bsi **Your partner in progress**

Trust in AI

Actions and attitudes around AI adoption

Contents

Foreword

Susan Taylor Martin
Chief Executive, BSI

There are many questions associated with the Artificial Intelligence (AI) transformation society is experiencing. One thing that is not in doubt is that AI will shape the future of society and the way in which organizations operate. At BSI, our belief remains that AI has the potential to change lives for the better, make a positive impact on society, and accelerate progress towards a sustainable world. We also recognize that this will not happen automatically and that all of us have a role to play in establishing the guardrails to ensure AI is indeed a force for good.

Organizations are at the heart of that. As our research shows, many are investing in different AI tools and excited about the prospect of how this technology will shape the future of work. It is instructive that three quarters of business leaders globally (76%) state that organizations will be at a competitive disadvantage if they do not invest in AI. Equally, the fact that 84% agree that employee buy-in is important for the success of rolling out AI in business shows an awareness that the AI transformation must be a collaboration so that it delivers for all.

By the same token, it is welcome to see 93% of business leaders globally recognize the importance of safety and an ethical approach to AI. There is no doubt that there is an enormous opportunity for organizations – especially those at the vanguard of AI adoption – to support and shape an AI ecosystem in which trust is a cornerstone.

What became clear from our research is that some organizations, and some markets and sectors, appear well positioned to take up that role. Yet while our International AI Maturity Model shows diverging paths thus far on AI, its mass adoption and integration into all parts of work and life is a marathon, not a sprint. Success is not about being first, but building trust for the long term.

Our findings set out practical steps that can be taken, including the value of long-term thinking, and a recognition that AI will support overall business strategy and will become integral to it. Equally, we note that for those organizations that are already realizing the benefits of AI, there

is a powerful opportunity for them to inspire wider society by sharing what they are already achieving.

Lastly, we highlight that cross-border collaboration can offer vital protections for our AI future while also enabling innovation. From the launch of the AI Management system standard (BS ISO/IEC 42001), BSI's role in the AI Standards Hub, and our progression to becoming an AI Notified Body, BSI is committed to playing a role in facilitating that collaboration, in order to build trust, in the safe and ethical use of AI.

Executive summary

Topline results

BSI's International AI Maturity Model represents organizational confidence and readiness for AI adoption. It considers actions organizations are already taking, as well as attitudes, plans and expectations.

Based on our research, consulting 932 business leaders spread across nine global markets and seven sectors, we averaged out the responses to a variety of topics from AI investment to AI training to provide a score between one and five. The scores give an indication of perceived maturity, presented in the following results:

BSI's International AI Maturity Model

Aggregate scores across 15 different categories, including investment, training, trust and communications.

Market	Sector	Organization size

Market	Score
India	4.6
China	4.3
US	4.0
Australia	3.1
Germany	2.8
France	2.2
The Netherlands	1.8
UK	1.3
Japan	1.1

0   1   2   3   4   5

Very low	Low	Medium	High	Very high

Perceived maturity level from 0-5

Click the buttons at the top to see results by market, sector and organization size.

Continue to Analysis

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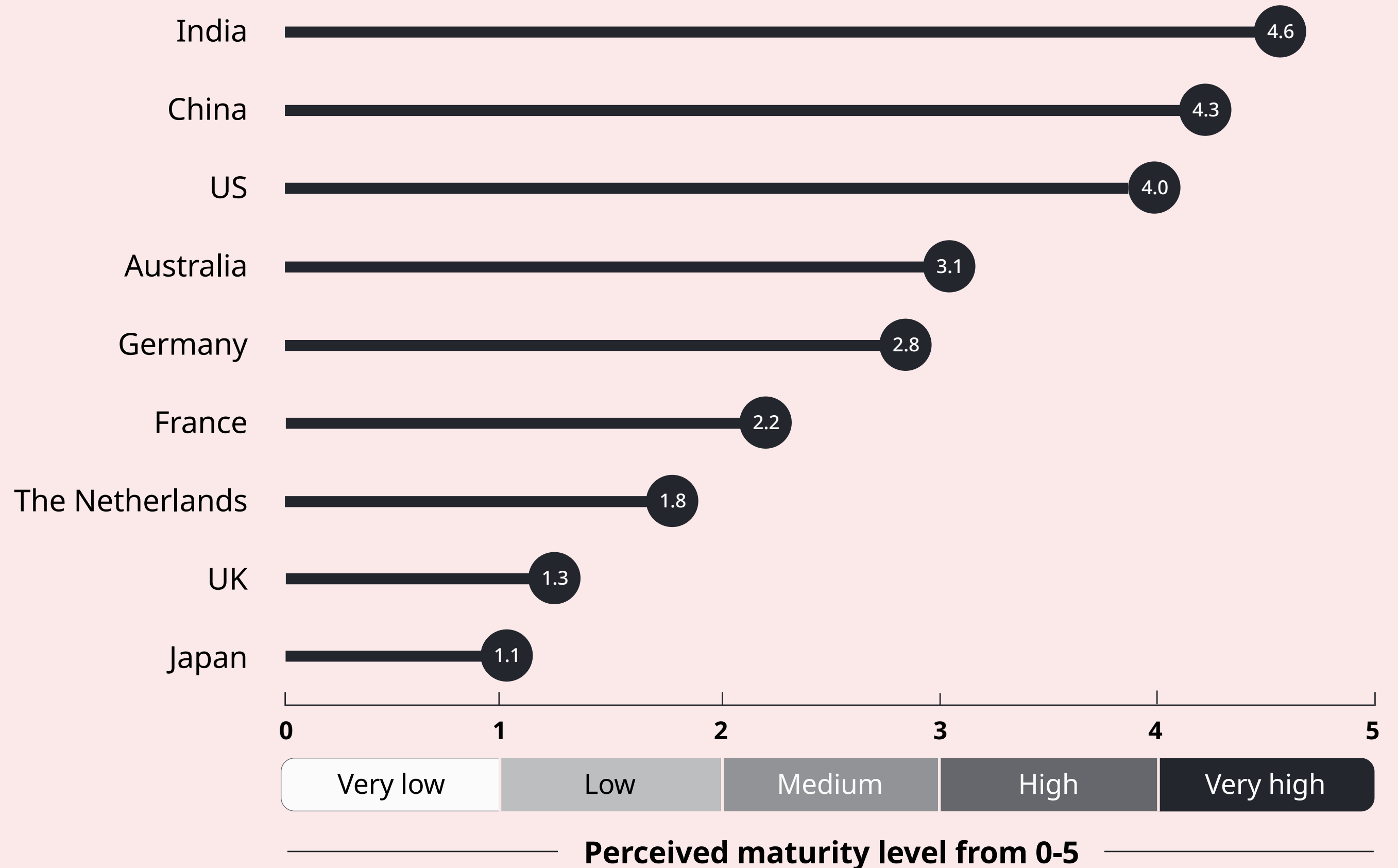
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| Continue to Analysis |

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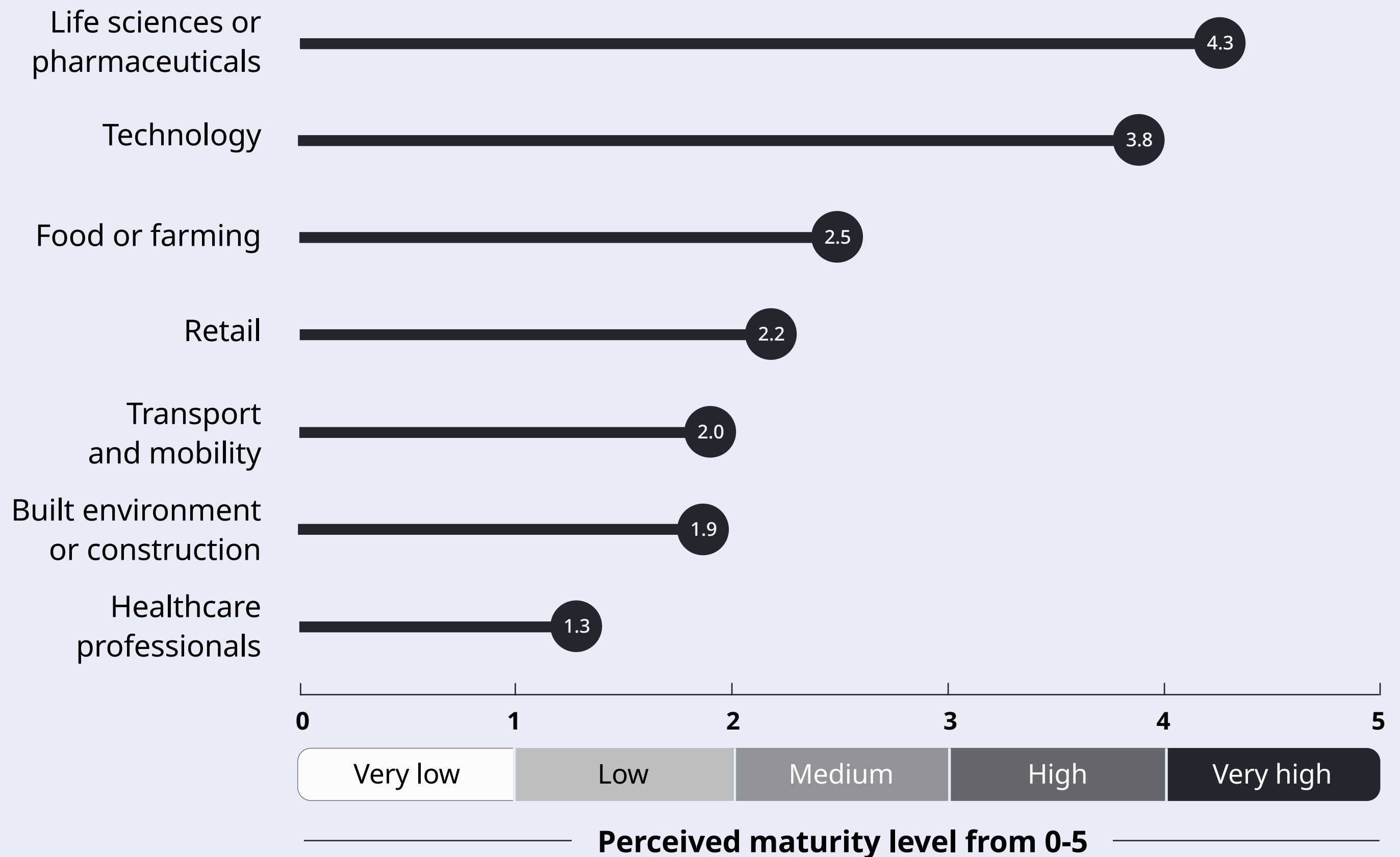
BSI's International AI Maturity Model

Aggregate scores across 15 different categories, including investment, training, trust and communications.

| Market | Sector | Organization size |

Organization sizes:

Large = 1000+ employees
Medium = 250 – 999 employees
Small = 0 – 249 employees

Large ———————————————● 2.3

Medium ——————————————————● 2.7

Small ——————● 1.1
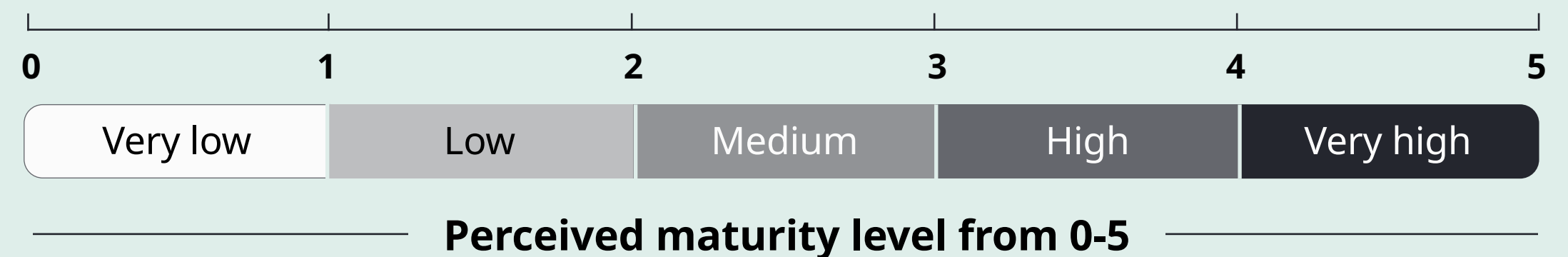
| 0 | 1 | 2 | 3 | 4 | 5 |

| Very low | Low | Medium | High | Very high |

Perceived maturity level from 0-5

Click the buttons at the top to see results by market, sector and organization size.

Continue to Analysis

Analysis

- AI engagement and adoption is happening at pace, but not necessarily consistently around the world or across sectors – however being more mature and trusting of AI now is not necessarily a guarantor of success.

- Findings may be shaped by interpretation of survey questions or wider personal or societal attitudes towards AI – for example whether AI has been made a strategic growth priority by government, as in China, or whether it is connected with a jobs boom, as in India.

- In countries with a more risk-focused media, such as the UK, there may be a natural inclination to caution. Other places have a stronger heritage of embracing innovation, like the US.

- The data indicates a divide between industries concerned about the impact of AI on jobs (for example healthcare) and those that feel AI can enhance operations, such as life sciences.

- Larger organizations are more AI mature than smaller ones, likely given the greater resources they have to support investment, management and training.

81%
of business leaders state their organization is already investing in AI

78%
of business leaders say they have greater trust in AI than a year ago

89%
of business leaders believe offering training to ensure safe, ethical and effective use is important

- There may be upsides to being less mature at this stage of society's AI shift - relentless optimism could detract from mitigating potential risks.

- Wherever an organization is on its AI journey, trust will be at the core of enabling people to use the technology effectively.

Key takeaways

The data identifies steps organizations can take in order to shape trust in AI across their ecosystems and wider society, so it can be realized as a force for good.

Think long-term:

Look at AI as part of your wider business strategy.

Lead and inspire:

Set the standard for an AI future in which the technology is a force for good.

Businesses and policymakers should collaborate across borders:

Innovate with AI, but do so safely.

Move from intention to action:

Instil trust in AI by clarifying priorities and accelerating progress towards them.

Shaping AI together

BSI is supporting governments, organizations, NGOs and other stakeholders to ensure the safe, secure and responsible use of AI, for example:

• Publication of the international standard (<u>BS ISO/IEC 42001</u>) - a first-in-kind AI management system designed to assist organizations in responsibly using AI

• Working towards designation as a Notified Body for AI-enabled products

• Working alongside government organizations and international stakeholders to support AI safety and trusted innovation

• A package of measures including training and certification to ISO/IEC 42001

• AI strategy and data governance services

<u>Explore the detail behind these findings in our full report</u>

Chapter one
Overview

Introduction

In developing this report, we sought to build on <u>research we conducted in late 2023</u>, exploring societal trust in AI. That research identified a confidence gap, showing the importance of building understanding so the benefits of AI could be realized. It also displayed clear variations between countries, with China and India on course to realize AI's potential in areas including healthcare, food safety and sustainability. Yet other major economies, including the UK, France and Germany, were at risk of missing out on the opportunity. We concluded that closing the confidence gap and building trust via installing the appropriate checks and balances could enable us to make not just good but great use of AI in every area of life.

Organizations sit at the heart of building that trust, because they will be using the technology in myriad ways, and because they already interact across society through their customers, suppliers and employees. With AI becoming integral to the future of work, we wanted to explore how organizations can support an AI ecosystem in which trust is a cornerstone.

