



LUFTHANSA GROUP

Wie sich Strategisches Workforce Management an die immer schneller werdende KI-Revolution anpassen lässt

FRA GP/W

07. Oktober 2025

| Intern |

Our challenge | Welcome to the VUCA world



Welche Jobs durch KI bedroht sind

04.04.2023 | 09:40

Die Künstliche Intelligenz ist auf dem Vormarsch - und wird auch den Arbeit vieler Menschen verändern. Studien haben untersucht, welche Jobs bedroht sind. Überblick.



5 Generations in the Workplace: How to Manage Them All

By Elizabeth Perry, ACC
August 5, 2022 - 55 MIN READ



Top Skills: Welche Fähigkeiten künftig gefragt sind

Globalisierung, demographischer Wandel und Digitalisierung greifen tief in den Arbeitsmarkt ein. Wer für die Zukunft gewappnet sein will, braucht Top Skills. Solides Wissen – durch Ausbildung oder Studium erworben – bleibt zwar Teil dessen. Wichtiger aber noch werden die **Soft Skills** der Zukunft. Was Unternehmen erwarten und dringend suchen – ein Ausblick auf die gefragtesten Top Skills im Job, mit denen Sie auch noch in den kommenden Jahren punkten...

Agenda

1 Strategic Workforce Management (SWM) – Risk Management

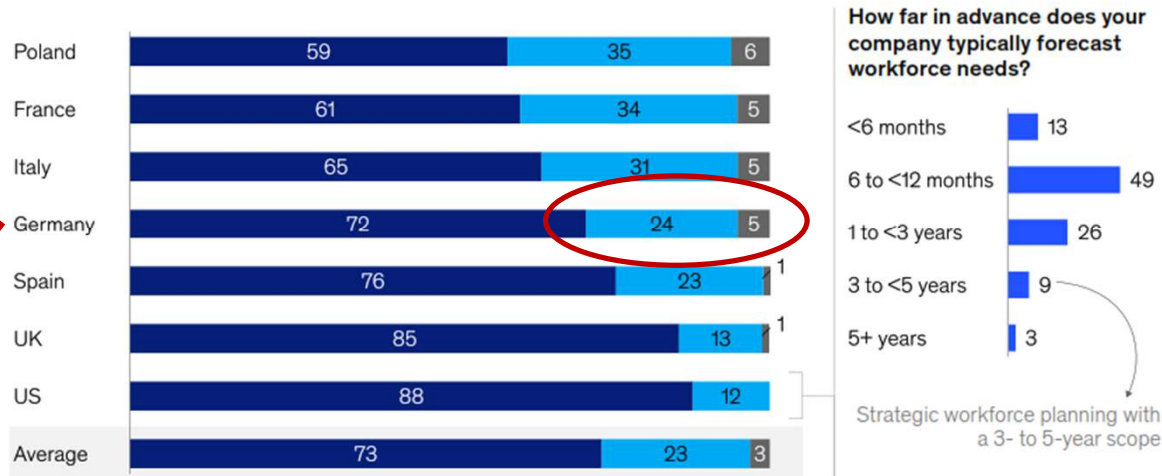
- 2 Outlook: External labor market in aviation
- 3 SWM in the Lufthansa Group
- 4 AI-Tools and impacts to SWM
- 5 Business driver and the right questions
- 6 Q&A



Strategic Workforce Management | Most companies conduct operational workforce planning, but only few take a strategic, long-term approach¹⁾

Engagement in workforce planning,¹ % of HR respondents

- Yes, in full throughout the entire company (including demand and supply side; regularly updated data)
- Yes, but not exhaustively (not all roles are tracked; data is not always up to date)
- No, not at all



Note: Figures may not sum to 100%, because of rounding.

¹Question: Does your company carry out workforce planning?

Source: McKinsey HR Monitor Survey, Dec 2024, n = 4,069 employees and 1,925 HR professionals in France, Germany, Italy, Poland, Spain, UK, and US

McKinsey & Company

1) Source: HR Monitor 2025 - McKinsey's

Workforce Transformation @ LHG

October 6, 2025, GP/WW

Page 4

HR Monitor 2025 – McKinsey's

- Employees lack the skills required to meet business demands
=> **32% of employees do not have all the skills** they need to perform in their current role
- **Critical skills** for the future are in high demand but short supply
- **Gen AI could automate up to 27%** of work hours in Europe
- **Skills based SWP** is the best method and **effective approach** to address skills gaps
- Companies are not **proactively assessing the skills** they have or lack, and they are not hiring and developing employees based on the SWP findings
- Only 41% have developed a **Skill taxonomy** that has been tailored to the needs of their business.
=> **crucial for talent management and learning**
- The **skills gap** is not just a future concern; it is a growing reality that already **threatens business agility and innovation**.
- **Workforce insights** - Use AI to track employees' skills dynamically => highlight skill gaps and development needs

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Risk Management | Looking 10 years ahead - What if **people risks threaten our airline industry** future business model more than we think?

Press Preview 2035

BREAKING NEWS

Large-scale cancellations of British Airways flights

10:16 MASSIVE STRIKES LEAD TO COMPLETE SHUTDOWN OF TERMINAL 1 AT HEATHROW

BREAKING NEWS

SAS has to give up Stockholm as a hub

09:49 Consequence following shortage of qualified professionals

BREAKING NEWS

Lufthansa grounds 4200 flights - Cyberattack

09:44 INTERNAL SKILL GAPS LEAVE EUROPEANS LEADING AIRLINE EXPOSED

BREAKING NEWS

MUC AIRPORT SHRINKING

09:39 HALF OF LUFTHANSA'S A350 FLEET MOVES TO OTHER HUBS

People risks may hinder European Airline growth, quality & efficiency

Transnational labor disputes lead to domino-style strikes:

- Dissatisfaction arising from labor shortages is prompting employees to initiate strike action (pilots, cabin crew, ground staff)
- Severe revenue losses incoming

Significant decline in Sweden's working-age population ¹⁾

- Widespread retirements and the consequent shortage of skilled personnel could force a company to downsize its operations
- Early retraining and recruitment measures are crucial

