

ai@work

How artificial intelligence contributes to competitiveness and workforce planning

AI & Competitiveness

Part 2 of 2 (AI@Work survey results)

Fact sheet #19

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Table of contents

- Introduction - AI & Competitiveness → Page 1
- Instruments for regulating AI systems → Page 2
- Availability of AI strategy by company size and AI usage duration → Page 3
- Expected competitive advantage of AI adoption / Areas of expected competitive advantage by sector → Page 4
- Barriers to using AI for increasing competitiveness by sector → Page 6
- Conclusion → Page 7

Introduction - AI & Competitiveness

Artificial Intelligence (AI) promises companies measurable productivity gains at foreseeable 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 competitive edge that companies can derive from the application of AI, independent of its origin.

Objectives

AI can strengthen 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 its effects on employees.

The project supports European and national sectoral and cross-sectoral employers' representatives obtaining a better understanding of the impact of AI on people and business management.

Scope

With the rise of AI in the workplace, the question of how AI is regulated in companies becomes increasingly important. The current fact sheet outlines **what instruments for regulating AI systems are in place in companies and whether these differ based on company size.** Furthermore, the availability of a company AI strategy is considered, taking into account the length of AI use.

Companies that adopt AI generally expect a competitive advantage from its introduction. The present fact sheet **investigates differences in the expected competitive advantage based on company size and the availability of an AI strategy**. Moreover, the specific areas in which companies expect a competitive advantage of AI are highlighted and compared by sector. Finally, barriers to the use of AI are considered, including sectoral discrepancies.

Instruments for regulating AI systems

To regulate AI systems, EU companies tend to rely on IT working groups involving employers and interest groups or on existing process or framework agreements on ICT use (e.g., for piloting new IT solutions), as illustrated in **Figure 1**.

Overall, **small companies are significantly less likely than large companies to use any form of regulatory instruments** (z = -3.88 to -1.07, ρ < .001 to .01), except for indirect regulation and separate works/service agreements for IT systems (ns).

The largest statistically significant differences between large companies and SMEs emerge in the use of **IT working groups between employers and interest groups** (z = -6.84/-2.75, ρ < .001/.02), as well as **framework agreements on the use of ICT** (z = -4.44/-3.39, ρ < .001/.01). Medium-sized companies, too, differ statistically significantly from small companies in the use of IT working groups (z = -3.88, ρ < .001) and separate works/service agreements for new AI systems (z = -3.48, ρ < .01).

In contrast, none of the large companies are using **no instruments**, whereas this is the case for 6% of medium and 11% of small companies (z = 2.80/6.57, ρ = .02/< .001).

