

EMEA-LATAM Economic Insights

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SUMMARY

Hiring continued to weaken across EMEA and LATAM in July (down -20.2% YoY on average; -18.7% YoY in Europe), and down -2.7% MoM. Industry hiring declines were led by Oil, Gas, and Mining (-23.7%); Administrative and Support Services (-24.0%); and Accommodation and Food Services (-24.6%). Employers and candidates are retreating together, as both postings per applicant (-16.0% YoY on average) and applications per applicant (-15.1%) declined in July. Entrepreneurship is on the rise as members increasingly add “Founder” to their profile (up 25% YoY in the UK, 22% in Germany, and 20% in France), likely boosted by AI as founders [are 11x more likely to have an AI skill than the average LinkedIn member](#).

HIRING IN EMEA AND LATAM WEAKENED FURTHER IN JULY, WITH THE LARGEST DECLINES IN MEXICO (-27.7%), BRAZIL (-26.2%), AND THE UAE (-24.6%), WHILE EUROPE AVERAGED AT -18.7% YOY.

- Year-over-year hiring across EMEA-LATAM declined by -20.2% on average in July and remained well below pre-pandemic levels (-29.7% YoY on average compared with July 2019).
- Ireland (-12.1% YoY) and Israel (-14.1%) had the smallest declines, followed by the UK (-18.0%) and Germany (-18.2%). Southern Europe and the LATAM markets weakened further, with hiring down in Italy (-21.2%), Brazil (-26.2%), and Mexico recording the steepest decline in the region (-27.7%). The UAE (-24.6% YoY) remains the only market still above pre-pandemic levels (+5.0% YoY compared with July 2019).
- Industry declines remain widespread, led by Accommodation and Food Services (-24.6%); Administrative and Support Services (-24.0%); and Oil, Gas, and Mining (-23.7%). Technology, Financial Services, and Government Administration held up

most, but still recorded double digit declines (-16 to -19% YoY).

- Entry-level hiring is faring slightly worse than overall hiring, not collapsing disproportionately, reducing modestly more than overall hiring last quarter (e.g., -13.4% vs. -13.0% YoY overall in the UK), pointing to broad economic uncertainty.
- The fastest growing roles last quarter point to a rise in entrepreneurship: “Founder” topped the overall lists in France (+55% YoY), Germany (+47%) and the UK (+53%), with Co-Founder close behind. The fastest hiring declines were in data and analytical work (Data Analyst -27% among entry-level and -30% overall in the UK), and administrative coordination (Project Manager -39% in France and -29% in Germany). Read more in our latest quarterly [AI Labour Market Update](#).

BOTH EMPLOYERS AND JOB SEEKERS REMAIN CAUTIOUS, AS APPLICATIONS PER APPLICANT FELL FURTHER IN MOST COUNTRIES.

- Job postings per applicant continued to decline across all countries analysed, down -16.0% YoY on average. The steepest decline was in the UAE (-30.9%), followed by Germany (-19.3%) and France (-18.1%); the UK was the most resilient (-7.3%).
- Applications per applicant fell further, down -15.1% YoY on average, pointing to cooling job search intensity across the region. The UAE again saw the largest drop (-20.8%), followed by France (-18.5%) and Ireland (-17.7%).
- Germany's [IAB-LinkedIn Reallocation Radar](#), developed in partnership with [LinkedIn's Data for Impact programme](#), tracks labour market reallocation through cross-industry job transitions and applications. The Radar continued to weaken, with both job moves and applications across

industries declining, suggesting workers are becoming less likely to explore opportunities outside their current sector. This could slow labour market adjustment as Germany's economy continues to transform.

- Together these signals continue to point to hiring caution on both sides of the market, consistent with ongoing economic uncertainty.

FLEXIBLE WORK CONTINUED TO NORMALISE ACROSS EMEA, THOUGH DEMAND REMAINS HIGHER THAN SUPPLY.

- Hybrid work remained the dominant flexible work arrangement, accounting for 25.0% of job postings on average across EMEA, but fell by -13.3% YoY in region, led by the UAE (-22.3%), Sweden (-22.1%), and Italy (-17.6%).
- Interest in hybrid work also eased, with hybrid application shares falling by -8.0% YoY on average. Despite this decline, hybrid roles continued to attract a larger share of applications (29.8%) than postings (25.0%), indicating demand remains somewhat stronger than supply.
- Remote work trends were more mixed. Remote postings increased by +13.9% YoY on average, including strong growth in the UAE (+44.3%), the Netherlands (+33.9%), and Italy (+16.9%), although remote jobs still represented just 6.0% of all postings across EMEA.
- Candidate interest in remote work softened, with the share of applications to remote roles down -18.5% YoY on average. Even so, remote roles continued to attract a disproportionate share of applications, accounting for 10.9% of applications.