Cybersecurity Risks

- Disruptive tech advances require significant up-skilling
- Strong impact on safety, security & ops stability

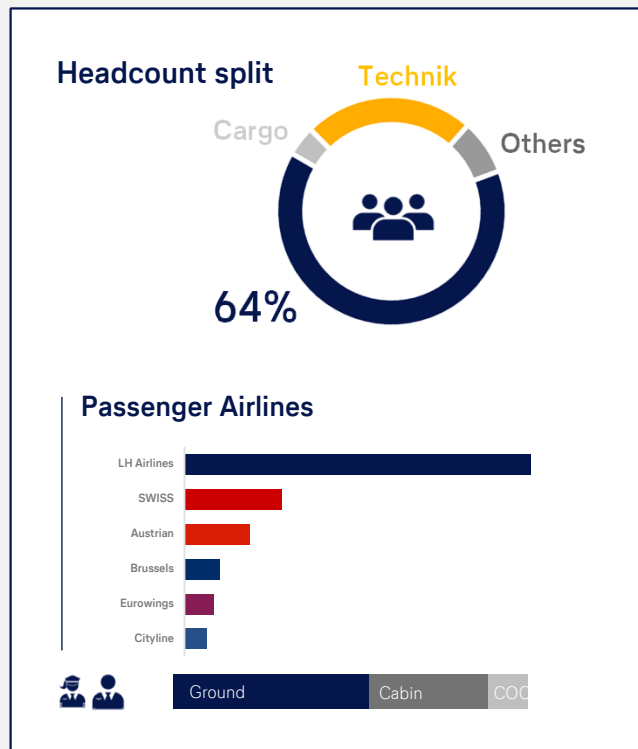
Staffing Challenges at MUC

- Lack of staff for service jobs, technical profiles, supply chain partners
- Underutilized infrastructure, growth opportunities left out

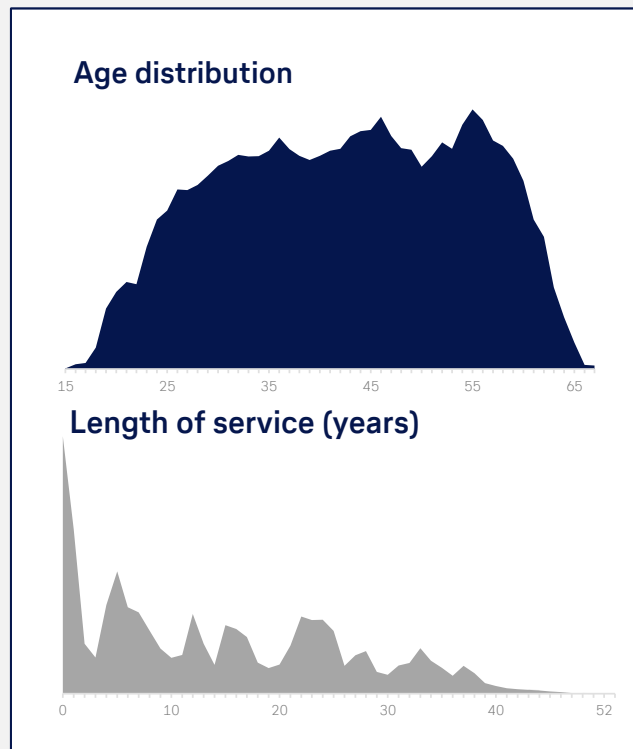
Source: 1) [2025 Global Talent Shortage](#)

