

ai@work

How artificial intelligence contributes to competitiveness and workforce planning

AI & Competitiveness

Part 1 of 2 (AI@Work survey results)

Fact sheet #16

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Introduction - AI & Competitiveness

AI promises companies measurable productivity gains at overseeable cost. However, gaps in AI research, model development, and innovation diffusion, low levels of private investment, and limitations in AI infrastructure, including computing capacity, pose significant challenges for the deployment of European AI solutions (see also here). Yet, rather than focusing on the global AI market, the present fact sheet focuses on the benefits companies can derive from the application of AI, independent of its origin.

Objectives

Artificial Intelligence (AI) can strenghten companies' overall productivity and competitiveness by **improving task efficiency, enabling better and faster decision-making, as well as improving the quality of outputs,** as demonstrated by the AI@Work business cases (also see here).

The AI@Work Survey aims to complement these findings using a quantitative online survey, describing in detail which benefits companies and employees can derive from AI tools and technologies. This will help companies gain important knowledge and information on the **effects of AI on the workplace, its potential to boost company productivity and competitiveness, as well as assessing its effects on employees**.

The project will support European (and national) sectoral employers' representatives in obtaining a better understanding of the impact of AI on people and business management. For more information on and results of the survey, please see here.

Scope

The present fact sheet aims to shed light on whether AI can generate tangible benefits in terms of company productivity and competitiveness.

To this end, respondents from EU-based companies of various sectors were asked to focus on **a single implemented AI use case**, which had generated the greatest benefits for their company in terms of productivity, competitiveness and/or workforce management. Where suitable, comparisons based on company size or sector are provided.

Company representatives were asked to report in which area their company had implemented the specific AI use case, how long it took to implement and whether the solution was developed internally or purchased externally. Furthermore, respondents were asked to indicate the risk category of their chosen AI use case, according to the EU AI Act, and if high-risk, were asked to indicate the type or types of data used.

Finally, survey respondents were asked which **particular benefits** the introduction of the specific AI use case has produced for the company and how employees have benefited from the introduction of AI. Where appropriate, statistical tests of significance (pairwise pooled z-tests) are reported for comparisons between (unweighted) comlumn proportions with Bonferroni adjusted p-values.

Areas of specific AI use cases by sector

As part of the survey, respondents were asked to report on a specific AI use case in their company - in particular, the one that had accrued the greatest benefits for the company in terms of costs, productivity, competitiveness, and/or workforce management. Here, some clear sector-specific trends emerge (see Figure 1):

Industry: The top three AI application areas for the Industry sector are administration (19.5%), customer service and development (both 16.5%). Notably, the Industry sector shows the highest percentages of assembly (9.5%) and production related (7%) AI use cases.

Construction: In the Construction sector, development dominates the areas of AI use cases (22.5%), followed by administration (18.5%) and customer service (11.5%). The Construction sector also represents the sector with the largest proportion of AI use cases in the area of logistics and warehousing (7.5%).

Trade: The top three AI application areas for the Trade sector are customer service (26.5%), followed by administration and marketing (both 17%). The Trade sector also shows the greatest proportion of AI use cases in sales (12.5%).

Services: In the Services sector, AI use cases in administration (26%), customer service (17%), and development (13.5%) lead the way. Moreover, the Trade sector evidences the greatest shares of AI use cases in service provision (7.5%) and research (6%).