> ## Organizations sit at the heart of building trust in AI.

We examine the role organizations can play. What are they already doing and what can they do now to ensure AI will be a force for good across society? How much are they investing, what guardrails are they putting in place both for AI and for the jobs that will be impacted by its use? Are they collaborating with their stakeholders as they adopt AI across their operations, and are they prioritizing ethics and safety? What value do they place on innovation?

We asked these questions and many more, and compiled the findings into an International AI Maturity model, mapping the actions leaders are aware of their organization taking and their attitudes to AI. We contrasted what business leaders say they think is important with delivery including investment, training, internal and external communications and safety.

Methodology

This research was compiled from polling of 932 business leaders (manager level or equivalent and above) by Yonder Data Solutions in March 2024, in the UK, US, France, Germany, The Netherlands, China, Japan, India and Australia.

An International AI Maturity Model - methodology

We asked business leaders globally 20 different questions in relation to AI across a range of themes such as investment and communication. The different responses across these themes were grouped together to form categories for an International AI Maturity Model, which averages out the responses from individuals in different markets, sectors and company size to provide a score between one and five.

The scores give an indication of perceived maturity, by grouping, to represent the relevant data set and produce a picture of the actions respondents are already saying are in place versus their expectations and attitudes towards AI adoption in their organization.

A full list of questions included in the model can be found here.

1-2	2-3	3-4	4-5	5
Very low	Low	Medium	High	Very high

Maturity level
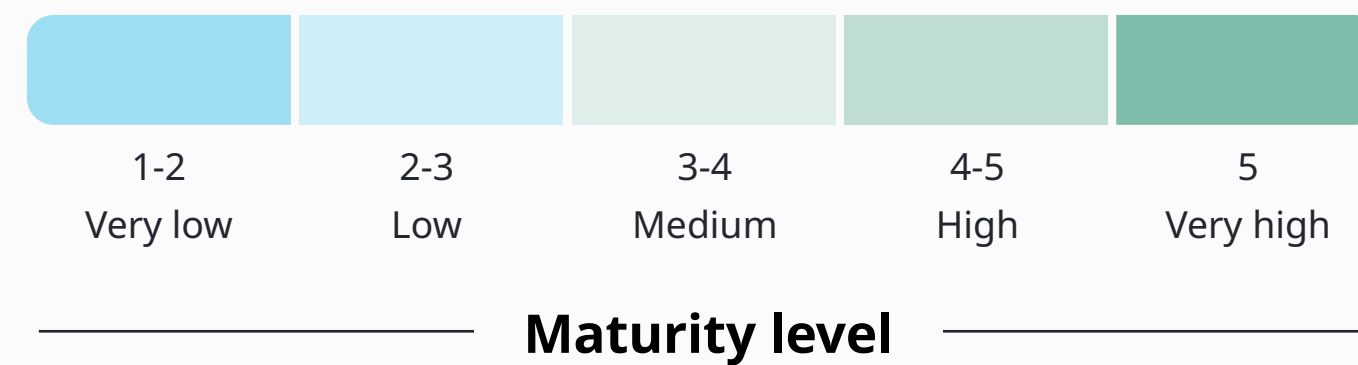
Maturity Model categories

Investment

How much are organizations already investing in AI or plan to, and is it enough?

Adoption

How do leaders anticipate using AI and what business functions do they expect to be impacted?

Confidence and appetite

Is use of AI encouraged and what measures are organizations taking?

Training

What training measures are in place, and how important is training employees?

Communication

Are organizations communicating and trialling AI with employees, supplier and customers?

Safety and guardrails

Are guardrails already in place and how important are they for safe, ethical and responsible use?

Progressing innovation

Are organizations focused on using AI in transformative ways?

Trust in AI

Is confidence in AI growing as it becomes more prevalent in business?

Results: International AI Maturity Model overview by country

	Attitudes									Actions						Overall score
	Investment	AI adoption	AI training	Internal comms	External comms	Safety	Progressing innovation	Trust	Focus	Investment	Confidence and appetite	AI training	Internal comms	External comms	Safety	
Australia	3	3	3	3	3	3	3	4	3	3	3	3	3	3	3	3.1
China	5	4	4	3	4	4	4	4	4	4	5	5	4	4	5	4.3
France	2	2	3	2	2	2	1	3	2	2	2	2	3	2	3	2.2
Germany	3	3	2	4	3	3	3	3	3	3	3	3	2	3	2	2.8
India	4	5	5	4	5	4	5	5	5	5	4	4	5	5	4	4.6
Japan	1	1	1	1	1	1	2	1	1	1	1	1	1	1	1	1.1
The Netherlands	2	1	2	2	2	1	2	2	1	1	2	2	2	2	2	1.8
UK	1	2	1	1	1	2	1	1	2	2	1	1	1	1	1	1.3
US	4	4	4	5	4	5	4	2	4	4	4	4	4	4	4	4.0

1-2 Very low	2-3 Low	3-4 Medium	4-5 High	5 Very high

Maturity level from 0-5

Trust in AI: Actions and attitudes around AI adoption
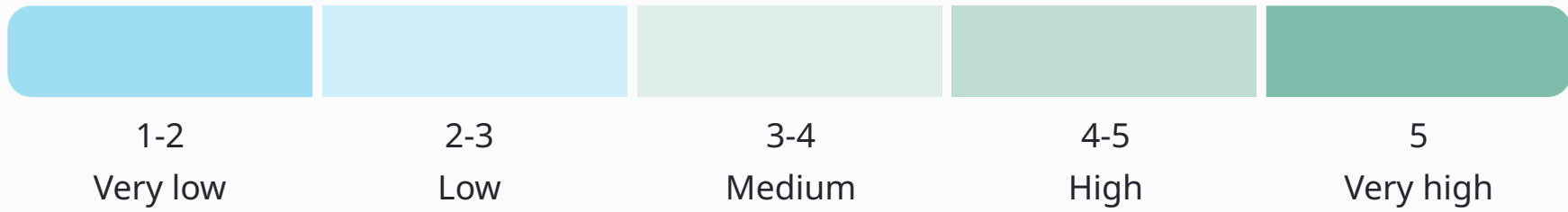
Results: International AI Maturity Model overview by sector

	Attitudes									Actions						Overall score
	Investment	AI adoption	AI training	Internal comms	External comms	Safety	Progressing innovation	Trust	Focus	Investment	Confidence and appetite	AI training	Internal comms	External comms	Safety	
Built environment or construction	1	2	1	1	3	1	1	1	3	3	3	2	2	2	2	1.9
Food or farming	2	1	2	2	1	1	3	3	2	1	1	3	5	5	4	2.5
Healthcare professionals	1	1	3	3	1	3	1	1	1	1	1	1	1	1	1	1.3
Life sciences or pharmaceuticals	4	2	5	4	5	5	4	5	5	4	5	5	2	4	5	4.3
Retail	2	3	2	2	2	2	2	2	1	2	2	1	4	2	3	2.2
Technology	5	5	4	5	4	4	5	4	4	5	4	4	3	1	2	3.8
Transport and mobility	3	4	1	1	2	2	2	2	2	2	2	2	1	3	1	2.0

1-2 Very low	2-3 Low	3-4 Medium	4-5 High	5 Very high

Maturity level from 0-5
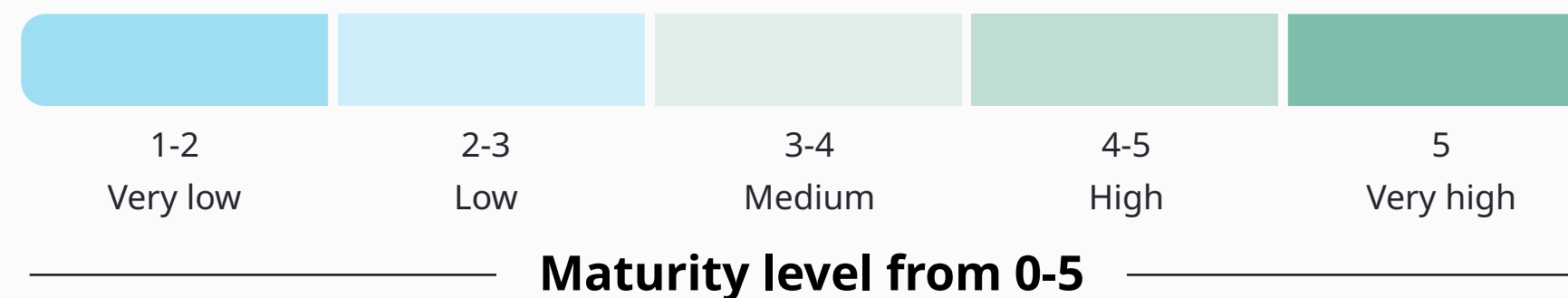
Results: International AI Maturity Model overview by organization size

	Attitudes									Actions						Overall score
	Investment	AI adoption	AI training	Internal comms	External comms	Safety	Progressing innovation	Trust	Focus	Investment	Confidence and appetite	AI training	Internal comms	External comms	Safety	
Large	2	2	3	3	2	3	3	2	3	2	2	2	2	2	2	2.3
Medium	3	3	2	2	3	2	1	3	2	3	3	3	3	3	3	2.7
Small	1	1	1	1	1	1	2	1	1	1	1	1	1	1	1	1.1

Organization sizes:

Large = 1000+ employees
Medium = 250 – 999 employees
Small = 0 – 249 employees

1-2 Very low	2-3 Low	3-4 Medium	4-5 High	5 Very high

Maturity level from 0-5

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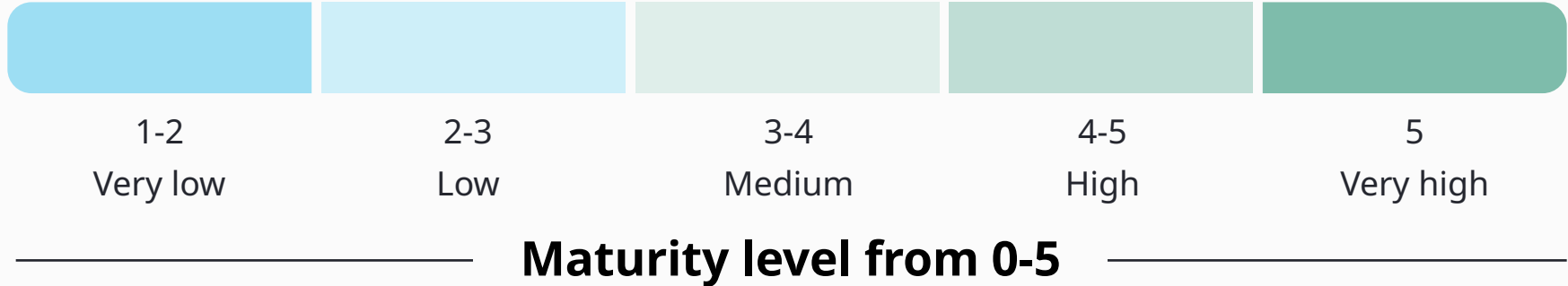
International AI Maturity Model Analysis

Craig Civil
Director of Data Science
and AI, BSI

BSI's International AI Maturity Model paints a picture of where organizations in different countries or sectors perceive they are on their AI journeys. Clearly each is at a different stage, both in terms of attitudes towards AI and tangible steps being taken to respond to it.

To truly understand the findings, it is important to consider the factors influencing them. These include the way in which people from different countries may have interpreted the original research questions, and how wider personal or societal attitudes towards AI may have affected their perceptions.

What becomes clear is that some organizations are investing more heavily, or prioritizing proactive communications and training, or have simply developed more positive attitudes to and greater trust in AI. Those in India and China, or those in the technology and the pharmaceutical sectors, appear further ahead than others according to the specific metrics of the Model; conversely Japan and the UK emerge as making slower progress.

The fact that the Maturity Model shows greater engagement with AI in India and China may reflect that both are countries in which AI has been made a strategic growth priority by governments and media. Political awareness of that may shape wider societal attitudes.

In European countries attitudes towards AI may be coloured by the recent passage of the EU AI Act and the safeguards this is designed to embed. In countries with a more risk-focused media and political culture, such as the UK, there may be a natural inclination to caution when it comes to new technologies. Other places have a stronger heritage of embracing innovation, like the US. Perceptions of AI there may have been shaped by high profile political scrutiny of AI at Senate Committees and a notoriously litigious culture. Sitting at the top of the table, India is the home to much outsourcing of technological roles, meaning AI is connected with a jobs boom, whereas low growth in Japan may reflect perceptions of AI more as a challenge to the labour market and economy.

Looking at the sectors, a divide between industries concerned about the impact of AI on jobs and those that feel AI can enhance operations emerges. AI has already proved key to rapidly reducing the time it takes to design, test and evaluate a new pharmaceutical product; in contrast, sectors such as healthcare or transport may feel AI represents another source of pressure on workforces already under strain. Those in manual roles in food or the built environment may see AI as a competitor to their labour. And it is perhaps unsurprising that larger organizations are more AI mature than smaller ones, given the greater resources they have at their disposal to support investment, management and training of new tools.

Looking behind the figures, there are other things to consider, such international frameworks that have the potential to help to build confidence.

While AI has been developing for years, we are only recently observing the mass societal adoption prompted by the arrival of generative AI. Thus, being more mature and trusting of AI now is not necessarily a guarantor of AI success. It just means that those cohorts are at a different starting point in a marathon; potentially better prepared but still with a lengthy course to run and obstacles to overcome.

In fact, there may be upsides to being less mature at this stage of society's AI shift. Relentless optimism in AI could detract focus from mitigating the risks associated with sharing data or developing strategies to protect vulnerable people. The desirable position to be in may be the middle ground; enthused by the prospects of AI but tempered by a recognition that AI on its own will not be a transformative force, unless trust is embedded.

The data shows that AI engagement and adoption is happening at pace, but not necessarily consistently around the world or across business. Nevertheless, wherever an organization is on its AI journey, trust will be at the core of enabling people to use the technology effectively – whether they are customers, employees, suppliers or anyone else.

Given that AI has enormous potential to be a force for good in areas including healthcare, food safety and sustainability, these findings can be a starting point for organizations in different sectors or markets to reflect on where they are in their AI journeys and the direction in which to proceed.

Chapter two

Analysis

Exploring the data

Delve into the data behind the International AI Maturity Model. We share a brief overview of the key findings and a snapshot into the response to one of the questions from each category.

All data referenced has been used to the develop the International AI Maturity Model. A list of the questions can be found in the Appendix and full data tables are available on request.

Read on to explore the findings.