LHG starting point | more than 104.000 employees' group-wide

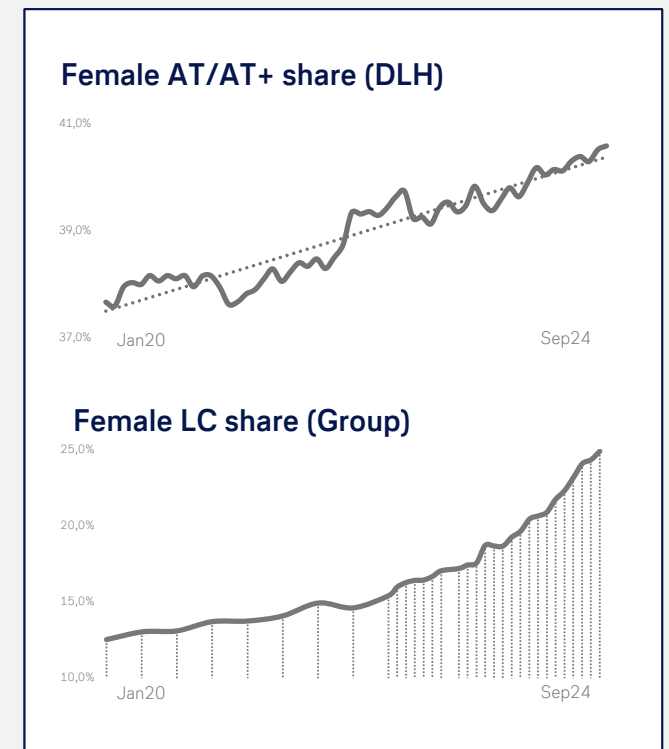
~2/3 of staff at Passenger Airlines



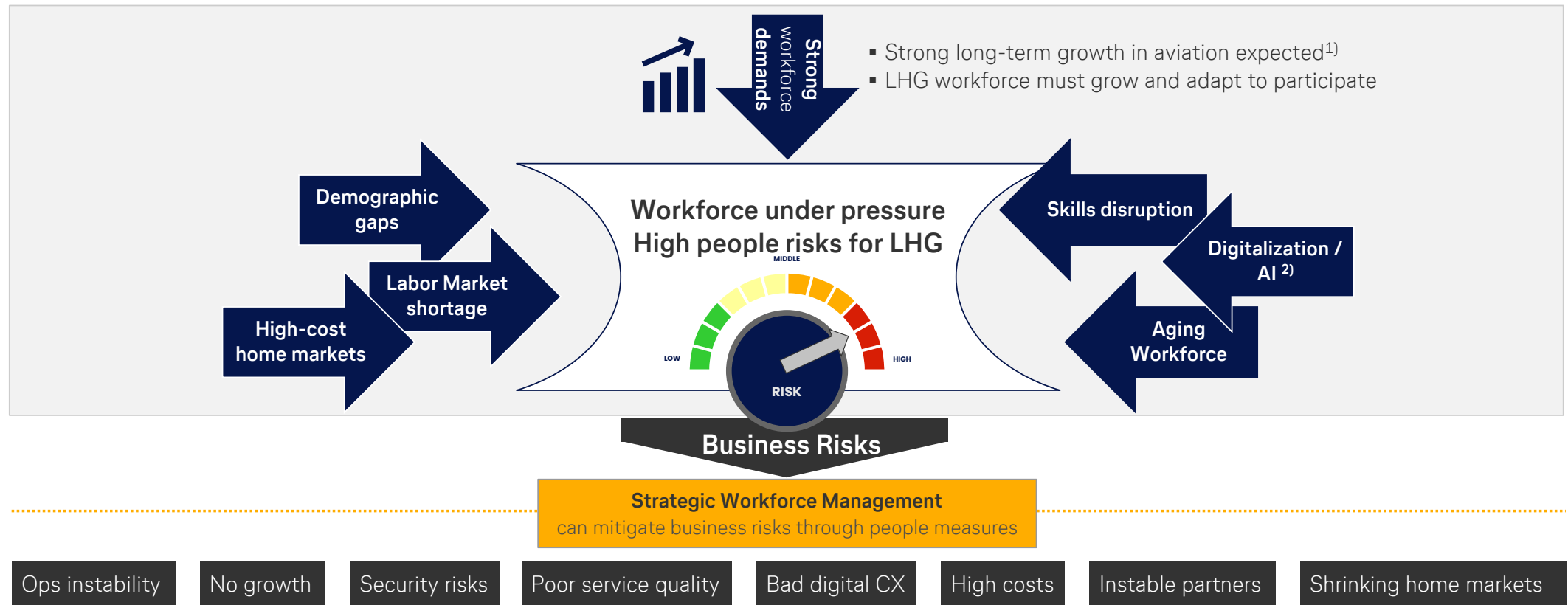
Re-Generation



Rising female share



SWM focus on biggest people risks | LHG must secure their business capabilities for stable growing in the future



Source: 1) IATA; 2) One IT project

SWP managing risks holistically | Researching the future and making developments transparent is the key to success



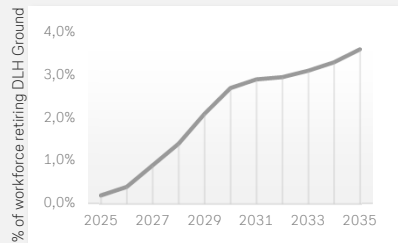
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Outlook in Aviation labor market | People risks are real already - Demographic shrinking plus decreasing number of qualified applicants in EU

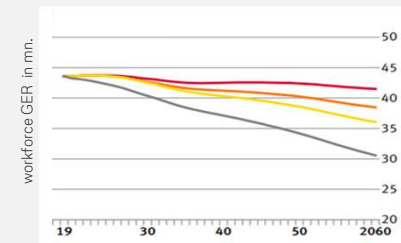
Demographic exodus from LHG¹⁾

- Retirements rapidly increase, peaking between 2030-2035



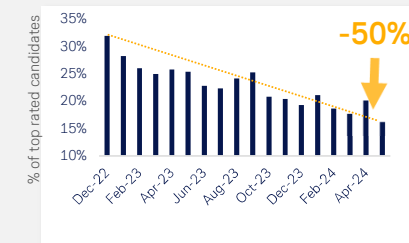
Shrinking labor market²⁾

- 300K net workforce loss in GER p.a., up to 17% shrinkage by 2035



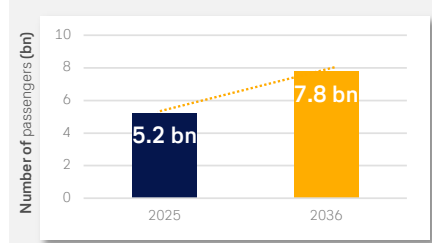
Decrease of candidate quality³⁾

- 50% less qualified candidates



Substantial aviation growth⁴⁾

- Higher staff demands in jobs with low automation potential



Critical outlook for growth, cost & ops stability



Overburdened aviation ecosystem

- Critical ground handling jobs understaffed (security, BVD)
- Limited ATC system due to lack of staff



No people, no growth

- Structural flight attendants & ground service gap expected at high-cost hubs
- By 2035 only 83% of today's candidates with lower quality



Strong competition for tech roles

- Technicians with big shortage already
- Competition to increase further (growing demand +156%; supply shrinks by 50K)⁵⁾

Risks: Rising costs, limited growth, ops instability, lower service quality, lower fleet efficiency

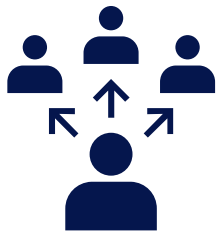
Source: 1) CB/Z; 2) Statistisches Bundesamt; 3) GD/M 2024; 4) IATA; 5) Talent Neuron, 2025, demand increase by +153% 2013-2023; 50K (-20%) net loss of technicians in GER labor market over the next 10 yrs.

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SWM in LHG | HR plus AI derives and prioritizes people focus groups – in close cooperation with Group Strategy

Governance Decision



Group owned, BU executed

- LHG CoE provides processes, tools, IT
- BUs execute SWM
- SWM resources in head-quarter and decentralized HR departments (BU)

Identify Focus Groups



AI-driven approach

- AI analysis of strategy documents from all BU
- Extracted strategically most important workforce focus groups
- Labor market analysis

Prioritize



Prioritization with Strategists of Airlines

- Focus groups rank & prioritized by Strategy & HR
- Impact (Strategic & KPI effects)
- Urgency

