



INDUSTRY
SECTOR
REPORT

MARKET UPDATE

Global Impact

JUNE 2026

ie
UNIVERSITY
TALENT & CAREERS

Executive Summary

The Global Impact sector is undergoing a major transformation. Traditional aid-based and publicly funded models are shrinking, while growth is increasingly driven by private capital, ESG investing, development finance, climate finance, and technology-enabled solutions. The sector is shifting away from theory and advocacy toward measurable impact, scalability, and financial sustainability.

A key turning point was the historic decline in Official Development Assistance (ODA) in 2025, which fell by more than 23%. As a result, Development Finance Institutions (DFIs), Multilateral Development Banks (MDBs), impact investors, and sustainability-focused private organizations are becoming the primary engines of growth. At the same time, geopolitical instability, security concerns, AI regulation, and climate-related challenges are reshaping government priorities and international cooperation frameworks. That is why governments are diverting funds from development to defense and security.

The sector is now evolving across three interconnected areas:

- **Global Development:** moving from grants toward blended finance, infrastructure investment, and economic resilience;
- **International Affairs:** more focused on geopolitics, AI governance, security, and digital policy;
- **Social Impact:** the fastest-growing segment, driven by ESG regulation, climate tech, sustainability consulting, GovTech, and impact investing.

This shift is fundamentally changing talent demand. Employers are increasingly seeking hybrid professionals who combine policy + data, finance + impact, technology + sustainability, and international perspective + operational execution.

The strongest demand is concentrated in ESG and sustainability analysis, development finance, climate resilience, public affairs and geopolitical advisory, AI policy and digital governance, impact investing, and Monitoring, Evaluation, Accountability & Learning (MEAL) data and reporting roles.

Digital fluency is rapidly becoming a baseline expectation. AI literacy, data analytics, ESG tools, and quantitative reasoning are increasingly required across policy, sustainability, and development functions. Meanwhile, traditional entry-level pathways in international organizations and NGOs are becoming more competitive due to restructuring, hiring freezes, and funding pressure.

For IE University, this environment creates both pressure and opportunity. While Global Impact placements declined between 2023 and 2025 due to contraction in traditional multilateral hiring, Social Impact and ESG-related pathways continue to grow strongly. IE's multidisciplinary and international profile is highly aligned with where the market is heading. Students who combine business, policy, sustainability, technology, and analytical capabilities are especially well positioned for future demand.

The report points to a clear strategic direction for IE: position itself as a leading source of “hybrid impact talent” — professionals capable of operating effectively across public, private, and multilateral sectors.

PURPOSE OF THIS REPORT

This report provides an annual update on the state of the Global Impact sector, key talent trends, employer landscape, and strategic recommendations for IE University's Careers team and academic stakeholders.

1.	Industry Overview & Market Trends	State of the Industry	5
		Key Trends	6
		Market Growth & Outlook	7
		Global & Regional Influences	7
		Emerging Technologies & Innovations	8
2.	Sector-Specific Insights	Global Development	9
		International Affairs	10
		Social Impact	10
3.	Talent Landscape & Recruitment Trends	In-Demand Skills	11
		Emerging Roles	11
		Recruitment Patterns	12
		Geographic Hiring Trends	13
		Recruitment Seasonality & Timelines	13
4.	Key Employers, Partnerships & Alumni	Top Global Impact Employers (2025)	15
		Key Partnerships with IEU	16
		Alumni Overview	17
5.	Data & Bibliography	Market Research & External Sources	19
		Internal IEU Data	20
		Notes	20

1. Industry Overview & Market Trends

The Global Impact sector is composed of three distinct but interconnected pillars:

Global Development

Inter-Governmental Organizations (IGOs), Multilateral Development Banks (MDBs), Non-Governmental Organizations (NGOs), foundations, and international development consulting firms

International Affairs

Public sector & Government, Public Affairs Advisories, Think Tanks, and research institutions

Social Impact

B Corporations, ESG consulting, Impact investing, and Tech for good.

