorbing the long-term fixed costs and delays of expanding permanent headcount for project-specific AI deployments, nearly two-thirds of organizations are optimizing their budgets by engaging agile, flexible talent delivery models precisely when and where they need them.

Flexible work models and shifts in accreditation requirements are allowing businesses to deploy teams as agility engines, helping them to react quickly to the evolving tech landscape.

To create sustainable talent pipelines in the long term, though, employers must also take steps to develop existing talent (currently just 3% are filling gaps through internal upskilling). Furthermore, there are widening gender gaps, with women only making up 31% of talent listing emerging AI skills in their profiles.

Flexible work models include freelancers, contractors, temporary talent and fractional workers — senior professionals working for multiple companies part-time — across home, nearshore and offshore locations.

To overcome talent scarcity, formal hiring criteria for AI roles are shifting: bringing specialist micro-credentials and vendor certifications (41%) almost on par with traditional degrees (42%).

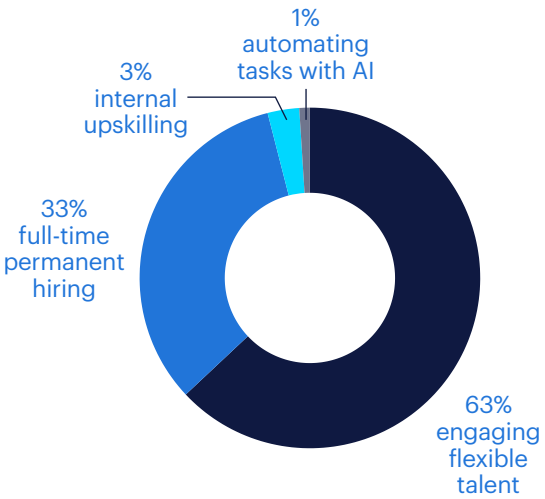
This trend is also borne out in the market, where around 73% of job postings require practical skills and certifications, compared to just 27% asking for university degrees.

This suggests that market-validated, high-quality micro-credentials help businesses recruit more flexibly while creating a new career bridge for talent.

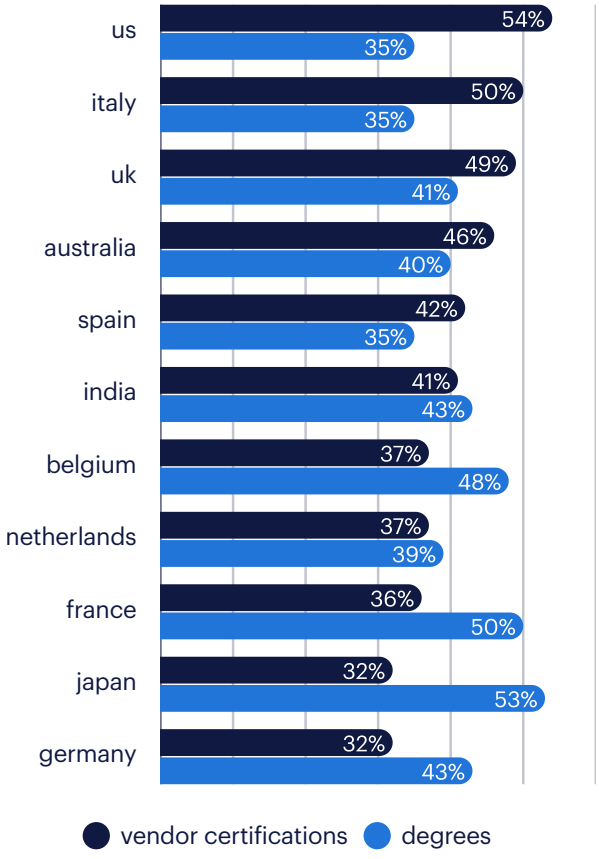
Employers' growing openness to flexible talent models and alternative qualifications coincides with talent seeking portfolio-style careers rather than following traditional linear paths, as highlighted in our Workmonitor 2026 report.

building teams, rethinking qualifications

primary strategy for filling AI skills gaps by employers



how employers in different markets prioritize micro-credentials vs. traditional computer science degrees



2.0

borrowing tech skills:

agility and digital marketplaces accelerate global delivery.

the new shape of sourcing.