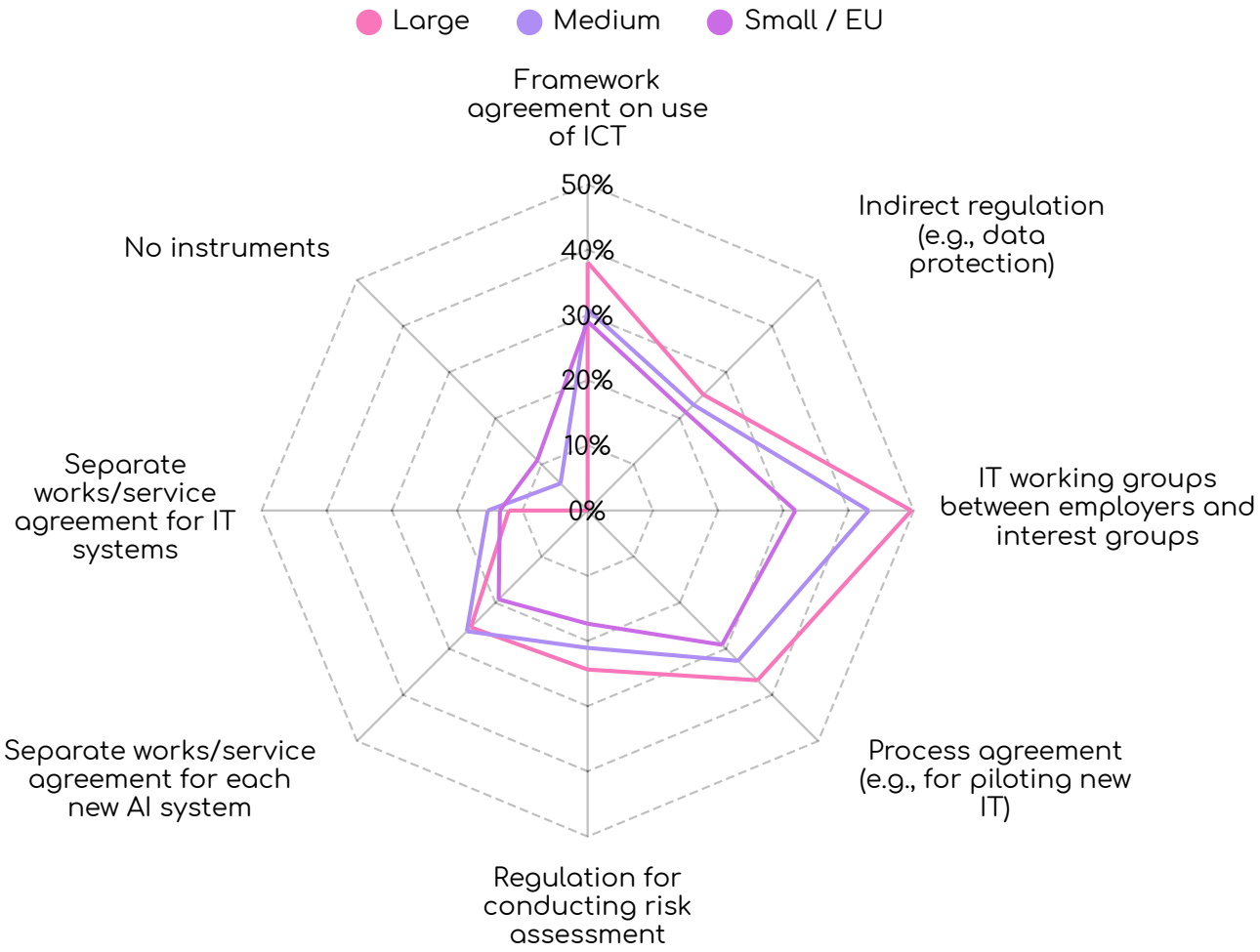


Figure 1. What instruments for regulating AI systems are in use in your company? Results by company size. Note: This item is a multiple-response question and percentages do not sum to 100%. *Proportions represent weighted percentages (N = 2,632)

Availability of AI strategy by company size and time passed since AI adoption

As illustrated in **Figure 2**, there is a clear divide between small, medium and large companies in terms of the availability of an AI strategy. Large companies are statistically significantly more likely than either medium-sized or small companies to possess an AI strategy ($z = 5.63/10.65$, $p < .001$), whereas medium-sized companies, in turn, are also significantly more likely to possess an AI strategy when compared to small companies ($z = 4.84$, $p < .001$).

