



DIGITAL 2030

# The Rise of Applied AI



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EDITORIAL

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## Insights from the boardroom: How to turn potential into measurable benefits

How do decision-makers really assess digital trends? What priority will they give to current digitalization topics over the next five years? And is it just our observation, or is a new phase of AI adoption emerging – one characterized by fewer experiments and more demonstrable successes instead?

This trend study by the Handelsblatt Research Institute in collaboration with the digital consultancy valantic gets to the bottom of these questions. After the massive hype surrounding generative AI in the past two years, the noise about the unlimited possibilities of AI has given way to a more critical debate about its actual added value in business applications.

With this study, we want to clarify whether AI is pushing all other digitalization trends into the background or whether the C-level considers other technologies to be just as critical to success in the near future.

On the other hand, we try to identify the status quo: Are measurable successes already being achieved with Applied AI in DACH companies? We also analyze which AI application areas are most relevant and which success factors contribute particularly to the success of AI projects.

An in-depth research question here is: Do companies that are already using AI successfully set different priorities than those that have not yet achieved any added value with AI?

A big thank you goes to the 700 board members from DACH companies who have given us their views on our research questions in recent weeks, either as part of a quantitative online survey or personal face-to-face interviews.

So much for now: a lot seems to be happening in companies at the moment when it comes to value-adding AI applications. We hope that the study results will give you one or two light-bulb moments and wish you an enjoyable read.

# Executive Summary

## Companies are at the beginning of the AI learning curve

Although AI is one of the most relevant technologies, it is also seen as the most overrated digital trend. This shows that the topic of AI is still characterized by more uncertainty than is the case with other digital trends.



## AI has top priority - but is not alone



Companies must systematically stay 'on top of technology', because: Although artificial intelligence will play a central role in the company's success over the next five years, there are also a number of other digital trends that are considered to be highly relevant for the company's success.

## Measurable AI benefits for 70 percent of companies



The majority of companies are already generating added value with intelligent applications. However, this is not the case to the same extent in all sectors. While companies from the telecommunications, transport and logistics and manufacturing sectors are generally further ahead, retail and consumer goods as well as food and beverage production are lagging behind.

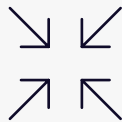
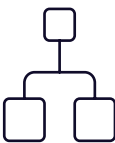
## SMEs are lagging behind when it comes to AI

Medium-sized companies (1,000 - 4,999 employees) - the top performers in the economy - are lagging behind in terms of generating measurable added value from AI.



## Leadership and a suitable system architecture make the difference

Companies that are already successfully using AI particularly emphasize the importance of two key success factors: on the one hand, clear management support for the use of AI is important, and on the other hand, a modular, scalable AI architecture is crucial. Companies without measurable AI success see these aspects as less of a priority.



## AI success is about more than technology

The successful use of AI applications depends on various factors. Cross-departmental collaboration, a suitable data basis, anchoring AI in the corporate strategy, identifying use cases, continuous AI skill building and effective AI governance are particularly important.

## The hurdle of recruiting skilled workers is less of an issue

A few years ago, the shortage of skilled workers was seen as a key reason for the slow pace of AI adoption, but this factor now seems to be less of a deciding factor. Although attracting AI talent is still important, it is now less of a focus as a success factor compared to other aspects.



## AI particularly relevant for IT and R&D

With regard to the specialist areas, great potential is seen above all in the use of AI in IT and in the areas of research and development, logistics, production, communication and marketing.



## Cybersecurity, cloud and AI lead the relevance ranking

These three digital trends are of the utmost importance - and for good reason: they are closely linked. They are followed by IoT and wireless technologies as essential enablers.

## AI opportunities everywhere - but quality and data management dominate

AI offers potential in all the fields of application examined. Use cases in the areas of quality management, automation of documents and data, and intelligent products are particularly relevant. Despite the high level of attention for generative AI, the automated creation of media content has so far played a rather subordinate role. The potential of the individual application clusters varies between industries.





## INTRODUCTION

# Digital roadmap: Setting the right course now

Companies have been undergoing digital transformation for years. In view of the constant stream of new technological developments, transformation will remain at the top of companies' agendas in the future, as new functionalities and potential applications are constantly opening up. The latest example is the progress made in the field of artificial intelligence (AI).

Alongside such new trends, existing technologies such as cloud computing and the Internet of Things continue to play a key role in companies. However, the significance of the various technologies for the future may differ. It is important for companies to identify the technologies with the greatest potential. If they rely on these technologies in development, they have a good chance of gaining an advantageous competitive position. However, these may not be the technologies that are currently the subject of the most hype. In the end, it is always the potential of the individual application in the company that counts.

Which digital technologies currently promise the greatest potential for the future will be examined in more detail. As this can vary from sector to sector, this analysis is carried out specifically for individual sectors so that companies can see in concrete terms what potential the individual technologies offer.

One technology that is currently associated with great potential is AI. Especially after the release of ChatGPT - based on GPT-3.5 - the technology has been very present in the media. As a result, many companies are looking into this topic. After an initial phase of intensive testing and initial pilot projects, companies are now likely to increasingly switch to using AI productively. It is precisely this topic - Applied AI, i.e. the use of AI applications in companies - that is also the subject of the second part of this report.

Two questions are at the center of the analysis:

- Are companies already achieving benefits with the AI applications and are the investments paying off in concrete terms?
- What success factors are important when using AI in daily business?

Findings on this support companies in successfully implementing AI applications themselves.

Which digital technologies currently promise the greatest potential for the future?

## Data basis of the report

The findings in this report are based on a quantitative and qualitative survey. In quantitative terms, 483 decision-makers from companies in Germany, Austria and Switzerland (DACH region) with more than 100 employees were surveyed. This survey was conducted from the end of November to the beginning of December 2024 together with the market research institute YouGov. In addition, a further 200 decision-makers, also from companies in the DACH region, were asked selected questions by the market research institute techconsult from the end of December 2024 to the beginning of January 2025 in order to broaden the range of industries.

The majority of the 683 respondents are C-level decision-makers who work in companies with more than 500 employees. Furthermore, the focus is on the automotive, healthcare and pharmaceutical, food and beverage production, retail and consumer goods, manufacturing, telecommunications, transportation and logistics and utilities (electricity, gas and water) sectors. The survey consisted of two parts. The first was about the assessments of the technologies with the greatest potential by 2030, as well as potential exaggerations and disappointments. The second part focused on the topic of Applied AI. The questions included the expected potential, added value already achieved and success factors.

These survey results are qualitatively supplemented and deepened by six interviews with CDOs/CIOs from companies in different sectors.

Like the surveys, this report also consists of two parts. The first part looks at the assessments of the potential of various digital technologies up to the year 2030. This part also deals with any overestimated technologies and possible disappointments.

The second part of the report focuses on Applied AI. In addition to the status quo and currently relevant use cases, the focus is on the potential that has already been exploited and the relevant success factors. With regard to the factors, an analysis of the current situation shows in which areas there is still a great need for action in order for the use of AI applications to be successful.

