



UNLOCKING BELGIUM'S AI POTENTIAL 2025

Introduction

Belgian businesses continue to embrace artificial intelligence (AI); the number of firms that have adopted AI has risen to **52%**, demonstrating a growth rate of **23%** from last year. If it maintains this pace of AI adoption, Belgium will be on course to meet the EU's [Digital Decade goal](#) of **75%** of Belgian businesses adopting AI by 2030.

The adoption of AI has resulted in great returns for businesses across Belgium:



For businesses that have adopted AI, a striking majority (**94%**) report increased revenue (on average, **29%**).



76% have seen significant productivity gains, including from streamlined data analysis (**64%**), customer service improvement (**52%**), and the automation of routine tasks (**51%**).

The Belgian public is similarly enthusiastic, with over eight-in-ten seeing significant potential for the technology to positively transform education (**81%**) and healthcare (**80%**).

Belgium's appetite for AI adoption is evident. As early as 2019, Belgium's leadership clearly outlined the country's ambitions with initiatives such as the 2019 [Flemish AI Action Plan](#), which includes €32 million per year in funding and focuses on strengthening AI research, fostering collaboration between businesses and research institutions, and providing training programs to bridge the AI skills gap. The nation has also enacted localised programming such as the 2019 [DigitalWallonia4.ai](#) programme that aims to boost the acceleration of AI adoption in the Wallonia region. Later, in 2022, the nation built upon these efforts with the [National Convergence Plan for the Development of Artificial Intelligence \(AI\)](#), which set out concrete action to make Belgium a "#SmartAINation".

Now, Belgian businesses have followed suit in their AI uptake, putting them ahead of many of their European peers. At the forefront are startups¹ and a small segment of large enterprises², who are going all-in on advanced, transformative AI. This is due to a powerful mix of digital readiness, ambition, and support that is accelerating AI transformation across parts of the economy.

While some businesses are rapidly advancing, many others, particularly SMEs and large enterprises, remain at the early stages. If left unaddressed, this divide could limit Belgium's ability to fully capitalise on the benefits of AI and slow the momentum of its broader digital transformation.

Belgium is fostering a pro-growth and innovative ecosystem. Belgian businesses are forward-thinking, agile, and quick to embrace technologies that drive performance. With the right policies, investment, and strategic focus, Belgium can build on this momentum and establish its position as an exemplar of successful digital transformation in Europe.

Key findings from this study:

- **52%** of Belgian businesses have now adopted AI – amongst the top of the region and well outpacing the European average of **42%**.
- **38%** of AI adopters have leveraged AI to launch new products or services.
- **94%** of Belgian businesses report an increase in revenue thanks to AI adoption, at an average increase of **29%** - attesting to the true power of AI in businesses' competitiveness.
- Businesses also report a **25%** increase in investment in AI over the last year – on par with the European average of **22%**.
- Belgium is outpacing Europe with the highest share of businesses (**25%**) who have adopted AI for its most advanced purposes.
- Over a third (**39%**) of businesses' tech spending goes toward compliance, while **78%** expect this to increase.

Adoption is high, but AI use remains to be converted into long-term strategies

Despite a clear group of advanced AI users, a more nuanced picture is emerging across the business landscape. While AI adoption uptake is high, a quarter (**25%**) of businesses are harnessing AI for transformative purposes throughout operations, where the true potential of AI to drive innovation, productivity, and competitive advantage can be fully realised.

Looking deeper into how businesses are implementing AI — from initial experimentation to full transformation, many businesses remain at the most basic level of AI adoption.

Stage 1

Exploring AI:

59% of businesses are still in the exploratory phase, primarily using off-the-shelf AI solutions from external providers. This is in line with the EU average of **61%**. At this stage, companies typically deploy basic AI applications, such as scheduling assistants (**51%**) and image recognition tools (**46%**).

Stage 2

Integrating AI:

A smaller share, **15%** of Belgian businesses, have advanced to the intermediate stage of AI adoption, compared to **18%** across the EU. These companies are moving beyond isolated applications and integrating AI across various business functions, resulting in efficiency improvements and more innovative approaches to customer experience.

Stage 3

Transforming with AI:

25% of Belgian companies have reached the most transformative stage of AI integration, where they are using AI for its most advanced purposes. This is the highest in Europe, above the EU average of **21%**. These organisations are combining multiple AI tools or models for complex tasks (**20%**), and creating custom AI systems (**5%**), which is transforming their operations comprehensively.

The challenge ahead is not just broader adoption, but deeper integration and more advanced usage of AI technologies.