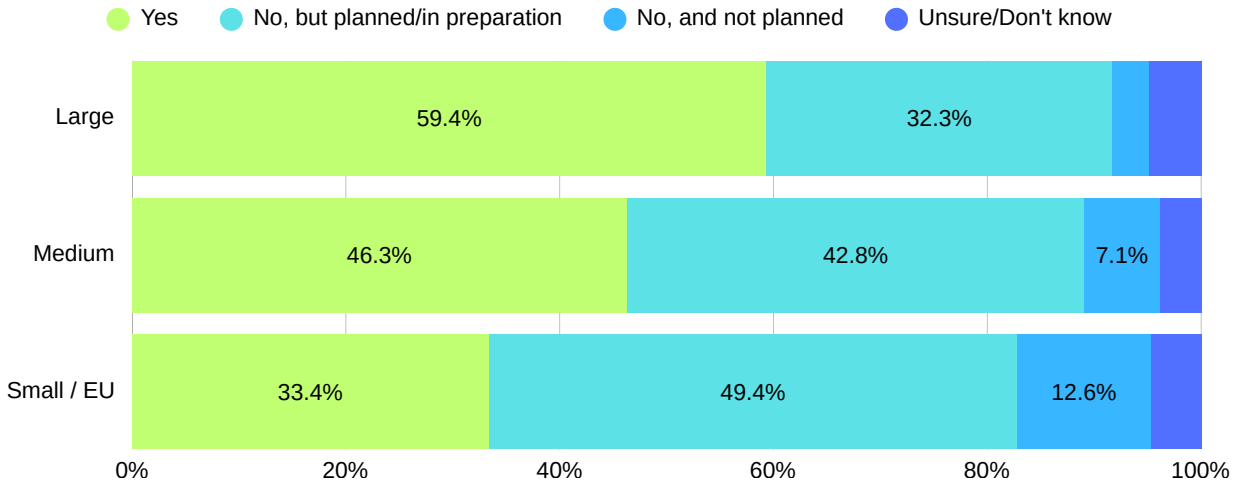


Figure 2. Does your company have an AI strategy? Results by company size.
*Proportions represent weighted percentages (N = 2,632)

Figure 3 compares companies' availability of an AI strategy by the time since the company has implemented AI systems. As would be expected, companies that have been using AI for less than a year are significantly less likely to possess an AI strategy than companies that have been using AI for 1-2 years ($z = -6.92$, $p < .001$), 3-4 years ($z = -5.42$, $p < .001$), or equal to or more than 5 years ($z = -2.85$, $p = .03$). Interestingly, there are no statistically significant differences between companies that have been using AI for either 1-2 years, 3-4 years, or more than 5 years. In each case, at least a third of companies possess an AI strategy.

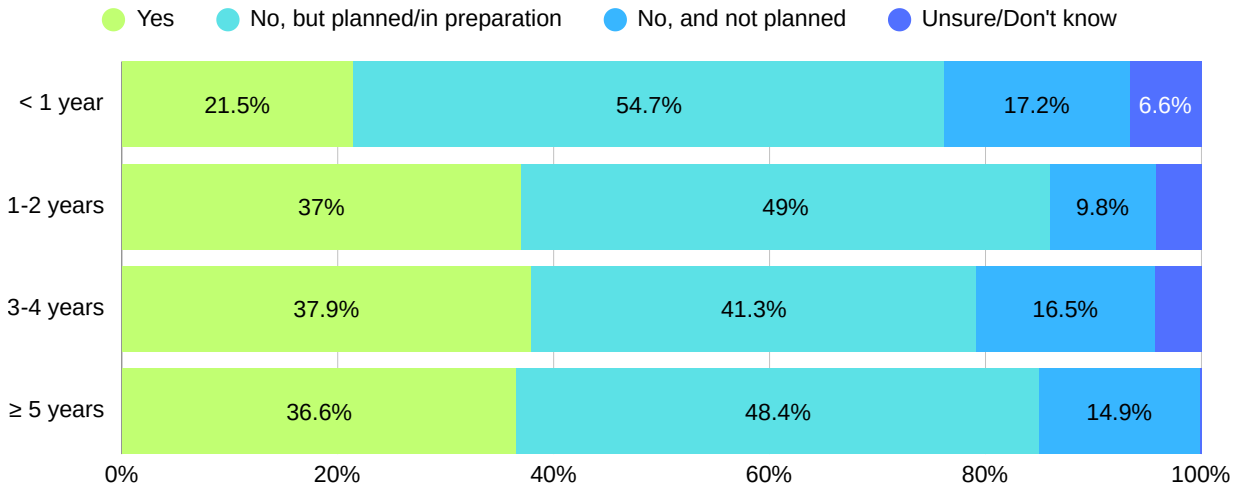


Figure 3. Does your company have an AI strategy? Results by time passed since AI adoption.
*Proportions represent weighted percentages (N = 2,632)

Expected competitive advantage of AI

EU-wide, almost 80% of companies expect a competitive advantage of AI for their company (see **Figure 4**). Compared to small companies, this proportion is significantly higher among medium-sized ($z = 2.45$, $p = .04$) and large companies ($z = 4.26$, $p < .001$).