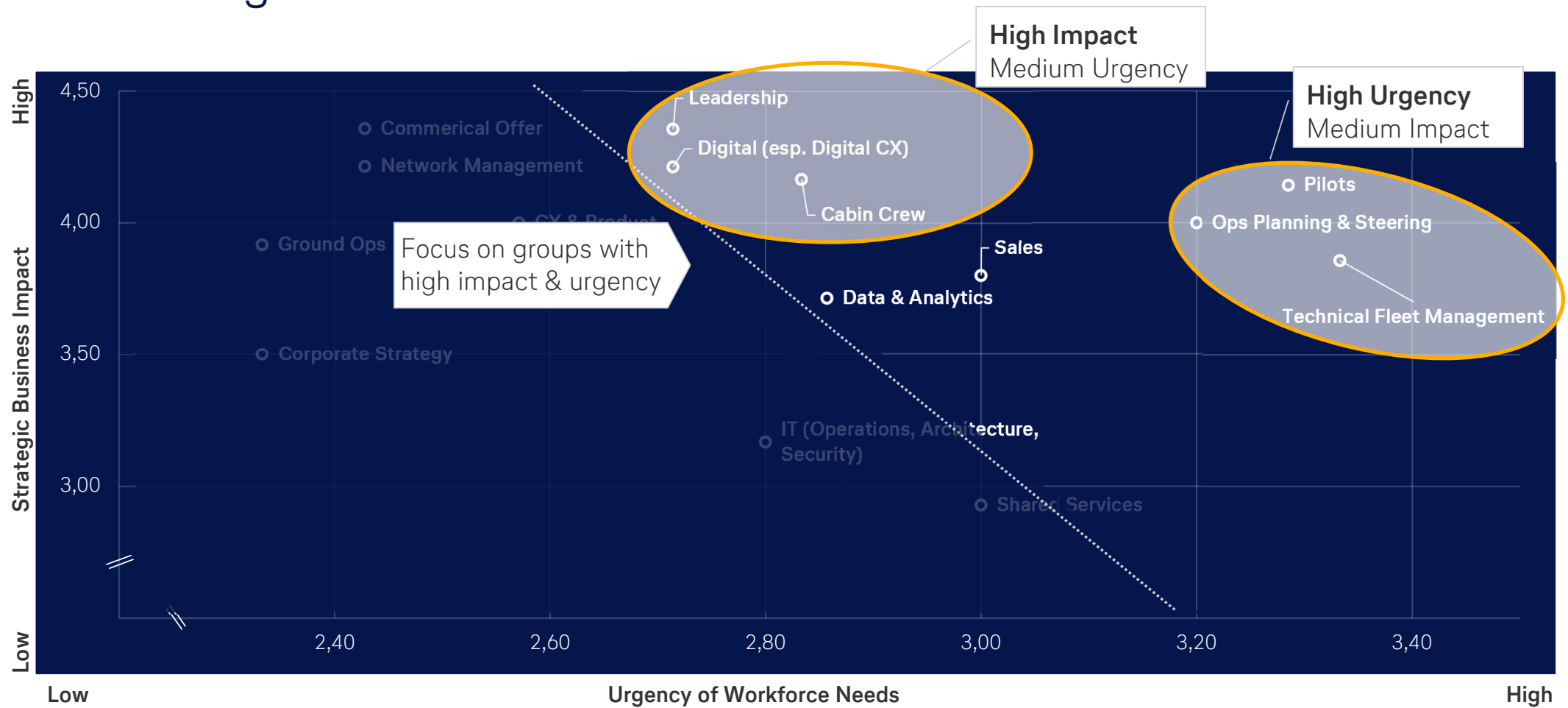
Next Steps



Elaboration with Business Owners & HR

- Top-down input by corporate strategy
- Input by HR & Business
- Decision by HR Board of Directors Oct 2025

SWM in LHG | LHG focus groups results: Prioritization points to high impact as well as urgent workforce needs



SWM in LHG | Focus on target picture and future needs



SWM pitstop | Creating awareness - Asking the right person the right questions in each business unit – you get first SWM insights very fast

1. Analyze status quo

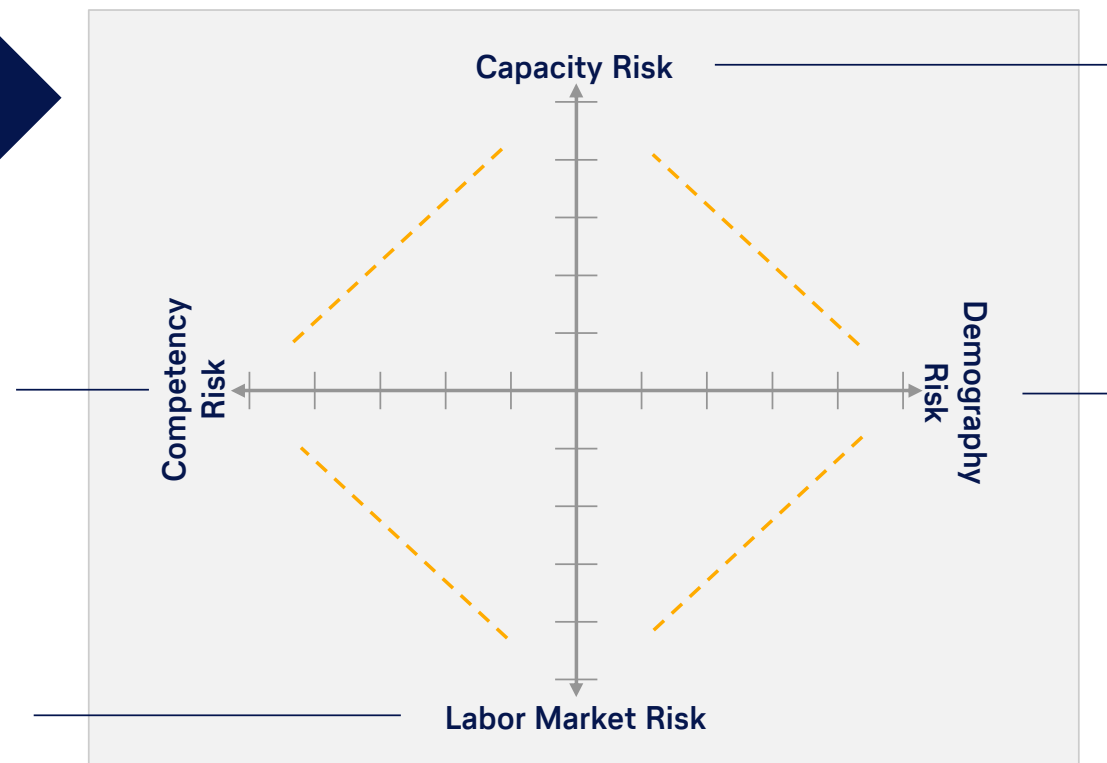
Risk evaluation of selected jobs / roles

Competency Risks:

Do employees have the skills needed to meet business goals?