Talent sourcing requires new levels of agility, with digital talent marketplaces becoming essential to rapidly realign workforces around new AI-driven business opportunities. To maintain momentum, organizations are also rethinking global delivery — expanding nearshoring and offshoring hubs to scale innovation.

digital marketplaces become the de facto standard

The changes brought by AI are also reshaping how talent are recruited.

AI-generated applications continue to saturate the hiring pipeline, reducing employers' confidence in traditional recruitment channels. In response, more than 9 in 10 organizations surveyed use DMPs for talent — including pre-vetting platforms and curated talent networks — either as their primary sourcing channel or to cut through the noise on traditional job boards.

34% of companies further maintain they are increasingly bypassing inbound applications entirely, relying on internal mobility, trusted talent partners and curated communities.

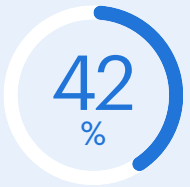
This challenge is especially prevalent among large organizations with 5,000+ employees (38%) and the Public Sector (42%). Consumer and Retail, Transportation and Healthcare all stand at 41%, with Germany (41%) and Spain (40%) showing the highest regional levels.

Talent need to be aware of this shift away from the classic job board to more curated hiring approaches and actively engage with DMPs, recruiters and other talent communities.

finding talent

92%

of organizations are actively using digital marketplaces for recruitment

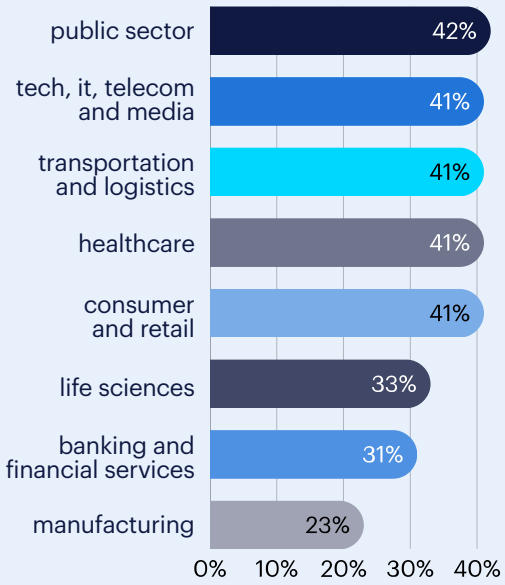


use them as their primary channel



are increasing their use of the platforms

how many employers in different industries bypass inbound tech applications in favor of trusted talent partners, internal mobility and curated talent communities



reshaping global sourcing

Flexible sourcing does not stop at employers' home markets. Accessing talent from nearshore and offshore delivery hubs is on the rise as businesses look to benefit from flexible workers across the globe.

Looking ahead, nearshoring is emerging as the top delivery model. While just 17% of business leaders relied on nearshoring to fill AI skills gaps over the past year, 35% plan to draw on nearshore hubs for digital and tech talent in the next 24 months.

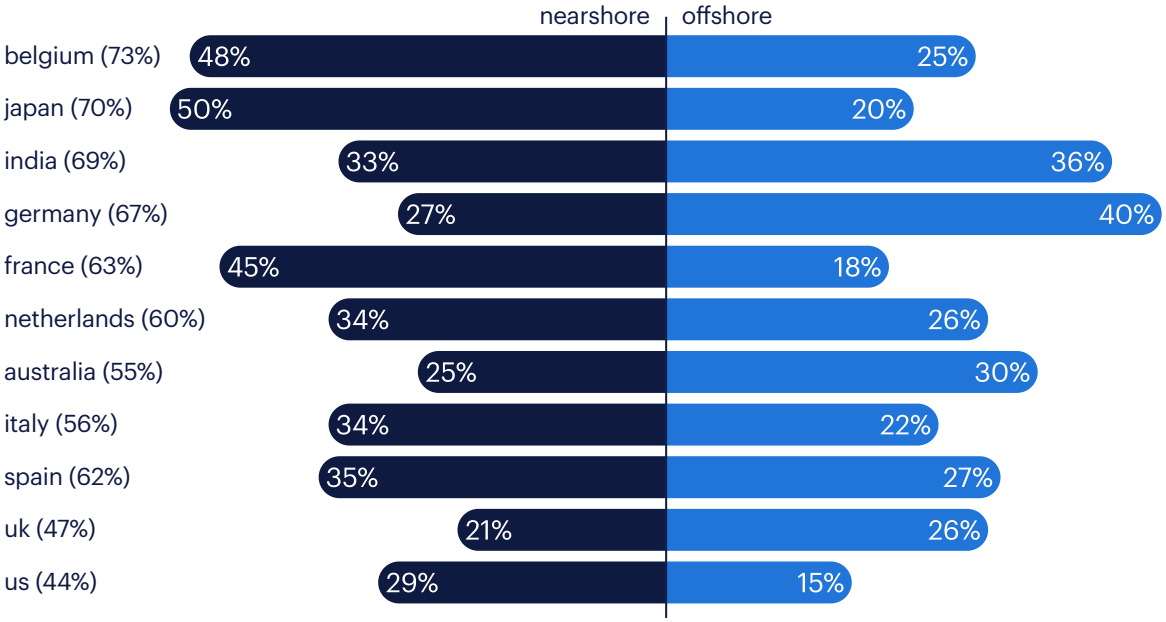
Among the biggest nearshorers are Japan, Belgium and France. A further 26% state they will move routine execution tasks to offshore delivery hubs, compared to 16% who said they had filled AI roles with offshoring flexible talent in the last 12 months.

