



# Global Talent Mobility Is Slowing and Shifting

BCG TOP TALENT TRACKER | Q4 2025





**BCG's Top Talent Tracker takes the pulse of the world's talent, helping leaders map the location choices of more than 210 million highly skilled people globally.**

**New in this edition: our first look at the top ten universities producing global AI talent.**

For the first time since 2020, the global mobility of highly skilled professionals declined. As of end-August 2025, mobility had fallen by 8.5% year a year.

About 2.4 million highly skilled workers (1.12% of a tracked pool of 214 million) relocated across borders—some 220,000 fewer than last year.

The slowdown reflects tighter migration policies in major economies (notably Canada and the UK), economic uncertainty, and weaker hiring in many major economies.

The US remains dominant, with a 2.4-percentage-point rise in market share, while traditional hubs in Europe lost share. (For example, Germany saw a slight decline in AI market share and no meaningful gains in highly skilled or STEM talent. This reflects

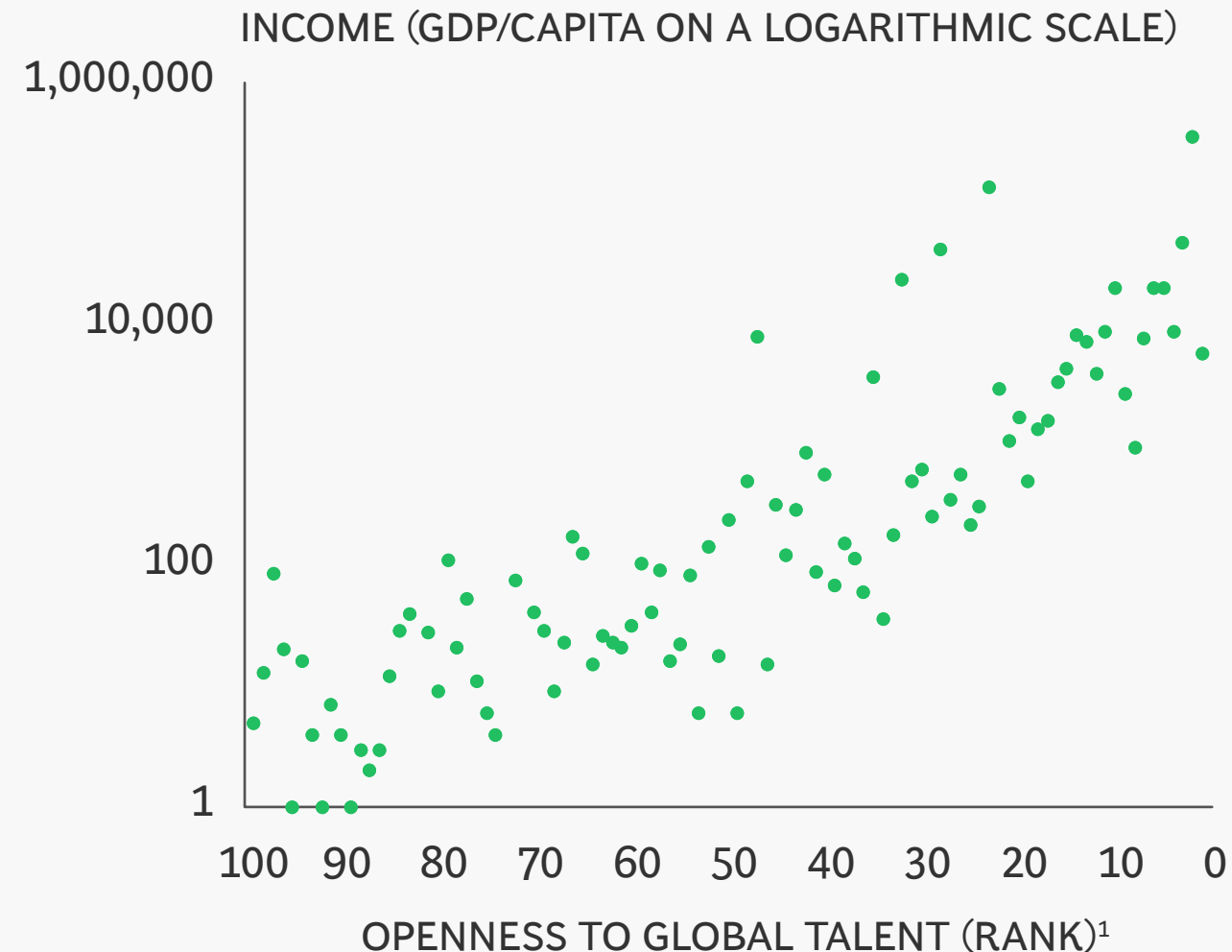
broader economic stagnation and the EU-wide challenge of retaining and attracting top talent.) Emerging hubs—particularly the UAE and Saudi Arabia—are surging: the UAE alone attracted about 178,000 highly skilled professionals, adding 0.8 points in share and rising to second place for STEM talent, surpassing Canada and the UK.

The competition for the world's best and brightest remains dynamic. The UAE now ranks among the top three destinations for overall, STEM, and AI talent—marking a remarkable global ascent, with Saudi Arabia following closely.

Private-sector leaders seeking world-class talent should look to our new list of ten stepping-stone institutions—the universities, some unexpected, that have produced the most globally mobile AI graduates.