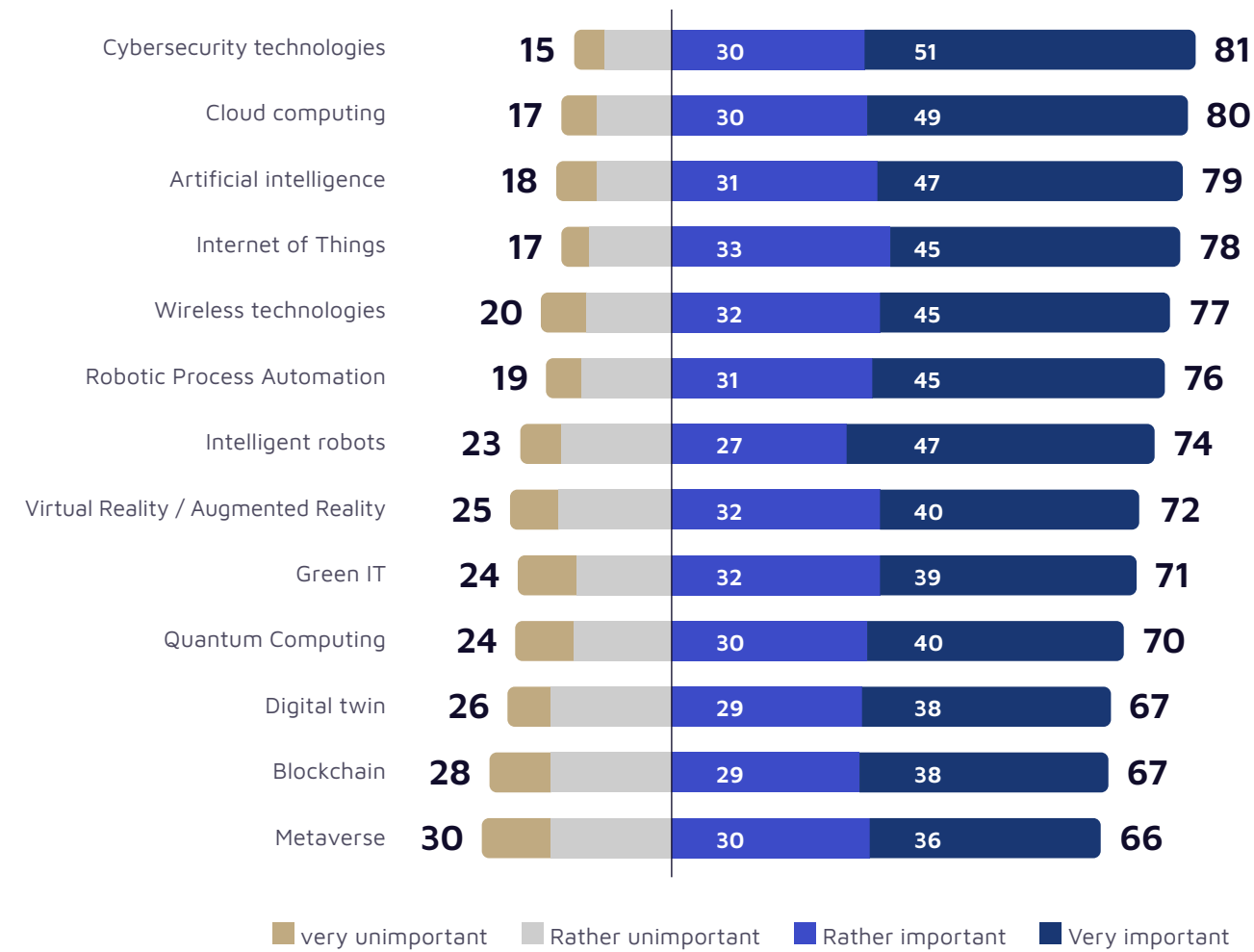


CHAPTER 1

# Digital 2030 - Opportunities and expectations

FIGURE 1

Importance of the following digital technologies for company success in the next five years\*



\* Percentage of corporate decision-makers surveyed who consider the respective technology to be "rather important" or "very important" or "rather unimportant" or "very unimportant"; difference to 100 percent: "Don't know/no response"; n=683.  
Source: Handelsblatt Research Institute / valantic (2025)



"I don't currently see a new trend like AI having such a big impact. But existing trends will continue to play a role in the coming years. These include cloud computing, for example. This technology trend will also be with us for the next ten years."

Holger Riemenschneider,  
Director Technology, IONITY

AI is currently still the dominant technology in the public debate. However, according to most of the corporate decision-makers surveyed, it is not the only technology that will be important for the success of the company by 2030 (see Figure 1). Together with AI, cybersecurity technologies and cloud computing make up the top 3 most important technologies in the next five years. At 81 percent, cybersecurity technologies are mentioned most frequently. This is understandable given the increasing threat of cyber attacks.

The topic of cloud computing, which has been playing a role in companies for some time now, will continue to be of great importance over the next five years. At least that is the assessment of 80 percent of those surveyed. One reason for this could be that cloud computing is a basic technology that enables many other technologies and applications, from which its importance is derived.

Overall, the respondents' answers show that no digital technology is really unimportant.

However, cybersecurity technologies, cloud computing and AI have the highest priority. The technologies with the lowest priority - although still considered important by around two thirds of respondents - are blockchain, digital twin and metaverse. Blockchain and metaverse in particular have repeatedly been seen as technologies with potential in the past - but without this being realized. Nevertheless, only around 30 percent of decision-makers state that these technologies are really unimportant.

The assessment of the importance of technologies varies from country to country - especially with regard to AI. Respondents in Germany and Switzerland, for example, largely consider the technology to be very important for the future success of the company. Here, AI is ranked first and second respectively. The situation is different in Austria. Here, far fewer respondents attach great importance to the topic. The result fits in with a picture that has also emerged in a number of recent surveys, such as a survey conducted by Accenture and Microsoft in



summer 2022 (population), a survey conducted by fit4internet in summer 2024 (population) and a survey conducted by Deloitte, also in summer 2024 (business decision-makers). austrian companies are skeptical about new technologies - including AI. This skepticism is also present in the population and is more pronounced there than in many other EU countries.

However, it is not only respondents from Austria who consider AI to be less relevant for their own economic future. a similar picture emerges among the decision-makers surveyed from smaller companies with 100 to 249 employees in the entire DACH region, in contrast to the results among larger companies. It is possible that they are latecomers to the use of AI applications and have therefore not yet experienced the benefits of intelligent applications, meaning that they do not consider the potential to be as important for the future.

A comparison of small and large companies also reveals a difference in the assessment of green IT. Overall, 70 percent of respondents consider sustainable IT to be important for the next five years. This puts the topic in the lower midfield. Given the fundamental importance of sustainability, this is quite surprising. It is possible that the topic has currently fallen somewhat out of the focus of companies in view of the economic challenges.