Market maturity

- **Global Development:** Mature but contracting in traditional aid-based structures; 2025 marked a historic decline in foreign aid (ODA): USD 174.3 billion, a 23.1% decrease over 2024. Transitioning toward finance-driven models.
- **International Affairs:** Stable but evolving toward geopolitics, security, and digital governance. Governments are entering a transformative period of redesign - not another modernization or digitization cycle.
- **Social Impact:** High-growth, innovation-driven, fragmented, and increasingly institutionalized.

STATE OF THE INDUSTRY

Current landscape

- The Global Impact sector in 2026 is undergoing a **structural transformation driven by funding shifts, geopolitical fragmentation, and technological disruption.**
- The sector is **transitioning from grant-based, publicly funded models to hybrid ecosystems** combining public funding, private capital, and technology-driven solutions

Foreign aid · ODA · 2025

\$ 174.3 B
↓ **23.1%**

A historic decline in official development assistance. The sector is transitioning toward finance-driven models as traditional aid-based structures contract.



Defense and security sectors outpacing broader job growth in Europe.



Key dynamics

- **Shift from aid to investment:** Development finance institutions (DFIs) and private capital are replacing traditional ODA.
- **Geopoliticization of impact:** Development and policy increasingly linked to security, trade, and influence.
- **Rise of hybrid talent:** Demand for professionals combining policy, finance, and technology.
- **Operational transformation:** Focus on execution, measurement, and scalability rather than theory or advocacy.

KEY TRENDS

Global Development

- **Historic decline in ODA funding:** Major donors (US, UK, Netherlands) reducing aid budgets significantly. 2025 marked a historic contraction in development funding, with ripple effects into 2026.
- **Rise of development finance & DFIs:** Strong shift toward loan-based financing and blended finance models. DFIs mobilizing large volumes of private capital and acting as market builders.
- **UN system restructuring:** Significant hiring reductions across UN agencies. Increased reliance on short-term contracts, consultancies, and decentralization of operations.
- **Localization of Development:** Greater reliance on regional actors, local NGOs, and national governments to implement development programs and projects.

International Affairs

- **Shift toward defense and security priorities:** Governments reallocating budgets from development aid to defense. Defense and security sectors outpacing broader job growth in Europe.
- **Climate diplomacy as core foreign policy:** Climate embedded into trade agreements, security strategies, and development frameworks.
- **Multipolar geopolitical environment:** Increased competition among EU, US, China, and Global South actors.
- **Digital governance & AI policy:** General growth in AI regulation, data sovereignty, and misinformation governance across governments.

Social Impact

- **ESG transition from narrative to accountability:** Shift toward measurable outcomes, regulatory compliance and data-driven ESG frameworks.
- **Impact investing expansion:** Continued growth of impact funds, ESG private equity and climate finance vehicles. \$30 trillion in ESG assets (institutional investors) cannot disappear overnight.
- **Rise of impact tech:** Rapid growth in ESG data platforms, climate tech and GovTech / CivicTech start-ups and scale-ups.
- **Corporate sustainability integration:** ESG embedded into operations, supply chains, and corporate strategy.

MARKET GROWTH & OUTLOOK

Growth projections

Impact investing assets projected to exceed \$1.5 trillion globally. Climate finance represents ~30–40% of development finance portfolios. Strong growth expected in Climate & resilience finance, ESG data and compliance, Policy advisory & public affairs.

Geographic growth opportunities

European UN hubs are welcoming new staff in Bonn, Madrid, and Trieste. The fastest regional growth, if the conflict in Iran allows, is concentrated in the Middle East (Vision 2030, sustainable infrastructure investments), Asia-Pacific (development finance, climate), and Africa (program implementation, SME finance, tech).