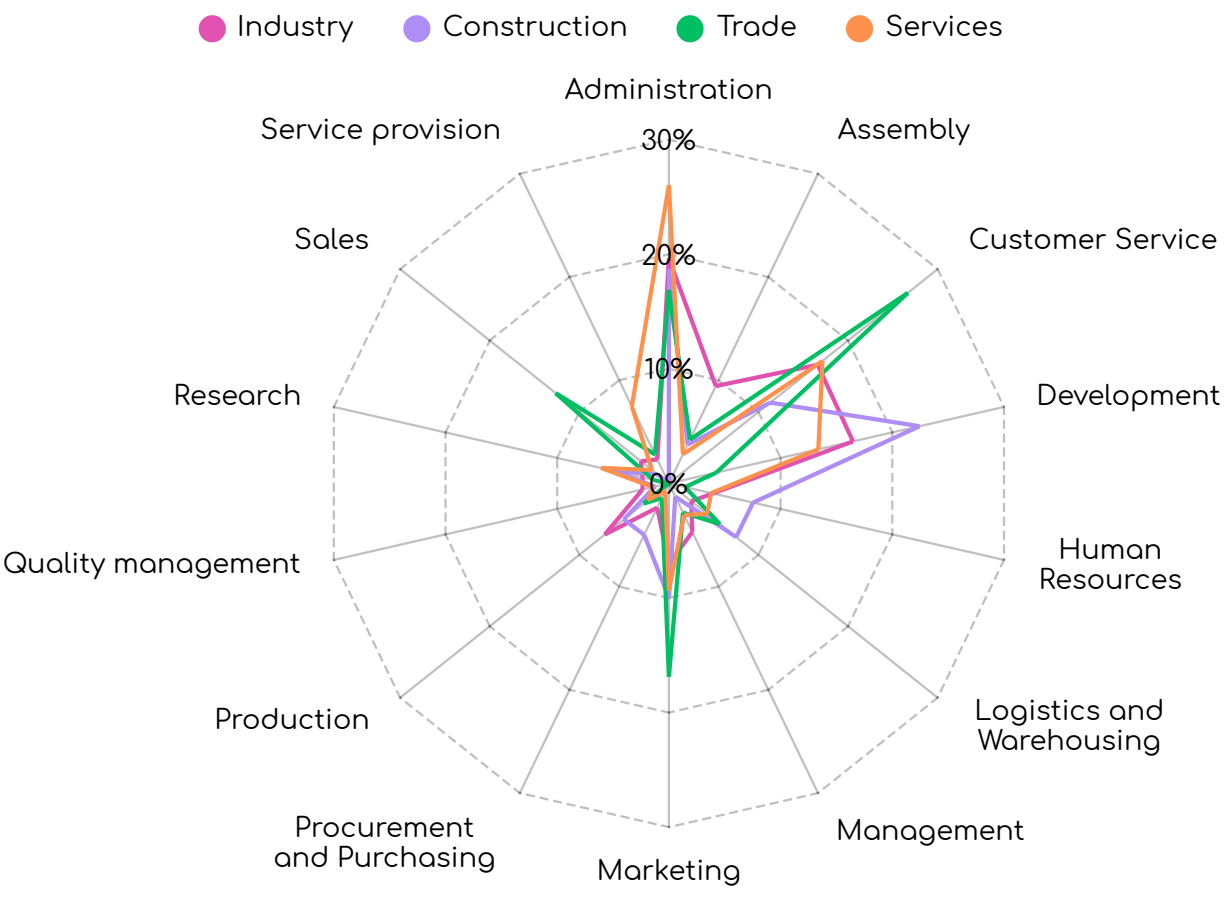


Figure 1. What functional area does your chosen AI use case fall into?
*Proportions represent weighted percentages (N = 2,632)

Risk classification according to AI Act

EU-wide, only one in five company AI use cases fall into the high risk category according to the EU AI Act (**Figure 2**). The majority of AI applications fall either into the limited or minimal risk categories. Notably, high-risk AI applications are reported significantly more often among medium (50-249 employees; $z = -3.49$, $p < .01$) and large (> 250 employees; $z = -4.77$, $p < .001$) compared to small companies (< 50 employees).

