

EMEA-LATAM Economic Insights

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SUMMARY

Hiring remained weak in March across EMEA-LATAM, down 14.5% YoY on average and ~20% below pre-pandemic levels, and demand softened, with job postings and applications both declining. Industry trends confirm widespread contraction, particularly in Oil & Gas, Mining, Utilities, and Manufacturing. At the same time, the latest [AI Labour Market Update](#) shows AI adoption is advancing unevenly, shaped by macroeconomic conditions, firm size, geography, and industry dynamics.

MARCH HIRING WEAKENS FURTHER WITH DECLINES ACROSS EMEA-LATAM, DOWN -14.5% YoY ON AVERAGE AND WELL BELOW PRE-PANDEMIC LEVELS (~20% Yo7Y).

- Year-over-year hiring in March continued to contract across EMEA-LATAM markets, down -14.5% YoY on average and well below pre-pandemic levels (-19.7% Yo7Y compared to a pre-pandemic March 2019), reflecting continued weak demand.
- Hiring declines were seen in the UK (-11.7% YoY), Germany (-13.9%), France (-14.0%), and the Netherlands (-16.1%), with deeper contractions in Southern Europe (Italy -17.9%, Spain -18.7%). Hiring in the United Arab Emirates remained above pre-pandemic levels (+19.3% Yo7Y), despite a modest YoY decline (-6.7%).
- Industry growth was limited in March, with green shoots in Ireland and construction: Ireland saw gains in Administrative & Support Services (+15.3%), alongside Utilities (+3.0%), and Hospitals & Health Care (+2.8%). Construction showed relative resilience across markets including Italy (+2.6%), Germany (+2.3%), Spain (-9.2%), and the UAE (-2.7%)
- Industry declines were widespread in March amid economic uncertainty, with broad-based contraction in EMEA-LATAM led by Oil, Gas, and

Mining (-19.5% YoY on average), Utilities (-18.5%), Manufacturing (-17.2%), and Entertainment Providers (-17.1%).

HIRING CAUTION ON BOTH SIDES OF THE MARKET, AS JOB POSTINGS AND APPLICATIONS PER APPLICANT DECLINED IN MARCH.

- Job postings per applicant continued to decline across most markets, with the largest drops in the UAE (-15.9%), Germany (-15.0%), France (-11.2%), and the Netherlands (-11.0%), while the UK was a notable outlier with postings increasing (+1.1%).
- Candidate activity weakened further, with applications per applicant falling sharply in the UAE (-27.5%), the UK (-19.6%), Germany (-18.4%), and Ireland (-17.2%), pointing to cooling job search intensity.
- These signals suggest hiring caution on both sides of the market, consistent with ongoing macro uncertainty.

HYBRID OPPORTUNITIES COOLED IN MARCH, WITH THE SHARE OF HYBRID ROLES DOWN -16% YoY, AS REMOTE JOB POSTINGS SAW A BOOST (UP 25% YoY).

- Hybrid roles remain the dominant flexible work option but continue to decline year-over-year across most markets, with shares highest in Israel (36.5%), the UK (34.8%), and Ireland (33.5%), and steep declines in Sweden (-15.0% YoY), Germany (-12.8%), and the Netherlands (-11.8%).
- Hybrid job applications continue to exceed postings in most markets, indicating sustained candidate preference for flexibility, with the highest shares in the UK (42.3%), Israel (40.9%), and Ireland (37.7%), and modest YoY growth in the UK (+3.7%) and Ireland (+1.8%).

- Remote job opportunities grew in March, with the largest increases in the UAE (+121.7% YoY), Netherlands (+50.3%), and UK (+26.6%), but remained a relatively small share of total postings (6.5% on average in EMEA).
- Remote roles continue to attract outsized interest relative to supply, accounting for a higher share of applications than postings (13.4% of applications in EMEA on average), especially in Germany (19.8%), the UK (17.7%), and Ireland (17.5%), though application shares declined year-over-year in most European markets, suggesting slightly easing demand intensity.

AI ADOPTION IS ADVANCING UNEVENLY, SHAPED BY MACROECONOMIC CONDITIONS, FIRM SIZE, GEOGRAPHY, AND INDUSTRY DYNAMICS.