In-demand profiles

Global Development: Development finance specialists, Climate resilience consultants, Impact measurement analysts. International Affairs: Geopolitical analysts, AI policy specialists, public affairs advisors. Social Impact: ESG analysts, Impact investing professionals, Climate tech product managers.

GLOBAL & REGIONAL INFLUENCES

Macroeconomic factors

Reduced public budgets limiting traditional development pathways. Increased reliance on private capital and blended finance. UN system mergers and restructuring. Global investments in security and defense.

GEOGRAPHIC BREAKDOWN 2026

Global & Regional Influences



Regional breakdown

Europe has regulatory leadership (CSRD, AI Act) and strong DFI ecosystem. North America suffers ESG rollback at federal level but strong private sector activity. Middle East has rapid growth driven by sovereign investment strategies. Asia & Africa benefit from implementation-driven growth and infrastructure investment.

Societal trends

Rising demand for purpose-driven careers. Increasing scrutiny of ESG and impact claims (greenwashing concerns).

EMERGING TECHNOLOGIES & INNOVATIONS

Key innovations

AI & data analytics are transforming policy analysis, ESG reporting and humanitarian operations. Satellite and geospatial tech are increasingly supporting climate and development work. Digital platforms are enabling transparency, governance, and civic engagement.

Impact on operations

AI has not yet significantly disrupted entre-level jobs and is currently a highly sought-after skill – these tools are improving Monitoring & Evaluation processes; resource allocation; remote program management; forecasting conflict, migration, and economic trends; and faster response in humanitarian contexts. Governments are investing in AI governance frameworks, cybersecurity, and digital sovereignty.

Disruption risk

Manual M&E, administrative coordination, entry-level research assistants focused on information gathering, basic communications (content production without strategic input), manual ESG data collection roles face medium-to-high automation risk. Hybrid roles combining technology and domain expertise are becoming structurally protected.

KEY INNOVATIONS

Emerging Technologies & Innovations

1 AI & DATA ANALYTICS

- Transforming policy analysis, ESG reporting and humanitarian operations

2 SATELLITE & GEOSPATIAL TECH

- Supporting climate and development work

3 DIGITAL PLATFORMS

- Enabling transparency, governance, and civic engagement

2. Sector- Specific Insights

GLOBAL DEVELOPMENT

Market Trends

Development finance is becoming a core instrument of economic diplomacy and statecraft. Strong pivot from grants to loans to private investment. Increased importance of financial intermediaries, SME financing, and infrastructure investment. Blended finance as the dominant model: DFIs and MDBs function as catalysts to mobilize institutional capital rather than direct lenders. MDBs are transforming (e.g., the EU adjusted EIB's mandate to be able to fund defense and security efforts) to adapt to this new geopolitical reality. Grant-making foundations and philanthropic capital are becoming more influential, but insufficient to replace ODA.

Key Insight

Development is increasingly linked to geopolitical positioning, economic resilience, and democratic stability.

SECTOR-SPECIFIC INSIGHTS

Key Insights

GLOBAL DEVELOPMENT

Development is increasingly linked to geopolitical positioning, economic resilience, and democratic stability.

INTERNATIONAL AFFAIRS

International Affairs is evolving from cooperation-driven to competition-driven systems of influence.

SOCIAL IMPACT

Social impact is becoming institutionalized and finance-driven, not purely mission-driven.

INTERNATIONAL AFFAIRS

Market Trends

Growing importance of security policy, geopolitical strategy, and regulatory governance, in public and private sectors. Development and international co-operation budgets are increasingly tied to trade and security agendas. Think tanks are shifting towards real-time policy influence and media engagement, which impacts their operations (streamlining) and their talent needs.

Key Insight

International Affairs is evolving from cooperation-driven to competition-driven systems of influence.

SOCIAL IMPACT

Market Trends

ESG is becoming regulated, data-driven, and performance-based. ESG has become integral to business operations but also a political tool – the EU is still committed but easing regulatory frameworks (EU Omnibus package). Strong expansion of impact investing, climate tech, and sustainability consulting.