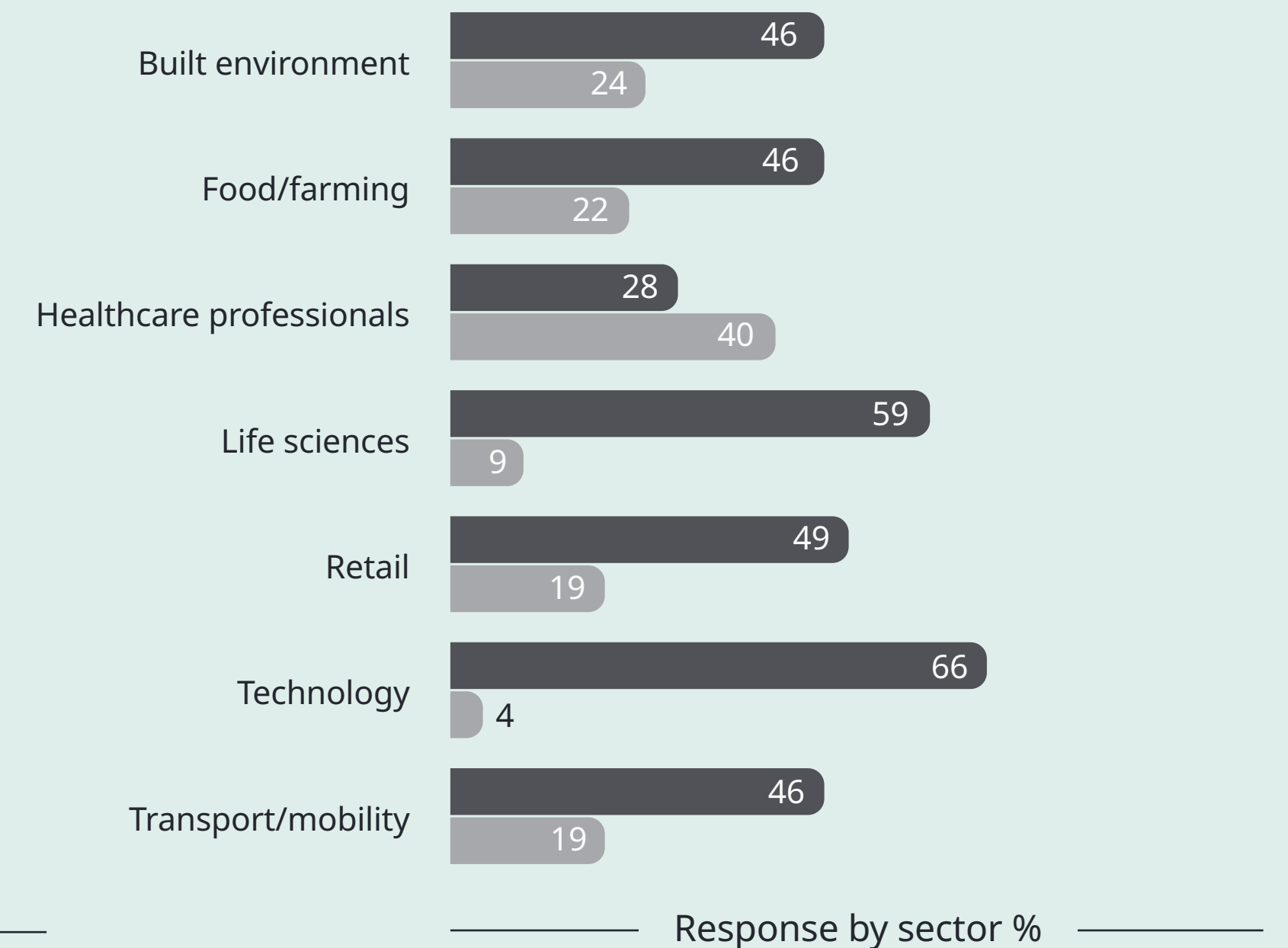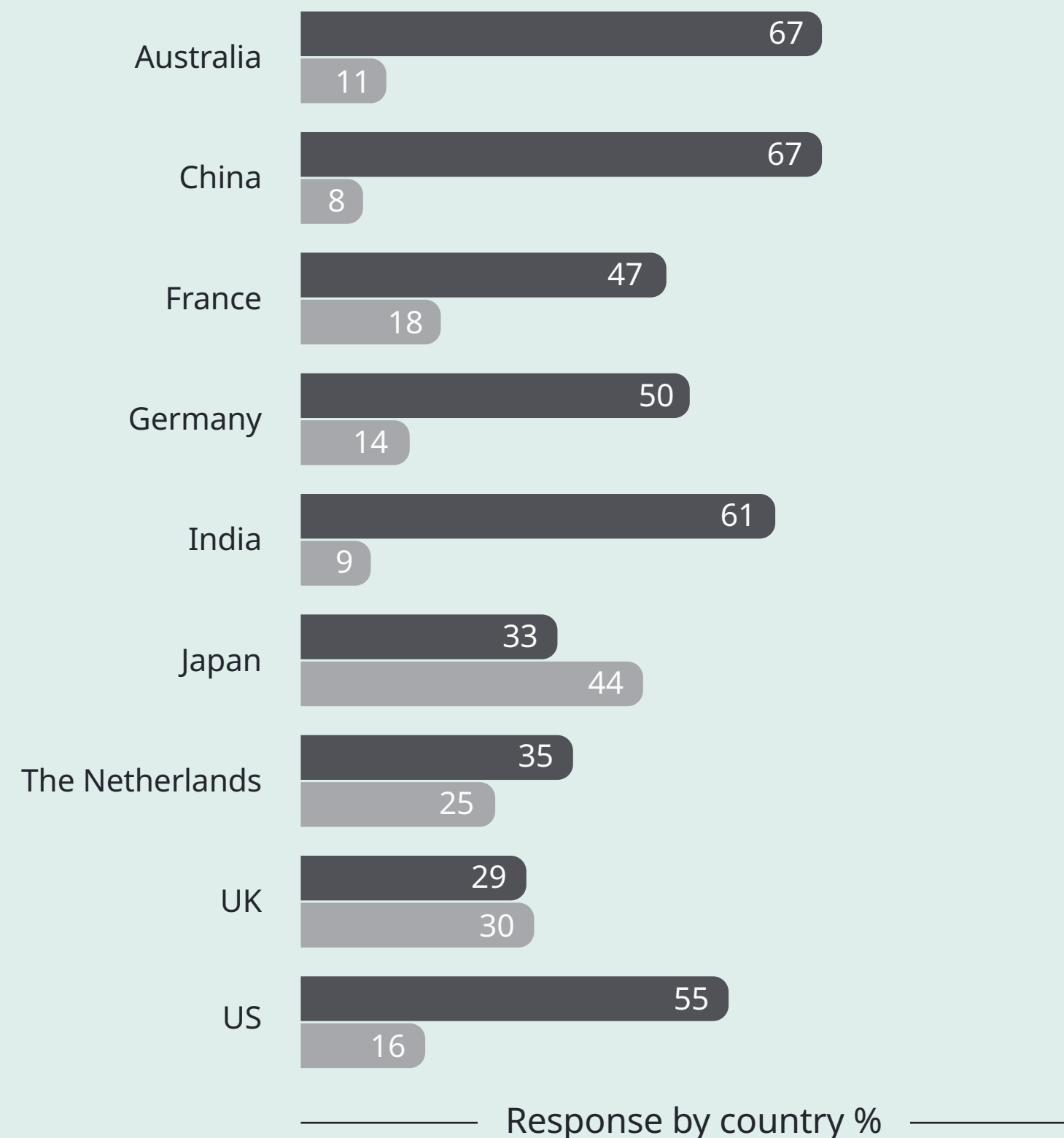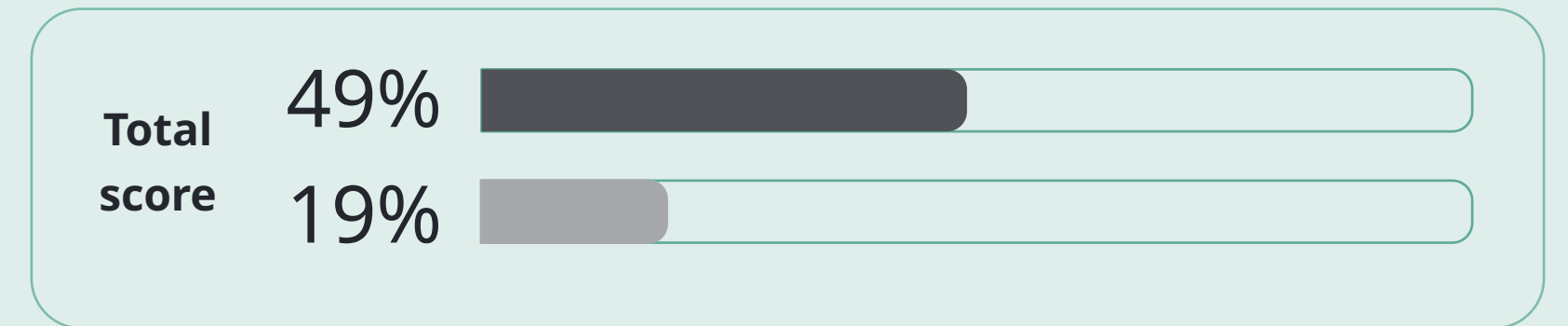59% of organizations globally are investing in process automation.

Investment

Money alone will not determine the successful roll-out of AI, but it can be seen as a statement of intent. While the majority of organizations are on course to prioritize spending on AI in the next five years, only 65% of those in Japan say this compared with 100% in China. There is a big gulf, too, between planned investment by SMEs compared with larger firms, with 62% of the latter planning major spending in the next five years against 41% for smaller firms.

Meanwhile, a quarter (24%) of built environment leaders say their organization is not investing in AI, along with two fifths of healthcare and 22% in food or farming (figure 1); all sectors in which AI could be transformational. Notably, 76% globally felt that if organizations do not invest in AI tools they will be at a competitive disadvantage, even as three in ten business leaders expressed concern that not enough was being invested in this.

Figure 1: AI investment

■ Investing more this year than last year in AI or AI enabled tools

■ Not currently investing in AI or AI-enabled tools

Total score
49%
19%

Response by country %

Country	Investing more	Not investing
Australia	67	11
China	67	8
France	47	18
Germany	50	14
India	61	9
Japan	33	44
The Netherlands	35	25
UK	29	30
US	55	16

Response by sector %

Sector	Investing more	Not investing
Built environment	46	24
Food/farming	46	22
Healthcare professionals	28	40
Life sciences	59	9
Retail	49	19
Technology	66	4
Transport/mobility	46	19

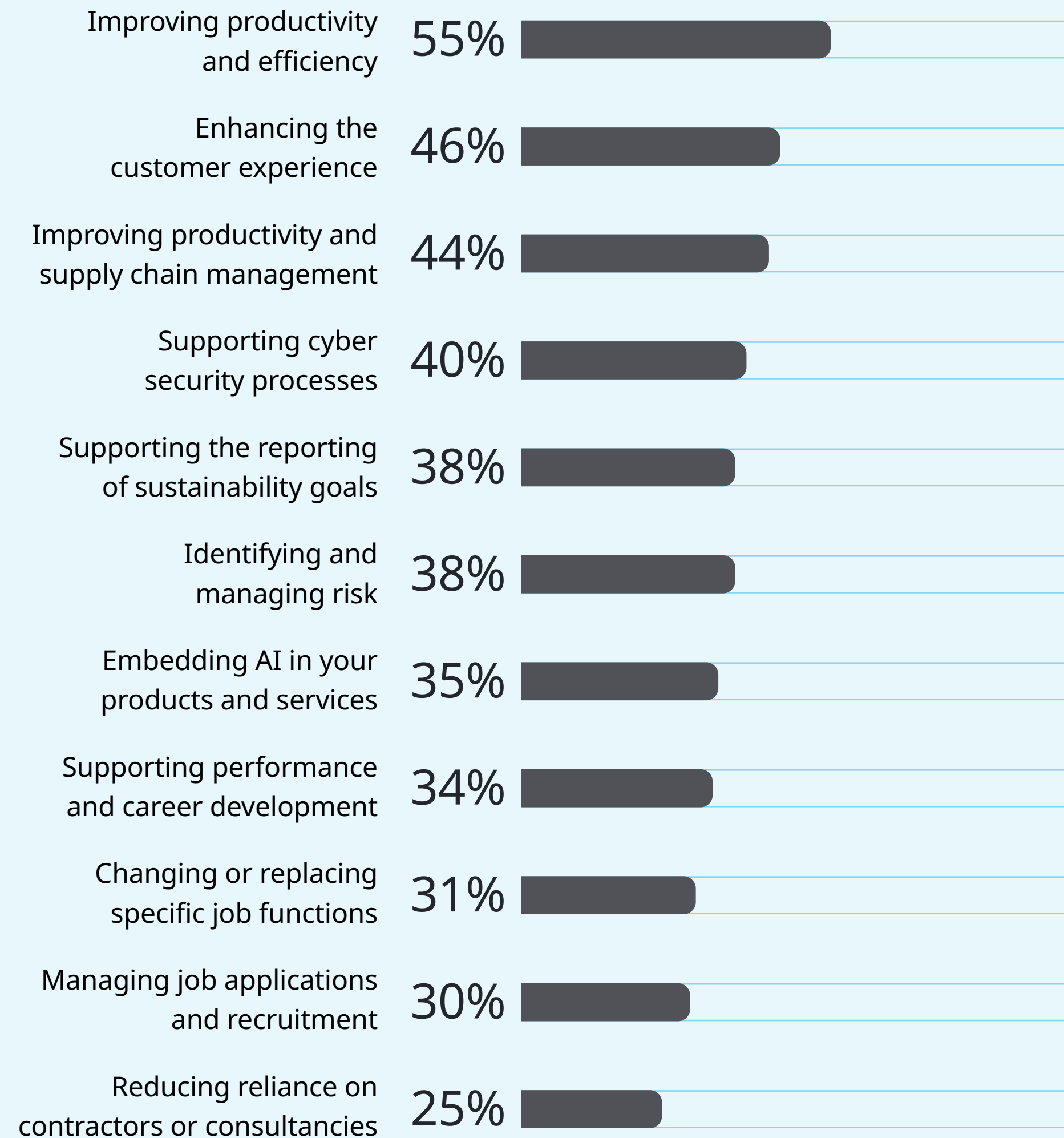Full question listings can be found in the appendix

Adoption

Organizations anticipate a wide range of functions to be disrupted by AI, with operations and marketing coming out top (56% and 54%) compared to just a fifth expecting legal departments to be impacted. For 55%, the key opportunity is around improving productivity and efficiency, closely followed by enhancing the customer experience including delivering better customer service (46%). However still a quarter see it as a tool to reduce reliance on contractors or consultancies.

Nearly two fifths (38%) expect to use AI to support the management, measurement and reporting of sustainability goals, while 40% expect to use it to support cybersecurity processes. Perhaps reassuringly, under a third globally (31%) anticipate AI changing or replacing specific job functions – and indeed healthcare, technology and the built environment are particularly enthused about using AI to improve productivity and efficiency (62%, 61% and 60%).