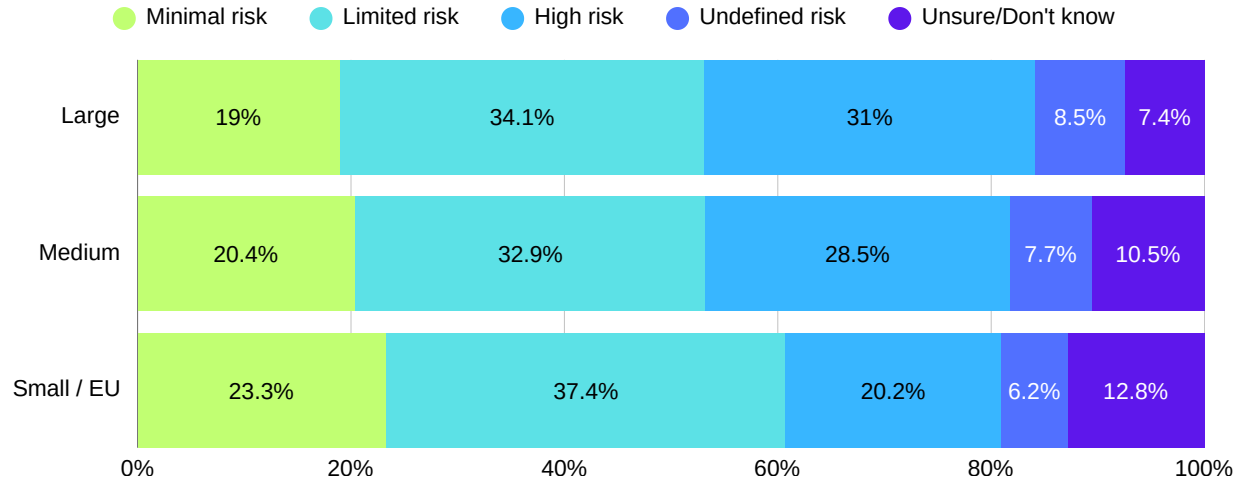


Figure 2. How is your AI use case classified according to the EU AI Act?.
*Proportions represent weighted percentages (N = 2,632)

Types of data used by high-risk AI applications

If their chosen AI application was deemed high-risk, respondents were asked to indicate what type of data the application relied on (**Figure 3**). More than half of AI use cases rely on operational data (e.g., production, logistics), whereas the remainder rely either on external (e.g., market, social media) or personal data (e.g., biometric, financial), or a combination of the former. No statistically significant differences were observed based on company size.

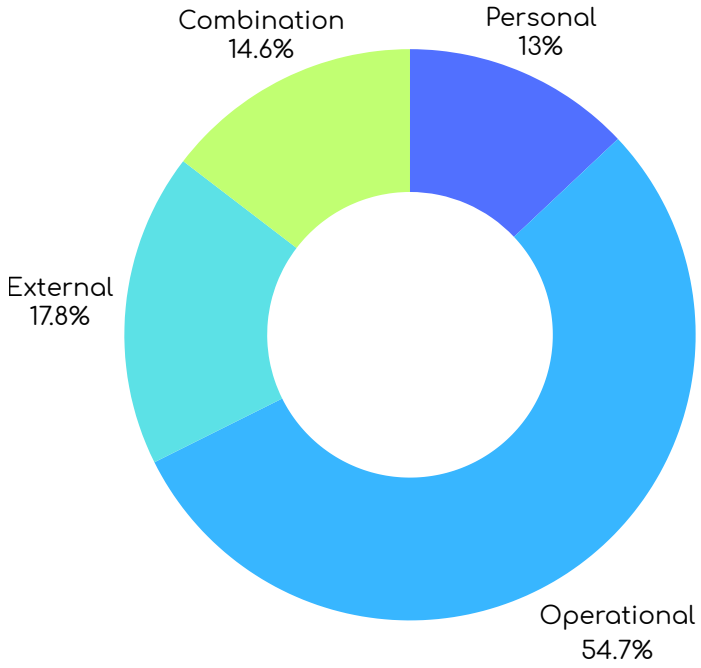


Figure 3. What type of data does your AI use case rely on?
*Proportions represent weighted percentages (N = 748)

Time to launch AI application

When it comes to the speed of implementing AI, there is a clear divide between smaller and medium or large companies (see **Figure 4**). In particular, small companies excel at implementing AI rapidly, with 80% managing to implement new AI applications within a year, 45% even within six months. In contrast, significantly fewer medium and large companies manage to implement AI within a timeframe of six months ($z = 6.79/11.96$, $p < .001$).