THE AI LABOUR MARKET UPDATE SHOWS THE ENTRY-LEVEL SLOWDOWN OWES MORE TO ECONOMIC UNCERTAINTY THAN TO AI.

- Across major markets, entry-level hiring declined only modestly more than overall hiring, pointing more to economic uncertainty than a collapse in junior opportunities. Where the gap does emerge is in AI-augmented occupations (like Software Engineer), where entry-level hiring ran 3 to 10

percentage points below augmented hiring overall (-9.6% YoY vs. -6.5% in the US; -23.0% vs. -12.6% in France), and junior hiring in AI-disrupted and AI-insulated roles broadly tracked overall hiring.

- Entrepreneurship is accelerating and founders are rapidly upskilling in AI. The share of members adding "Founder" to their profile rose across all five markets (up 21% YoY in the US, 25% in the UK, 22% in Germany, and 20% in France). Founders are also adopting AI skills at a much faster rate than the workforce overall, as AI appears to reduce barriers to start a company. Globally, founders are now 11x more likely to have an AI skill than the average LinkedIn member.
- Finance hiring contracted by -13% YoY in June on average. As AI-skilled talent claims a growing share of a smaller hiring pool, firms appear to be prioritising capability over scale. This shift may be putting pressure on the early career pipeline: entry-level finance hiring fell faster than the sector overall in the UK (-16.3% YoY vs -12.5%), Germany (-16.9% vs -14.3%), France (-17.6% vs -15.5%) and India (-15.7% vs -14.0%). Yet green shoots remain, with demand for roles like Finance Specialist up 23% YoY last quarter in the UK.

WOMEN REMAIN LARGELY ABSENT FROM THE JOBS SHAPING AI'S FUTURE, ESPECIALLY IN THE HIGHEST-PAYING ROLES. WOMEN HOLD JUST 13% OF EXECUTIVE AI ROLES AT AI COMPANIES.

- The AI leadership gap starts well before the C-suite. Women make up 39% of leadership roles globally, but only 31% of AI leadership roles; the pipeline into AI leadership is already less female well before executive roles.
- The AI leadership gap is often larger at smaller companies. Women are underrepresented across the board, but smaller firms (51-200 employees) tend to have even fewer women in executive leadership roles than larger companies.
- No industry has solved the AI leadership gap. AI firms are concentrated in professional services (41%), technology (31%), and financial services (8%), which together account for roughly 80% of AI firms in our sample. While the size of the gap varies across industries, women are less represented in executive roles across every industry we examined.

- AI is creating some of the fastest-growing and highest-paying jobs in the economy. In the US, the number of AI job postings have doubled in recent years, and the typical AI role pays more than twice as much as a non-AI role. But access to that opportunity is far from equal.
- Women are underrepresented in many of AI's highest-paying jobs. Women make up just 20% of Head of AI hires, 26% of Director of AI hires, and 18% of Member of Technical Staff hires. Meanwhile, women are better represented in lower-paying AI roles such as data annotation.

METHODOLOGY

- The LinkedIn Hiring Rate (LHR) is a measure of hires divided by LinkedIn membership in the country. This is based on members' profile updates using the start date of a new job. The hiring rate has been seasonally adjusted, as detailed in the [LinkedIn Hiring Rate methodology](#). This number is indexed to the average month in 2016; for example, an index of 1.05 indicates a hiring rate that is 5% higher than the average month in 2016.
- Labour market tightness is calculated from the ratio of active job listings (open listings) that attract applicants (has at least one application) to the number of job seekers who applied to such listings.
- Job search intensity is the average number of job applications per applicant, measuring the intensity of each applicant's job search where job applicants and job postings share the same country. The higher the number, the more intense the job seeking behaviour of the applicant.
- A "remote job" refers to jobs that can be done completely out of the office and is defined as either the job poster explicitly labelled it as "remote" or if the job contained keywords like "work from home" in the listing. A "hybrid job" refers to jobs that are done both in the office and out of the office and is defined as being explicitly labelled as "hybrid" by job poster. The share of hybrid and remote jobs is calculated in proportion to all paid job postings.