Figure 2: Do you anticipate your business using AI for any of the following purposes? *

Purpose	Percentage
Improving productivity and efficiency	55%
Enhancing the customer experience	46%
Improving productivity and supply chain management	44%
Supporting cyber security processes	40%
Supporting the reporting of sustainability goals	38%
Identifying and managing risk	38%
Embedding AI in your products and services	35%
Supporting performance and career development	34%
Changing or replacing specific job functions	31%
Managing job applications and recruitment	30%
Reducing reliance on contractors or consultancies	25%

* Base: All whose business is investing / likely to invest

62%

of healthcare professionals anticipate AI being used to improve productivity and efficiency

50%

of technology leaders expect AI to be used to support cybersecurity

35%

of life sciences leaders anticipate their businesses embedding AI in what it produces

52%

of Indian business leaders think AI will be used to support the management, measurement and reporting of sustainability goals - this drops to just 27% for Japan

36%

of those in the transport sector think AI will change or replace specific job functions
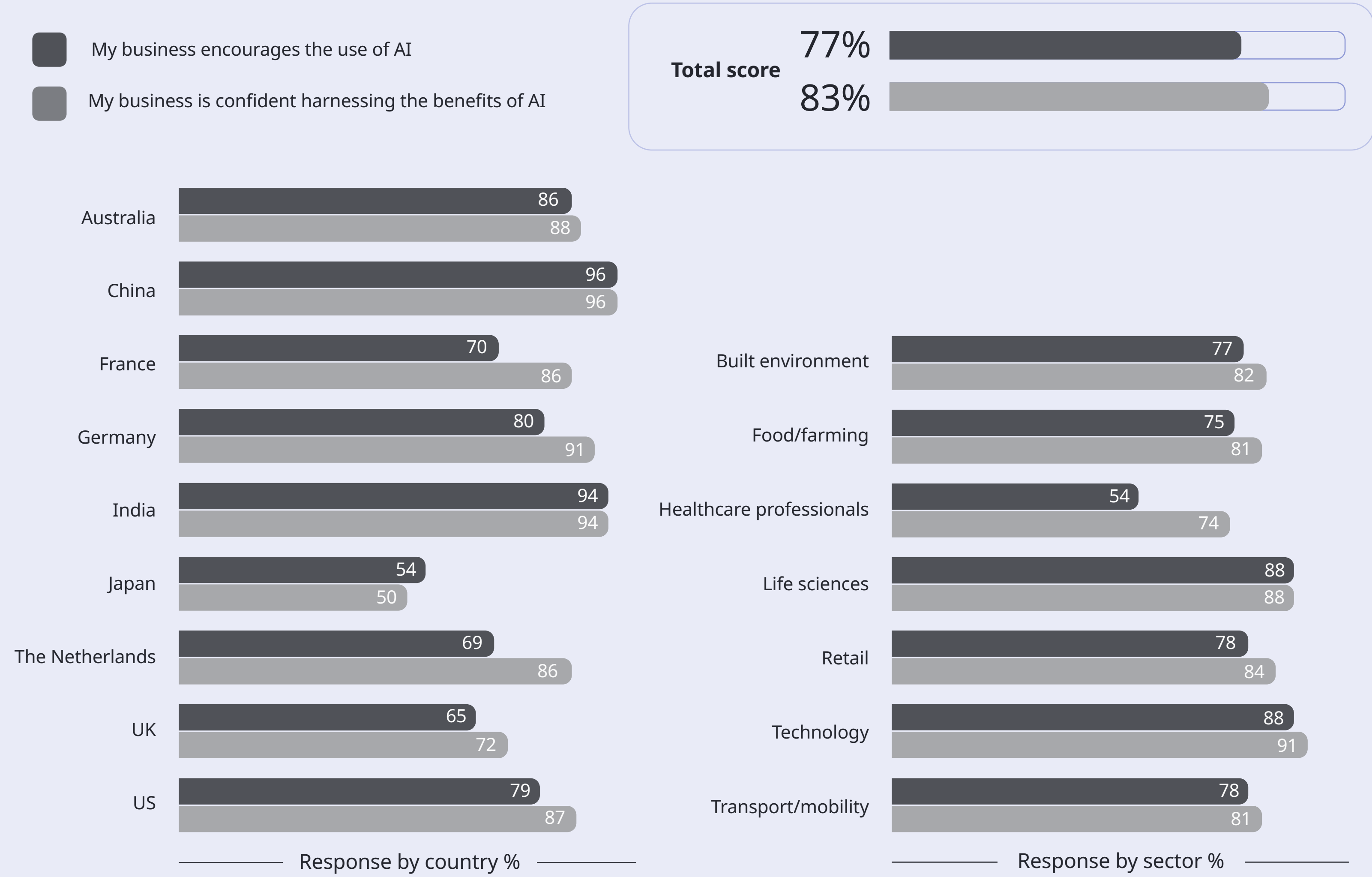
13%

of Chinese bussiness leaders expect AI to be used to manage job applications and recruitment – the lowest of any country

Confidence and appetite within the business

Business engagement with AI is high. Yet there are striking variances. Most say their businesses encourage the use of AI (77%), but this is most common in China (96%) and India (94%) and least in Japan (54%) and the UK (65%). A similar picture emerges in terms of confidence in their business's ability to harness the benefits of AI in Japan (50%) compared with China (96%).

Those in life sciences and technology are most likely to say their business encourages the use of AI (88%) but only 54% of those in healthcare say the same. Despite this, three quarters (74%) in healthcare say they are confident in business' ability to harness the benefits of AI (figure 3). When it comes to the systems and structures to support AI roll-out, it is notable that less than half of businesses globally have an AI strategy (44%) – falling to just 28% in the Netherlands and 21% in Japan. Only two fifths have a learning and development programme to ensure successful delivery of AI training, and only 38% are undertaking AI risk assessment.

Figure 3: Attitude towards AI use

Legend:
- My business encourages the use of AI
- My business is confident harnessing the benefits of AI

Total score
- 77%
- 83%

Response by country %
Country	My business encourages the use of AI	My business is confident harnessing the benefits of AI
Australia	86	88
China	96	96
France	70	86
Germany	80	91
India	94	94
Japan	54	50
The Netherlands	69	86
UK	65	72
US	79	87

Response by sector %
Sector	My business encourages the use of AI	My business is confident harnessing the benefits of AI
Built environment	77	82
Food/farming	75	81
Healthcare professionals	54	74
Life sciences	88	88
Retail	78	84
Technology	88	91
Transport/mobility	78	81

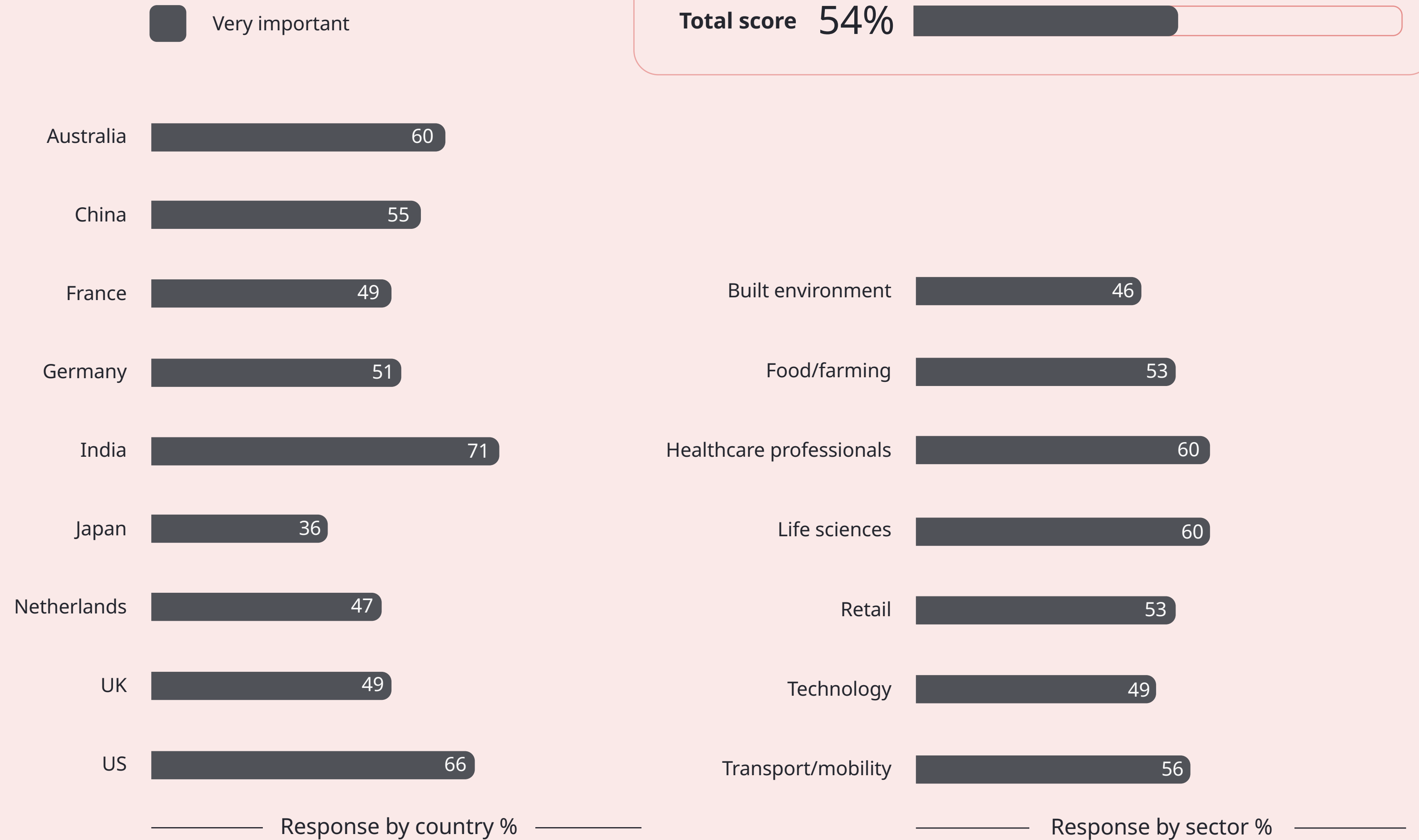Full question listings can be found in the appendix

Training

Nine in ten business leaders said offering training to ensure safe, ethical and effective use of AI was important (89%), and over half (54%) of these leaders said it was very important (figure 4). A similar proportion (87%) felt businesses have the responsibility to train teams in utilizing AI tools in order to protect jobs. Yet there was a sizeable gap between expectation and reality here.

While three quarters of businesses leaders globally (76%) said they were aware of their company offering training for employees in how to use AI tools safely and ethically, while also managing risk, only a third reported that training is of significant volume (33%). Only two fifths said their organizations had a specific learning and development programme to ensure successful delivery of AI training.

Figure 4: How important is it for your business to train employees about how to deploy AI tools safely, ethically and effectively?

■ Very important

Total score   **54%**

Response by country %

Country	Value
Australia	60
China	55
France	49
Germany	51
India	71
Japan	36
Netherlands	47
UK	49
US	66

Response by sector %

Sector	Value
Built environment	46
Food/farming	53
Healthcare professionals	60
Life sciences	60
Retail	53
Technology	49
Transport/mobility	56

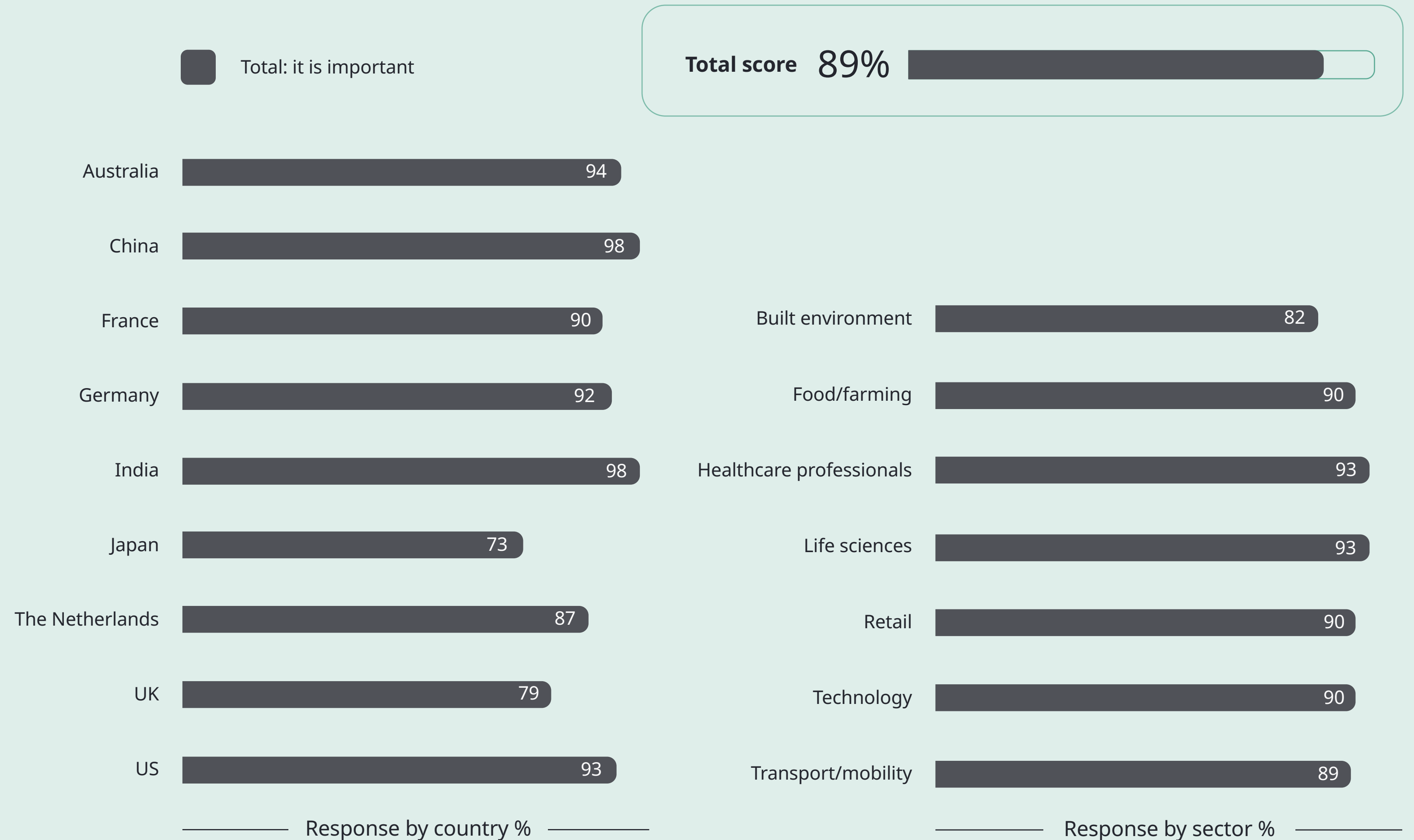Full question listings can be found in the appendix

35% say their business is involving employees in trialling or testing new AI tools to a significant extent.

Communications and engagement – internal

AI is already shaping business practice, so it stands to reason that 89% say that informing and consulting employees is important to ensure the safe, ethical and effective use of AI (Figure 5). Reassuringly, there is less of a mismatch here, but actions do vary significantly.