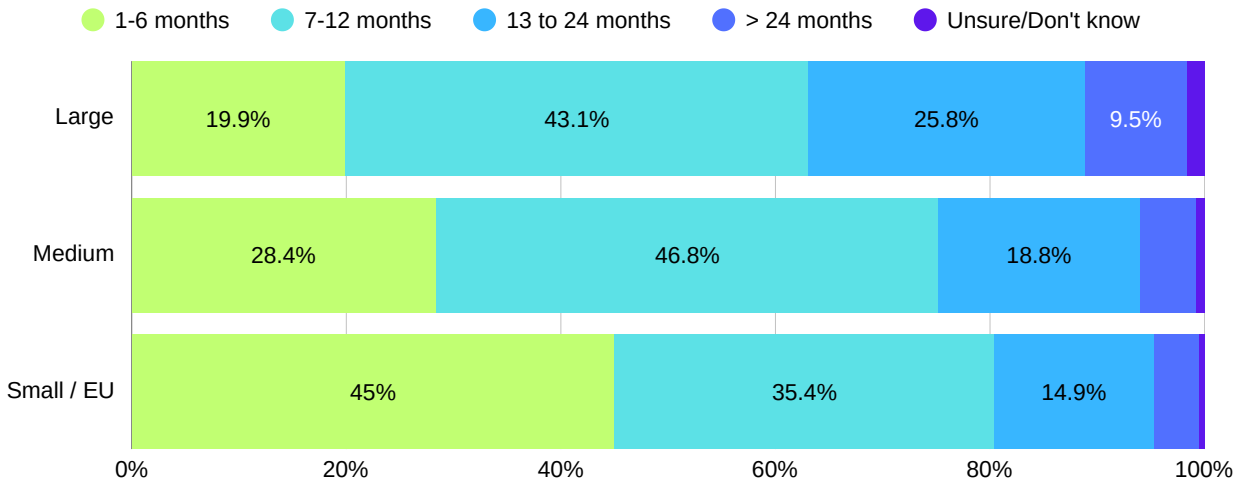


Figure 4. How long did it take to launch your AI application (from needs assessment to completion of piloting)? *Proportions represent weighted percentages (N = 2,632)

Implementation of AI application

With regard to the implementation of AI applications, only one in six companies in the EU rely on in-house solutions (**Figure 5**). Most commonly AI solutions are purchased off-the-shelf. About a quarter of companies trust in customised solutions from external vendors, although this option is significantly less preferred among large compared to medium ($z = 2.44$, $p = .04$) and small ($z = 3.74$, $p < .001$) companies, whereas a minority of companies rely on a mix of in-house and external solutions.

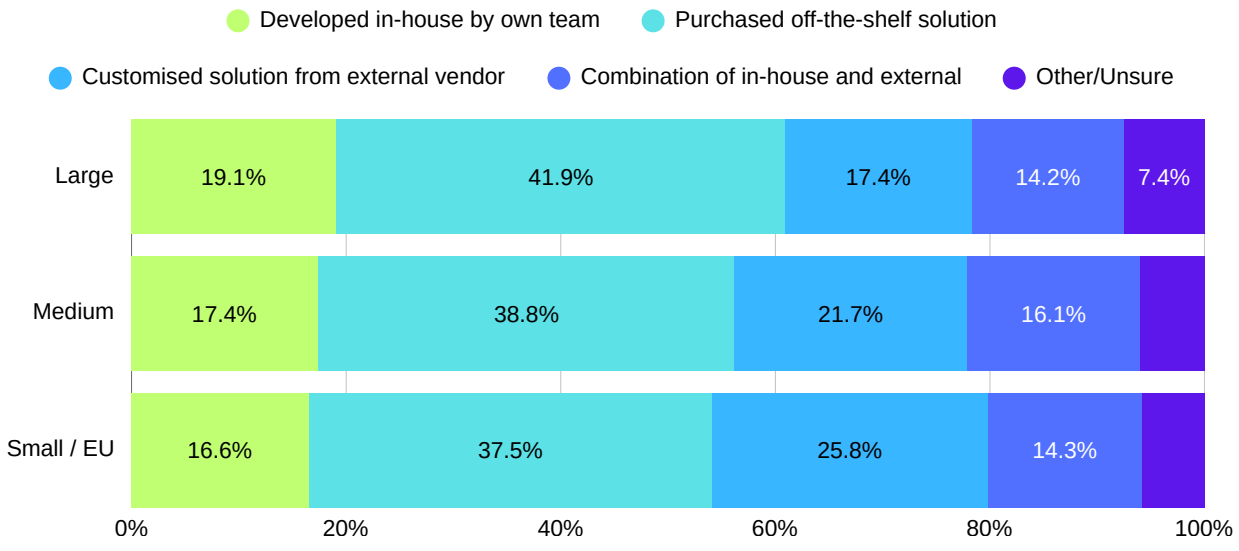


Figure 5. How did you implement your AI application for your company? *Proportions represent weighted percentages (N = 2,632)