Key Insight

Social impact is becoming institutionalized and finance-driven, not purely mission-driven.



Development finance is becoming a core instrument of economic diplomacy and statecraft.



3. Talent Landscape & Recruitment Trends



A comprehensive view of talent demand, hiring patterns, timelines, and emerging roles across all Global Impact subsectors.

IN-DEMAND SKILLS

Technical skills

Data Analytics, Financial modeling (impact investing), Digital tools for policy and development, Fundraising.

Analytical skills

Geopolitical analysis, Strategic decision-making, Policy evaluation, Quantitative reasoning, Economic analysis.

Soft skills

Intercultural communication, Stakeholder management, Cross-cultural adaptability, Leadership in complex environments.

Digital fluency

Required: AI literacy, data fluency, prompt engineering. Desirable: Python, R, ESG tools.

EMERGING ROLES

New job titles

Global Development: Development finance specialists, Climate resilience consultants, Impact measurement analysts. International Affairs: Geopolitical analysts, AI policy specialists, public affairs advisors. Social Impact: ESG analysts, Impact investing professionals, Climate tech product managers.

EMERGING ROLES · GLOBAL IMPACT SECTOR 2026

New job titles in demand now vs. roles emerging over the next 2–3 years

New Job Titles

In demand now

- DEVELOPMENT FINANCE SPECIALISTS
- CLIMATE RESILIENCE CONSULTANTS
- IMPACT MEASUREMENT ANALYSTS
- GEOPOLITICAL ANALYSTS
- AI POLICY SPECIALISTS
- PUBLIC AFFAIRS ADVISORS
- ESG ANALYSTS
- IMPACT INVESTING PROFESSIONALS
- CLIMATE TECH PRODUCT MANAGERS



Future Roles

2–3 year outlook

- FINANCIAL STRUCTURING, RISK ANALYSIS, IMPACT MEASUREMENT
- CLIMATE ADAPTATION, URBAN RESILIENCE, SUSTAINABLE INFRASTRUCTURE
- AI REGULATION, DIGITAL SOVEREIGNTY, CYBERSECURITY POLICY
- CLIMATE TECH & GOVTECH: PRODUCT MGT, DATA SCIENTISTS, PLATFORM STRATEGISTS



Outside of IGOs, hiring is driven by networks rather than processes, with many roles not publicly advertised and filled through referrals and alumni networks.



Future roles (2–3 year outlook)

Roles combining financial structuring, risk analysis, and impact measurement will become core across MDBs, DFIs, and impact funds. Robust growth in roles focused on climate adaptation, urban resilience, and sustainable infrastructure, particularly relevant in development banks, development consulting firms, and international organizations. Professionals who understand both technology and policy implications for building capacity in governments and IGOs on AI regulation, digital sovereignty, and cybersecurity policy. ClimateTech and GovTech organizations will require experts in product management, data scientists, and platform strategists.

IEU profile fit

IE students with multidisciplinary background (business + policy + tech) are well positioned for emerging roles requiring cross-functional skills. Their diverse backgrounds and multilingual profiles align well with talent demand from IGOs, development and public affairs. There is room to grow in advanced data analytics, financial modeling for impact investing, and AI and digital tools in policy contexts. Best-positioned profiles are MTGA, BPS, MIM, IMBA students with ESG, sustainability, or policy specialization, and exposure to finance or data tools.

RECRUITMENT PATTERNS

Hiring volumes

Overall contraction in Global Development and Public Sector roles in 2025. IGOs reduced hiring due to funding constraints and restructuring. Growth concentrated in specific subsectors such as Social Impact and ESG-related roles. Development finance institutions and impact investing platforms remain stable or growing. General reduction in full-time, long-term roles, with increase in internships, fellowship, and short-term consultancies.

Demand for specific roles

Highest demand for ESG and sustainability analysts, development finance professionals, climate and resilience specialists, policy analysts (climate, tech, geopolitics), and public affairs and regulatory advisors.