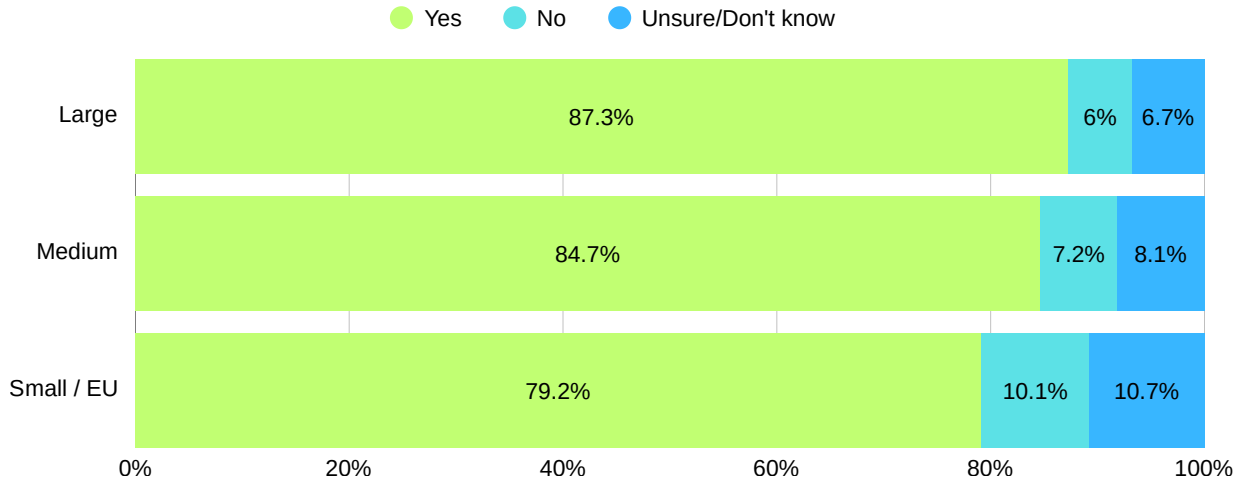


Figure 4. Do you believe that AI will provide a competitive advantage for your company? Results by company size. *Proportions represent weighted percentages (N = 2,632)

Whether companies expect a competitive advantage from AI can also be linked to their availability of an AI strategy (see **Figure 5**). Companies that already have an AI strategy or are planning or preparing a related strategy are significantly more likely than companies without an AI strategy to believe in a competitive advantage through AI ($z = 12.81/11.60$, $p < .001$). Yet, even among companies with no AI strategy planned, more than half believe in a competitive advantage through AI.