Labor Market Risks:

How likely is it that new hires won't be available on the market when needed?



Capacity Risks:

Will current staff be sufficient in the next years?
Are there roles where we expect too many employees?

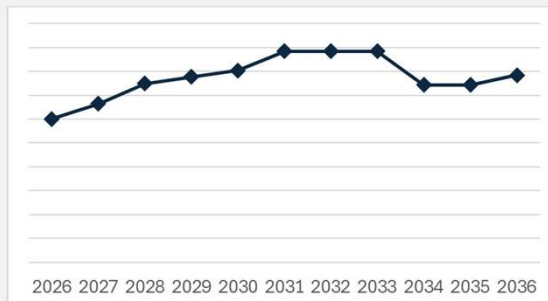
Demography Risks:

Does the age structure indicate risk of staff loss that needs replacement?

After Pitstop-Analysis | Numeric simulation of demand and supply forecast as the key for focus groups with great size

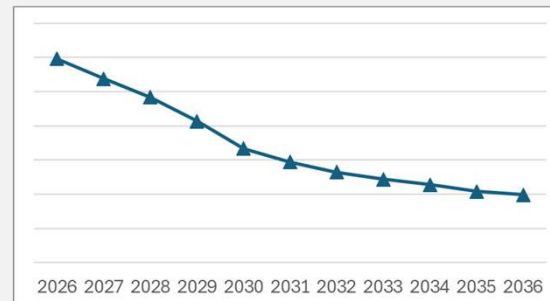
Step 1: Demand

Demand model to forecast qualification chains



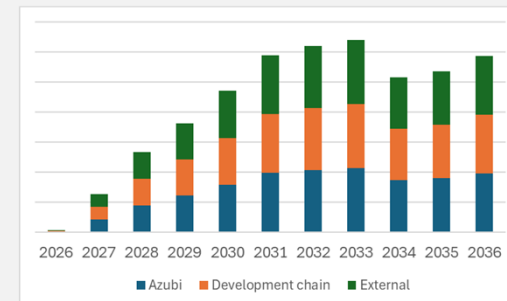
Step 2: Supply

“Do nothing”-scenario- current workforce forecast



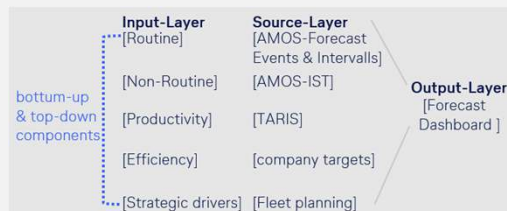
Step 3: Gap closing

Result: Recruiting necessities



Example Line Maintenance:

AMOS basis to forecast EASA-qualifications



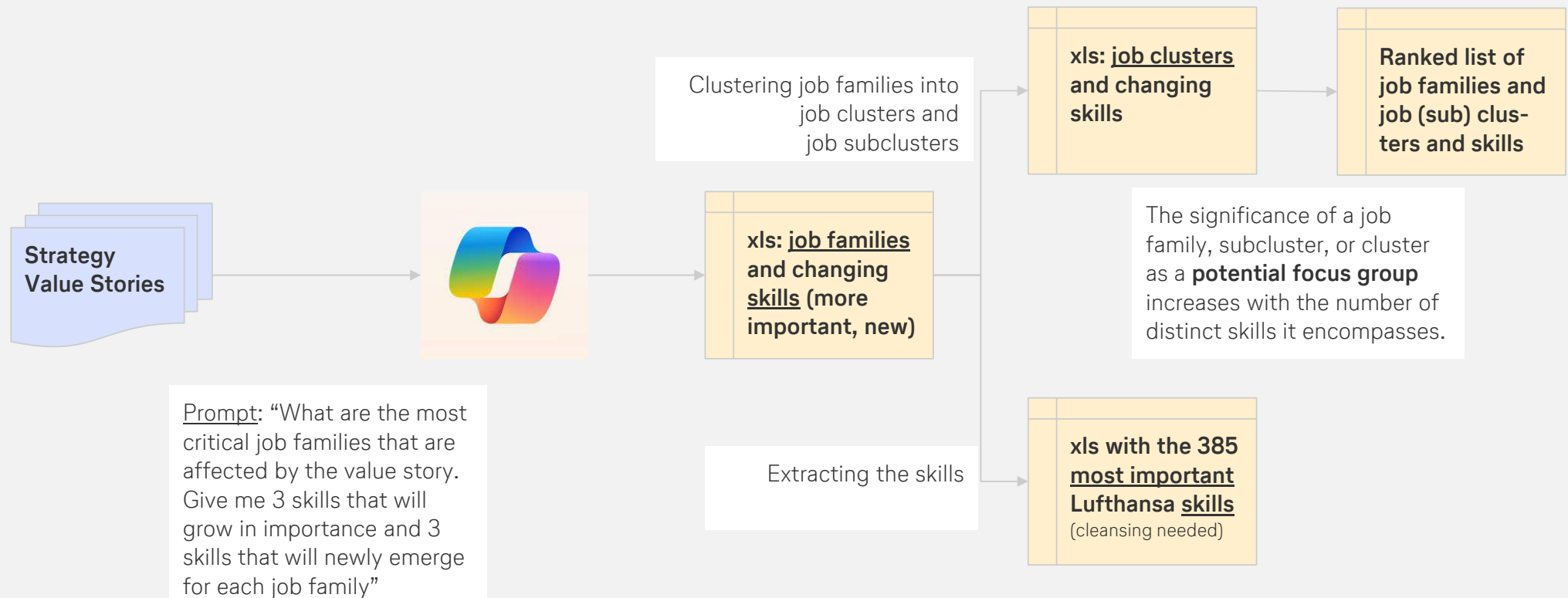
development chains in duration of up to 10 years)