Competition for talent

Highly competitive entry-level market with a large number of applicants for limited roles, particularly in the UN system, EU agencies and other IGOs. Less competition in specialized hybrid roles combining finance + impact, data + policy and tech + sustainability. Outside of IGOs, hiring is driven by networks rather than processes, with many roles not publicly advertised and filled through referrals and alumni networks.

GEOGRAPHIC HIRING TRENDS

Talent hotspots

Primary Global Hubs

- **New York:** UN Headquarters, impact investing, social impact
- **Geneva:** UN system, NGOs, humanitarian organizations
- **Brussels:** EU institutions, public affairs, policy/regulatory roles
- **Washington DC:** development consulting, public policy

Secondary Hubs

- **London:** public affairs, think tanks, impact investing
- **Paris:** multilateral institutions, development agencies
- **Madrid/Valencia:** growing presence of IGOs and consultancies
- **Bonn:** growing presence of UN agencies

Emerging Hubs

- **Riyadh, Dubai:** development finance, sustainability, grant-making foundations
- **APAC (Singapore, Jakarta, Bangkok):** ESG, development consulting, UN system
- **Africa (Nairobi, Addis Ababa):** program implementation, NGOs

Remote vs. on-site

Hybrid work becoming standard in policy and social impact roles (Think tanks, public affairs, and ESG consulting). On-site presence remains critical for Global Development roles in field-based and country-specific roles. Social Impact businesses and start-ups are more flexible, in many cases with distributed teams.

IEU talent placement geography

Global Impact IE placements are spread across multiple regions, with no single dominant market. 2025 saw a shift toward Europe and Asia, with increased placements in Spain and broader Europe, and slight decline in North America and Middle East. The drivers of these geographic trends are Visa restrictions, geopolitical shifts, and hiring concentration of IGOs and development institutions.

RECRUITMENT SEASONALITY & TIMELINES

Peak hiring months

Recruitment is less seasonal than in sectors such as consulting or finance, but several recurring hiring cycles exist. Certain IGOs and MDBs open structured processes between September-November for Graduate programs (World Bank Group, UN JPO, African Development Bank, Asian Development Bank...), other IGOs open Graduate Programs in the spring (Islamic Development Bank, BADEA, NATO, World Trade Organizations, WIPO...), in both cases for intakes the next Fall. To apply for internships and jobs with starting dates in September and the fall, applications usually open the previous spring.

Average process duration

Recruitment processes for graduate programs may extend up to 6 months. For jobs, consultancies, and internships it may take between 2 and 4 months. Social Impact and private sector hiring processes usually take less time, around 6-10 weeks.

Internship timeline

Internships usually have short hiring timelines, averaging 4 to 10 weeks. Internship programs in MDBs are focused on summer internships and usually launch in January-February for starting date in May-June. The UN system publishes internship opportunities on a rolling basis throughout the year, same as NGOs, Public Affairs, and Social Impact. Public Sector organizations have specific application windows for their internships e.g., MAEC (Spanish Ministry of Foreign Affairs) publishes one call in the fall and one call in the spring, for starting dates 6 months after.

Full-time timeline:

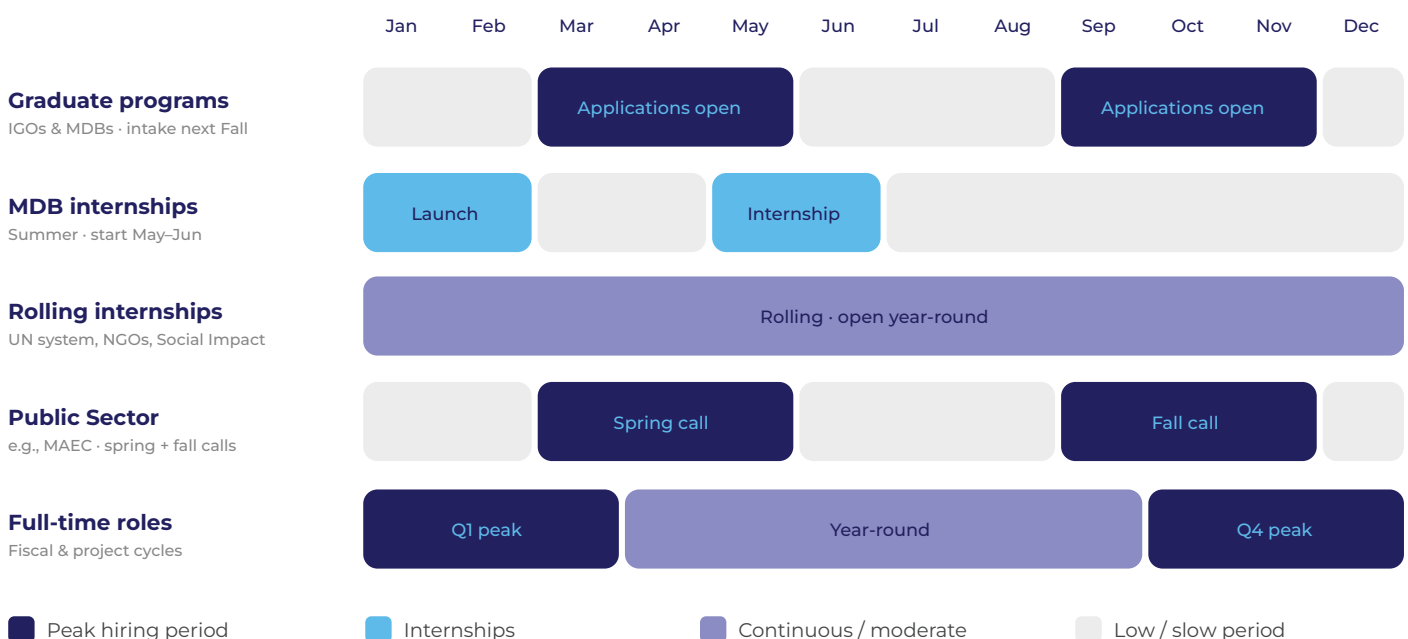
Hiring for full-time roles often aligns with the organization's fiscal calendar and project cycles, leading to recruitment activities throughout the year, with notable peaks in the first and fourth quarters.

Regional variations

Peak recruitment in North America often occurs in the fall (September – November) and early spring (January – March), aligning with fiscal planning and academic calendars. In Europe hiring tends to slow during the summer months (July – August) due to widespread vacations, with peaks in early spring and autumn. In Asia organizations usually target for intakes in the Fall and early Spring.