However, many respondents from companies with 100 to 999 employees attach more importance to green IT compared to the other technologies. As larger companies in particular have already done a lot in this area due to regulatory requirements, they may no longer see any great potential. The situation is different for smaller companies: they will only be affected by the legal requirements in the coming years and therefore have a greater need for action.

Furthermore, the technologies also play different roles in the individual sectors. AI is among the top 3 technologies in most of the sectors surveyed, to which most respondents attach great importance (see Figure 2). Only in the utilities sector is the technology more in the middle of the field. the situation is similar for cybersecurity technologies.

For decision-makers from utility companies, green IT is further up the rankings in terms of the number of mentions. This technology is not among the top 3 in any other industry.

The Internet of Things plays a particularly important role in industrial sectors. Metaverse, blockchain and digital twins, on the other hand, are considered important for the future by relatively few respondents in all sectors. With one exception, this also applies to quantum computing. Only in the telecommunications industry is this technology already seen as having great potential by many respondents.

AI is the basis for the future success of companies in almost all sectors.



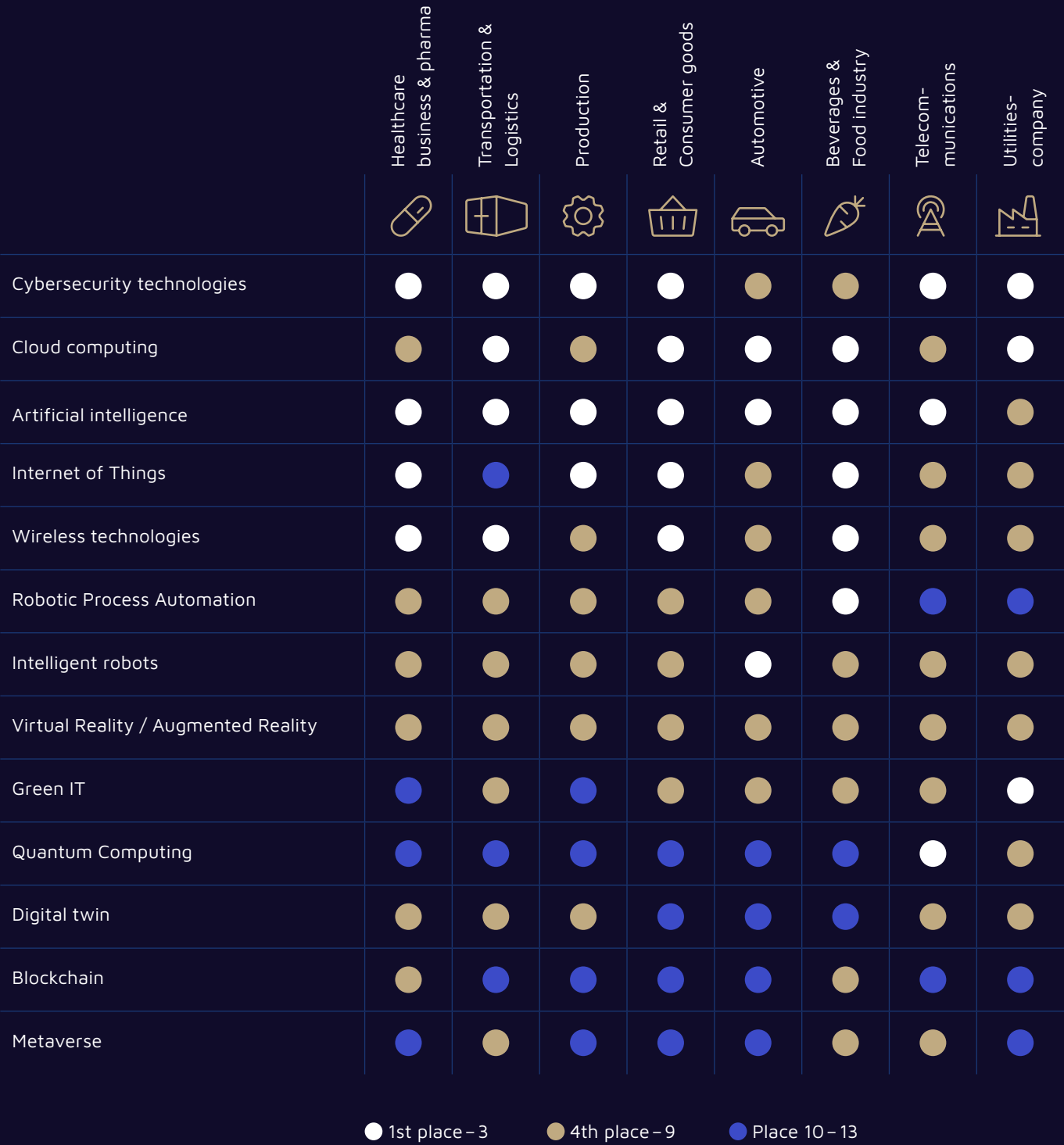
**"Particularly in the area of pattern recognition , intelligent applications are already as good as the doctors. The technology is there. And so is the data."**

Holger Mägdefrau,  
Chief Financial Officer, Lohmann & Rauscher



FIGURE 2

Importance of the following digital technologies for the company'scompany success in the next five years - by sector\*



\* Ranking according to the proportion of corporate decision-makers surveyed who consider the respective technology to be "rather important" or "very important", partially split places; n=683.  
Source: Handelsblatt Research Institute / valantic (2025)

Broken Dreams: After the hype comes disillusionment

However, such potential associated with a technology can sometimes be overestimated. For example, the majority of respondents believe that AI has great potential. However, at least around a fifth of corporate decision-makers believe that the potential of AI for the future is overestimated (see Figure 3). AI thus represents a certain outlier. This shows that the topic of AI is still characterized by more uncertainty than is the case with other digital trends.