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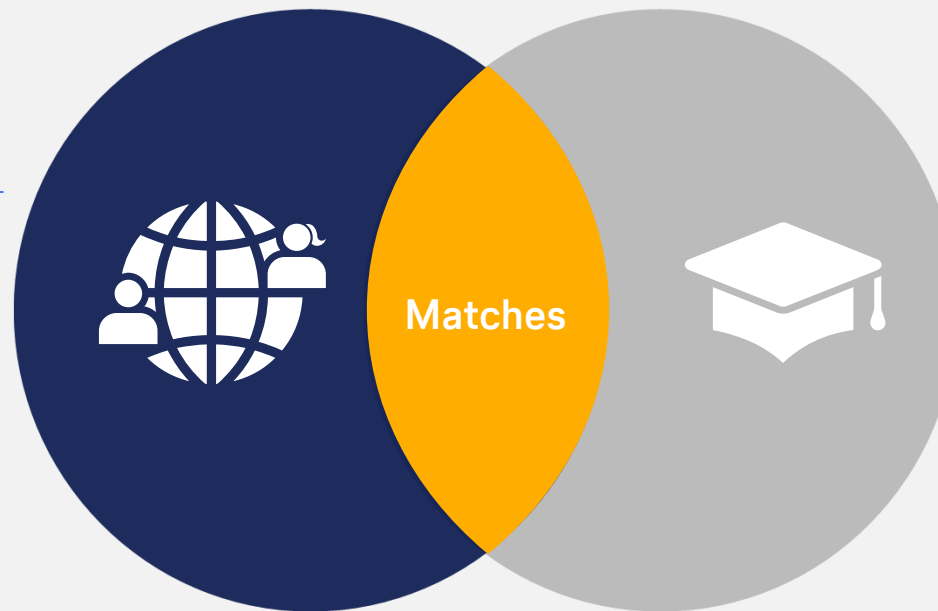
AI-Tools | Gen-AI driven identification of critical workforce focus groups from LHG strategy documents – Evaluation of BU's strategies



AI-Tools | Skill-Matching: Synchronization of skill requirements for a position with the applicant's skill set – Compare worldwide job-postings with internal Job-Profiles

Which skills are needed?

- Compare internal job-profiles against external market via AI-Data from job-postings worldwide | TalentNeuron/HRforecast
- Future Job-Profiles:
Skill-requirements based on business needs



Which skills does the applicant have?

- Individual skill-set
- Competence level
- Experiences
- Professional education
- Identification of training needs and personal development

AI-Tools | Talent intelligence discover, that boundaries between existing roles are blurring, new roles are emerging – work architecture?

**AI-powered platform
that analyzes global talent data**



Complexity

Flexibility

New roles: Example Workforce Transformation Team

Data Analyst, Product Owner, Transformation Designer, Workforce Transformation Consultant:
Skill development, clear responsibilities

„Superworker“ & AI (Augmentation)

Greater productivity, creativity, performance, responsibility: AI empowers

Stronger focus on tasks

Jobs → Tasks → Workflows → AI agents: Business reengineering – the basis for controlled automation

Trend: Job/work architecture

Broader profiles, focus on responsibility rather than skills, more self-determination for BUs/managers, but different systematics simultaneously => Example: S4HANA implementation

Personnel development

Dynamic, personalized: microlearning and modular approaches, talent marketplaces and coaching, capability academies for strategic skills

* Microsoft's AI Product Lead Says Agents Could Kill the Org Chart - Business Insider

AI-Tools | Simulation of workforce: Supply

Workforce supply

Shows how your supply changes in the upcoming years.

Simulation of doing nothing

- Natural fluctuation -

Changes: Waterfall

Decreasing Supply



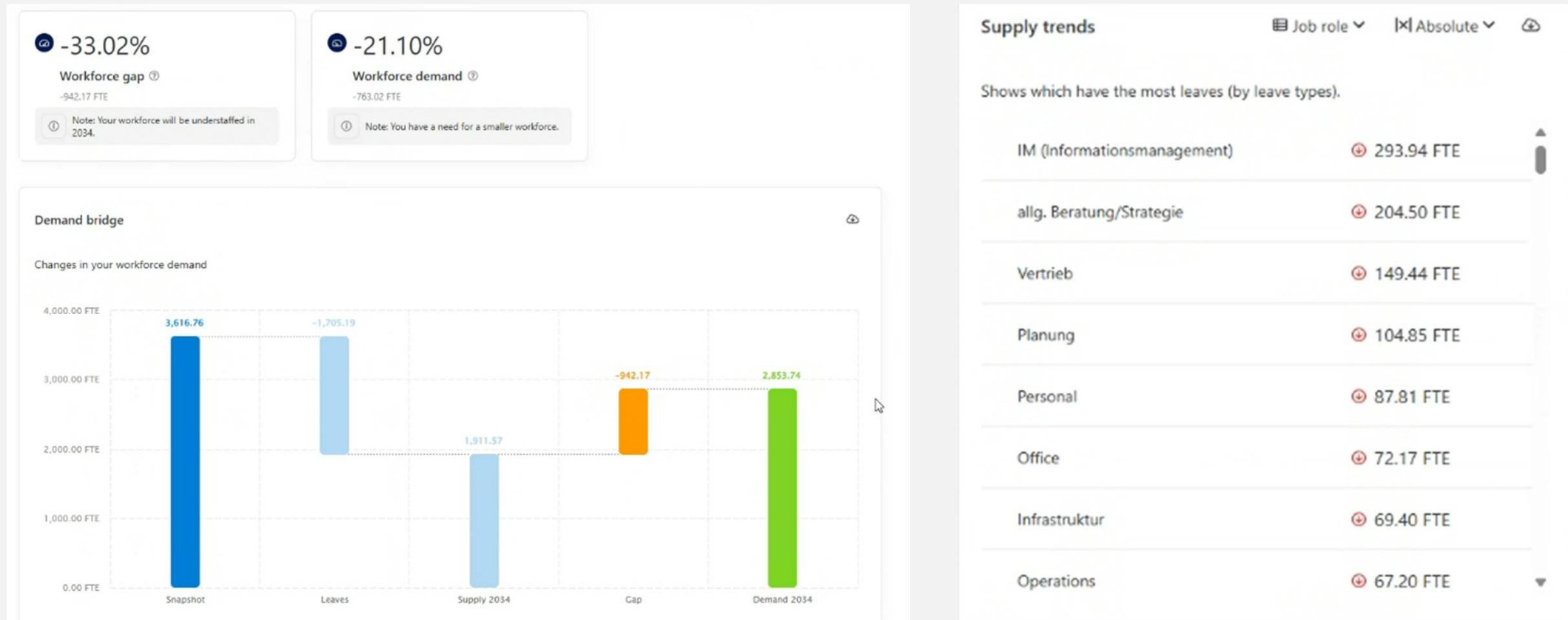
AI-Tools | Simulation of workforce: Leave risks