# Openness to global talent is linked to national and business leadership

Talent openness drives country-level productivity...



... and leadership in technology and business



Countries that lead in talent for a technology are 17x more likely to also lead in that technology.



Firms that attract more global talent into leadership create 1pp per year more shareholder value.

**Sources:** Australian Policy Institute (ASPI); BCG analysis.

<sup>1</sup>BCG's Global Talent Migration Index (GTMix), which analyzed 96 countries.

<sup>2</sup>Technology leadership: country's share of high-impact research across 44 technologies.

<sup>3</sup>Based on the largest 1,000 public companies per Capital IQ; BCG analysis.

# Overall, global top talent mobility has slowed by 8.5% versus the prior year

AI talent remains highly mobile, however; numbers reflect increased upskilling on AI

## Highly Skilled Talent<sup>1</sup>



−223,000  
−8.5%

## STEM Talent<sup>1</sup>



−37,000  
−5.2%

## AI Talent<sup>1</sup>



+175,000  
+528%<sup>2</sup>

**Sources:** BCG Top Talent Tracker, Q4 2025; BCG analysis.

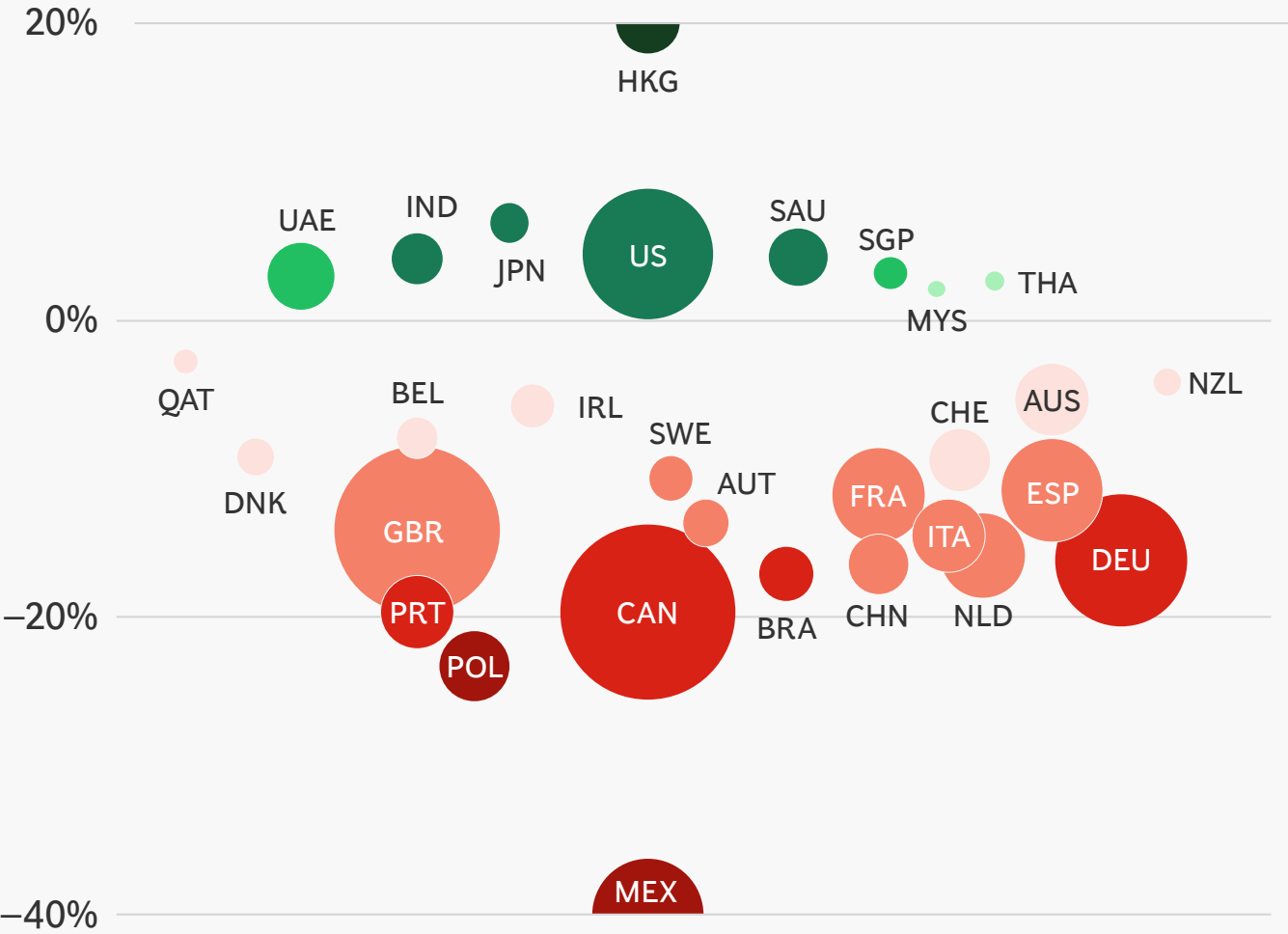
**Note:** See slide 11 for definitions of our talent groups.

<sup>1</sup>Last 12 months vs 2024. <sup>2</sup>Increase reflects a large rise in the number of AI experts worldwide.