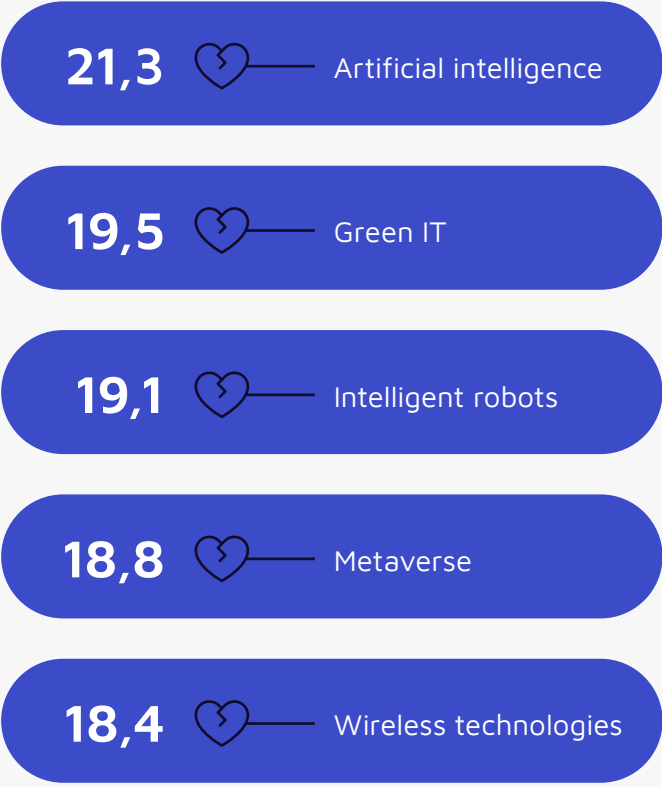
Cloud technology, robotic process automation, the Internet of Things and cybersecurity technologies, on the other hand, do not appear in the five most overrated digital technologies for the future. It is therefore striking that the technologies with which companies have already gained a lot of experience were mentioned the least. They may have already registered measurable successes for some time and are therefore better able to assess what opportunities these technologies offer.

There is still a lack of experience with AI to this extent, meaning that respondents are more inclined to question potentials that have not yet been registered. This thesis is supported by the fact that decision-makers from large companies (1,000 and more employees) see AI as an overrated technology (18%), which is lower than the proportion of those from smaller companies (23%). Larger companies are more likely to have the opportunity and resources to try out technologies and get to know their potential. However, such experience can also make it easier to recognize a lack of benefits.

For example, significantly more respondents from larger companies (29 vs. 14 percent) state that the potential of the metaverse is overestimated. No other technology was mentioned more frequently by these respondents. In many cases, the metaverse is seen as a recent hype whose benefits have not materialized (see also box *What actually happened to the hype surrounding the metaverse and blockchain?*)

FIGURE 3

Top 5 overrated digital technologies for the future\*



\* Percentage of company decision-makers surveyed; multiple answers possible; n=483.  
Source: Handelsblatt Research Institute / valantic (2025)



## What has actually happened to the hype surrounding Metaverse and blockchain?



When it comes to technology hypes where expectations have not been met in the past, metaverse and blockchain are often quickly mentioned. It is also these two technologies that few respondents associate with great significance for the future (see Figure 1).

Around half of those surveyed (46 percent) stated that metaverse and blockchain have so far proved to be a disappointment when used in companies.

It became clear in the interviews that this is particularly the case when there is a lack of suitable application options. This is particularly true of the metaverse. The hype surrounding this technology led to exaggerated expectations. However, most companies have not been able to exploit its potential as there are no use cases to date. The hope for individual technologies then quickly turns into disappointment. In the end, it is not the use of the technology as an end in itself that counts, but the more economical execution of tasks.

## Two questions for...

**Dr. Matthias Marquart,**  
CDO, Andreas Schmid Logistik AG



### What do you think of the hype surrounding the Metaverse?

The metaverse is a good example of a technology where the hype had already started before there were any real use cases. Blockchain is a different story. This technology offers potential, for example, in the fight against counterfeiting. It is the basis for the traceability of products in regulated markets. The problem with the technology is that it is still often too strongly associated with Bitcoin and therefore tends to be avoided.

### AI has also been heavily hyped recently. What is the difference to the other technologies mentioned at, so that the potential is greater here?

AI is accessible to everyone. You can even find out how to use this technology with AI itself. In contrast to other technologies, this makes access relatively low-threshold. You don't need a big project to experience the added value.



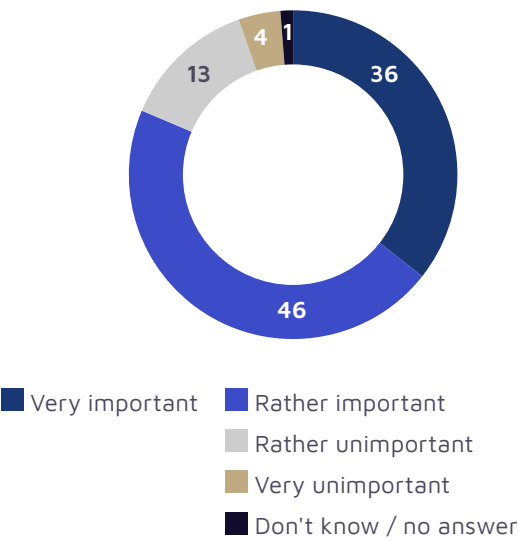
CHAPTER 2

# Applied AI: How artificial intelligence is changing business

AI has been a relevant topic in companies not only since the major leap in the development of generative AI. Some companies were already looking into the use of AI before 2022. According to the Federal Statistical Office, one in nine companies with more than ten employees used AI.

FIGURE 4

### Importance of Applied AI for the company\*



\* Percentage of corporate decision-makers surveyed; n=483.  
Source: Handelsblatt Research Institute / valantic (2025)

However, AI is now likely to be relevant for almost all companies. After an initial familiarization phase and trying out the various possibilities, the next step for companies - also by means of pilot projects - is to identify commercial use cases. In this respect, the topic of Applied AI is increasingly coming into focus. These are practical applications that use the capabilities of AI (such as extraction, classification, segmentation, prediction, generation) to solve complex problems, improve decision-making processes, gain valuable insights or support decision-making, for example. In contrast to theoretical or academic AI research, Applied AI aims to deliver measurable business benefits in the real world.

## Which use cases are particularly relevant?

With a view to the company's success in the next five years, 79% of decision-makers consider AI to be an important technology (see Figure 1). Even slightly more respondents attach great importance to Applied AI - i.e. deployed AI applications. More than four-fifths consider Applied AI to be somewhat or even very important (see Figure 4). AI applications therefore play a major role in almost all companies. And this is independent of the number of employees and applies to both small and large companies.

In a country comparison, however, respondents from Austria are again somewhat more reserved in their assessment. Applied AI is considered important by almost 90% of decision-makers in both Germany and Switzerland. In contrast, the proportion in Austria is only 75 percent ("rather important" or "very important"). Of the respondents from Switzerland, slightly more than half (52%) stated that Applied AI is "very important" for the company.

A similar picture emerges in the assessment of the importance of Applied AI for the industry. across all three countries, around three quarters of business decision-makers consider this application to be relevant for their respective industry (see boxes on the right). While this figure is around 85% in Switzerland and Germany, it is only 56% in Austria. However, the proportion of those who answered "Don't know/no answer" is particularly high in Austria.

In addition, fewer respondents from small companies with 100 to 999 employees see Applied AI as relevant for their industry compared to respondents from large companies with 1,000 or more employees (69 vs. 83 percent).

9 %

of respondents\* consider Applied AI to be (rather) irrelevant for the industry.