Understand which leave types drive your supply.

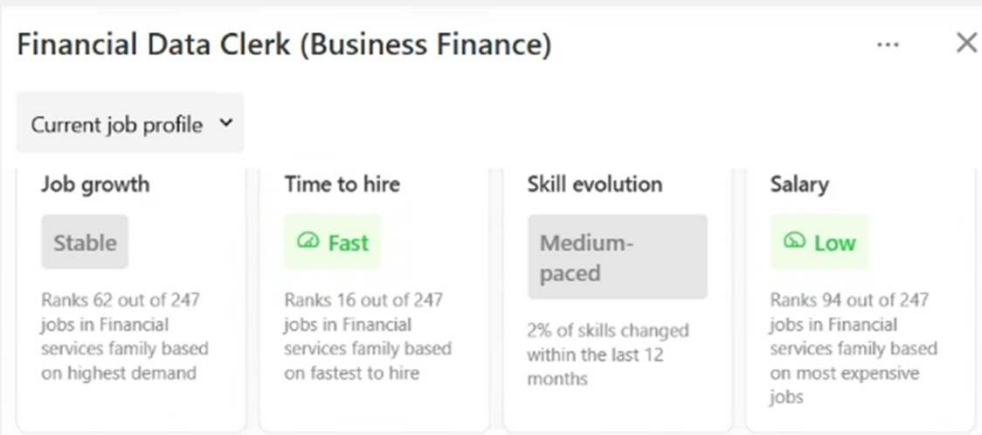


AI-Tools | Simulation of workforce: Supply and Demand



AI-Tools | Global Labor Market Data provides important insights for recruiting of Job-Roles as well as for hiring locations

Development of dedicated Job-Roles and recruiting locations

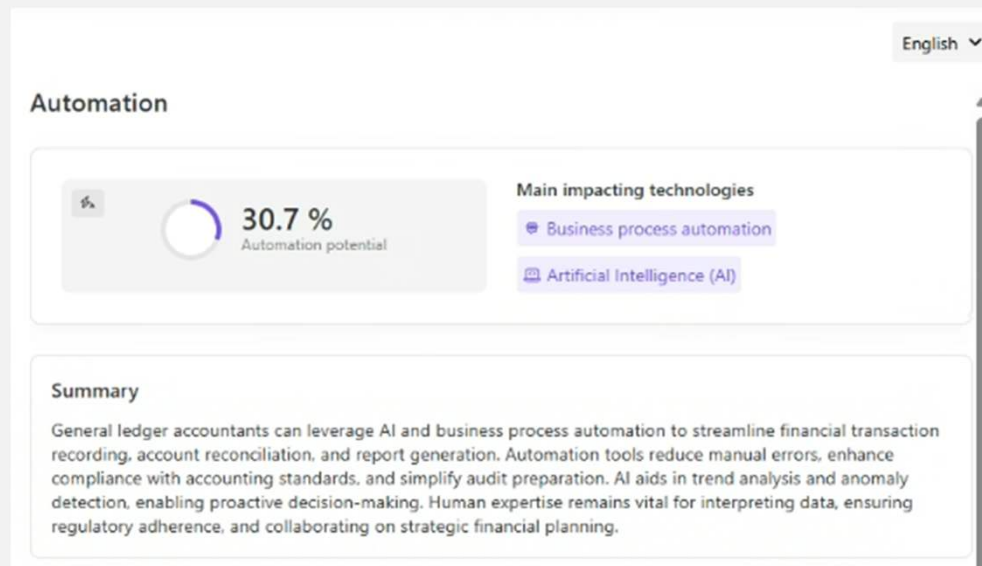


Adjust the sliders to affect the **Location rating**, as to how important each factor is to you. This will help determine how promising we believe a location will be as a base of operations for your business, taking into account your preferences for **supply**, **cost**, **competition**, and **headcount**.



AI-Tools | Global Labor Market Data provides important insights for specific job-roles