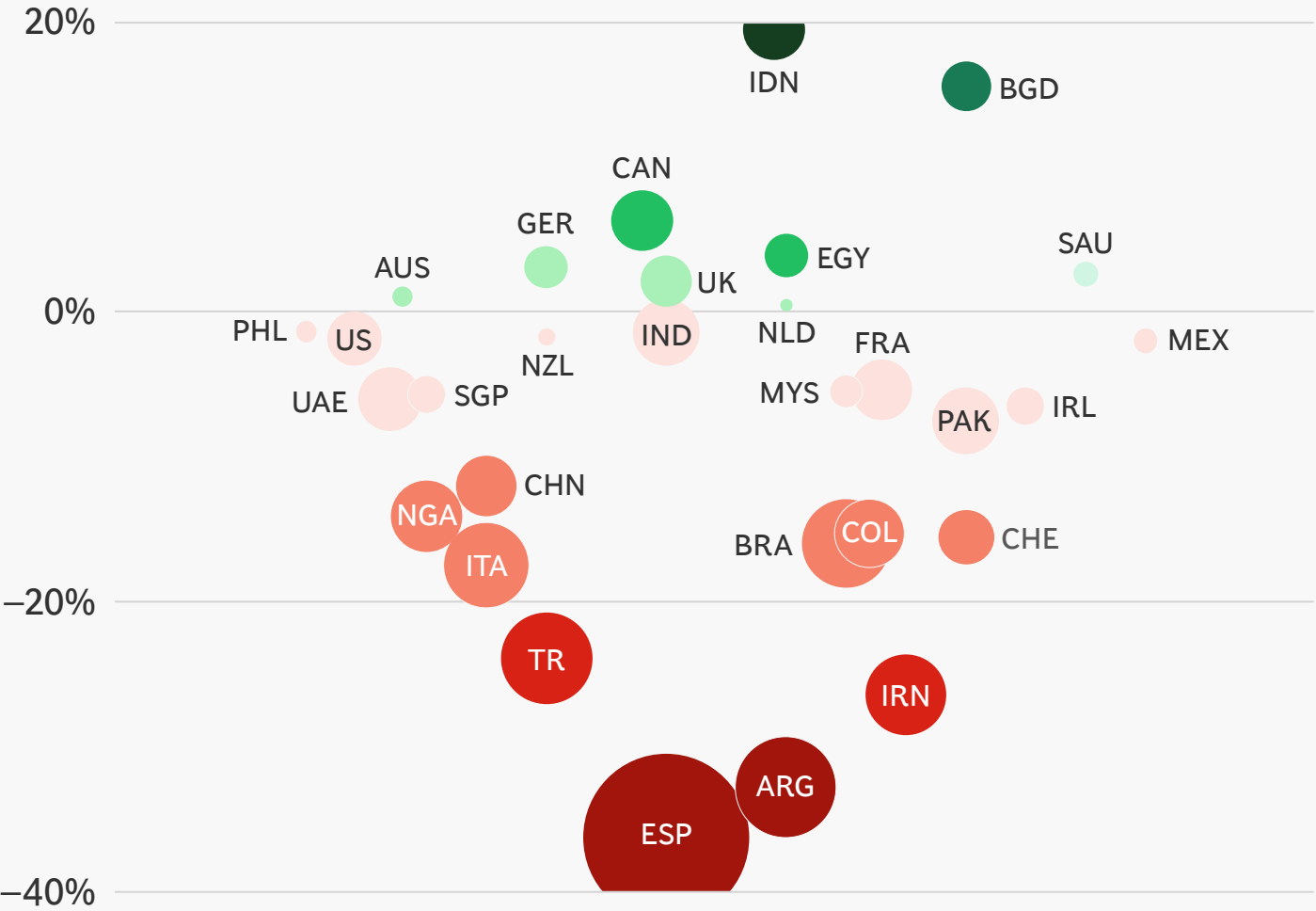
# Canada, UK, and European countries drive the mobility slowdown