RECRUITMENT SEASONALITY & TIMELINES

Key application and hiring windows by entry route



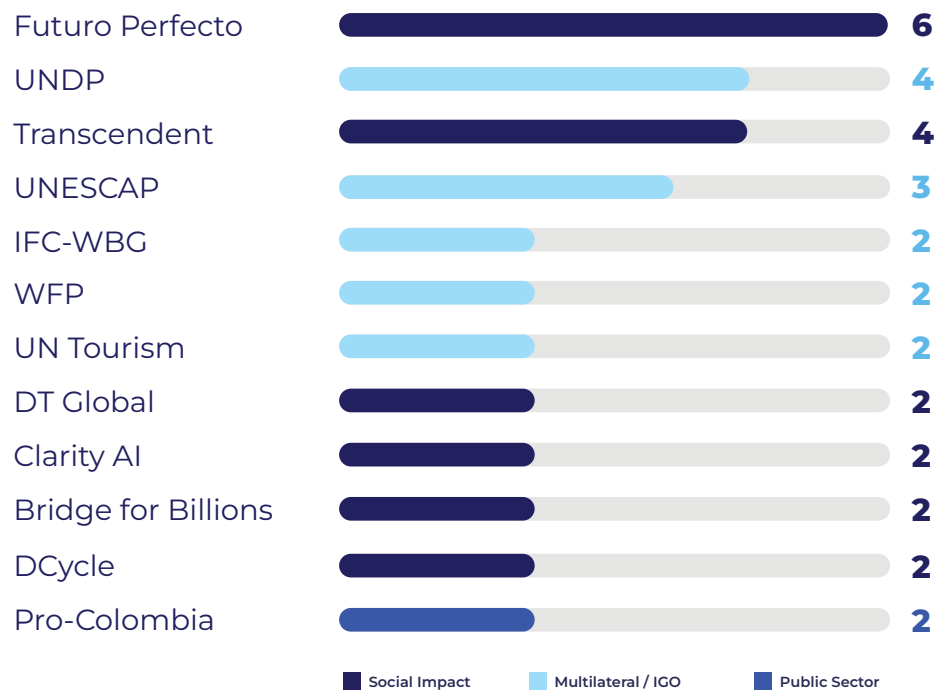
4. Key Employers, Partnerships & Alumni



An overview of the main employers recruiting IEU talent in the Global Impact sector, strategic partnerships, and alumni engagement data.

TOP GLOBAL IMPACT EMPLOYERS (2025)

Top Global Impact Employers (2025)



TIER 1 EMPLOYERS

Employers with the highest volume of IEU hires or strongest recruitment relationship. High brand value, strong career pathways, salary potential.

SubSector	Employers
Multilateral / IGOs	MDBs: Asian Development Bank (ADB), European Central Bank (ECB), Inter-American Development Bank (IDB), World Bank Group (IFC, IDA) EU agencies: European Patent Office (EPO), EPSO - European Commission, EUIPO UN System: FAO, IOM, UN HQ, UN Tourism, UN Women, UNDP, UNEP, UNESCO, UNHCR, UNICEF, UNSSC, WIPO, WFP Other IGOs: NATO, OECD
NGOs / Foundations	International Committee of the Red Cross (ICRC)
Public Sector	MAEC, ICEX
Public Affairs	BeBartlet, Brunswick Group, Kreab
Think Tanks	World Economic Forum (WEF)
Social Impact	Social innovation: Futuro Perfecto, Bridge for Billions; Sustainability: Clarity AI, Transcendent, DCycle; Dev Consulting: DT Global

TIER 2 EMPLOYERS

Employers with moderate or growing engagement with IEU. High growth, strong IE fit, scalable partnerships.

SubSector	Employers
Multilateral / IGOs	MDBs: Asian Infrastructure & Investment Bank (AIIB) EU agencies: EU Agency for Asylum (EUAA) UN System: ITU, UNIDO, WTO, IFAD, UNOPS, UNESCAP Other IGOs: International Chamber of Commerce (ICC)
NGOs / Foundations	Fundación Madrina
Public Sector	ProColombia, GiZ, AECID
Public Affairs	Gobe, The Report Company
Think Tanks	Climate Policy Initiative (CPI), RAIA, Real Instituto Elcano
Social Impact	Sustainability: STX Group, ACT Commodities Dev Consulting: DAI, Technoserve

EMPLOYERS TO WATCH

Emerging companies or sectors showing new interest in IEU profiles.

SubSector	Employers
Multilateral / IGOs	MDBs: African Development Bank (AfDB), Nordic Investment Bank (NIB) EU agencies: European External Action Service (EEAS), European Space Agency (ESA) Other IGOs: Council of Europe, Green Climate Fund
NGOs / Foundations	European Climate Foundation (ECF)
Public Sector	UK Embassy in Spain, Argentinian Embassy in Spain, FCDO
Public Affairs	Political Intelligence, Club de Madrid, GWL Voices, Asymmetrica, Midat
Think Tanks	European Council on Foreign Relations (ECFR), CIDOB
Social Impact	Social innovation: Ashoka, Relief Applications; Sustainability: Cycle Platform, Copenhagen Infrastructure Partners (CIP), Q Impact, The Overview Effect Dev Consulting: Dalberg, Consulted (EducTrade, EPTISA, AENOR, Boleo Global)

KEY PARTNERSHIPS WITH IEU

Existing strategic partnerships

Consulted (currently developing MoU with internship opportunities in development consulting); PwC (strategic partner of MAE program at SPEGA); The Overview Effect (currently developing MoU with internship opportunities in sustainability and social impact consulting).