How AI benefits companies

Overall, **improved communication with customers** was the company benefit most cited by respondents, especially in the Trade sector (see **Table 1**). The **reduction of processing times** plays an important role for all sectors, yet particularly in the Services sector. Similarly, **productivity gains** were most commonly cited in Services. Improving the quality of decisions was equally important across sectors, whereas improving the quality of products and services was regarded as especially relevant by Service sector respondents. Further AI benefits include increases in customer satisfaction, enabling new products and services, and better achievability of sustainability goals. The **reduction of routine tasks** mattered most in the Services sector, comparable to reducing throughput times in Trade.

Table 1. What benefits has your company gained from the AI application?
*Note: This item is a multiple-response question and percentages do not sum to 100%.
Proportions represent weighted percentages. I = Industry, C = Construction, T = Trade, S = Services

Benefit	I	C	T	S
Improved communication with customers	34.6%	41.3%	46.5%	39.2%
Reduction of processing times	26.8%	31.2%	33.8%	38.2%
Increase in labour productivity	29.2%	30.0%	29.6%	35.0%
Improvement in the quality of decisions	31.6%	31.2%	33.8%	30.5%
Improving quality of products and services	23.7%	26.2%	28.1%	32.6%
Increase in customer satisfaction	25.2%	25.0%	31.1%	28.9%
Enabling new products and services	29.9%	26.2%	21.1%	29.3%
Better achievability of sustainability goals	29.8%	23.8%	29.6%	25.4%
Reduction of routine tasks	12.7%	21.2%	22.5%	28.4%
Reduction of throughput times	17.3%	18.8%	26.7%	20.2%

How AI benefits companies (continued)

Among the less frequently cited company benefits (see **Table 1**), more flexibility in work organisation or product variants was mentioned by 15-18% of companies across sectors. **Counteracting the shortage of skilled workers** was considered a key benefit among companies of the Industry and Construction sectors (both 21%). Moreover, for the Construction sector, **securing knowledge** was regarded as a key benefit of AI implementation (22%). Reducing material costs (16%) and improving the employer's image as an innovative company (15%) mattered most to those in the Construction business, while the latter mattered least to those in Industry (9%), who placed a greater emphasis on reducing personnel costs (16%). A safer work environment was cited most frequently by respondents in Construction (13%), whereas upgrading jobs held little significance overall.

Table 1. What benefits has your company gained from the AI application? (continued)

Benefit	I	C	T	S
More flexibility (work organisation/variants)	15.0%	16.2%	15.6%	17.9%
Counteract the shortage of skilled workers	21.3%	21.3%	14.1%	16.0%
Securing knowledge	14.9%	22.4%	11.3%	16.7%
Improving employer's image as innovative	8.7%	15.0%	12.7%	13.4%
Increasing the ability to innovate	14.1%	13.8%	11.3%	13.2%
Reduction of material costs	13.5%	16.3%	11.3%	10.8%
Reduction of personnel costs	15.8%	13.8%	14.1%	10.0%
Safer work environment/less accidents	5.5%	12.5%	5.7%	4.5%
Upgrading jobs	2.4%	6.2%	4.2%	4.0%
Other (please specify)	1.6%	1.2%	0.0%	0.2%

How AI benefits employees

While AI tools and technologies can provide tangible benefits for companies, they can also provide several benefits for employees (**Table 2**). The most common benefit cited was a **decrease in work pressure**, especially in Trade. Moreover, AI enables employees to **focus on more interesting value-added tasks**, particularly in the Trade and Services sectors.

Table 2. What benefits does the AI application have for employees?
*Note: This item is a multiple-response question and percentages do not sum to 100%.
Proportions represent weighted percentages. I = Industry, C = Construction, T = Trade, S = Services