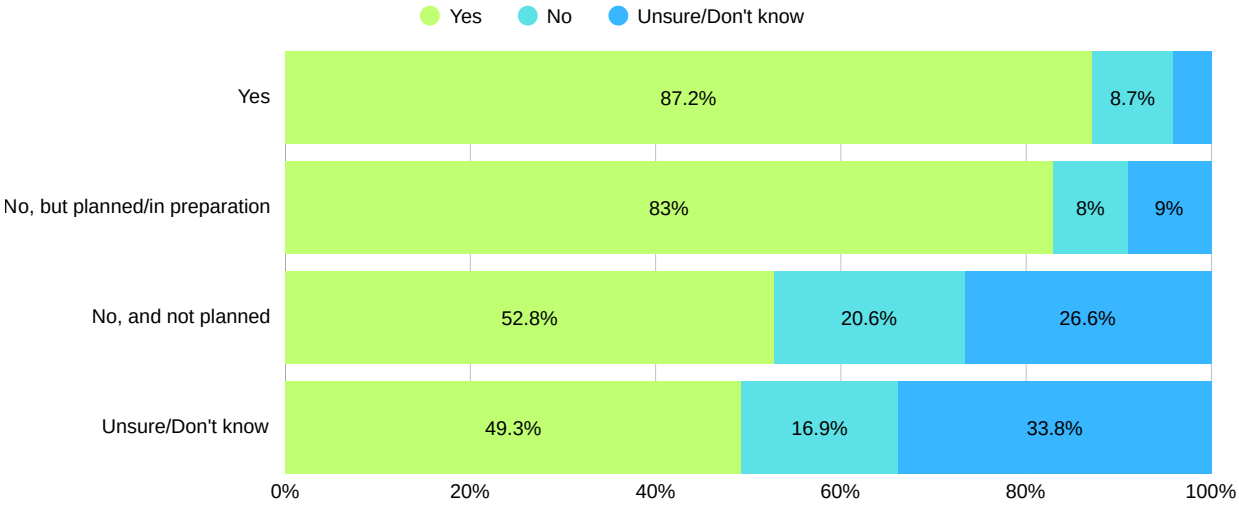


Figure 5. Do you believe that AI will provide a competitive advantage for your company? Results by availability of AI strategy. *Proportions represent weighted percentages (N = 2,632)

Areas of expected competitive advantage through AI by sector

Among the most cited areas of expected AI benefits, three areas stand out: across sectors, companies particularly expect benefits in terms of **cost efficiency and productivity**, **speed of decision-making**, as well as **customer experience and personalisation** (**Figure 6**). This pattern also persists for different company sizes.

Sectoral differences become apparent mostly with regard to product or service innovation and risk management and compliance. Companies in the Construction and Trade sectors tend to expect greater benefits in **risk management and compliance**, whereas companies in the Industry and Services sectors tend to expect greater benefits in **product or service innovation**.

Compared to the other sectors, companies in Industry tend to expect fewer benefits in the speed of decision-making and talent attraction and retention. On the other hand, companies in Construction tend to expect comparatively fewer benefits in customer experience and personalisation, as well as market expansion and new revenue streams.