US, Middle East, and parts of Asia see increased inflows

Change in inflows<sup>1</sup>  
Highly skilled, 2024 vs 2025



Change in outflows<sup>2</sup>  
Highly skilled, 2024 vs 2025

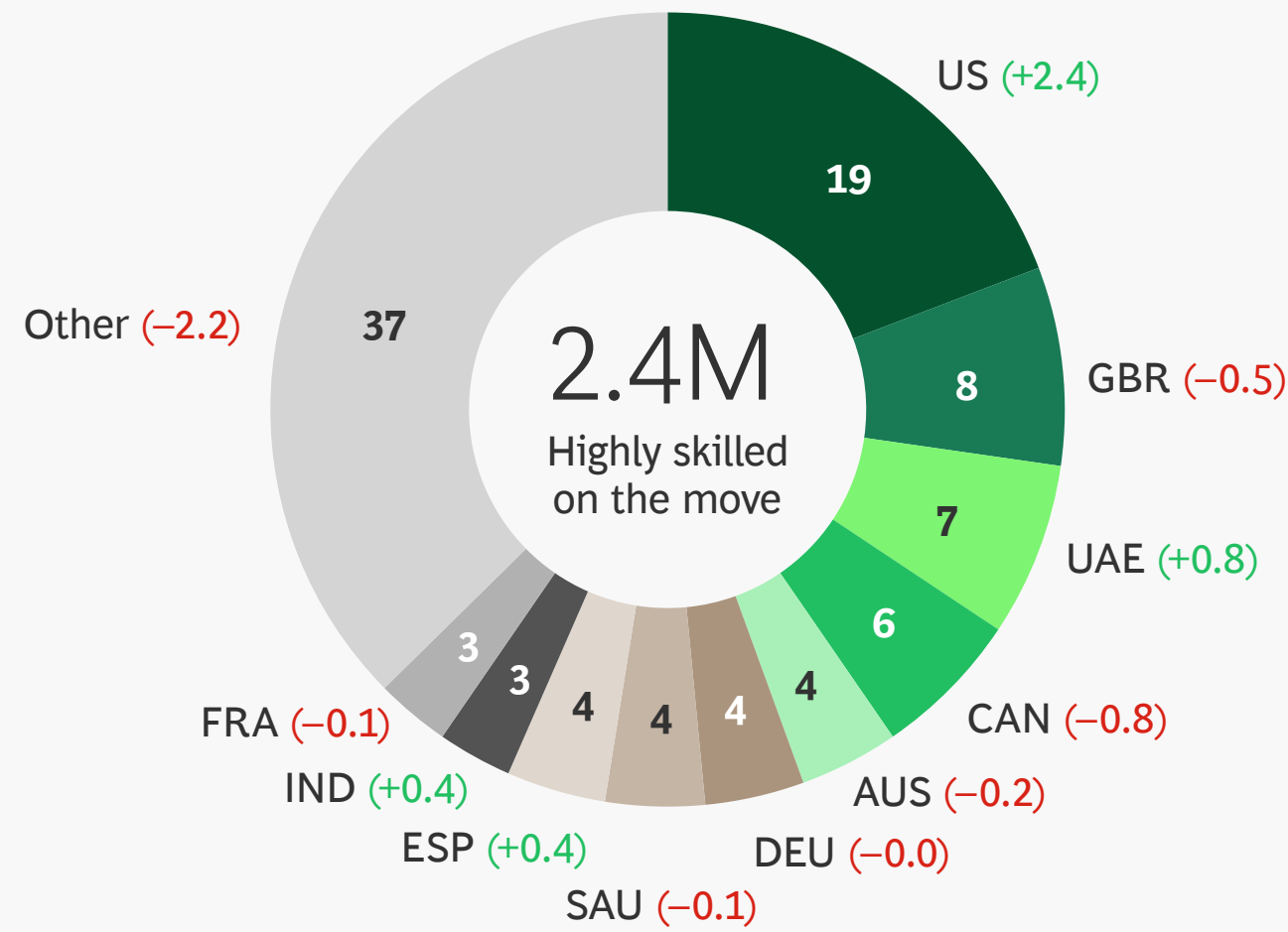


Sources: BCG Top Talent Tracker, Q4 2025; BCG analysis.  
<sup>1</sup>Bubble size denotes absolute change in inflows. <sup>2</sup>Bubble size denotes absolute change in outflows.