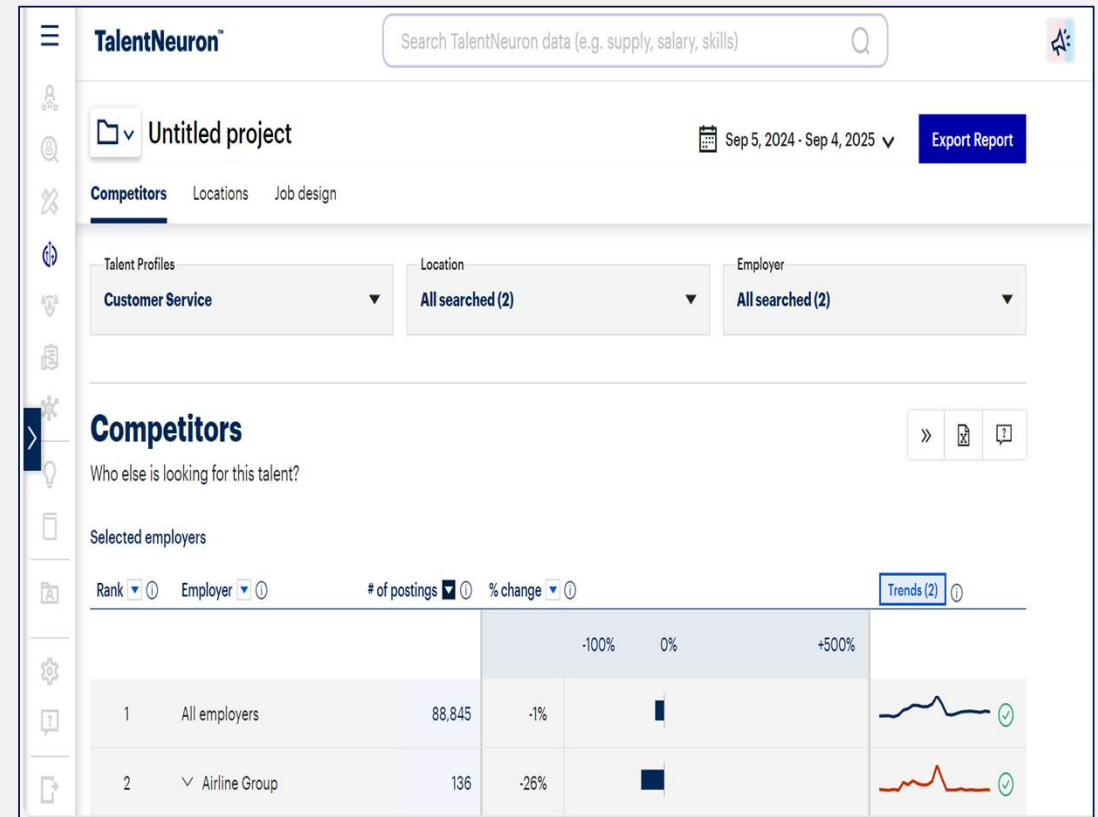
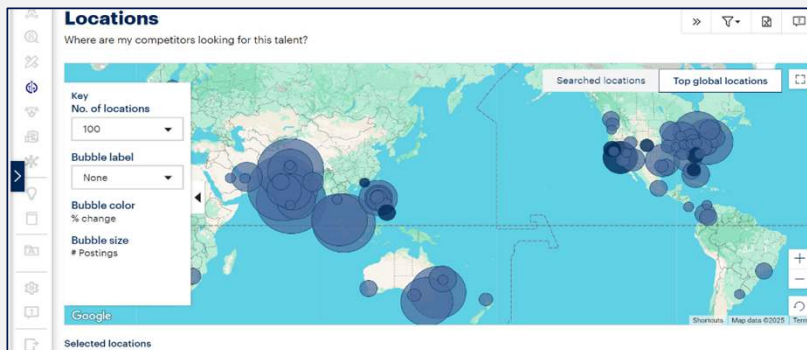
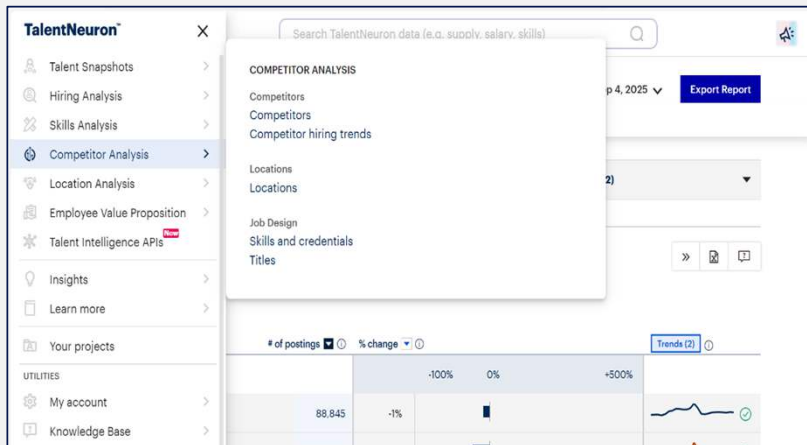
Development in Automation and Duties for dedicated Job-Roles - General ledger Accountant -



Duties 9

Duty	Automation impact
Record financial transactions accurately, to maintain an up-to-date general ledger	High
Reconcile accounts monthly, to identify and rectify discrepancies promptly	High
Generate financial statements on schedule, to support informed decision-making	High
Verify compliance with accounting standards and regulations, to mitigate financial risks	High
Assist with annual audits, to ensure a smooth and accurate audit process	High
Prepare and submit tax returns and financial reports, to meet regulatory requirements	High

AI-Tools | Competitor Analysis tracks competitors' hiring activity, geographic expansion, and in-demand skills to benchmark your talent strategy



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Business Drivers and right questions | Goal: Data Based Decision Making to design the future workforce for stable business

Business goals & drivers:

- Corporate Strategy
- Shrinking or increasing business
- Build-up new production line or closing production line in ...
- Set-up new sales offices in ...
- New Technology
- Digital Transformation
- Skill-Gaps
- ...

What are the core questions for a stable business and workforce?

What influence our **business**? Which **drivers** must be monitored? (**ecosystem**)

(Whom) should I **reskill** to avoid costly layoffs?

How many employees will be **retiring** within the next 5 years?

What **skills** will my employees need to learn now to be future-ready?

Is it worth **targeting employees** who are being let go at other companies?

Which **recruiting bottlenecks** will become apparent in 3 years?

Is my **comp & ben package** competitive enough?

To **which location** should I offshore?

Tools and activities:

- Labor Market Intelligence
- Strategic Workforce Planning
- Skill Management/-Matching
- Competitor Listening
- Location Analytics
- Demography Analysis
- Workforce Scenario Modelling
- Loss Rate Simulations
- ...

Conclusion| Finaly: SWM is not a “nice-to-have” but a “must-have” critical success factor for the future sustainability of companies

Only those who identify risks
at an early stage,
develop skills in a targeted manner,
and respond with flexibility
to market changes
will remain competitive.



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Q & A | How does the Strategic Workforce Management with AI look in 3-5 years? Just with simple prompts: ...

- **...SWP tools autonomously analyze complex business models and the multitude of influencing factors...?**
- **...AI develop independently scenarios and identifying potential risks...?**
- **...AI generate ideas for skill requirements and propose solutions to close skill gaps across different scenarios and operating models...?**



Referent



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Thank you
for your attention