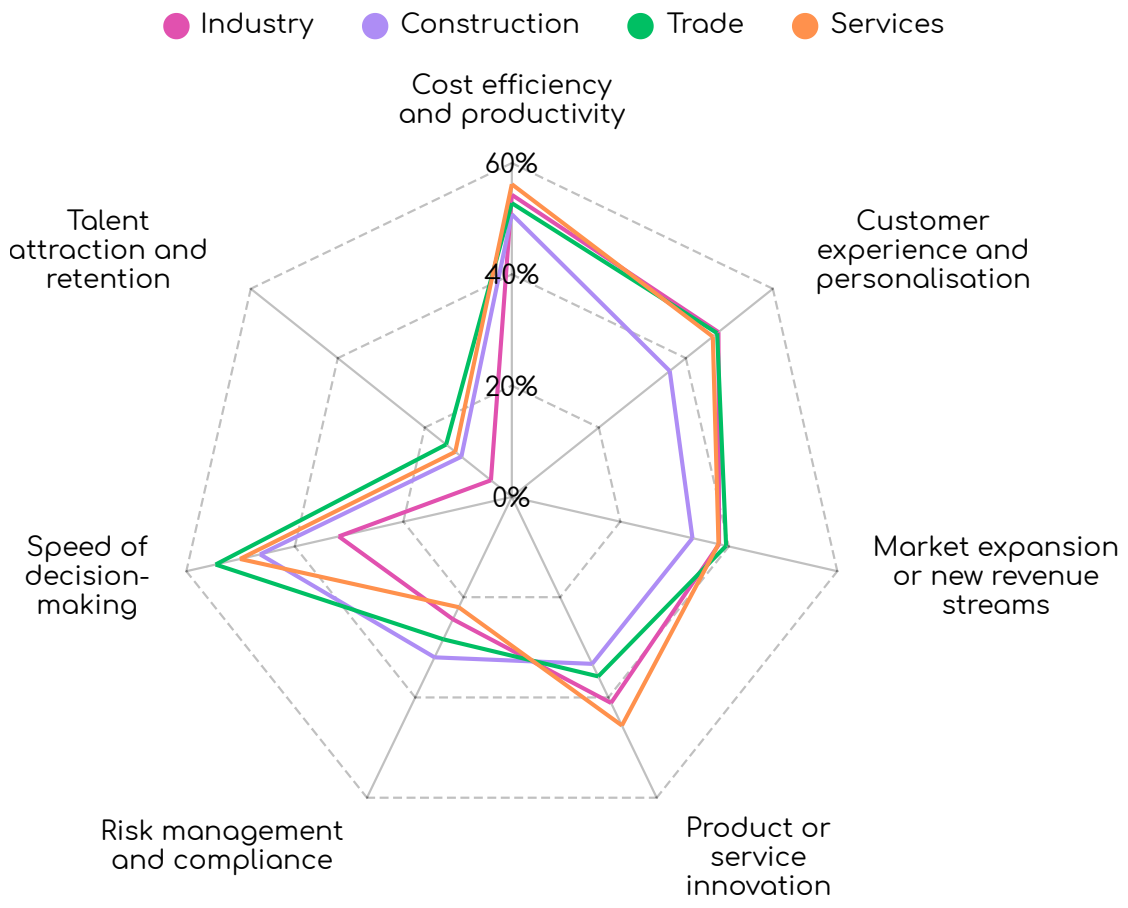


Figure 6. In which areas do you expect AI to provide the greatest competitive advantage for your company? Results by sector. Note: This item is a multiple-response question and percentages do not sum to 100%. *Proportions represent weighted percentages (N = 2,224; i.e., only respondents who indicated that their company expects a competitive advantage from AI)

Barriers to using AI for improving competitiveness by sector

The most common barrier to implementing AI for improving competitiveness, across sectors, lies in **budget constraints**, followed by data protection requirements, and lack of AI skills or talent (see **Figure 7**).

Sectoral differences become apparent across various barriers. In particular, **resistance to change or low adoption** is cited more frequently by respondents from the Trade and Services sectors, whereas **technology or infrastructure constraints** are most common in Construction and least common in Industry.

Data quality or availability issues, as well as **governance, ethical, or regulatory concerns**, are most common in Construction, although **data protection requirements** are least common compared to the other three sectors.

Finally, reported barriers such as a **lack of instruments** for regulating the use of AI (e.g., work agreements) and **unclear business use cases or return on investment (ROI)** are most prominent in the Trade sector.