APPENDIX

Table 1. % change in hiring

July 2026 (seasonally adjusted)

	Jul 2026	YoY % change
Ireland	0.81	-12.1
Israel	1.04	-14.1
United Kingdom	0.77	-18.0
Germany	0.88	-18.2
Netherlands	0.62	-19.8
Spain	0.73	-20.0
France	0.76	-20.2
Sweden	0.64	-20.3
Italy	0.73	-21.2
United Arab Emirates	1.06	-24.6
Brazil	1.33	-26.2
Mexico	0.73	-27.7

Table 2. % change in hiring by seniority

Apr-Jun 2026 average (seasonally adjusted)

	Entry	Overall
Ireland	-12.9	-14.0
United Kingdom	-13.4	-13.0
Netherlands	-18.3	-17.8
Sweden	-18.4	-18.4
Spain	-18.7	-15.4
France	-18.8	-17.4
Germany	-18.9	-17.5
Israel	-19.5	-13.9
Italy	-21.9	-19.6
Brazil	-22.7	-21.8
Mexico	-24	-23.2
United Arab Emirates	-30.9	-29.8

Table 3. % change in hiring by industry

July 2026 (seasonally adjusted), EMEA-LATAM Average

	YoY % change
Technology, Information and Media	-16.0
Financial Services	-18.4
Government Administration	-18.5
Construction	-19.2
Education	-19.3
Consumer Services	-19.7
Professional Services	-19.9
Wholesale	-20.0
Transportation, Logistics, Supply Chain and Storage	-20.3
Hospitals and Health Care	-21.1
Entertainment Providers	-22.0
Manufacturing	-22.7
Real Estate and Equipment Rental Services	-23.0
Retail	-23.1
Utilities	-23.3
Oil, Gas, and Mining	-23.7
Administrative and Support Services	-24.0
Accommodation and Food Services	-24.6

Table 4. Labour market tightness and job search intensity

July 2026

	Job Postings per Applicant		Applications per Applicant	
		YoY % change		YoY % change
United Kingdom		-7.3		-15.9
Brazil		-11.3		-13.9
Mexico		-12.6		-8.2
Italy		-14.0		-8.7
Ireland		-14.6		-17.7
Netherlands		-16.2		-15.5
France		-18.1		-18.5
Germany		-19.3		-17.1
United Arab Emirates		-30.9		-20.8

Table 5. Share (%) of hybrid job postings

July 2026

	Jul 2026	YoY % change	MoM % change
Israel	33.9	-13.1	-3.5
United Kingdom	32.1	-10.3	+0.0
Ireland	31.4	-10.6	+0.8
Netherlands	26.7	-6.2	-2.8
France	24.2	-3.1	+15.3
Sweden	24.0	-22.1	-0.5
Germany	23.3	-14.7	-4.2
Italy	22.5	-17.6	+0.1
United Arab Emirates	6.5	-22.3	-6.1

Table 6. Share (%) of hybrid job applications

July 2026

	Jul 2026	YoY % change	MoM % change
Israel	39.9	-4.6	+1.1
United Kingdom	38.7	-6.8	+1.3
Ireland	36.4	-0.9	+0.4
Netherlands	35.1	-7.4	+1.8
Germany	30.1	-10.2	+0.5
Italy	27.9	-6.7	+3.4
France	26.9	-5.6	+3.2
Sweden	26.6	-10.4	-0.4
United Arab Emirates	6.9	-19.2	-9.9

Table 7. Share (%) of remote job postings

July 2026

	Jul 2026	YoY % change	MoM % change
United Kingdom	9.6	+14.0	+2.6
Ireland	9.1	-3.3	+2.3
Germany	7.3	+9.3	+1.3
Italy	6.4	+16.9	+3.4
United Arab Emirates	5.9	+44.3	-3.7
Sweden	5.0	+3.4	+9.3
Israel	3.8	+13.6	+14.6
France	3.6	-6.8	+11.7
Netherlands	3.3	+33.9	+9.4

Table 8. Share (%) of remote job applications

July 2026

	Jul 2026	YoY % change	MoM % change
Germany	16.4	-23.6	-2.8
United Kingdom	15.9	-11.2	-3.5
Ireland	14.9	-22.3	-2.1
Italy	11.7	-17.7	-9.2
Netherlands	9.9	-25.7	+5.6
Sweden	9.9	-31.5	+6.0
Israel	7.2	-18.6	-5.5
France	6.6	-17.4	+8.3
United Arab Emirates	5.6	+1.3	-11.8