\* Percentage of corporate decision-makers surveyed; n=483, difference to 100 percent: "Don't know / no response "  
Source: Handelsblatt Research Institute / valantic (2025)

74 %

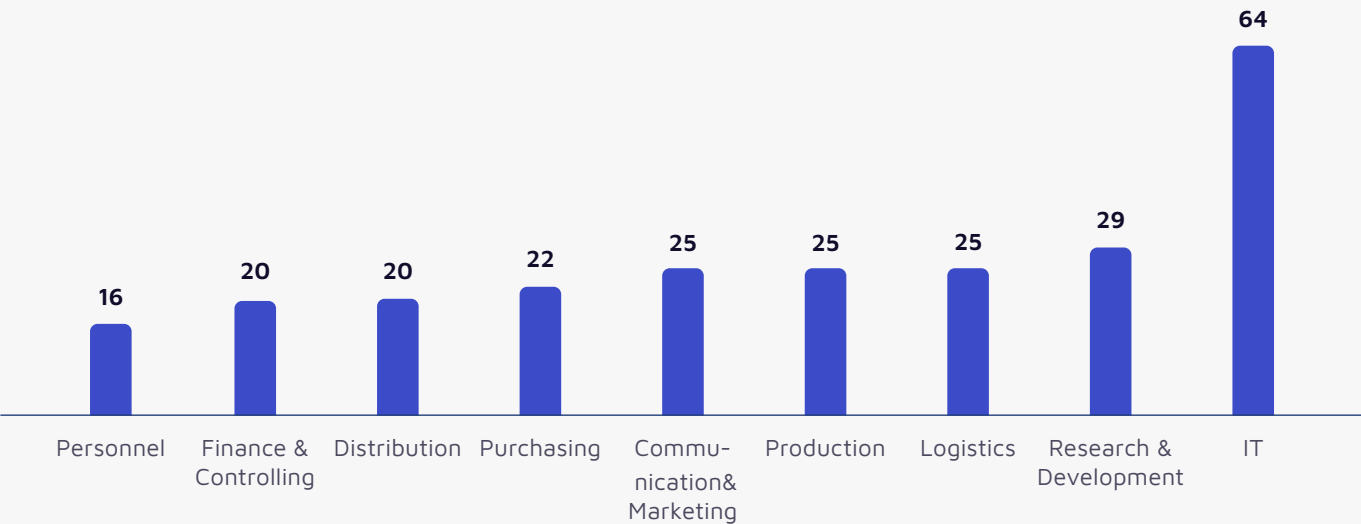
of respondents\* consider Applied AI to be (rather) relevant for the industry.

Overall, the survey results show that the corporate decision-makers surveyed predominantly associate great potential with Applied AI. However, this potential can vary depending on the area of application of the AI applications in the company.

A particularly large number of respondents see great potential in the IT sector (see Figure 5). The added value of using intelligent applications in areas such as programming or cybersecurity is therefore rated highly. Research and development is a distant second. In the chemical and pharmaceutical sector, intelligent applications are associated with the expectation of accelerating the development of new active ingredients.

FIGURE 5

Areas with the greatest current potential for Applied AI\*



\* Percentage of company decision-makers surveyed; multiple answers possible; n=483.  
Source: Handelsblatt Research Institute / valantic (2025)

A quarter of company decision-makers also see great potential in the areas of logistics, production and communication and marketing. It is striking that in Switzerland, the area of communication and marketing is the most frequently mentioned after IT, with a share of 45%.

In contrast, significantly fewer respondents see greater potential for Applied AI in sales or HR. The same applies to the area of finance and controlling, which is actually particularly predestined for the use of AI given the large and standardized data basis.

In these areas, AI is then used in various fields of application. Most respondents consider quality assurance to be the most important field of application (see Figure 6). Among other things, this involves identifying defects and ensuring product quality by means of visual or other sensory inspections (see box *outlining the various use cases*). Automation of documents and data, intelligent robotics and products as well as supply chain optimization were also frequently mentioned. For larger companies with 1,000 or more employees, the intelligent management of documents and data is actually the most frequently mentioned use case. This is understandable, as the volume of documents and data increases with size, as does the administrative effort and the potential for savings with AI.

Outline of the various use cases



**Automated Customer Dialogue**  
Chatbots & virtual agents to handle requests and provide support



**Fraud prevention**  
Anomaly detection, identification & handling of fraud attempts in realtime



**Automation of documents & data**  
Handling of information from vast quantities of documents and data



**Financial planning & risk**  
KPI prediction and planning, driver analysis, risk identification and management



**Media content generation**  
Generation of creative content (Image, Text, Sound, Video) for media publication



**Supply chain optimization**  
Demand prediction, inventory planning, optimized logistics & operations



**Personalized marketing**  
Effective marketing messages & spend based on user behavior analysis



**Personnel management**  
Automated HR administration and effective HR development measures



**Asset Management & Maintenance**  
Remaining useful life prediction and automated asset operations



**Better prices**  
Context-aware supply prices; dynamic and demand based market pricing



**Product and application development**  
Automated requirements engineering and software delivery



**Quality Assurance**  
Identify defects and ensure product quality by means of visual or other sensory inspections



**Robotics & smart products**  
Automation of product functions through interplay of sensors, controls & software



**Speech operations**  
Understanding of spoken language in operating procedures (call center, machine operations, ...)

Corresponding to the greater importance of Applied AI in the area of communication and marketing at companies in Switzerland, significantly more of these respondents also named personalized marketing (36%) and speech operations (33%) as important use cases. These percentages are almost twice as high as in Germany or Austria.

The importance of the various use cases also varies depending on the industry (see Figure 7). For example, a particularly large number of respondents in the automotive, food and beverage manufacturing, production and utilities industries generally consider quality assurance to be important. In the healthcare and pharmaceutical sectors, on the other hand, most decision-makers cite automation of documents and data as an important use case. This is roughly in line with the industry-specific conditions and challenges for companies. For example, the most frequently mentioned use case in the retail and consumer goods sector is supply chain optimization. In contrast, purchasing and sales - especially for electricity and gas - are extremely important for utilities companies, meaning that many respondents named price optimization as an important application. In this respect, their sector plays a major role for companies when identifying suitable use cases.



**“The big trend in AI right now is that people are no longer approaching the technology dogmatically, but are starting to put the business case first – the real business case, not an imaginary one. This means that implementation immediately brings value.”**

Dr. Matthias Marquart,  
CDO, Andreas Schmid Logistik AG

However, the decision-makers surveyed not only associate Applied AI with great relevance and great potential, they also believe that their companies are well positioned in this regard. Only nine percent believe that their company is lagging behind the competition in this area (see Figure 8). Half see themselves on a par. And almost two fifths even believe that their company is a pioneer.

A more in-depth analysis of the results also shows that respondents from larger companies are slightly more likely to see them as laggards, although the difference in share values is only four percentage points.

This is clearer when comparing countries. While slightly less than ten percent of decision-makers in Austria and Germany see their company as a latecomer, in Switzerland the figure is almost a quarter.