Recruitment agreements

Preferential internship agreements with OECD, MAEC, ICEX, UNSSC, EPO, EUIPO, Cámara de Comercio de Madrid, Argentinian Embassy in Madrid, and

IOSCO. Standard internship agreements with UNE-SCO, CSIC, AECID, Fundación Mujeres, International Institute for Democracy and Electoral Assistance (International IDEA).

Events & engagement

Besides participating in the spring and fall Career Forums, we organize subsector-specific multi-company events: **IGOs Career Day** (January), **Public Affairs & Think Tanks Day** (April), and **Security & Defense Careers Day** (November). The “**Global Impact Tuesdays**” initiative brings recruiters from top global organizations on campus, through specific career webinars or in-person events – in 2025 we hosted UNSSC, Technoserve, WEF, UNDP, UN Human Rights, UNEP, World Bank Group, RBB Economics, and Consulted. In 2026 we have held webinars with UNSSC, InterAmerican Development Bank, NATO, World Food Programme, World Trade Organization, African Development Bank, and World Economic Forum.

+6,500

IE alumni currently working
in the Global Impact sector

391

students placed in the sector over
the last 3 years via Talent & Careers

CAREER TRAJECTORIES

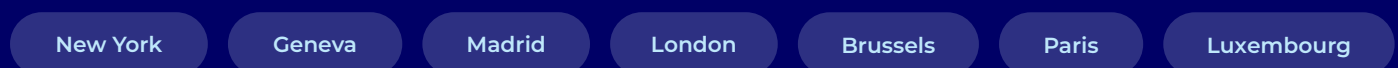


ENGAGEMENT EVENTS



+ spring & fall Career Forums

ALUMNI HUBS



+ other locations in the global south where projects are implemented

ALUMNI OVERVIEW

Alumni in sector

Over 6,500+ IE alumni are currently working in the Global Impact sector. Alumni are present in key locations including New York, Geneva, Madrid, London, Brussels, Paris, Luxembourg, and other locations in the global south where projects are implemented. Over the last 3 years, 391 students have been placed in the Global Impact sector through the Talent & Careers team.

Top companies

UN System, EU Commission, World Bank Group/IFC, OECD, UNDP, UNESCO, World Food Programme, CARE International, Greenpeace, WWF, ICRC, World Economic Forum, DT Global, Clarity AI, Futuro Perfecto, Bridge for Billions, Transcendent, DCycle, SGS... among others.

Career trajectories

The entry pathway for junior profiles is internships which can evolve into short-term contracts or consultancies, and ideally end up in a full-time role. Junior-to-Mid-career professionals are suitable for Policy / program leadership roles and ESG / sustainability roles. MBA profiles tend toward roles in Public Affairs leadership, Development finance, and Impact investing.



Alumni are present in key locations including New York, Geneva, Madrid, London, Brussels, Paris, Luxembourg, and other locations in the global south where projects are implemented.



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Internal IEU Data

- Global Impact Sector Account Plan (2026)
- IE Talent & Careers Placement Database (2023–2025): Global Impact Sector.
- Employer engagement and recruitment data (2025-2026)

Notes

This report integrates internal IEU placement data (2023–2025) with publicly available market research and industry reports current as of April 2026. Placement figures reflect employed students/alumni tracked by the Talent & Careers team and may differ from official Careers Report totals due to reporting timing.

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