Underpinning this outsourcing trend is a transformation within offshore hubs, which are transitioning from labor-intensive tasks such as low-cost coding toward specialized AI capabilities. By advancing up the value chain, these regions are well-positioned to capitalize on global demand and meet acute technical skill needs.

In turn, businesses recognize this as a direct route to cross-border flexibility. India alone now commands over 12% of global AI management roles and 16% of AI risk and compliance roles, while China's share of AI management roles is 20%.

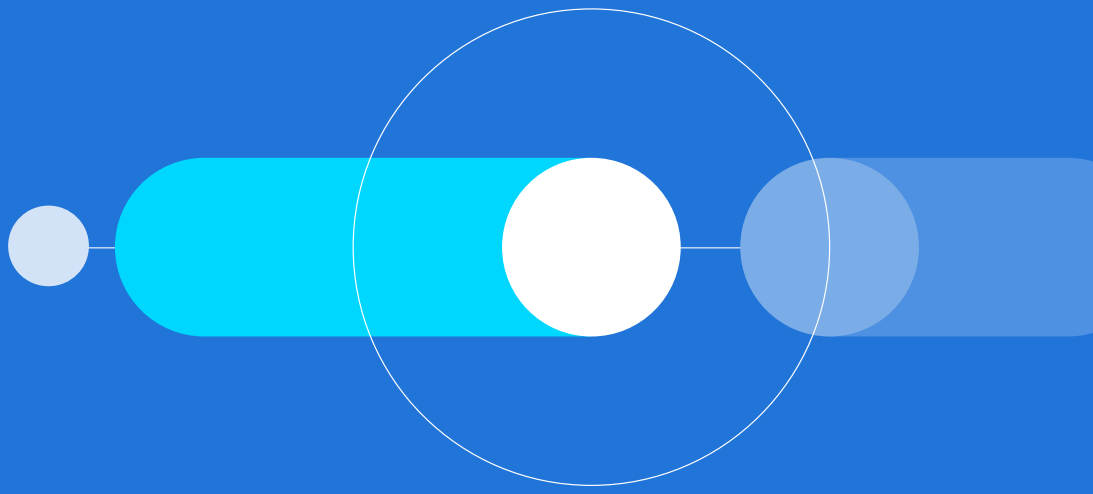
finding flexibility

how different markets are actively expanding use of offshore and nearshore talent



(%) = combined expansion of nearshore and offshore

3.



building tech skills:

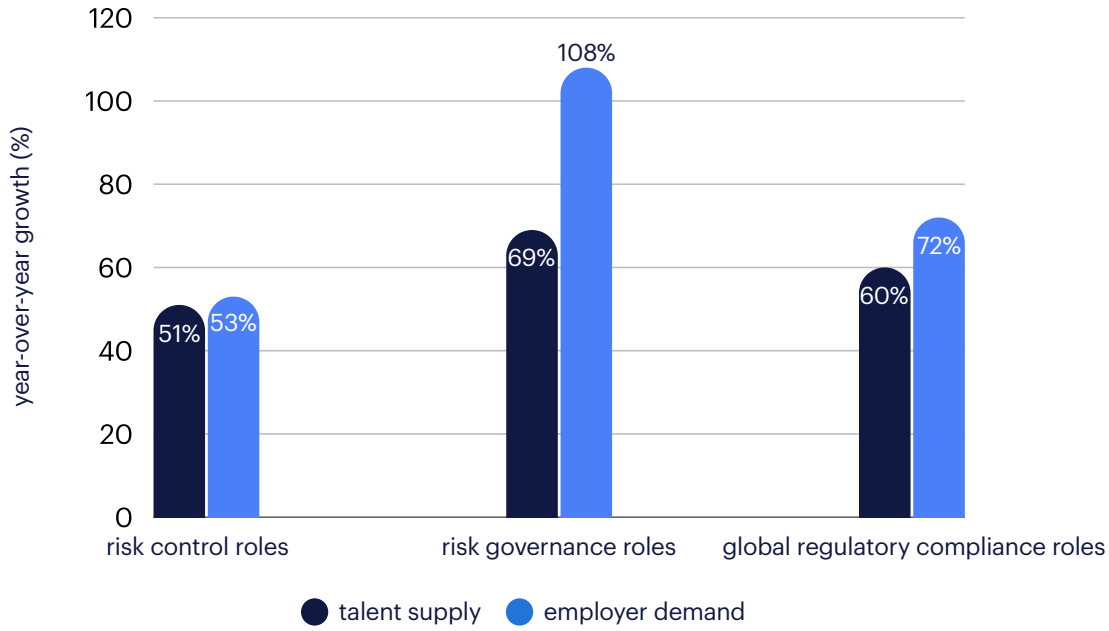
governance and equity gaps.

the scarcity of human capabilities.

The gap between available talent and tech demand is most acute for uniquely human skills and AI governance. Yet, AI is also deepening the gender diversity gap, threatening to further restrict an already limited talent pool.

demand for AI control, governance and compliance skills outpaces talent supply

1-year growth in talent supply vs. employer demand, AI governance roles, july 2025 to july 2026



the human skills for governing AI are hardest to find

Leaders rank human skills such as critical thinking and creative problem-solving as the most difficult capability to recruit (35%), with the largest companies most affected (41%). Based on job postings, demand for these in 2026 to date is up 69% from 2020.

Close to two-thirds of respondents (61%) further agree that finding tech talent with strong communication and stakeholder management skills is harder than finding pure coders.

At the same time, they struggle with AI governance skills — arguably based on these underlying human capabilities. Employer job postings looking for talent in risk control, risk governance, regulatory compliance and policy development are expanding at rates that far outpace candidate supply. The biggest divergence is in risk governance, where a 108% rise in employer demand is met with a 69% increase in talent supply.

External expertise is the first go-to for employers — 55% use external vendors and consultancies to manage AI risks (bias, data security, hallucinations).

But in line with this approach, 54% are upskilling to overcome risks of AI deployment, while 24% of employers who believe internal upskilling is a more sustainable approach to talent sourcing in the long term.

However, nearly half (47%) state that they use automated tools to monitor AI safety.

AI risks deepening gender disparities in tech

In 2024, our AI & Equity report put the balance in AI skills between men and women at 71% and 29%, respectively. The latest job posting and candidate data show this gap has narrowed very slightly to 69% vs. 31%.

While women account for 36% of the workforce in legacy tech roles, their presence in AI functions lags behind. Driving this deficit is a distinct upskilling gap: men are gaining AI capabilities at a rate 5 percentage points higher than women.

The gap is most pronounced among experienced professionals. Entry-level AI talent pools stand at 63% men compared to 37% women. However, among talent with over 30 years' tenure, the disparity expands to 73% men and 27% women with AI and GenAI skills.