When classifying the results, however, it is important to bear in mind that, firstly, these are only subjective perceptions and, secondly, the benchmark criteria may vary. For example, some companies may already consider themselves well positioned if they use ChatGPT, while for others this is just a standard application that they do not associate with a competitive advantage. For these companies, intelligent controlled processes and machines are more important.

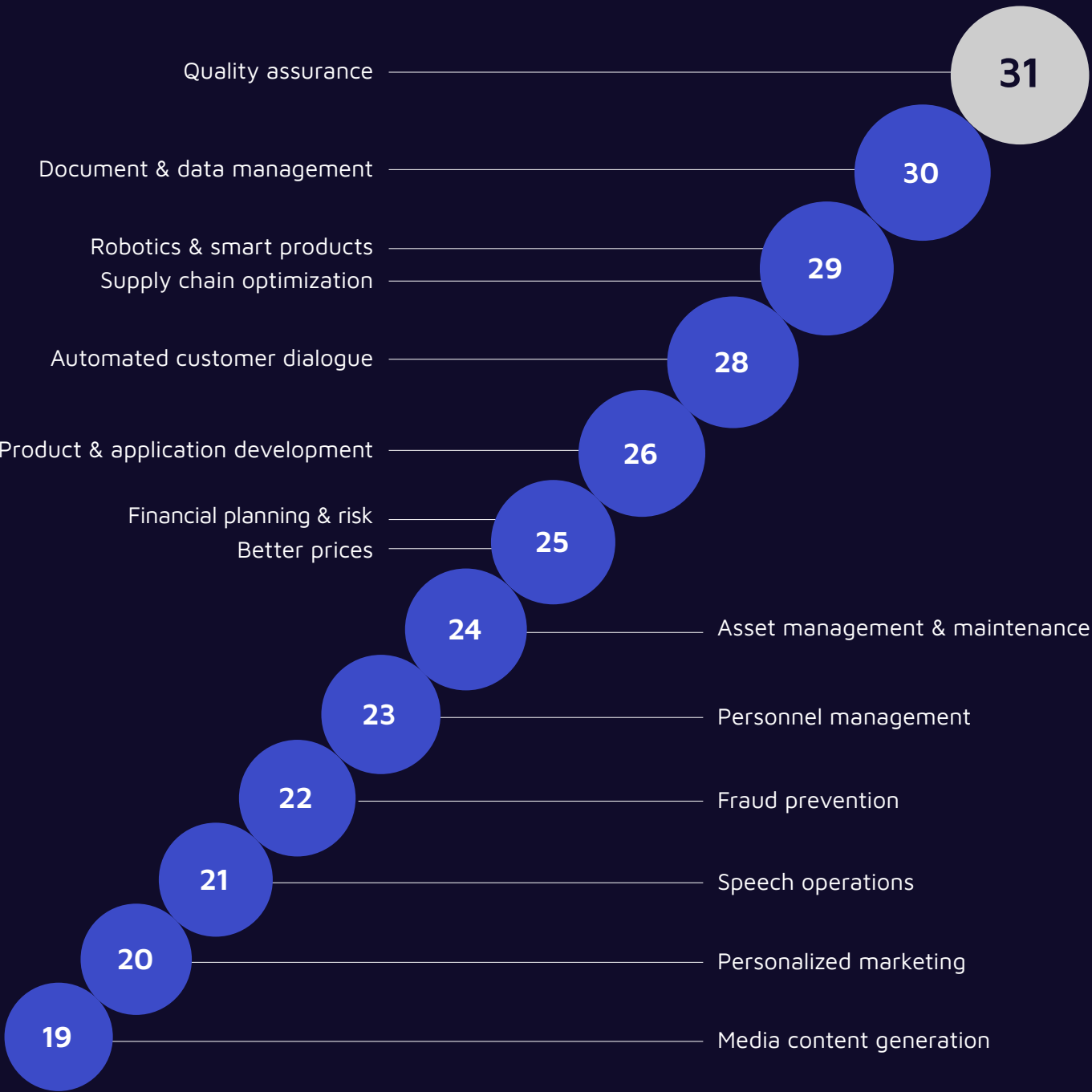
When comparing the sectors, most respondents see their sector as the leader in production (see Figure 9). Just over two-fifths say this. Transportation and logistics as well as automotive also see themselves further ahead. In contrast, very few respondents in utilities and in the retail and consumer goods sector rate their sector as leading compared to the other sectors. However, it is the healthcare and pharmaceutical sectors as well as food and beverage production that are rated as lagging behind. Surprisingly, most respondents even say this about the telecommunications industry.





FIGURE 6

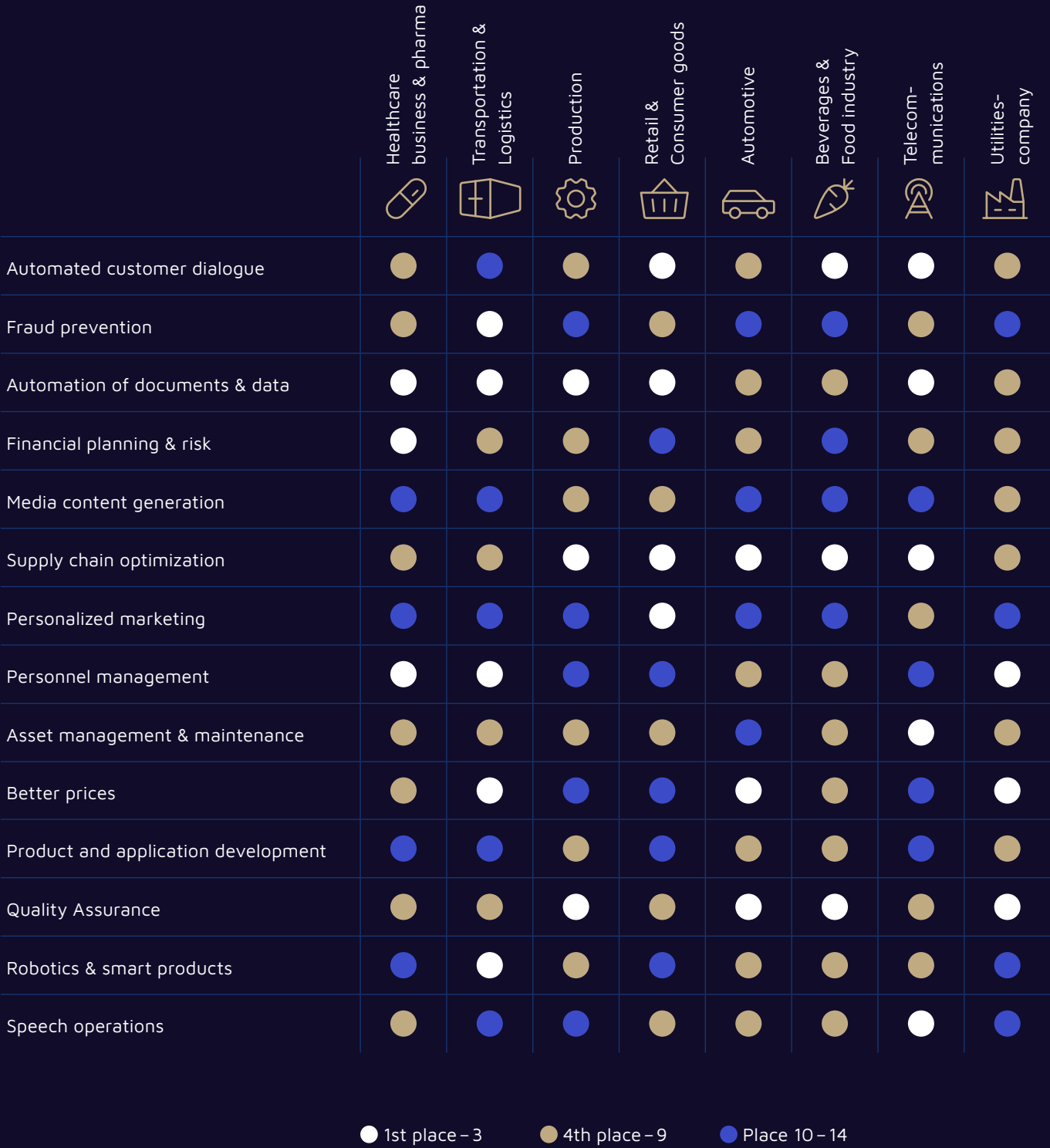
Most important use cases for Applied AI in the company\*