- Entry-level hiring is slowing, not collapsing disproportionately: Across the US, UK, France, Germany, and India, entry-level hiring in the last three months has fallen broadly in line with overall hiring, likely due to economic uncertainty.
- Productivity gains may be reshaping junior pipelines in AI-augmented occupations: In AI-augmented occupations (like Software Engineer and Data Analyst) entry-level hiring has softened more sharply in the last three months (-8.9% YoY in the US vs. -1.9% overall), but hiring still remains most resilient in AI-augmented roles compared to roles that are AI-disrupted or AI-insulated.
- Company size matters, but the gap is narrowing: Large firms still employ the highest share of AI talent (~4% of employees), reflecting their infrastructure and deployment capacity. But SMBs and micro firms are catching up: in France and the UK, micro firms posted a higher share of AI roles in 2025 than large firms.
- AI skills signal deployment, not just experimentation: Fast growth in applied skills like AI Agents, LLMOps, and AI productivity tools points to a focus on practical, productivity-enhancing use cases – especially among SMBs.
- Local ecosystems are crucial in shaping AI adoption: Cities like Cambridge (where 3.2% of members have AI talent), San Francisco (3.0%), Bengaluru (3.0%), and

Grenoble (1.6%) far exceed national averages of AI engineering talent, underscoring the role of universities, research strength, and anchor employers in tech and advanced industry.

- Manufacturing shows a broader levelling trend: AI engineering talent in manufacturing has grown sharply since 2016 (2.5× in Germany, 4× in India), yet job postings requiring AI skills have softened in recent years mirroring national AI hiring patterns.
- Read more in the latest [AI Labour Market Update](#).

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

March 2026 (seasonally adjusted)

	Mar 2026	YoY % change
United Arab Emirates	1.28	-6.7
Ireland	0.86	-9.8
Brazil	1.65	-11.0
United Kingdom	0.85	-11.7
Germany	0.96	-13.9
France	0.85	-14.0
Sweden	0.68	-15.4
Netherlands	0.67	-16.1
Israel	1.09	-16.6
Italy	0.80	-17.9
Spain	0.81	-18.7
Mexico	0.88	-21.6

Table 2. % change in hiring by industry

March 2026 (seasonally adjusted), EMEA-LATAM Average

	YoY % change
Construction	-10.0
Government Administration	-12.4
Technology, Information and Media	-12.4
Financial Services	-13.1
Education	-13.9
Transportation, Logistics, Supply Chain and Storage	-14.1
Retail	-14.1
Consumer Services	-14.5
Administrative and Support Services	-14.6
Hospitals and Health Care	-14.8
Real Estate and Equipment Rental Services	-15.6
Wholesale	-16.0
Accommodation and Food Services	-16.0
Professional Services	-16.4
Entertainment Providers	-17.1
Manufacturing	-17.2
Utilities	-18.5
Oil, Gas, and Mining	-19.5

Table 3. Labour market tightness and job search intensity

March 2026

	Job Postings per Applicant	Applications per Applicant
	YoY % change	YoY % change
United Kingdom	1.1	-19.6
Brazil	-6.3	-9.2
Ireland	-7.5	-17.2
Italy	-8.5	-12.9
Mexico	-9.3	-10.2
Netherlands	-11.0	-15.4
France	-11.2	-17.0
Germany	-15.0	-18.4
United Arab Emirates	-15.9	-27.5

Table 4. Share (%) of hybrid job postings

March 2026

	Mar 2026	YoY % change	MoM % change
Israel	36.5	-8.3	5.6
United Kingdom	34.8	-1.4	-3.9
Ireland	33.5	-7.5	-0.5
Sweden	27.8	-15.0	-6.5
Netherlands	26.4	-11.8	-2.1
Germany	25.1	-12.8	-4.5
Italy	22.7	-12.3	-2.8
France	22.3	-7.1	-5.5
United Arab Emirates	7.3	-65.2	-41.4

Table 5. Share (%) of hybrid job applications

March 2026

	Mar 2026	YoY % change	MoM % change
United Kingdom	42.3	3.7	1.3
Israel	40.9	-7.5	1.6
Ireland	37.7	1.8	2.6
Netherlands	37.5	-3.0	0.3
Germany	33.1	-3.3	0.7
Sweden	31.5	-3.2	-0.9
Italy	30.1	1.2	0.2
France	28.3	-5.0	0.7
United Arab Emirates	10.2	4.6	19.5

Table 6. Share (%) of remote job postings

March 2026

	Mar 2026	YoY % change	MoM % change
United Kingdom	10.4	26.6	8.8
Ireland	8.8	-16.1	-14.1
United Arab Emirates	8.5	121.7	68.6
Germany	8.0	20.5	5.1
Italy	6.9	23.1	-2.4
Sweden	4.2	-0.2	-14.7
France	3.9	9.8	0.5
Netherlands	3.9	50.3	10.2
Israel	3.6	-15.7	11.1

Table 7. Share (%) of remote job applications

March 2026

	Mar 2026	YoY % change	MoM % change
Germany	19.8	-6.2	-4.1
United Kingdom	17.7	-7.0	2.2
Ireland	17.5	-16.1	-6.6
Italy	12.6	-3.1	-5.1
Netherlands	11.9	-8.8	-7.4
Sweden	10.7	-6.4	-7.4
Israel	9.2	1.4	-7.3
United Arab Emirates	7.7	20.8	20.4
France	6.7	-11.5	-11.0