Benefit	I	C	T	S
Decreases work pressure for employees	38.6%	41.2%	49.3%	42.3%
Focus on more value-added tasks	28.5%	27.6%	39.4%	38.7%
Provides relief for employees	33.1%	31.3%	33.8%	36.4%
Encourages employees to learn new skills	32.3%	35.0%	22.6%	36.2%
Increases employee motivation	32.2%	38.7%	40.7%	28.6%
Reduces employees' overall workload stress	18.3%	27.4%	32.3%	32.6%
Reduces (process) complexity for employees	23.7%	22.5%	28.2%	32.6%
Increases employee satisfaction	25.3%	37.4%	28.2%	26.8%
Facilitates new employees' learning process	19.8%	22.6%	22.7%	25%
Increases employees' work autonomy	20.6%	17.6%	18.4%	22.8%
Strengthens employees' personal responsibility in their work	4.0%	11.3%	5.7%	9.2%

How AI benefits employees (continued)

Between 33-36% of companies state that AI **provides relief** for employees



32-36% of companies say that AI **encourages employees to learn new skills**, although only 23% in Trade



AI **increases employee satisfaction**, especially in Construction (37%)





AI **increases employee motivation**, especially Constructio n (39%) and Trade (41%)

In the Trade and Services sectors, AI **reduces overall workload stress** and **process complexity**



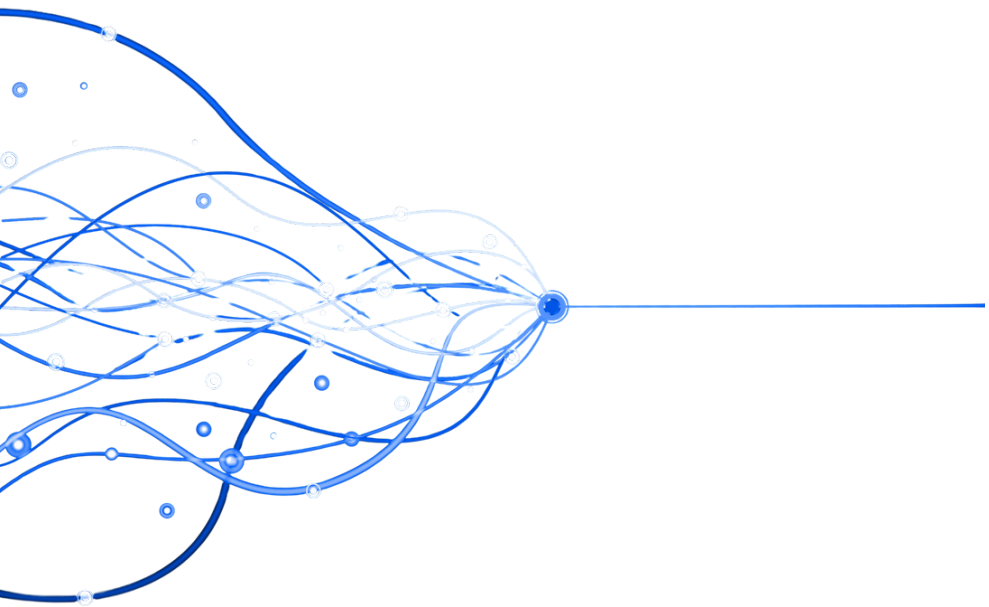
AI can **facilitate learning processes** and **increase work autonomy**, but does not affect employees' **personal responsbility**



Conclusion

Based on the above findings, several key conclusions emerge:

1. Sector-specific variation
   - AI creates value in different ways across sectors. There is considerable variety in AI use cases areas with administration, customer service and development standing out as the most promiment use case areas across sectors.
2. AI adoption is currently driven by practical, manageable use cases
   - Companies primarily implement low-risk AI applications, indicating a cautious and pragmatic adoption approach. The reliance on external solutions suggests that AI diffusion is being enabled more by market-ready tools than by in-house development capabilities.
3. Organisational agility matters more than company size
   - Smaller firms can often implement AI faster, presumably due to simpler structures and quicker decision-making. Larger firms need stronger governance and change management to accelerate AI deployment, which is also supported by the AI@Work business cases on competitiveness.
4. Boosting competitiveness is the main driver of AI adoption
   - AI is primarily used to increase efficiency, productivity, and service quality rather than for disruptive innovation. Its ability to address workforce shortages and retain knowledge highlights its strategic value beyond cost reduction.
5. AI can support good work design
   - The reported reduction in work pressure suggests that AI has the potential to improve employee well-being alongside business performance. Positive effects on skills and motivation indicate that AI can complement, rather than replace, human work when implemented appropriately (see here for exemplary AI@Work business cases). .
6. Benefits depend on the context of use
   - Between sectors, there is considerable variation in the benefits targeted and achieved through AI. For instance, in the Industry and Construction sectors, counteracting the shortage of skilled labour with the help of AI is a key priority. In contrast, enabling employees to focus on more interesting value-added tasks is a stronger priority in the Trade and Services sectors.