\* Percentage of company decision-makers surveyed; multiple answers possible; n=677.  
Source: Handelsblatt Research Institute / valantic (2025)

FIGURE 7

Most important use cases for Applied AI in companies - by industry\*



\* Ranking according to proportion of corporate decision-makers surveyed; multiple answers possible, partially split places; n=683.  
Source: Handelsblatt Research Institute / valantic (2025)

FIGURE 8

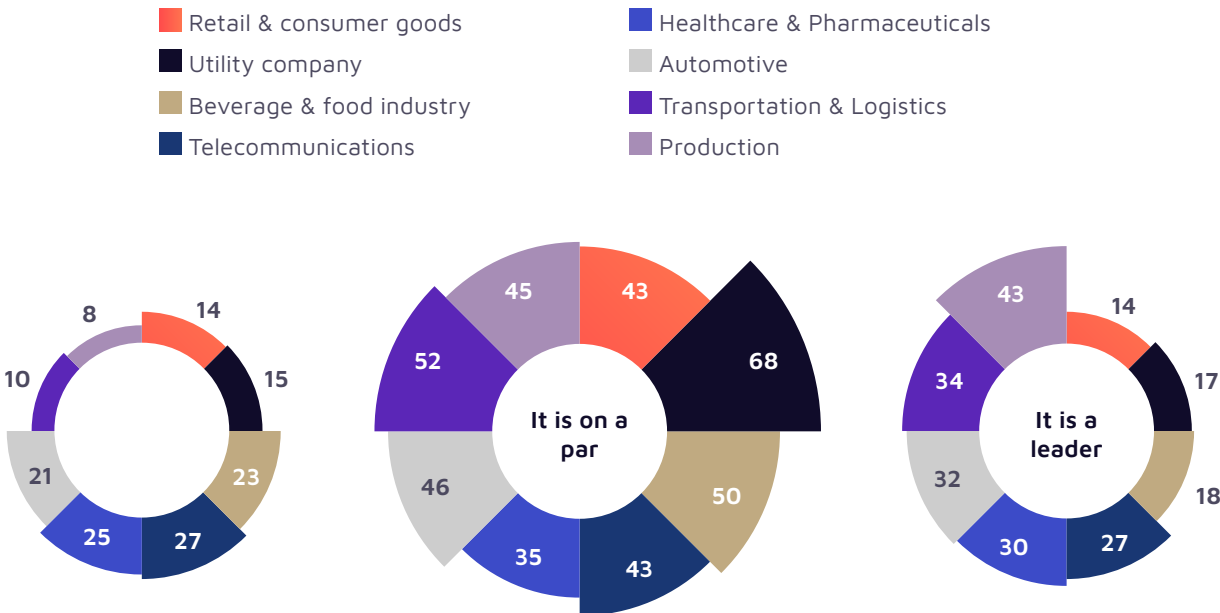
How your company compares with others  
in terms of Applied AI\*



\* Percentage of company decision-makers surveyed in percent; difference to 100 percent: "Don't know / no response"; n=483.  
Source in each case: Handelsblatt Research Institute / valantic

FIGURE 9

The state of your own industry compared  
to other industries when it comes to Applied AI\*



\* Percentage of company decision-makers surveyed in percent; difference to 100 percent: "Don't know / no response"; n=683.  
Source in each case: Handelsblatt Research Institute / valantic

Measurable added value of AI:  
Is it worth using?

The corporate decision-makers surveyed not only associate AI-applications with great potential in the future. The majority of companies are already achieving concrete and measurable added value with intelligent applications. This is reported by 70 percent of respondents (see Figure 10). In particular, these are decision-makers from small companies with 100 to 999 employees (see Figure 11). Of these, 83% stated that added value is already being achieved in their companies through the use of Applied AI. In contrast, only 59% of companies with 1,000 to 4,999 employees have done so. This means that larger SMEs - the backbone of the DACH economy - have so far been the least successful in generating added value with AI. Overall, the proportion of larger companies is also lower than that of smaller companies. One possible explanation is that smaller companies are faster and more agile when it comes to implementing applications because they are less likely to be blocked and slowed down by strategic preparatory work. Larger companies, on the other hand, take care of the strategy and responsibilities first. This means that implementation takes a little longer, so the added value can only be identified later.

The majority of companies are already achieving concrete and measurable added value with intelligent applications.

A comparison shows that many decision-makers in the production, telecommunications and transportation and logistics sectors in particular report that they have already achieved added value. This is somewhat less often the case for food and beverage manufacturers as well as in retail and consumer goods.

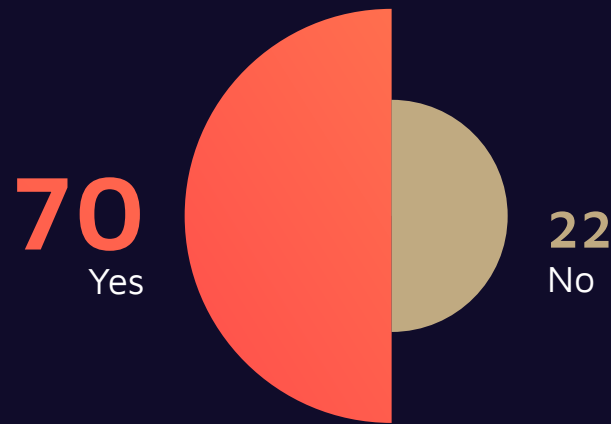
Financial added value and efficiency gains:  
Versatile benefits through AI

Almost all respondents whose companies are already generating added value report financial benefits such as increased profits or turnover (see Figure 12). And the financial added value should not be neglected. Just over half of those surveyed estimate this at between 10 and 19 percent (see Figure 13). A good fifth even reported values in excess of 20 percent.