# Highly skilled talent: US and Middle East hold strong shares

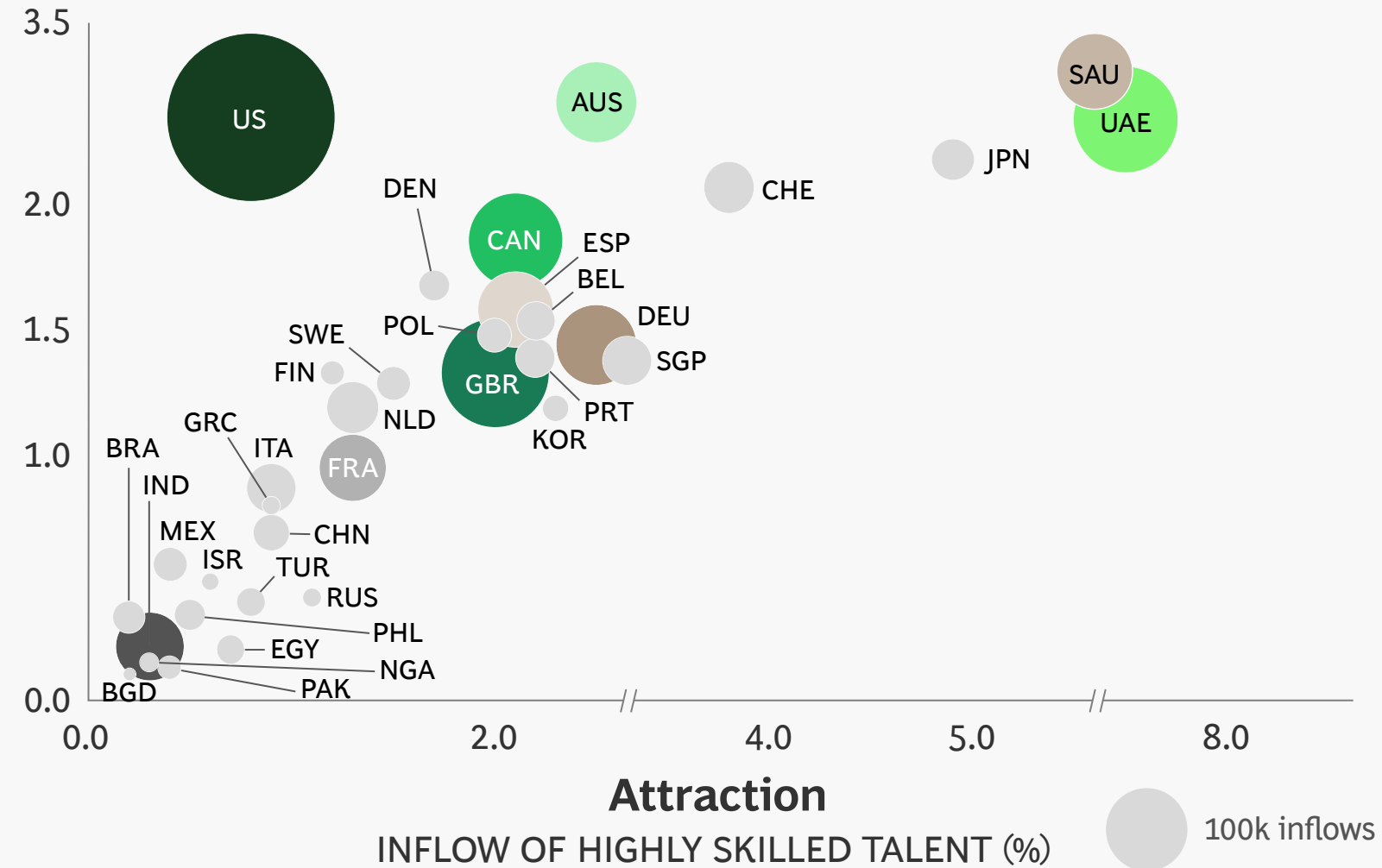
## Market share: Inflow

TOP 10 DESTINATIONS, IN % SHARE AND PP CHANGE VS 2024