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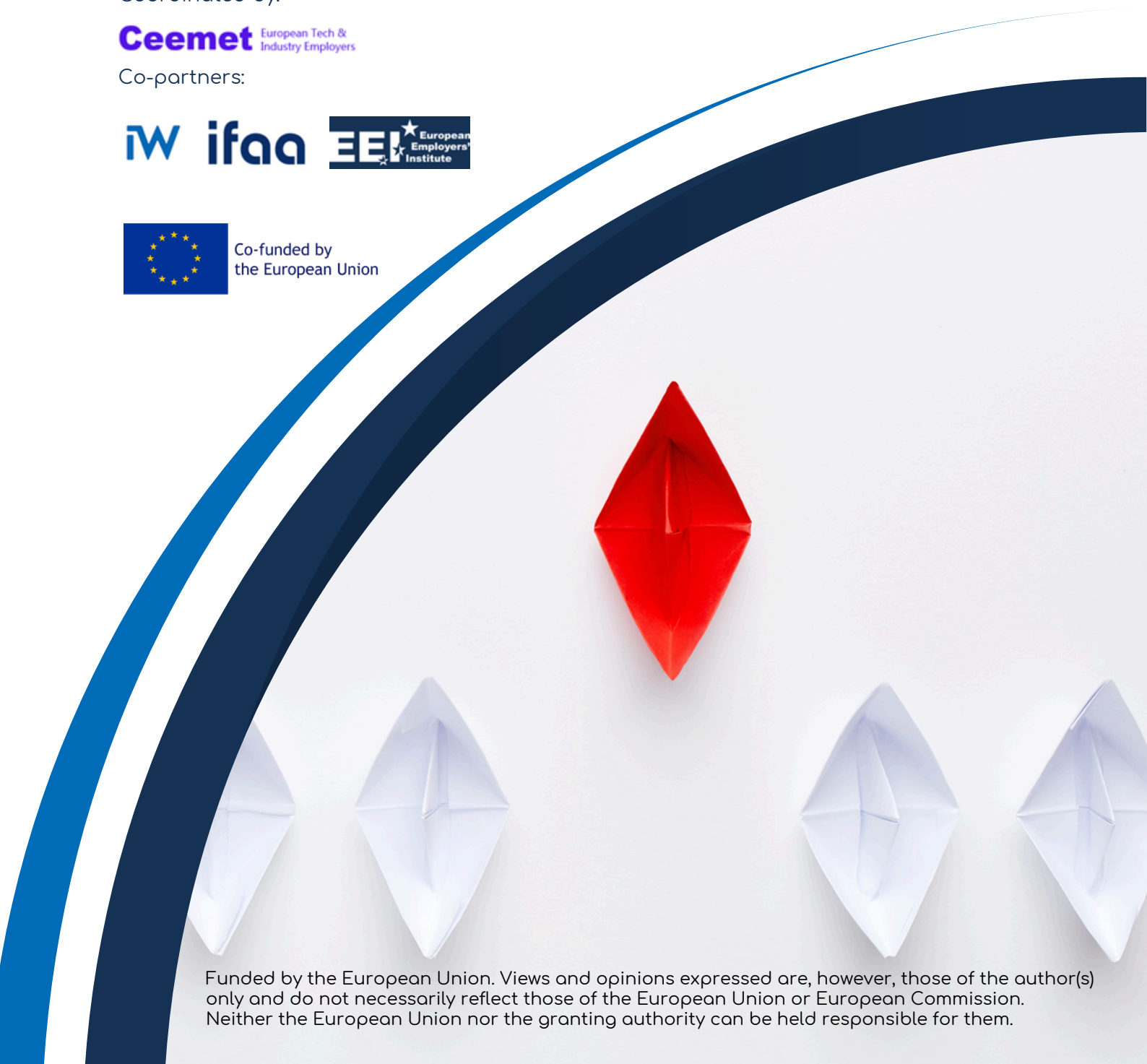

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