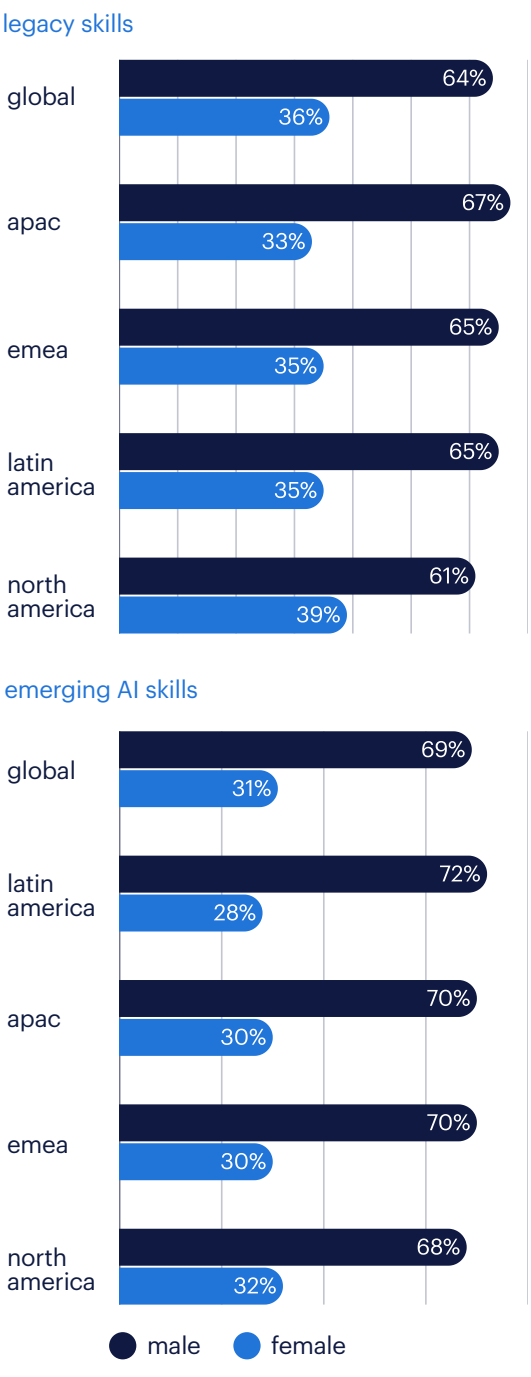
Looking at generational differences, the gender gap globally is starkest among Baby Boomers; of those with AI skills, 76% are men and only 24% are women.

Regionally, North America shows the largest drop at 7 percentage points, with women representing 39% of legacy roles but only 32% in emerging AI positions.

From the employer's perspective, this widening gender gap creates a major business risk in an area of extreme talent scarcity. With talent shortages in AI governance, orchestration and technical execution expanding at triple-digit rates, organizations simply cannot afford to leave half of their potential talent pool behind.

At the same time, women in technology must proactively upskill into high-demand areas to capture emerging career opportunities.

2026 gender representation for legacy and emerging skills





conclusion:

building a future-ready workforce.

from insight to action.

In a rapidly shifting market, competitive advantage belongs to those who anticipate where talent is going, not just where it is today. To capitalize on the AI opportunity, organizations must find the right balance as they buy, borrow and build the skills they need to evolve. For both employers and professionals, success now hinges on a deliberate strategy to secure the right workforce mix, flexibly access specialized skills across global delivery hubs and intentionally expand the talent pool to ensure sustainable growth.

buy: securing the right workforce mix

action for employers: Map the skills required for your AI roadmap, identify internal gaps and determine the right mix of permanent, flexible and project-based talent. Build continuous upskilling and career advancement into the workforce strategy rather than treating it as a separate initiative.

action for talent: Identify how your role is changing and build the combination of AI, business and human skills required for emerging opportunities. Use recognized certifications, practical experience and demonstrated outcomes to validate those capabilities.

borrow: access skills wherever they are

action for employers: Move beyond traditional job boards and local talent pools. Use trusted talent partners, curated communities and nearshore and offshore delivery hubs to access pre-vetted skills faster and scale teams as business needs change.

action for talent: Build relationships with specialized talent communities and make your skills visible through credentials, assessments and completed work. Increasingly, opportunities will come through trusted networks rather than inbound applications alone.

build: develop AI talent pools

action for employers: Treat inclusion as a workforce strategy, not simply a diversity objective. Invest in targeted AI upskilling and create clear pathways for women and other underrepresented talent to move into technical, governance and leadership roles.

action for talent: Focus on areas where demand is outpacing supply, including AI governance, orchestration and risk, while continuing to strengthen critical thinking, communication and problem-solving skills.

let's start a conversation.

inquiries
press@randstad.com

randstad

partner for talent.