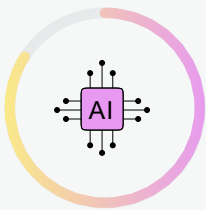
Startups are pioneering the AI revolution

Unlike many larger enterprises and SMEs that are still navigating the early stages of adoption, startups in Belgium are leading the charge with advanced, transformative uses of AI. This emerging dynamic is creating a two-tier AI economy, where innovation-focused startups are surging ahead, while the many larger enterprises and SMEs that make up the [majority](#) of the Belgian business ecosystem, remain in the early stages of AI adoption.

Startups aren't just using AI – they're building entirely new products and business models around it that would have been impossible just years ago. **33%** of Belgian startups are at the most advanced stage of AI use, compared to **26%** of businesses across Europe, leveraging the technology for creating their own AI systems or combining multiple systems for complex tasks.

Belgian startups are at the forefront of AI-driven innovation, leveraging the technology to build new business models and transform industries. Their advanced adoption and integration of AI set them apart, driving Belgium's competitive edge and positioning the country as a leader in Europe's digital transformation.

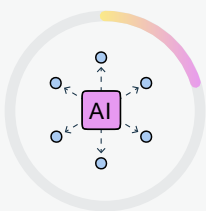
The breadth of AI integration among Belgian startups is striking:



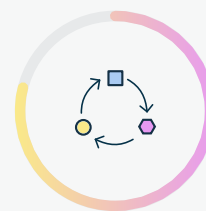
84% of startups report using AI in some form across their business operations.



64% are leveraging AI specifically within R&D and innovation labs, pushing forward new solutions and products.



21% have embedded AI at the very core of their business proposition, using it as the primary engine behind their value creation.



And more broadly, **79%** of all businesses in Belgium believe AI will transform their industry in the next five years—a future that startups are already actively building.

Large businesses and SMEs are not harnessing AI to its full potential

In contrast, while many larger businesses have adopted AI technologies, most are currently not using them as deeply as startups. For **65%** of large businesses, their AI adoption remains at Stage 1, where they are focused on incremental gains, such as driving efficiencies and streamlining processes. This is in contrast to **44%** of startups who remain here at this basic stage.

- Only **9%** of large businesses have a comprehensive AI strategy, and among those who have adopted AI, just **19%** are delivering a new AI-driven product or service, less than half of the proportion of startups (**40%**).
- However, for the portion of large businesses that take the steps beyond basic AI use, they are going all-in: **27%** are at the most advanced stage of AI use, nearly double that of the average across Europe (**14%**).

Additionally, SMEs are broadly in line with the national average when it comes to AI maturity. As with large enterprises, the majority (**57%**) remain at basic levels of AI adoption, while **20%** are leveraging AI for its most advanced uses. As SMEs represent the majority of Belgian businesses, this represents considerable untapped potential.

Both large enterprises and SMEs show a readiness to integrate AI when given the right tools and support. If not addressed, this 'two-tier' AI economy, where startups and a handful of larger enterprises outpace the rest of businesses in harnessing AI for transformation, threatens to limit Belgium's competitiveness and slow the pace of its digital transformation.

Full integration within businesses of all sizes is key to unlocking the full benefits of AI for Belgium's economy and society. Recent [research](#) by the Telecoms Advisory Service, on behalf of AWS, found that cloud-enabled AI added over \$812 million to Belgium's GDP in 2023. The research also found that cloud as a whole is set to add \$2.6 trillion to Europe's GDP by 2030, with nearly \$434 billion alone coming from cloud-enabled AI.



Key challenges are preventing Belgian businesses from fully leveraging AI

Four key challenges are holding businesses back from adopting AI, and once adopted, from innovating successfully:

Digital skills:

- **36%** of Belgian businesses identify skills as a barrier to deeper AI adoption, and are spending **5.5 months** on average searching for the right candidate.
- With AI literacy expected to be required in **50%** of new jobs in Belgium in the next three years, bridging this gap will be especially important. **48%** of Belgian businesses say they struggle to attract the talent with the necessary digital skills, and are, in turn, willing to offer premiums for candidates with strong digital skills – at an average of **42%** salary increase.

Compliance costs:

- Belgian businesses face high compliance costs, estimating that **€39** out of every **€100** they spend on tech goes towards compliance-related costs. This is in line with the EU average of **€40**. **78%** of businesses expect these compliance costs to increase further in the next 12 months.

Regulatory uncertainty:

- **59%** of Belgian businesses do not understand their roles and responsibilities under the EU AI Act. Furthermore, **43%** of Belgian businesses view regulatory uncertainty as a key barrier to AI adoption.