Overall, three quarters of organizations (74%) are informing employees about how AI is being used in the business or future plans, but under a third are providing a significant volume of information (32%). This is highest in China (93%) and India (90%) and lowest in Japan (53%) and the UK (58%). 17% of UK businesses and over one in ten in Japan, The Netherlands, Germany and France are not offering any such information. Two thirds of small businesses (65%) are providing this information, compared with 81% of larger ones, while AI information provision to employees is highest in life sciences (83%) and technology (83%) and lowest in healthcare (48%).
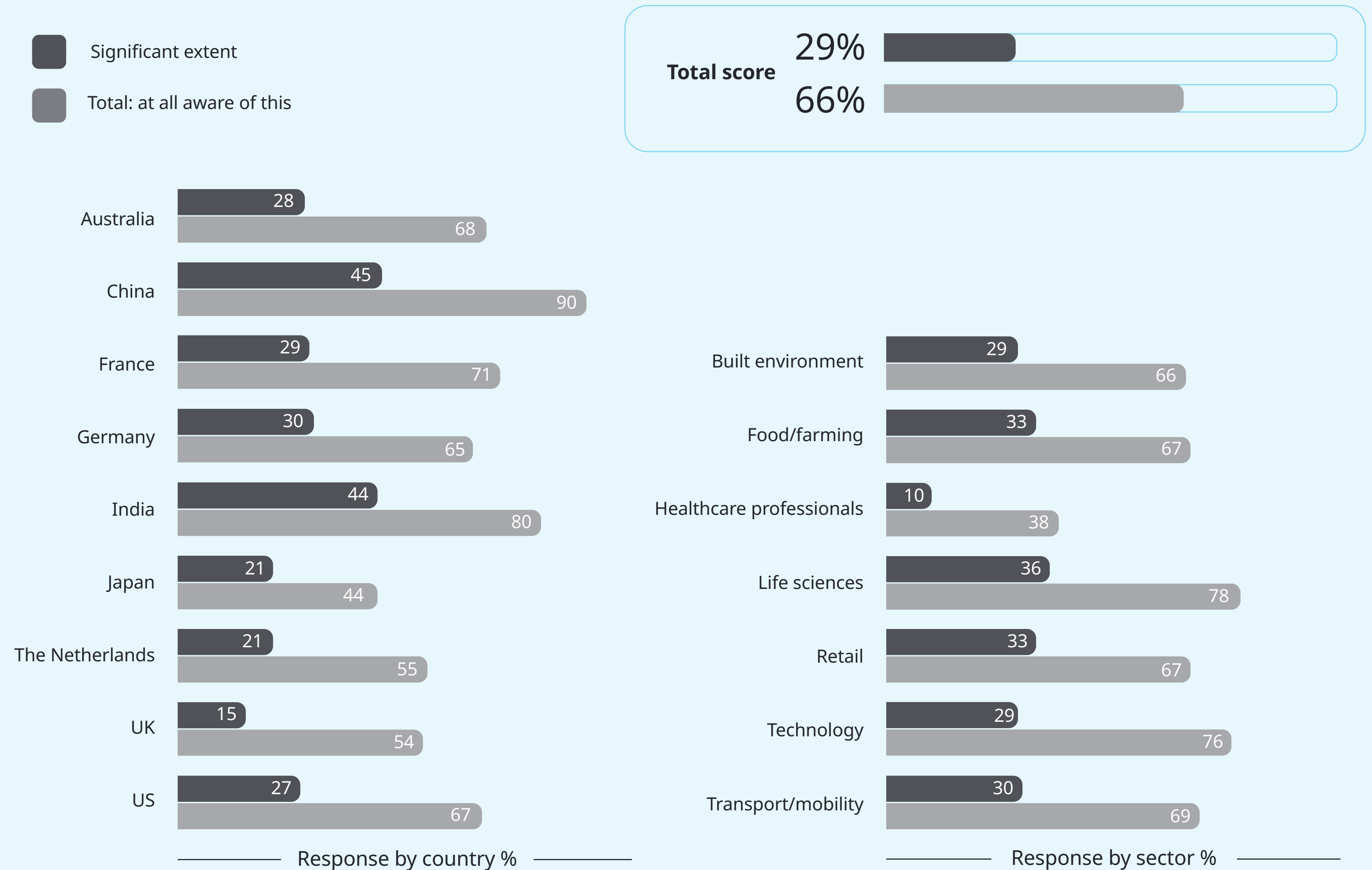
Figure 5: How important is it for your business to inform employees about how AI is being used in the business or future plans to use it?

■ Total: it is important

Total score 89%

Response by country %

Country	%
Australia	94
China	98
France	90
Germany	92
India	98
Japan	73
The Netherlands	87
UK	79
US	93

Response by sector %

Sector	%
Built environment	82
Food/farming	90
Healthcare professionals	93
Life sciences	93
Retail	90
Technology	90
Transport/mobility	89

Full question listings can be found in the appendix

Communications and engagement – external

70% say their organization is using AI to manage some aspects of the supply chain. 83% globally recognize the importance of informing businesses in the supply chain about how they are using AI or future plans to use it, and 82% say the same about customers. Again, however, it is not clear whether this is happening in reality. Only a third (32%) say their business is providing a significant volume of information to their supply chain about how AI is being used in the business or future plans to use it, and just a quarter (26%) are informing customers to the same degree about this. This rises to 29% for significantly involving customers to trial and test new AI tools, suggesting there is movement towards a two-way engagement before things are released (figure 6).

Figure 6: To what extent are you aware of your business involving customers trialling or testing new AI tools?

■ Significant extent

■ Total: at all aware of this

Total score
29%
66%

Response by country %

Country	Significant extent	Total: at all aware of this
Australia	28	68
China	45	90
France	29	71
Germany	30	65
India	44	80
Japan	21	44
The Netherlands	21	55
UK	15	54
US	27	67

Response by sector %

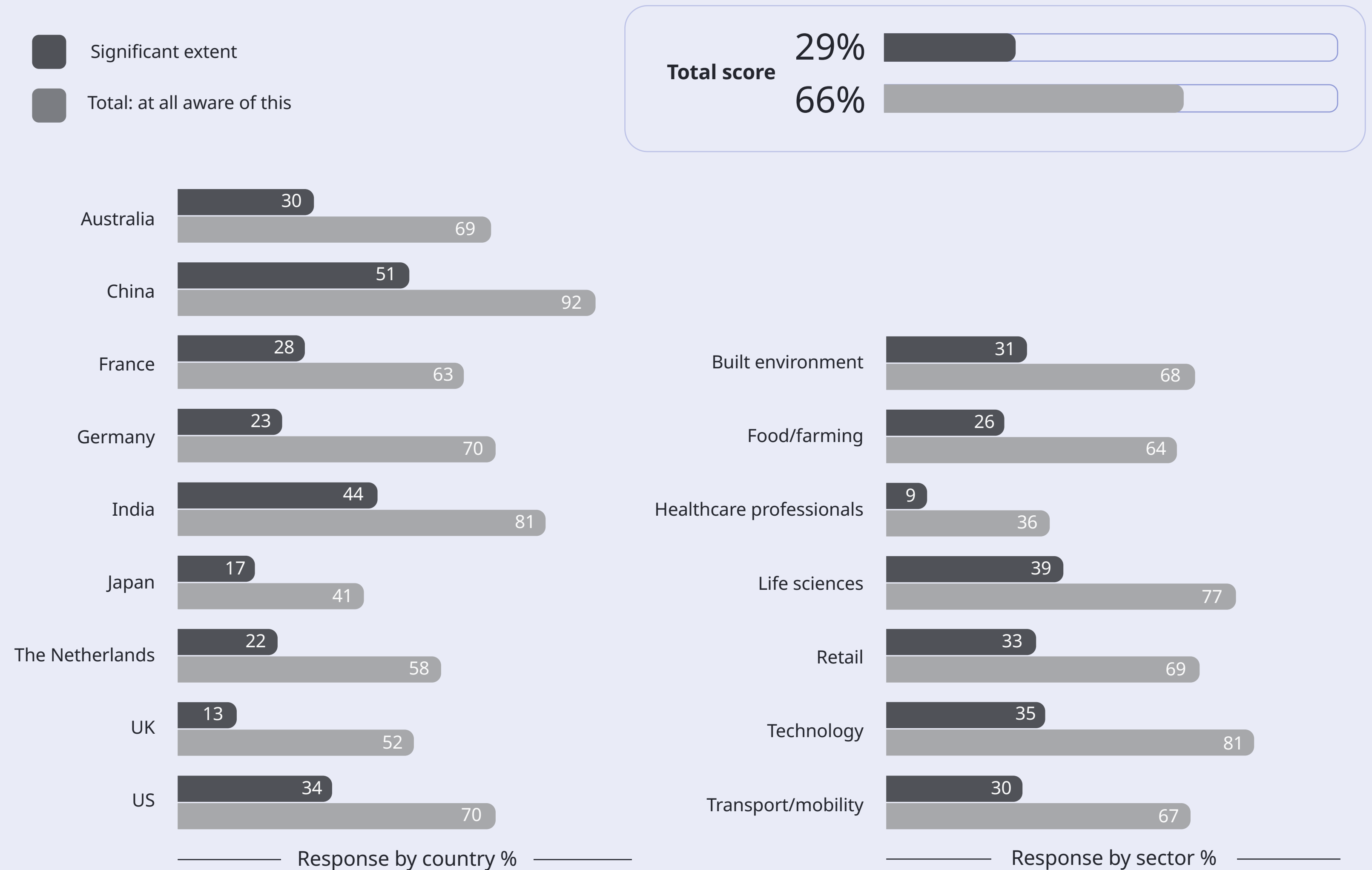| Sector	Significant extent	Total: at all aware of this
Built environment	29	66
Food/farming	33	67
Healthcare professionals	10	38
Life sciences	36	78
Retail	33	67
Technology	29	76
Transport/mobility	30	69

Full question listings can be found in the appendix

83% globally say it is important for businesses to implement policies and processes regarding the safe and ethical use of AI.

Safety and guardrails

While policymakers consider whether to introduce AI regulation, if the EU AI Act is the right model, or whether we should install international guidelines for the safe, ethical and responsible development of AI, there is overwhelming support for such guidance from business leaders. Two thirds say these measures are extremely important (65%), rising to 81% for India and 78% for the US. In total, 97% say these are at least somewhat important. However only one in three (29%) are aware of significant moves by their organization to implement policies and processes regarding the safe, ethical use of AI, for example the implementation of the AI standard, ISO/IEC 42001 (figure 7). There is a clear opportunity to respond to the recognized need for guardrails and to put them in place, helping to build trust in AI.

Figure 7: To what extent are you aware of your business implementing policies and processes regarding the safe and ethical use of AI?

■ Significant extent

■ Total: at all aware of this

Total score 29%
66%

Response by country %

Country	Significant extent	Total: at all aware of this
Australia	30	69
China	51	92
France	28	63
Germany	23	70
India	44	81
Japan	17	41
The Netherlands	22	58
UK	13	52
US	34	70

Response by sector %

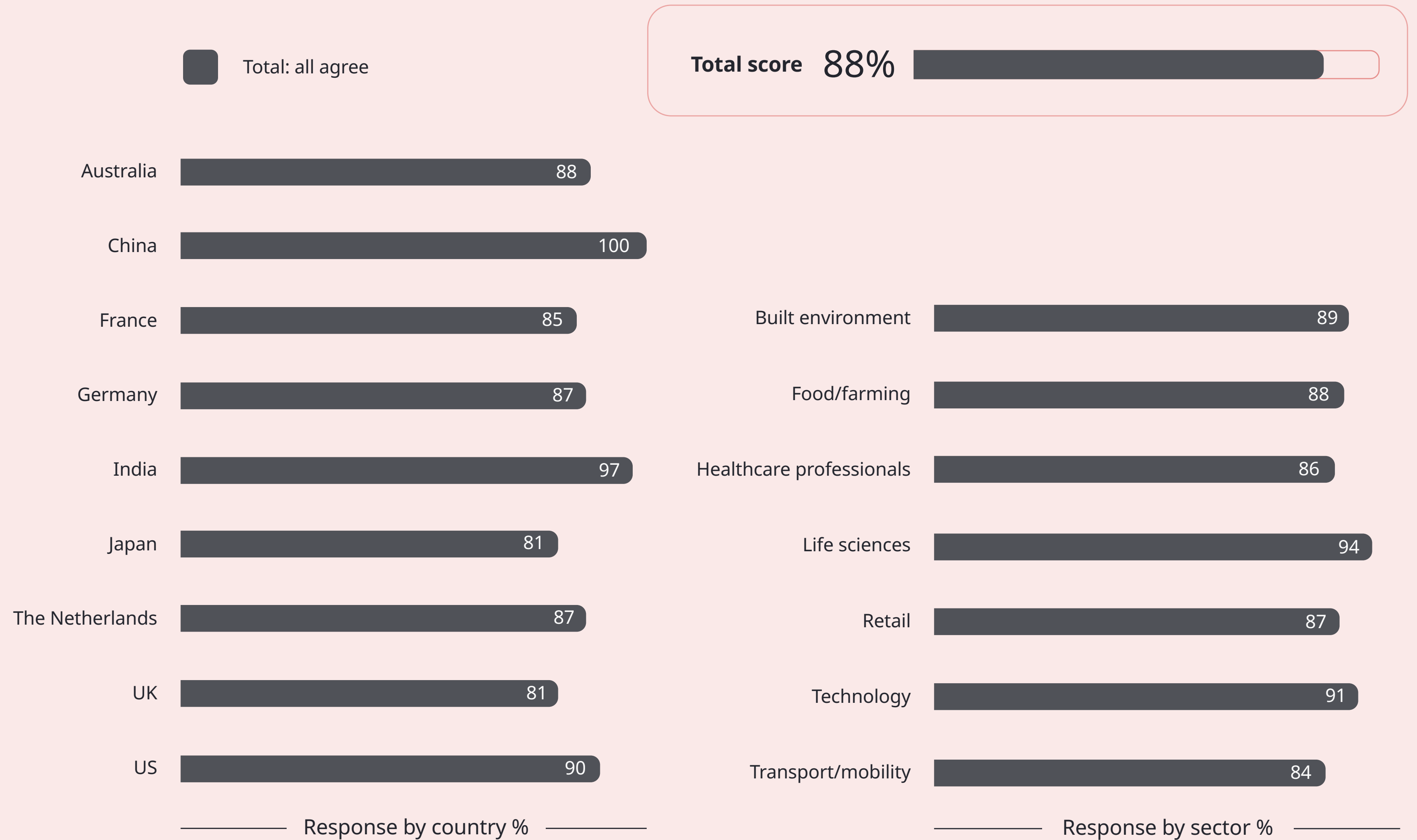| Sector	Significant extent	Total: at all aware of this
Built environment	31	68
Food/farming	26	64
Healthcare professionals	9	36
Life sciences	39	77
Retail	33	69
Technology	35	81
Transport/mobility	30	67

Progressing innovation

The vast majority globally, in all markets and sectors, believe that organizations have a responsibility to promote and support innovation in society, meaning there is strong recognition for the role they have to inspire trust in AI in their wider ecosystem. Innovation is a particular focus for life sciences (94%) and technology (91%); two sectors in which this is perhaps integral to success (figure 8). A slightly lower proportion say AI tools should be embraced, even if some jobs change or are lost as a result (72%), recognizing inevitable changes to the workforce catalyzed by this technology.

Two thirds (65%) agree that innovation is more important than protecting existing jobs – however a high number also reject this statement, including 37% in the UK, 38% in France and 37% in healthcare. Going forwards, business leaders will need to strike a balance between encouraging innovation and reassuring employees that they will be a part of this future.

Figure 8: Businesses or organizations have a responsibility to promote and support innovation in society

Total: all agree

Total score 88%

Response by country %

Country	Value
Australia	88
China	100
France	85
Germany	87
India	97
Japan	81
The Netherlands	87
UK	81
US	90

Response by sector %

Sector	Value
Built environment	89
Food/farming	88
Healthcare professionals	86
Life sciences	94
Retail	87
Technology	91
Transport/mobility	84

Trust in AI

Both trust in and enthusiasm for AI is growing. Globally, 78% say they have greater trust in AI than a year ago, although there is a divide here: a quarter (24%) in the UK and 21% in France disagree. Trust is also lower amongst those working in healthcare and transport. And while 80% say they are more excited about the potential use of AI by business than a year ago, over half (52%) also say they are more worried about this today – indicating the complex relationship society have with AI. A year in which both negative stories about AI and examples of its potential to transform society has become commonplace have clearly had an impact on attitudes. Notably, 78% think their business should be doing more to build trust in AI amongst employees – indicating a desire for organizations to play a leading role in shaping trust in AI.