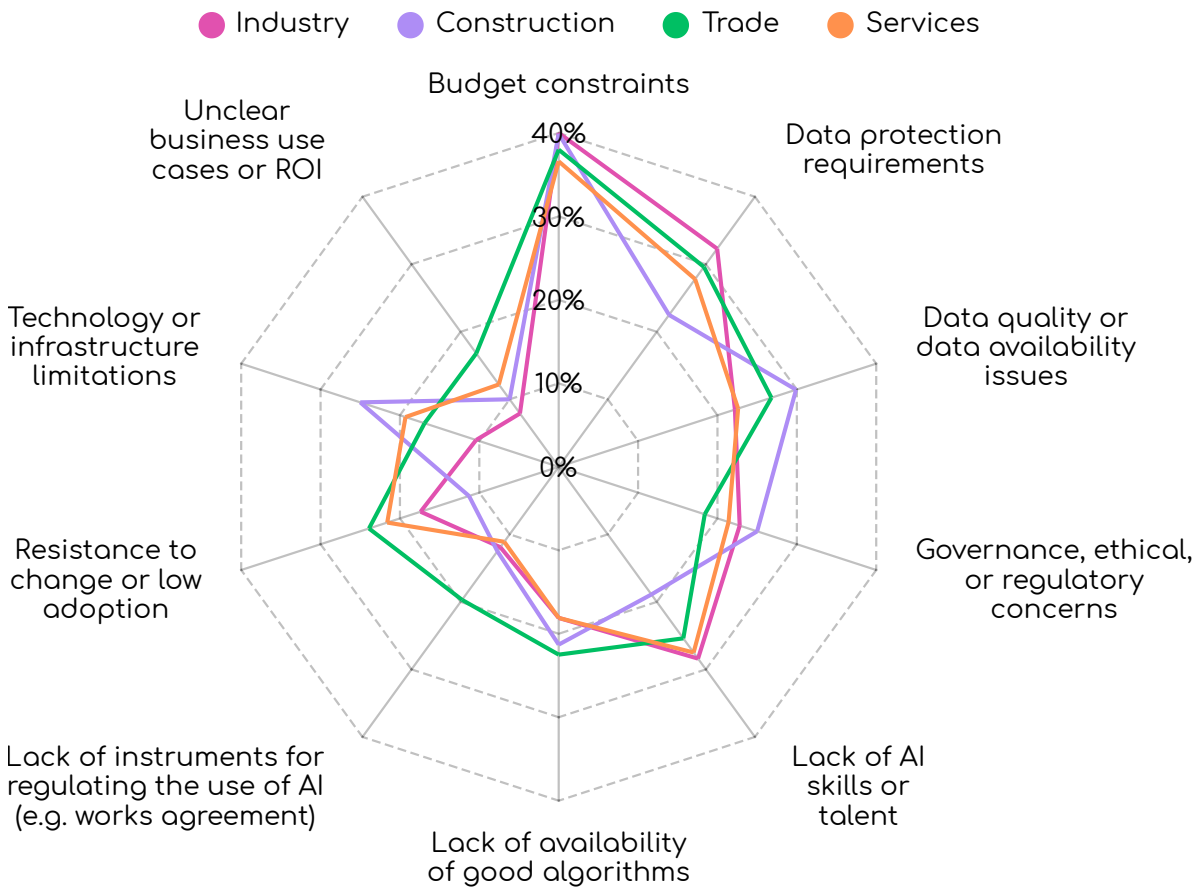


Figure 7. What are the biggest barriers preventing your company from using AI to improve competitiveness? Results by sector. Note: This item is a multiple-response question and percentages do not sum to 100%. *Proportions represent weighted percentages (N = 2,632)

Conclusion

Based on the above findings, several key conclusions emerge:

1. AI governance maturity

- Company size affects AI governance practices, with large companies being more likely to have implemented formal regulatory frameworks and small companies more likely to lack governance measures altogether. IT working groups between employers and interest groups are considered the most valuable tool for regulating AI systems.

2. AI strategy availability

- Similar to the governance of AI systems, the findings indicate that the availability of a formal AI strategy increases with both company size and AI maturity. This suggests that organisations increasingly recognise the importance of strategic governance as AI adoption progresses and becomes more embedded in business operations.

3. Expected competitive advantage

- The results demonstrate a strong belief that AI can generate competitive advantages. This expectation is particularly pronounced among organisations that have already established an AI strategy or are actively developing one, highlighting the role of strategic planning in shaping confidence in AI-driven value creation.

4. Sector-specific opportunities

- Improvements in cost efficiency and productivity, faster decision-making, and enhanced customer experience and personalisation are widely perceived as key benefits of AI. Sector-specific differences reflect varying operational priorities and business objectives that are closely aligned with the distinct challenges and innovation goals of each industry sector.

5. Barriers to competitiveness

- The findings show that financial constraints, regulatory and data-protection requirements, and shortages of AI-related skills remain the most significant barriers to leveraging AI for competitive advantage. In addition, sector-specific challenges underline the need for tailored measures to address the differing conditions and requirements across industries.

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