Perceived upfront costs:

- **35%** of Belgian businesses cite perceived upfront costs as a key barrier to AI adoption. Interestingly, **20%** of businesses say they need a clearer understanding of AI's return on investment, yet **94%** of Belgian businesses have seen a significant increase in revenue from AI, with an average **29%** revenue growth attributed to AI.

These barriers are acting as a handbrake on the speed of digital transformation across Belgium. Addressing these challenges is essential to unlocking AI's full economic potential and ensuring that Belgium remains a leader in the next wave of technological transformation.

Skills: A key barrier to innovation

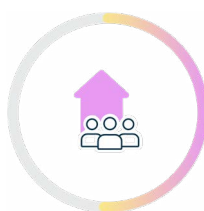
As outlined, the lack of AI and digital skills is one of the most pressing challenges for Belgian businesses. Only **24%** of companies report having a strong AI skillset, while **38%** struggle to find local talent with the necessary expertise. In turn, this is directly impacting their ability to adopt and scale AI-driven solutions.

The digital skills gap is increasing costs and stifling innovation; for **57%** of businesses, a lack of AI skills is hindering innovation, and for **56%**, operational costs are rising. AI literacy is expected to be required in **50%** of new jobs within three years, yet only **24%** feel prepared. Bridging this gap is critical for Belgium's economic future.

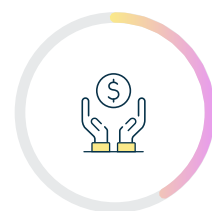
Recognising the urgency, Belgian businesses are actively addressing the skills gap through training and investment:



Companies are upskilling their workforce – **39%** have already implemented AI-specific training programs, and on average, **40%** of employees have undergone digital training in the past year.



The availability of training is making AI more accessible – **51%** of businesses believe that widespread AI training initiatives are helping drive adoption.

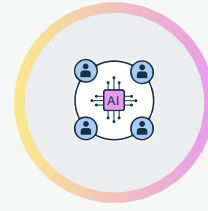


Companies are offering financial incentives to attract top talent – businesses say they are willing to offer, on average, a **42%** salary premium for candidates with strong digital skills.

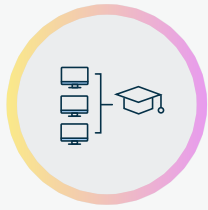
Public and private initiatives are playing a crucial role in strengthening Belgium's AI workforce:



The [Digital Belgium Skills Fund \(BOSA\)](#) is actively supporting projects that enhance digital literacy and equip workers with future-proof skills.



The [AI4Belgium](#) coalition brings together AI actors from public services, the private sector, academia and civil society to collaborate on efforts to boost Belgium's AI adoption.



[Various AI and tech hubs](#) across Belgium are fostering collaboration between academia, startups, and established businesses to develop specialised training programs.



Increased investment in digital education and collaboration with tech firms are helping create a pipeline of AI ready professionals, and Amazon and AWS have [invested €450 million](#) since their arrival in Belgium, which is supporting workers and talent across the nation.

The skills gap is directly impeding businesses' ability to integrate and scale AI-driven solutions, as evidenced by the limited proportion of companies possessing strong in-house AI capabilities and the considerable challenges encountered in local talent acquisition. The ramifications of this skills gap are tangible, manifesting in both increased operational expenditures and a demonstrable stifling of innovation.



Belgium can be a model for Europe, but momentum must be maintained

Belgium has set itself apart on the frontlines of AI uptake, launching the [2019 Flemish AI Plan](#), the [2019 Digital Wallonia 4.ai](#) programme, and, in 2022, the [National Convergence Plan for the Development of Artificial Intelligence \(AI\)](#). These strategic initiatives highlight the government's commitment to making AI a cornerstone of Belgium's digital transformation – and continued expansion and delivery on these commitments are necessary to harness AI's true power .

It is clear that Belgium has all of the right tools to drive a prosperous economy and play a role in supporting the EU's ambitions to be a world leader in AI innovation. AWS is urging Belgium and European policymakers and industry leaders to continue this momentum and take steps to unlock the full potential of AI across both fast-paced start-ups and larger enterprises:

1. Create a pro-growth environment that incentivises adoption and innovation

To position Belgium at the forefront of digital and AI-driven growth, the Belgian government can foster a pro-growth policy environment that incentivises technology adoption and supports innovation across sectors. Therefore, the Belgian government could consider:

- Implementing supportive economic policies that widen access to needed capital and act to encourage investment in R&D, incentivising the adoption and development of new technologies by Belgian businesses.
- Clear regulatory frameworks to support faster AI adoption while ensuring safety and ethical considerations are met. This need is recognised by the Belgian government, which has proposed [Regulatory Sandboxes](#) and [called](#) for a collective European dialogue regarding the regulation of digital services, emerging technologies, and AI.