Total agree

52%

Total disagree

39%
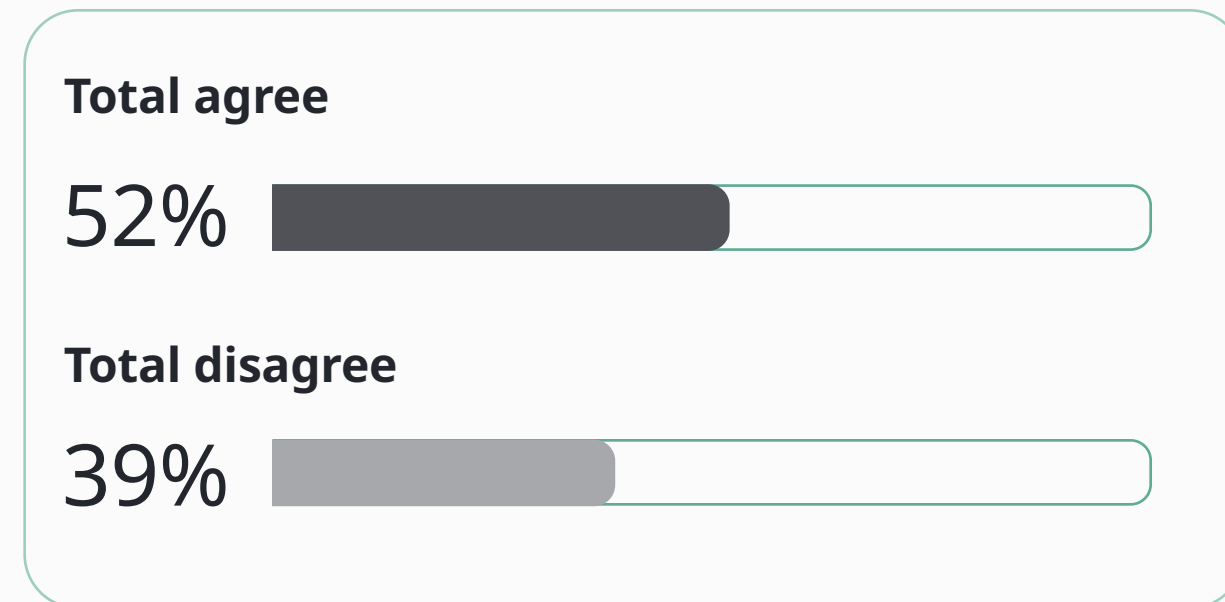
Figure 9: I am more worried about the potential use of AI by business than a year ago

■ Strongly agree

■ Agree

■ Disagree

□ Strongly disagree

Response by country %

Australia: 20, 38, 27, 4
China: 11, 25, 46, 13
France: 24, 37, 27, 7
Germany: 28, 35, 22, 10
India: 33, 30, 23, 6
Japan: 17, 29, 32, 10
The Netherlands: 16, 41, 24, 3
UK: 14, 26, 38, 7
US: 16, 28, 38, 13

Response by sector %

Built environment: 25, 30, 28, 6
Food/farming: 21, 36, 25, 10
Healthcare professionals: 9, 35, 38, 2
Life sciences: 29, 26, 31, 8
Retail: 16, 30, 34, 10
Technology: 16, 36, 33, 7
Transport/mobility: 22, 33, 26, 11

Full question listings can be found in the appendix

Focus on building trust

Business leaders in India and China have the greatest expectation of organizations having a role to play in building trust in AI across society. Globally, the picture is fairly consistent, with respondents seeing a trust-building role for businesses with regard to customers (85%), employees (88%) and society (85%).
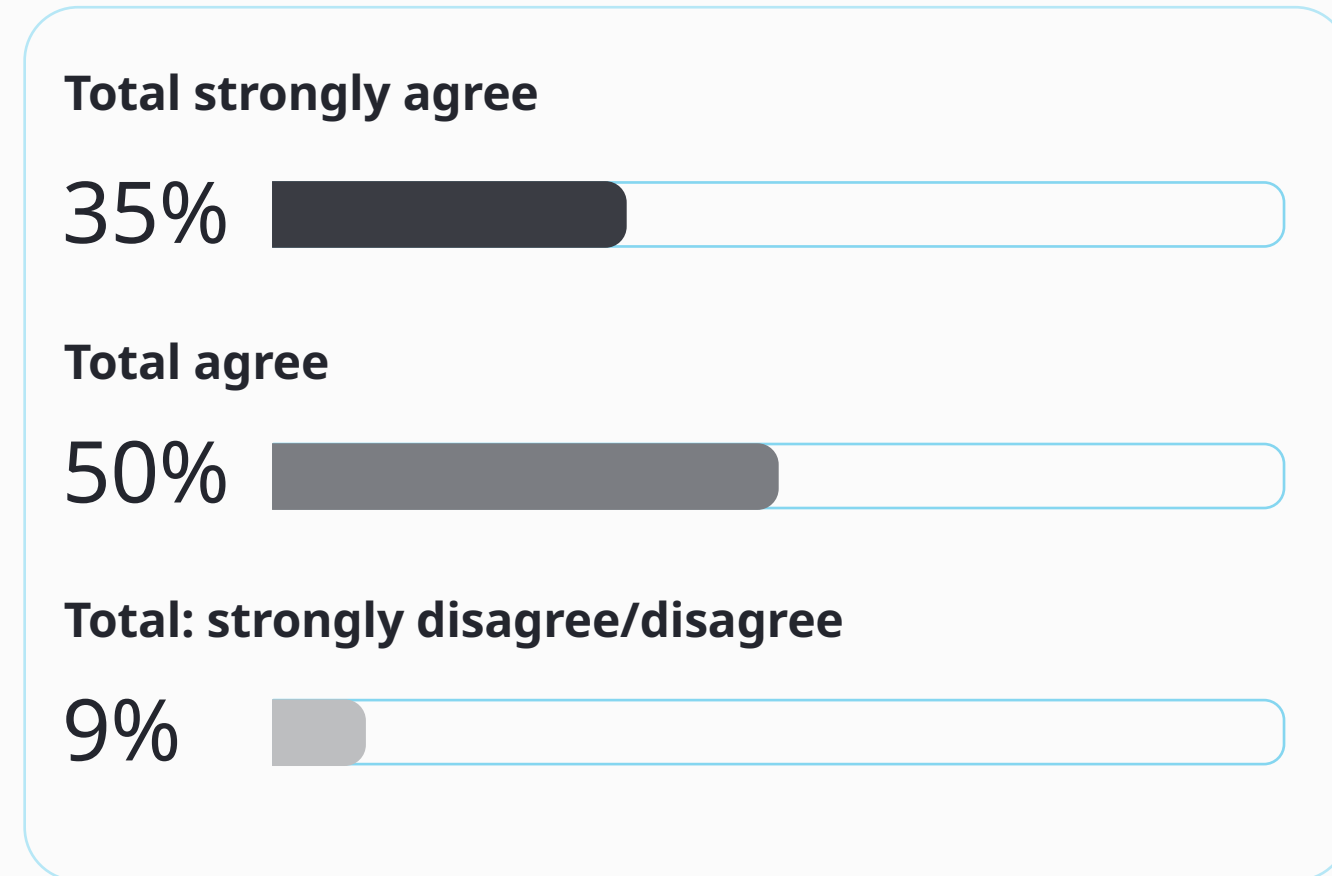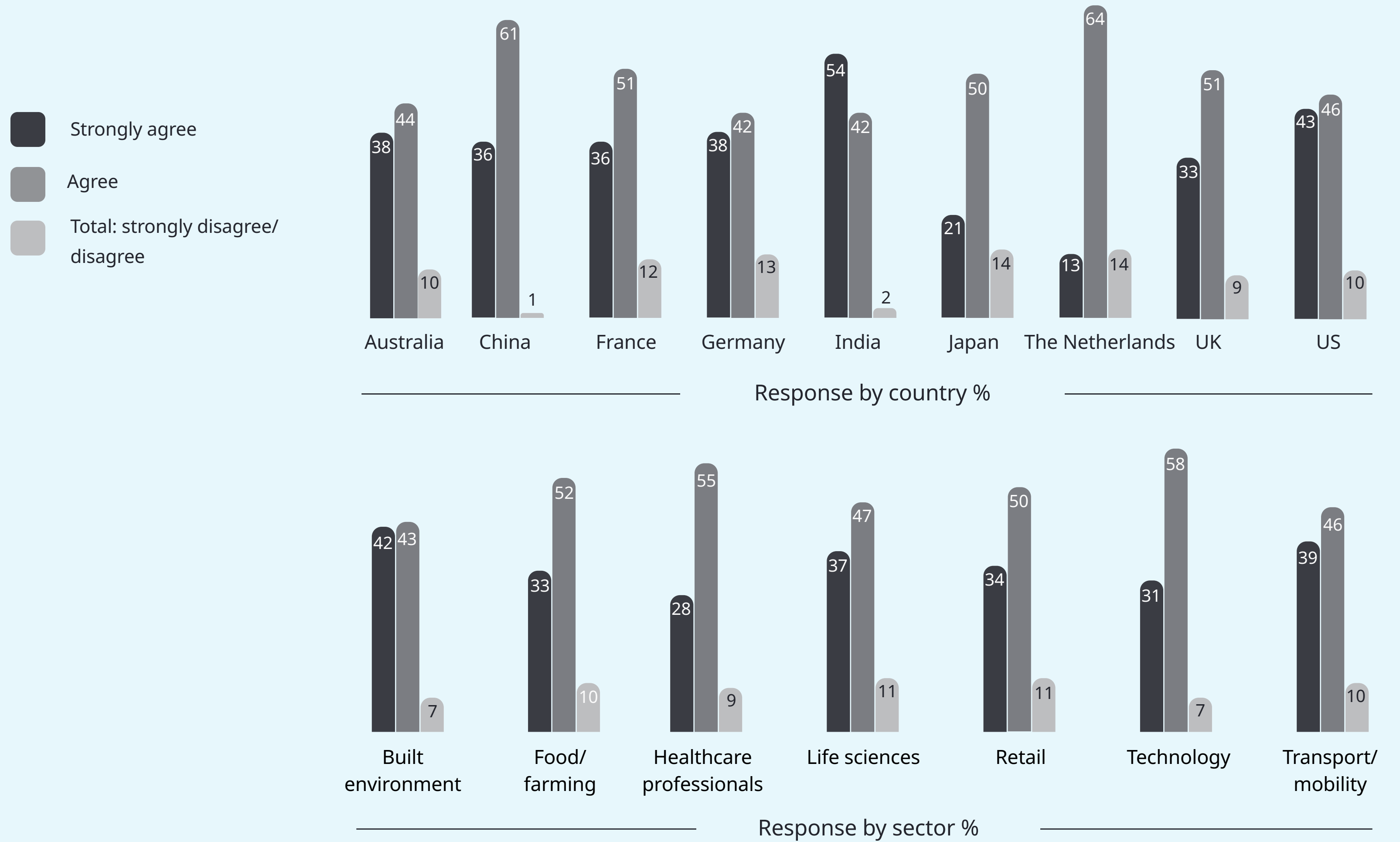
Total strongly agree

35%

Total agree

50%

Total: strongly disagree/disagree

9%

Figure 10: Businesses or organizations have a role to play in building trust in AI amongst society

Legend:
- Strongly agree
- Agree
- Total: strongly disagree/disagree

Response by country %

	Australia	China	France	Germany	India	Japan	The Netherlands	UK	US
Strongly agree	38	36	36	38	54	21	13	33	43
Agree	44	61	51	42	42	50	64	51	46
Total: strongly disagree/disagree	10	1	12	13	2	14	14	9	10

Response by sector %

	Built environment	Food/ farming	Healthcare professionals	Life sciences	Retail	Technology	Transport/ mobility
Strongly agree	42	33	28	37	34	31	39
Agree	43	52	55	47	50	58	46
Total: strongly disagree/disagree	7	10	9	11	11	7	10

Full question listings can be found in the appendix

Organization size

One of the starkest indications of maturity related to the size of a business is that on almost all measures, organizations with more than 250 employees have made greater progress on activities and actions around AI adoption than SMEs. Mid-sized or larger organizations have greater confidence and are investing more, but are also more likely to be putting in place the training, communications and guardrails necessary to make AI adoption a success.

Digging into the details, medium-size organizations (those with between 250 and 999 employees) display stronger maturity in terms of actions already being taken, but larger organizations (those with more than 1,000 employees) are more mature in their attitudes towards AI, seeing it as an opportunity accelerator.

Figure 11: Investment

Which of the following is applicable?

Investing more this year than last in AI or AI related tools
- 37%
- 58%

Not currently investing in AI or AI related Tools
- 31%
- 11%

Total: all investing in AI
- 69%
- 89%

Total: total increased investment
- 46%
- 65%
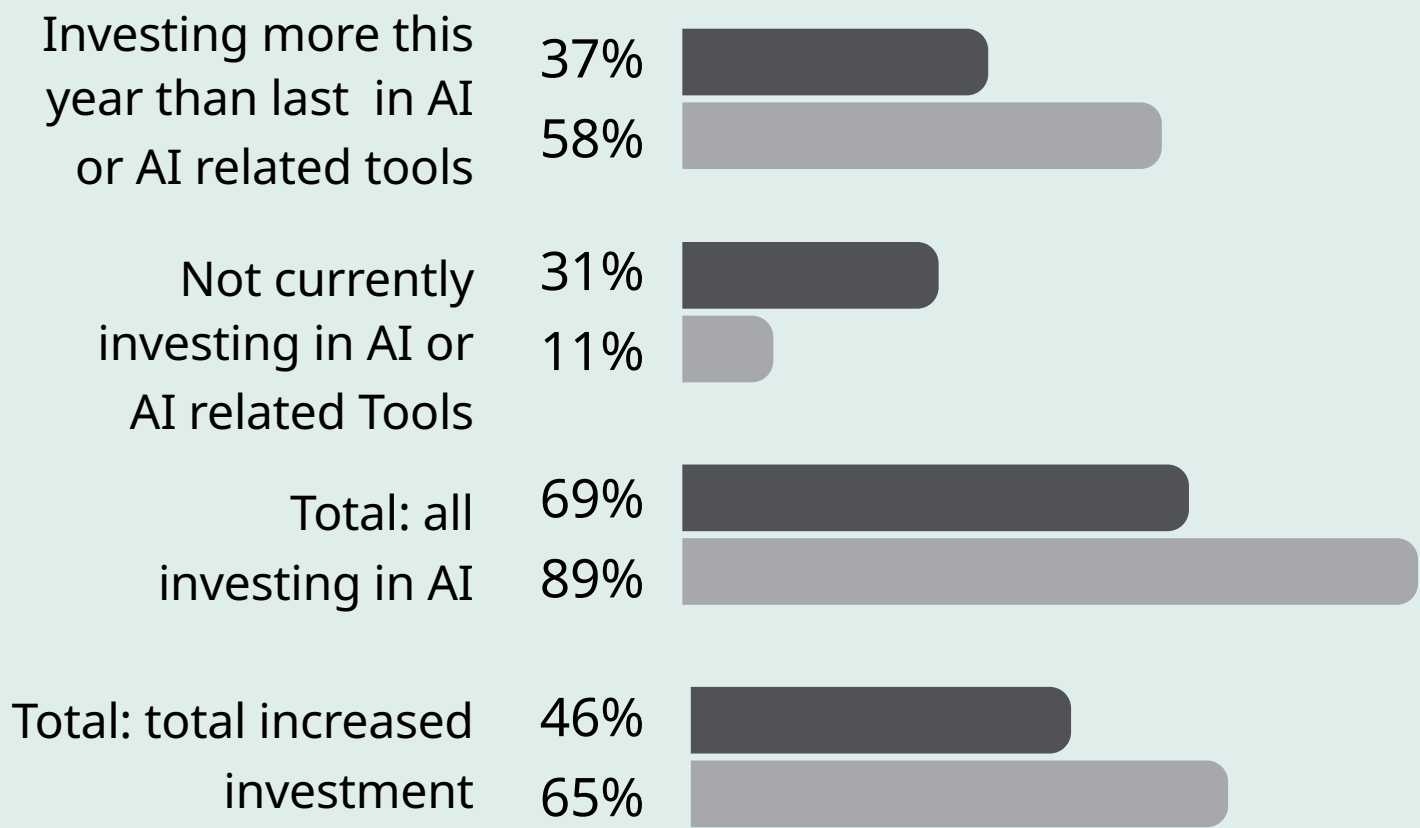
Organization size:

- 0-249
- 250+

Figure 12: Adoption

Expected use of AI*

Improving productivity and efficiency
- 53%
- 56%

Enhancing the customer experience
- 44%
- 48%

Improving productivity or supply chain management
- 41%
- 45%

Supporting cyber security processes
- 33%
- 45%

Supporting the reporting of sustainability goals
- 30%
- 44%

Identifying and managing risk
- 35%
- 40%

Embedding AI in your products and services
- 34%
- 35%

Supporting performance and career development
- 28%
- 38%

Changing or replacing specific job functions
- 26%
- 33%

Managing job applications and recruitment
- 24%
- 34%

Reducing reliance on contractors or consultancies
- 23%
- 26%

* Base: All whose organization is investing / likely to invest

Smaller businesses appearing less mature than larger ones is not surprising, given that the latter have greater resources to draw on, both financially and in terms of data scientists and AI expertise. Also, those with shareholders may be acting in response to shareholder pressure. At the same time, smaller businesses stand to benefit from AI, not least in terms of the efficiencies it can offer to organizations without great capacity. For example, automating tasks or using AI to analyse data can in the long run bring huge benefits to businesses without dedicated teams.

For society to harness AI for societal good, there is an opportunity for mid-size and large organizations to partner with small businesses, including in their supply chain, to share successes with AI and support adoption across the value chain.

Figure 13: Confidence and appetite

Which of the following is applicable?

My business encourages the use of AI
- 67%
- 84%

My business is confident harnessing the benefits of AI
- 76%
- 89%
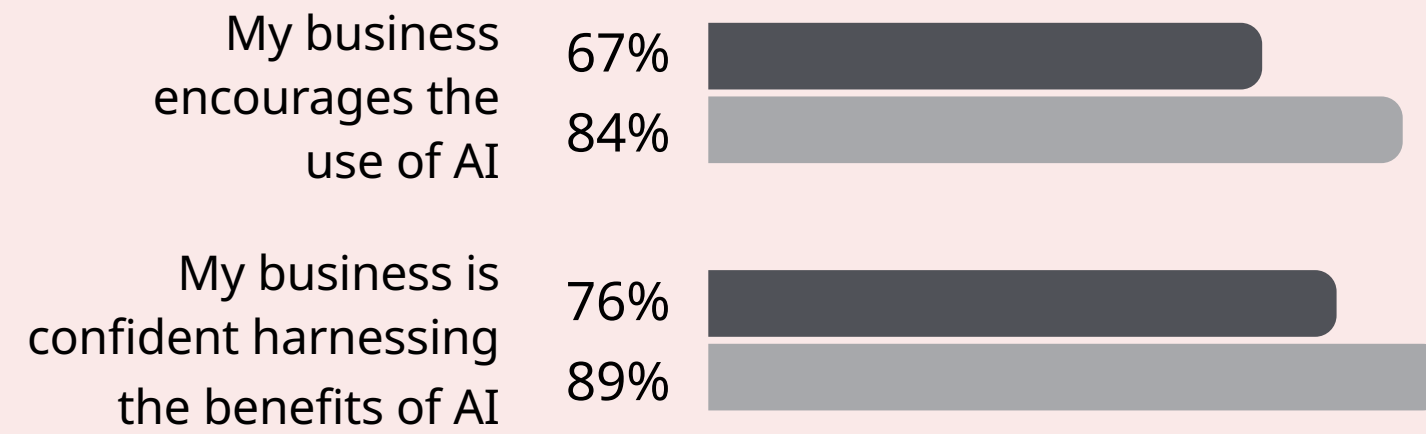
Figure 14: Training

How important is it for your business to train employees about how to deploy AI tools safely, ethically and effectively

Very important
- 46%
- 59%
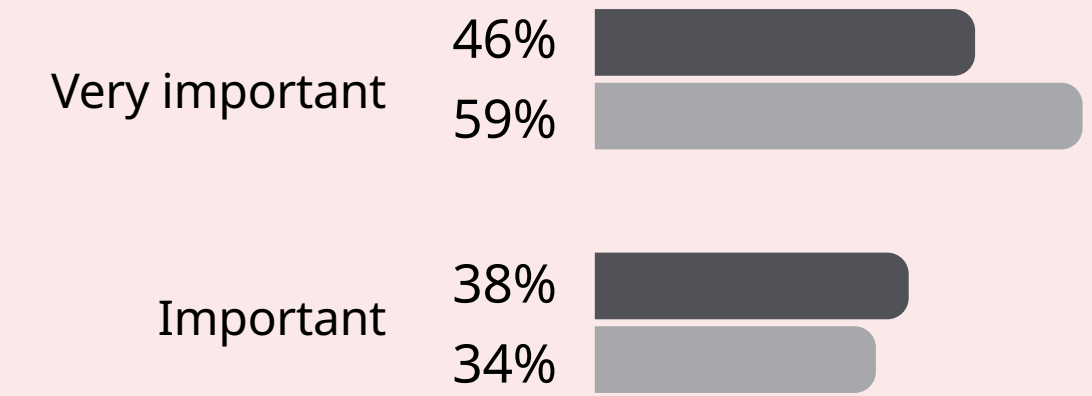
Important
- 38%
- 34%

Figure 15: Internal communication

How important is it for your business to inform employees about how AI is being used in the business or future plans

Very important
- 42%
- 52%

Important
- 43%
- 41%

Not important
- 9%
- 4%

Organization size:

■ 0-249   ■ 250+
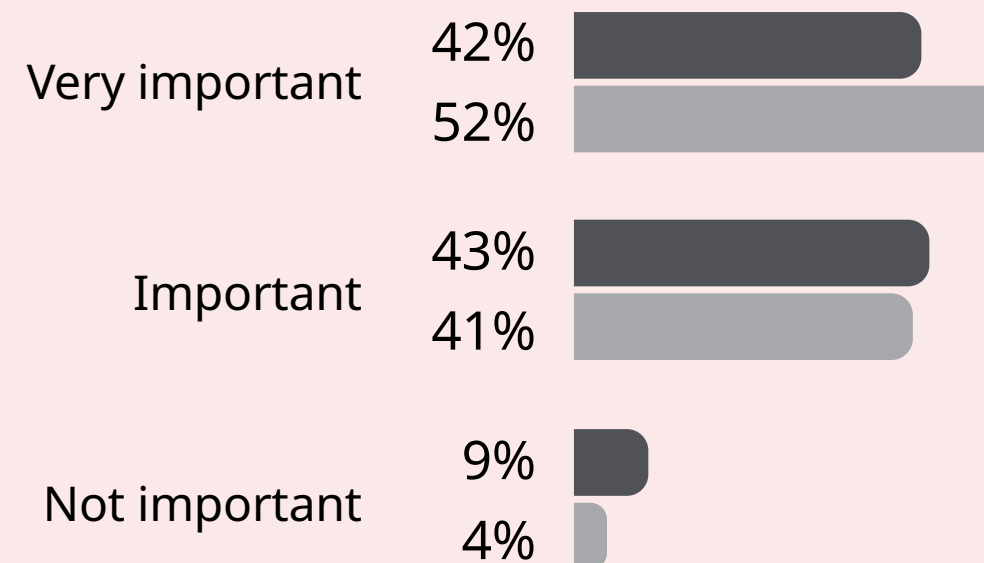
Figure 16: External engagement

To what extent are you aware of your business involving customers trialling or testing new AI tools

Significant extent
- 23%
- 33%

Some extent
- 34%
- 40%

Not at all
- 15%
- 13%

Total: at all aware
- 57%
- 74%
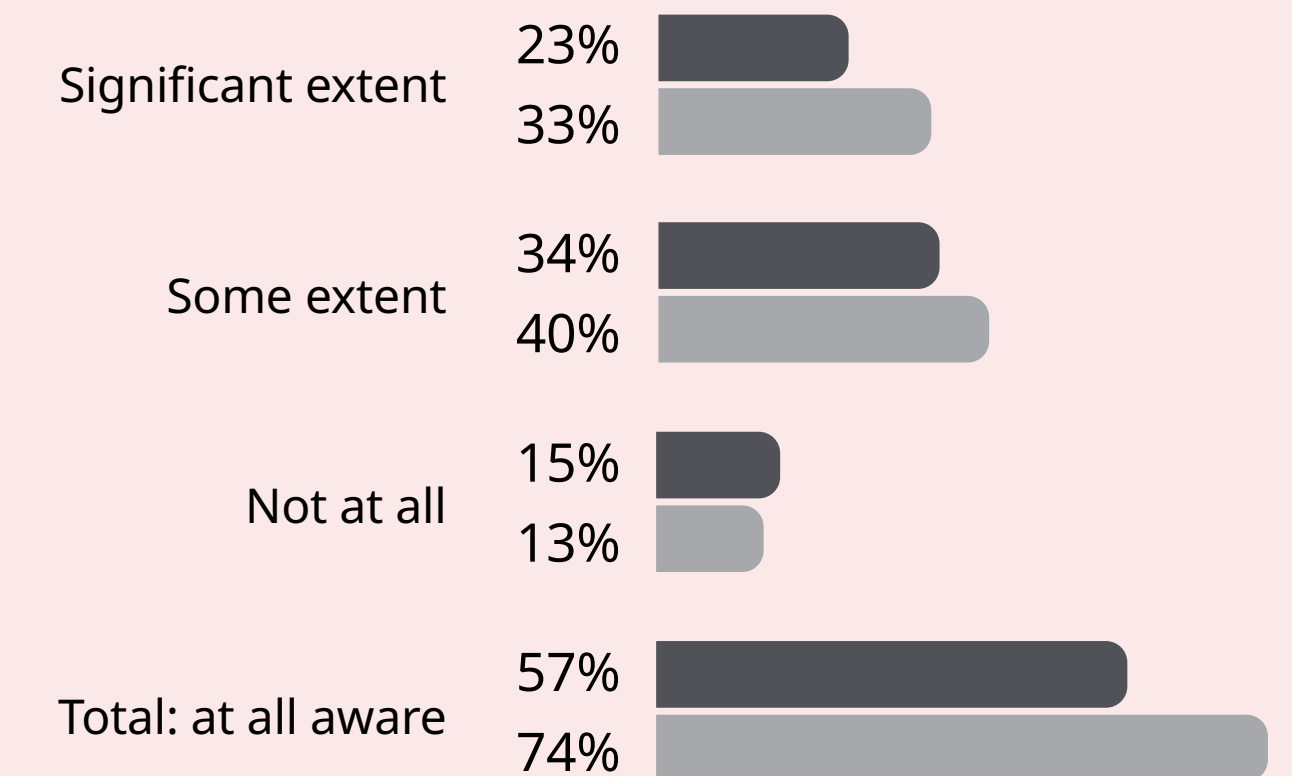
Figure 17: Safety and guardrails

To what extent are you aware of your business implementing policies and processes regarding the safe and ethical use of AI?

Significant extent
20%
36%

Some extent
35%
39%

Not at all
13%
9%

Organization size:

■ 0-249   ■ 250+
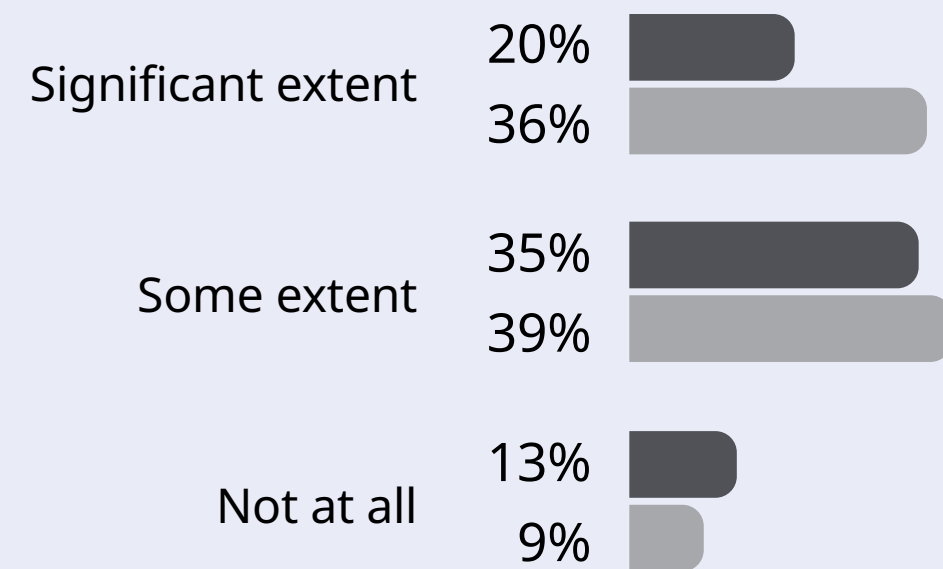
Figure 18: Progressing innovation