## Retention

INFLOW/OUTFLOW OF HIGHLY SKILLED TALENT



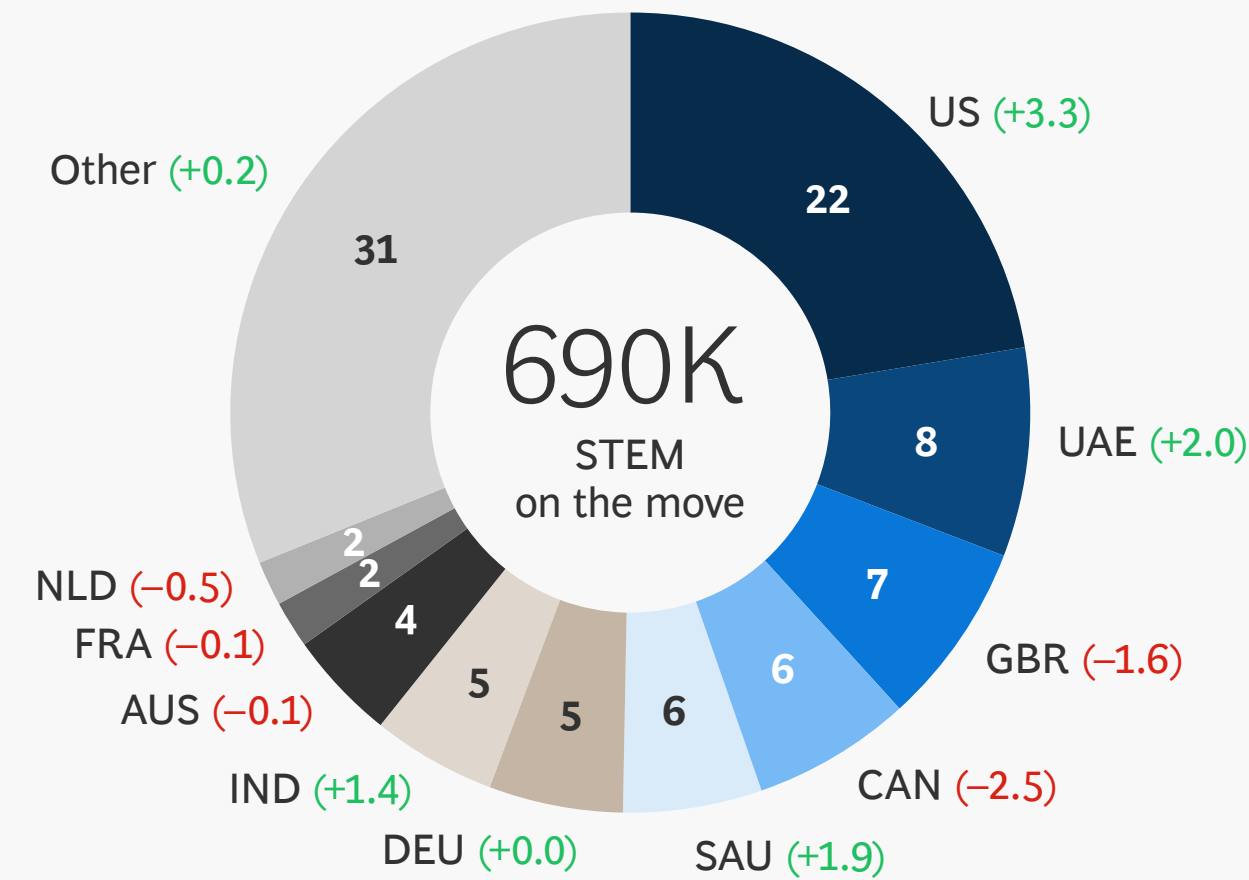
Sources: BCG Top Talent Tracker, Q4 2025; BCG analysis.