2. Accelerate digital transformation across industries

To accelerate private sector digital adoption, Belgium can establish a virtuous cycle of investment and growth, centred around digital transformation and a skilled workforce. A renewed emphasis on updating business processes, applying innovations commercially, and investing in R&D can help Belgium's companies recapture their start-up zeal and drive European competitiveness globally. Efforts to enable this include:

- Continued investing in digital upskilling efforts, such as [The Digital Belgium Skills Fund](#), which supports a digitally-confident workforce.
- Strengthening Belgium's dynamic AI ecosystem by maintaining an open and competitive technology environment. Belgian businesses are supported by a network of AI and cloud providers that enable their AI ambitions, and **99%** of all businesses surveyed value the ability to adopt and integrate AI solutions that fit their needs. Encouragingly, **91%** believe they have sufficient choice to select and switch AI providers, underscoring Belgium's dynamic and technology-positive ecosystem—a key strength in its AI-driven future.

3. Modernise public sector technology

The Belgian government can evolve from being a technology follower to a digital leader. The government has taken various steps to progress the public sector's use of AI, including leveraging AI [in law enforcement and telecoms](#), yet continuing to take the lead on digital transformation will meet citizens' expectations regarding how new technologies can improve their daily lives and catalyse technology adoption and innovation in the wider economy.

- This will be supported by proposals within the government's [2025-2029 Federal Government Agreement](#), where the Belgian government has committed to spending reviews to evaluate opportunities to implement AI to drive efficiency.

Belgium is rapidly emerging as one of the European leaders in AI adoption, with **52%** of businesses now using the technology, well ahead of the EU average, and strong public support for its transformative potential. Sustaining this momentum requires deeper integration, not just broader uptake. Startups are pushing the boundaries of innovation, while larger enterprises must be empowered to move beyond incremental gains. Addressing barriers will be key to unlocking AI's full potential across the economy. With the right support, Belgium can lead not just in adoption but in shaping the future of AI in Europe.

Appendix

Methodology

The fieldwork for this study was undertaken by Strand Partners' research team for Amazon Web Services. This research has followed the guidance set forth by the UK Market Research Society and ESOMAR. For the purposes of this study, business leaders are defined as founders, CEOs, or members of the C-suite in organisations.

'Citizens' are nationally representative members of the public based on the latest available census.

For inquiries regarding our methodology, please direct your questions to: polling@strandpartners.com.

In Belgium:

- We conducted a survey targeting 1,000 nationally representative members of the public, and ensured representation based on age, gender, and NUTS 1 region.
- Additionally, we surveyed 1,000 businesses, representative by their business size, sector, and NUTS 1 region

Sampling:

Our sampling process used a mix of online panels that are recognised for their validity and reliability. These panels are carefully curated to ensure diverse representation across various demographics. For the business leaders, the panels are selected with a consideration for organisational size, sector, and position within the company. Our objective with the sampling strategy is to achieve an optimal mix that mirrors the actual distribution of our target populations in the respective markets.

Weighting Techniques:

Post-data collection, we applied iterative proportional weight to correct any discrepancies or over-representations in the sample.

Survey:

- Usage Patterns: This survey gauges the evolving patterns of digital technology usage. We are particularly interested in examining the adoption and implementation levels of technologies, focusing on cloud computing and artificial intelligence.
- Perceptions and Attitudes: The survey seeks to unearth the prevailing perceptions and attitudes towards digital technologies, understanding the perceived benefits, challenges, and potential ramifications of both present and emerging tech solutions
- Barriers and Opportunities: The survey scrutinises the predicted challenges and potential avenues that both businesses and individuals anticipate on their digital trajectory. This involves pinpointing challenges, from skill deficits to regulatory complications, and recognising opportunities for growth, innovation, and market development.
- 'Size of the Prize': The survey shed light on the economic repercussions and growth prospects linked with digital transformation. By elucidating the 'size of the prize', we aspire to stress the importance of digital transformation and foster further investments and technology adoption.

References

1. A startup is a business founded in the last 2 years which provides a new product/service or innovation and is aiming for rapid growth in terms of employees and turnover.
2. A large business or large enterprise is a business with 500 or more employees, founded 10 years ago or more.