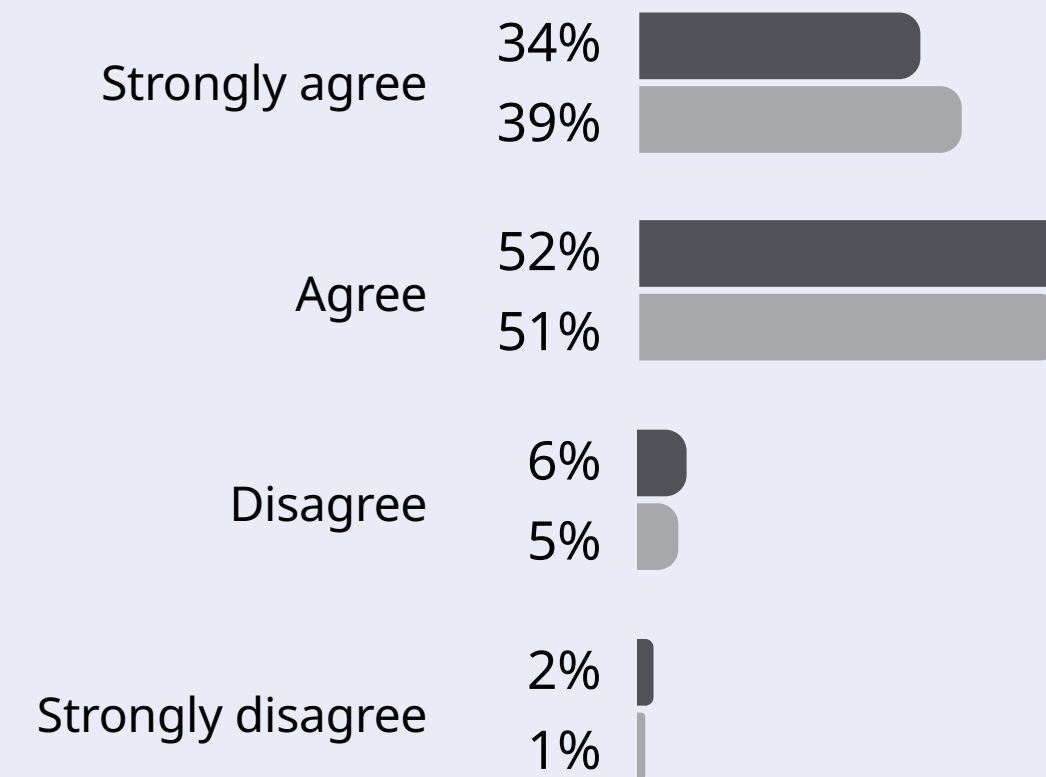Organizations have a responsibility to promote and support innovation in society

Strongly agree
34%
39%

Agree
52%
51%

Disagree
6%
5%

Strongly disagree
2%
1%

Figure 19: Trust in AI

I am more worried about the potential use of AI by business than a year ago

Strongly agree
16%
23%

Agree
32%
33%

Disagree
32%
30%

Strongly disagree
8%
8%
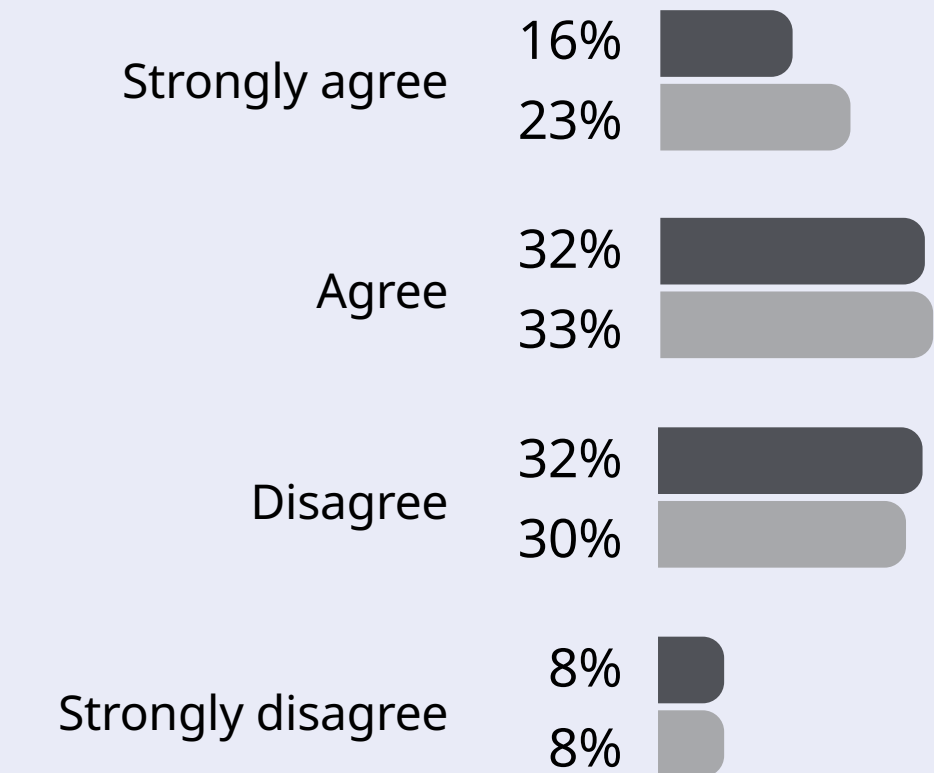
Figure 20: Focus on building trust

Organizations have a role to play in building trust in AI amongst society

Total: agree
79%
89%
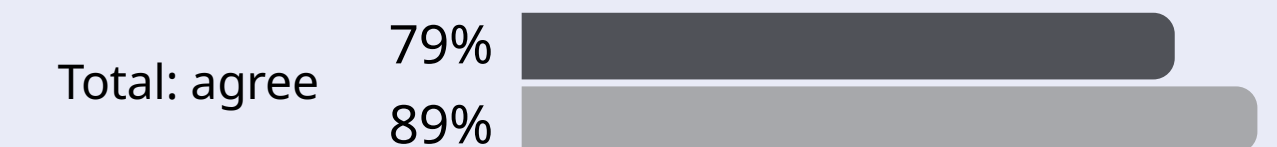
Chapter three

Key takeaways

The data offers a number of learnings on how organizations can act to shape trust in AI across their ecosystems and wider society, so that AI can be realized as a force for good.

Think long-term

Look at AI as part of your wider business strategy.

AI strategy cannot be unpicked from wider business strategy nor developed in isolation. Nor is it simply about investing more or creating new job titles. Forward-thinking organizations will already be planning ahead, looking across their investment, people and training needs, or thinking proactively about how to strengthen supply chains and bolster customer relationships. Developing a long-term AI strategy will be a critical component – not as a bolt-on for the technology team, but as a core element for the C-Suite to respond to.

Those organizations that take a long-term look at their business strategy and consider what they are trying to achieve with AI, which technology meets their needs and what challenges might need to be mitigated, will be well placed to effectively integrate trusted AI into their operations. Once the foundations are in place, organizations can optimize and evolve their AI strategy as technology advances.

Businesses and policymakers should collaborate across borders:

Innovate with AI, but do so safely.

The goal must be to innovate with AI, but to do so safely. 97% of people say international guidelines are important for the safe, ethical and responsible development of AI. Alongside regulatory routes, cross-border collaboration can offer necessary protections for our AI future. Businesses and policymakers should proactively support this.

Such a framework could build on the AI management system standard (BS ISO/IEC 42001) to support the safe roll-out of AI, in a form that is flexible enough to foster innovation but robust enough to build societal trust.

Move from intention to action:

Instil trust in AI by clarifying priorities and accelerating progress towards them.

There is a gulf between what business leaders say are priorities to instil trust in AI and the extent to which action is being taken, whether around guardrails, training or stakeholder engagement.

To overcome this mismatch, now is a key moment to accelerate progress on these points. This includes building trust with staff, suppliers and customers by consulting and communicating with all those in the wider business ecosystem about when, how and why AI is being used, or how roles might change, so they can be partners in progress.

Lead and inspire

Set the standard for an AI future in which the technology is a force for good

Businesses will be at the vanguard of the AI transformation. They have a powerful opportunity to inspire wider society as to how AI can be a force for good, which in turn can help build confidence. Some sectors or countries are further ahead with AI adoption than others, including larger organizations. Those making use of AI have a role to play in fostering discussion amongst organizations and the public both about how AI can benefit society in practice, and about the necessary checks and balances that sit alongside this.

This includes embedding high standards from the outset – with businesses leaders working out how to integrate AI in a way that builds trust with all stakeholders while also continuously learning from the example set by others.

Appendix

International AI Maturity Model questions

The Model has been developed based on the global responses to the following survey questions:

Which of the following is applicable?

My business is investing more this year than last year / the same amount / less / for the first time / not investing in AI or AI-enabled tools to improve operations or performance

Which of the following is applicable?

In the next five years my business is likely to invest a major amount / a small amount / invest for the first time / not likely to invest in AI or AI-enabled tools

Your business is using or plans to invest in AI in the next 5 years, which AI technologies are being used or invested in?

Text based AI / Computer Vision / Voice AI / Machine Learning / Process automation

Your business is using or plans to invest in AI in the next 5 years, which business functions do you expect to be impacted?

Marketing / Sales / Finance / Operations / Legal / Procurement / HR / Other

Which of the following is applicable?

I think my business is currently investing the right amount / not currently investing enough / currently investing too much in AI tools

My business encourages the use of AI?

Yes / No

I am confident in my business's ability to harness the benefits of AI?

Yes / No

Your business does not encourage the use of AI, why not?

Lack of trust or ethical concerns / Lack of understanding / Cost / Lack of skilled staff / Other / Not sure

Do you anticipate your business using AI for any of the following purposes?

Improving productivity and efficiency among employees / Delivering better customer service / Improving productivity and efficiency of supply chain management / Embedding AI in the products or services you deliver to customers / Managing job applications and recruitment / Changing or replacing specific job functions / Supporting performance management and career development / Supporting cybersecurity processes / Supporting the management, measurement and reporting of sustainability goal / Reducing reliance on contractors or consultancies / Identifying and managing risk

Do you expect the following?

Some manual roles to change because of AI / be replaced by AI / Some knowledge-based roles to change because of AI / be replaced by AI / The creation of new roles such as AI transformation, AI tools trainer, AI innovation manager

To what extent are you aware of your business doing the following?

Offering formal or informal training for employees in how to use AI tools safely, ethically and effectively and manage risk / Providing information to employees about how AI is being used in the business or future plans / Involving employees in trialling or testing new AI tools / Using AI tools to support any stage of the candidate recruitment process / any aspect of performance management / Implementing policies and processes regarding the safe and ethical use of AI / Using AI to identify and manage risk

To what extent are you aware of your business doing the following?

Providing information to businesses in the supply chain or customers about how AI is being used in the business or future plans to use it / Involving supply chain or customers in trialling or testing new AI tools / Using AI to manage any aspect of the supply chain

To ensure safe, ethical and effective use of AI, how important is it for your business to do the following?

Train employees about how to deploy AI tools safely, ethically and effectively / Address bias and ensure inclusive design of AI tools / Inform employees or businesses in the supply chain or customers about how AI is being used in the business or future plans to use it / Inform customers about how AI is being embedded in products and services / Involve employees in trialling or testing new AI tools / Implement policies and processes regarding the safe and ethical use of AI, for example AI standard ISO 42001 / Keep up to date with regulation and guidance around AI use and management / Offer reverse mentoring whereby members of the team who have experience with AI support less experienced colleagues

To what extent do you agree or disagree with the following?

Organizations have a role to play in building trust in AI across their supply chain / amongst their customers / amongst their employees / amongst society

BSI

Trust in AI: Actions and attitudes around AI adoption

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To what extent do you agree or disagree with the following?

Organizations have a responsibility to promote and support innovation in society / should only use AI tools if they can be confident these tools are safe and will not have unintended consequences / have a responsibility to ensure the gains from incorporating AI are shared across society

Does your business have any of the following in place?

A Chief AI Officer (or equivalent) / Plan to recruit a Chief AI Officer (or equivalent) in the next two years / Board-level focus on how AI is being deployed in the business / An AI strategy / AI risk assessment / A learning and development programme to ensure successful delivery of AI training

Do you agree or disagree with the following?

Safety should be the priority when it comes to rolling out AI in business / Ethical use of AI should be the priority / Employee buy-in is important for the success of rolling out AI in business / AI tools should be embraced even if some jobs change or are lost as a result / Innovation is more important than protecting existing jobs / If people do not have the skills to manage AI tools this will have a negative impact on their career progression / If businesses do not invest in AI tools they will be at a competitive disadvantage / Organizations have the responsibility to train teams to utilize AI tools in order to protect jobs

Thinking about the pace of change with AI, do you agree with the following?

I have greater trust in AI now than a year ago / am more excited about the potential use of AI by business than a year ago / am more worried about the potential use of AI by business than a year ago / think my business should be doing more to build trust in AI amongst employees or the general public

On a scale of 1 to 10 do you see AI as an opportunity or a risk for the following?

For businesses / For individual employees / For jobs generally / For society / For the environment / For cybersecurity

How important do you think AI regulation or international guidelines are for the safe, ethical and responsible development of AI in your industry?

Extremely important / Moderately important / Slightly important / Not important

We extend our gratitude to all those involved in developing this research for their time and contributions.

BSI products and services to help you shape trust in AI*

Introducing BS ISO/IEC 42001

The international standard (BS ISO/IEC 42001) is a first-in-kind AI management system designed to enable the safe, secure and responsible use of AI and to assist organizations in responsibly using it. It addresses considerations like non-transparent automatic decision-making, the utilization of machine learning instead of human-coded logic for system design, and continuous learning.

The guidance sets out how to establish, implement, maintain and continually improve an AI management system, with a focus on safeguards. It is an impact-based framework that provides requirements to facilitate context-based AI risk assessments, with details on risk treatments and controls for internal and external AI products and services. It aims to help organizations introduce a quality-centric culture and responsibly play their part in the design, development and provision of AI-enabled products and services that can benefit them and society as a whole. BSI also offers a package of measures including training and certification to ISO/IEC 42001.

Regulatory Services

- Algorithm Auditing and Dataset Testing
- AI Technical Design Assessment
- AI management system (ISO/IEC 42001) certification
- AI Notified Body – progressing towards designation.

Training

- AI management system (ISO/IEC 42001) training courses and qualifications
- AI technical standards training

Consulting

- AI strategy development
- Data governance services for AI solutions
- AI management system (ISO/IEC 42001) implementation support services
- EU AI Act compliance services
- AI risk management services

Trust in AI: Actions and attitudes around AI adoption

Standards

- ISO/IEC 42001:2023 Information Technology — Artificial intelligence — Management system

- BS EN ISO/IEC 23894:2024, Information technology. Artificial intelligence. Guidance on risk management

- PD ISO/IEC TR 24368:2022, Information technology. Artificial intelligence. Overview of ethical and societal concerns

- PD ISO/IEC TR 24028:2020, Information technology. Artificial intelligence. Overview of trustworthiness in artificial intelligence

- PD CEN/CLC ISO/IEC TR 24027:2023, Information technology. Artificial intelligence (AI). Bias in AI systems and AI aided decision making

- PD ISO/IEC TR 27563:2023, Security and privacy in artificial intelligence use cases. Best practices

- BS ISO/IEC 38507:2022, Information technology. Governance of IT. Governance implications of the use of artificial intelligence by organizations

- BS/AAMI 34971:2023, Application of ISO 14971 to machine learning in artificial intelligence. Guide

- PD ISO/IEC/TS 4213:2022, Information technology. Artificial Intelligence. Assessment of machine learning classification performance

- BS ISO/IEC 24668:2022, Information technology. Artificial intelligence. Process management framework for big data analytics

- PD CEN/CLC ISO/IEC TR 24029-1:2023, Artificial Intelligence (AI). Assessment of the robustness of neural networks – Overview

- BS EN ISO/IEC 22989:2023, Information technology - Artificial intelligence - Artificial intelligence concepts and terminology

- BS 30440:2023 Validation framework for the use of artificial intelligence (AI) within healthcare

- PAS 440:2020 Responsible Innovation guide

Partnership projects

- AI Standards Hub

- BridgeAI

Related products and services

Responsible AI adoption also requires strong digital trust and resilience. Supporting products that can help bolster your organization's AI transformation include:

- Breach resilience services

- Information security management

- Privacy information management

- Business continuity management

- Smart cities

- Secure digital applications

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