# STEM talent: US is still first and UAE is now second, overtaking Canada and UK

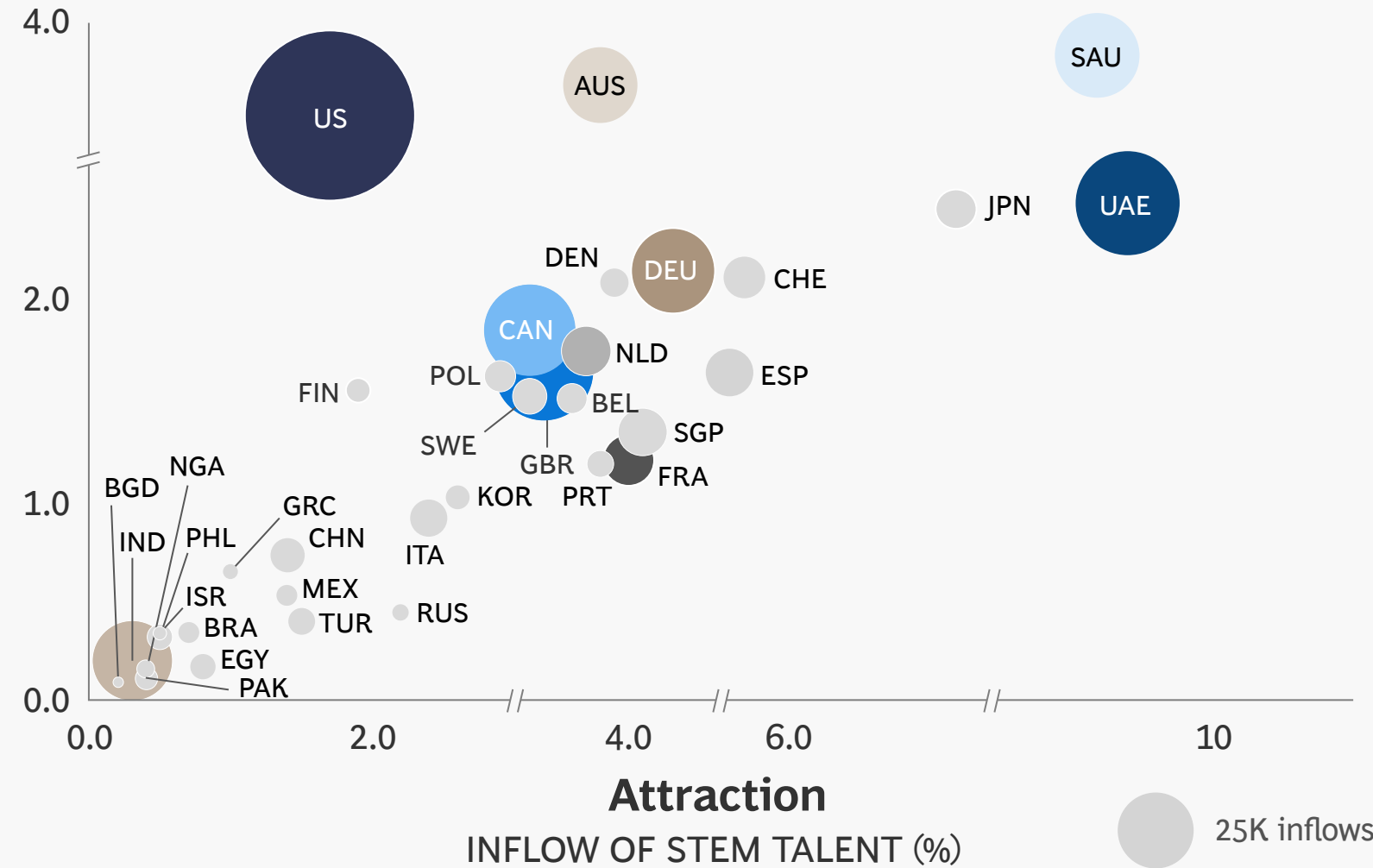
## Market share: Inflow

TOP 10 DESTINATIONS, IN % SHARE AND PP CHANGE VS 2024



## Retention

INFLOW/OUTFLOW OF STEM TALENT

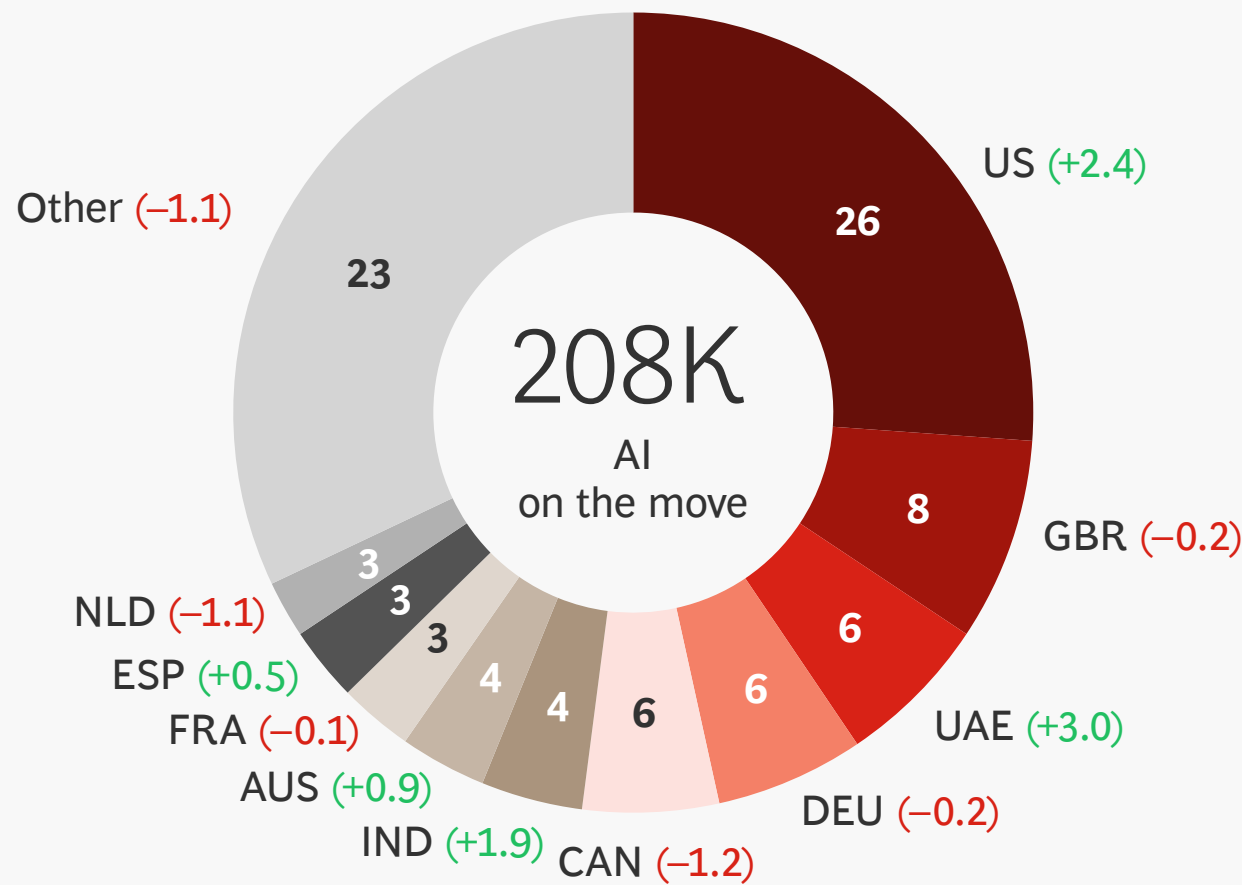


Sources: BCG Top Talent Tracker, Q4 2025; BCG analysis.

# AI talent: US retains first place and builds its lead over European countries

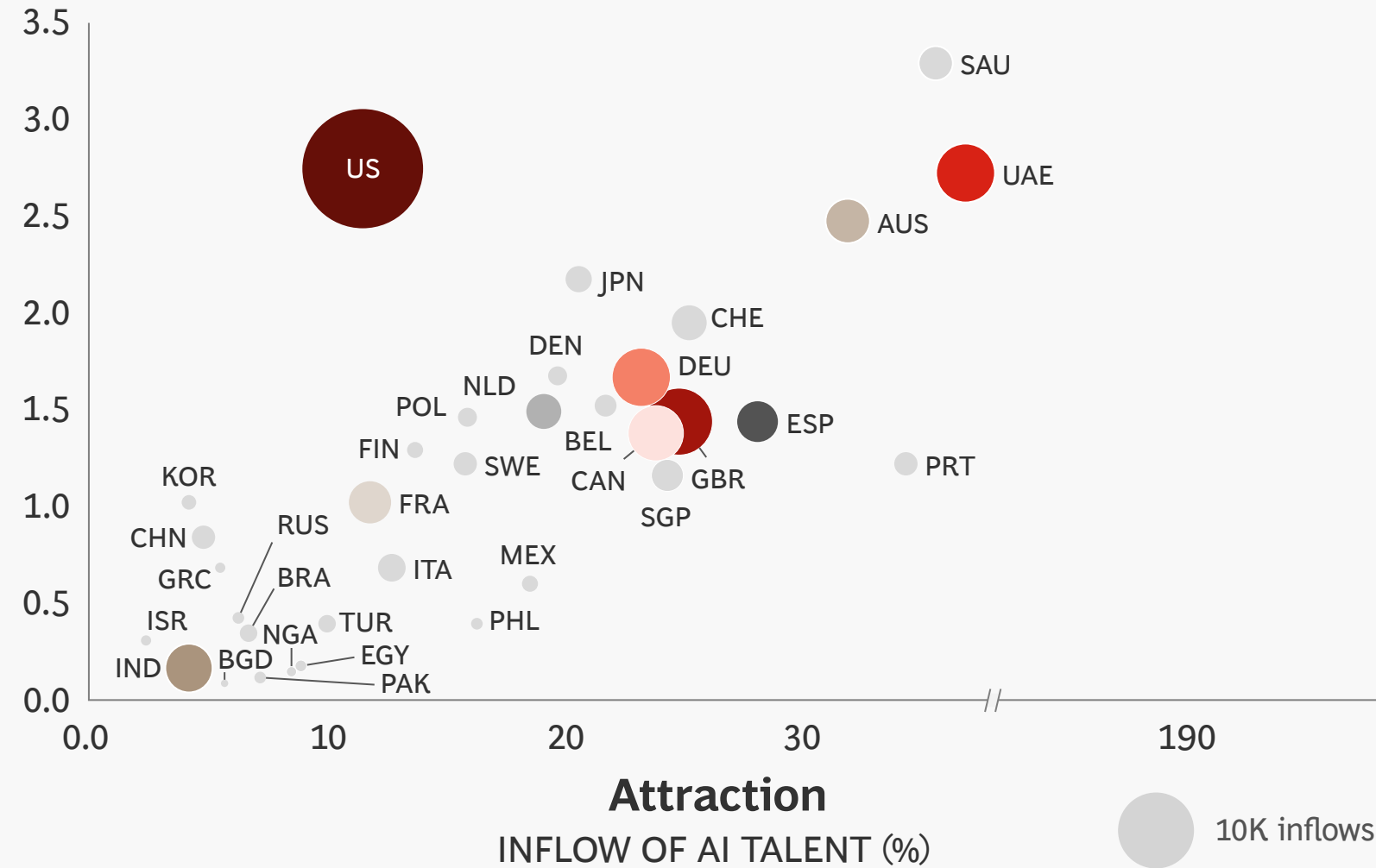
## Market share: Inflow

TOP 10 DESTINATIONS, IN % SHARE AND PP CHANGE VS 2024



## Retention

INFLOW/OUTFLOW OF AI TALENT



Sources: BCG Top Talent Tracker, Q4 2025; BCG analysis.

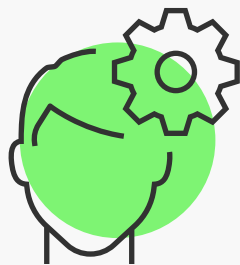


# The ten universities that serve as prime stepping stones for global AI talent

AI TALENT ABROAD, TOTAL & %			
Jawaharlal Nehru Technological University	India	17,766	<div><div></div></div> 69%
University of Mumbai	India	16,265	<div><div></div></div> 51%
Anna University, Chennai	India	13,893	<div><div></div></div> 51%
Visvesvaraya Technological University	India	10,470	<div><div></div></div> 40%
Osmania University	India	9,655	<div><div></div></div> 64%
University of Cambridge	UK	7,733	<div><div></div></div> 55%
University of Tehran	Iran	6,196	<div><div></div></div> 64%
I.K. Gujral Punjab Technical University	India	2,093	<div><div></div></div> 44%
University of Calicut	India	565	<div><div></div></div> 31%
Mansoura University	Egypt	372	<div><div></div></div> 22%
Total		85,008	

**Sources:** BCG Top Talent Tracker, Q4 2025; BCG analysis.  
**Note:** These figures cover all graduation years and represent aggregate numbers based on LinkedIn profile data.

# How nations, cities, and companies can compete for talent



**Company-led  
programs**



**Public talent  
funds**



**Immigration  
strategy**

SCALABILITY

THE  
CHALLENGE

Private-sector companies often lack the experience and cultural affinity to hire truly globally. The challenge is not only operational in HR but ultimately a cultural change that needs to involve the full C-suite.

In the public sector, there is usually not one single owner for global talent attraction and retention, leading to a lack of impact. The opportunity: Bundling of competencies and initial seed funding—leading to ROI by broadening the tax base.

Labor migration strategy evolves very dynamically, creating new best practices. A holistic political approach is needed as part of a “talent trifecta”: upskilling, tech and automation, and migration.

WHAT NEEDS  
TO HAPPEN

Make the business case and design an industry-specific global talent toolbox that covers the process from end to end—from workforce planning to recruiting, relocation, and onboarding.

Establish an agency or team with a clear goal, and mandate an ecosystem of recruiters, training providers, and relocators—aiming to engage companies in global hiring and broaden the skills and tax base.

Review the immigration system for highly skilled employment, analyze bottlenecks in the end-to-end process, and learn from international best practices.



## Definitions

The analysis covers highly skilled talent—those with at least a bachelor’s degree. Within that group, STEM talent is defined as working in research, engineering, IT, or product roles. AI talent is defined as having at least one skill in artificial intelligence, generative AI, artificial intelligence for business, large language models, Microsoft Azure Machine Learning, autoML, Apache Hadoop, data science, computer vision, PyTorch, reinforcement learning, neural networks, MapReduce, or high-performance computing. Note: This definition excludes a lot of talent with end-user knowledge of AI and focuses on those at the AI technology frontier.

## Global Coverage

The analysis covers more than 200 countries, with a particular focus on 34 key destinations: Australia, Bangladesh, Belgium, Brazil, Canada, China, Denmark, Egypt, Finland, France, Germany, Greece, India, Israel, Italy, Japan, Mexico, Netherlands, Nigeria, Pakistan, Philippines, Poland, Portugal, Russia, Saudi Arabia, Singapore, South Korea, Spain, Sweden, Switzerland, Turkey, the UAE, the UK, and the US.

## Time Coverage

Data is current as of August 31, 2025.



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