Larger companies with 1,000 or more employees show a higher average added value through the use of AI. This again fits in with the previous explanation that a smaller proportion of larger companies are already achieving added value compared to smaller companies, as they take longer to implement the applications due to the strategic preparatory work. However, this strategic approach means that they increase the potential for greater financial benefits through the use of AI in the long term.

FIGURE 10

Does the company achieve measurable business value from the use of Applied AI?\*



\* Percentage of company decision-makers surveyed; difference to 100 percent: "Don't know/no response"; n=683.  
Source: Handelsblatt Research Institute / valantic (2025)

FIGURE 12

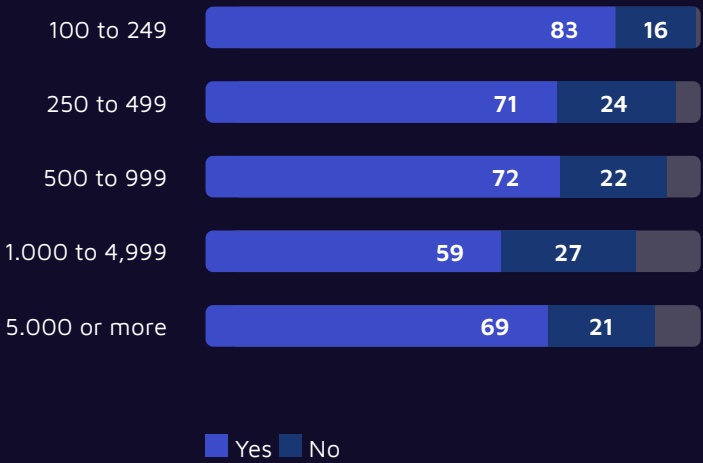
Can the added value be measured in the form of financial KPIs or in the form of efficiency gains?



\* Percentage of corporate decision-makers surveyed whose companies achieve measurable business added value through the use of Applied AI; difference to 100 percent: "Don't know/no response"; n=372.  
Source: Handelsblatt Research Institute / valantic (2025)

FIGURE 11

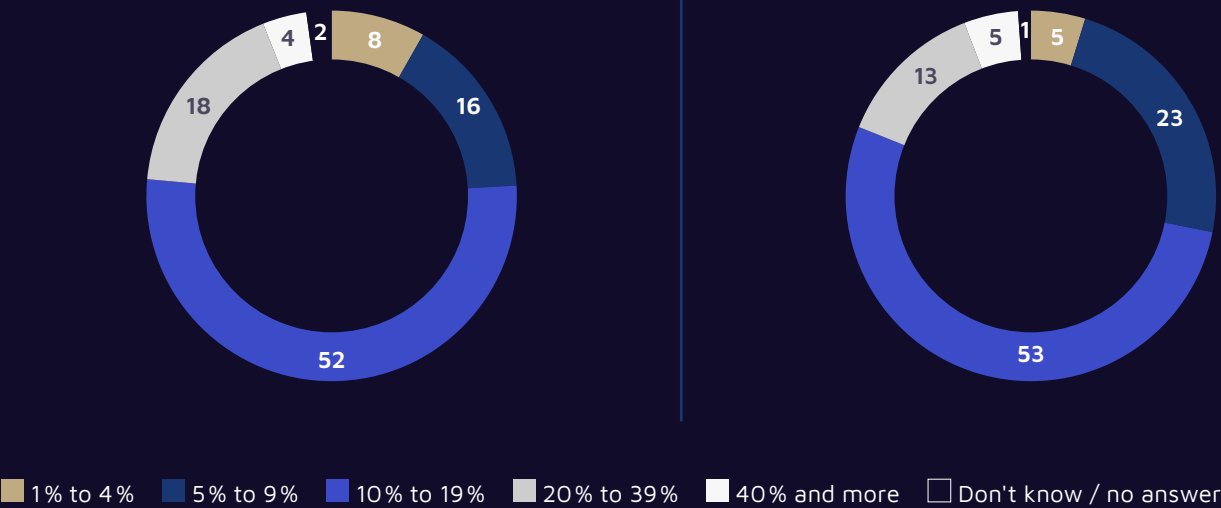
Does the use of Applied AI generate measurable business added value for the company? - by company size\*\*



\*\* Percentage of company decision-makers surveyed; difference to 100 percent: "Don't know/no response";  
Company size by number of employees; n=683.  
Source: Handelsblatt Research Institute / valantic (2025)

FIGURE 13

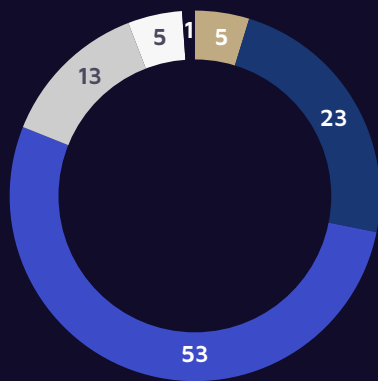
Amount of the financial added value\*\*



\*\* Percentage of corporate decision-makers surveyed for whom added value can be measured in the form of financial KPIs; n=365.  
\*\*\* Percentage of corporate decision-makers surveyed for whom the added value can be measured in the form of efficiency gains; n=359.  
Source in each case: Handelsblatt Research Institute / valantic (2025)

FIGURE 14

Amount of the efficiency gain\*\*\*





These added values are primarily based on efficiency gains such as time savings or cost reductions, which 97% of respondents stated are achieved in companies with added value (see Figure 12). Respondents reported efficiency gains of a similar magnitude to the financial added value (see Figure 14). Just over half also estimate the efficiency gain at between 10 and 19 percent. And slightly less than a fifth reported values greater than 20 percent. Once again, the larger companies report greater added value on average, which again fits in with the explanatory approach.

The feedback from company decision-makers therefore shows that Applied AI pays off for companies. They are already achieving benefits in the form of measurable added value. However, it is not only these benefits that are relevant when assessing profitability, but also the investments associated with implementation. These include, for example, costs for the acquisition of solutions from external providers or for programming within the company, for employee training and for integrating the application into existing processes.



**"For me, the most important aspect of AI is increasing efficiency. To a certain extent, there is also the chance of higher productivity, so that a company can achieve more with the same number of employees. On the other hand, I don't believe that the use of AI will enable companies to reduce their workforce to any great extent."**

Felix Jähnen,  
Chief Digital Officer, Krombacher Group

**"Especially when implementing LLM technologies, which are relatively simple on the application side, the ROI is usually faster than with other technologies. And they are also less expensive in comparison."**

Zied Bahrouni,  
CEO, Motius



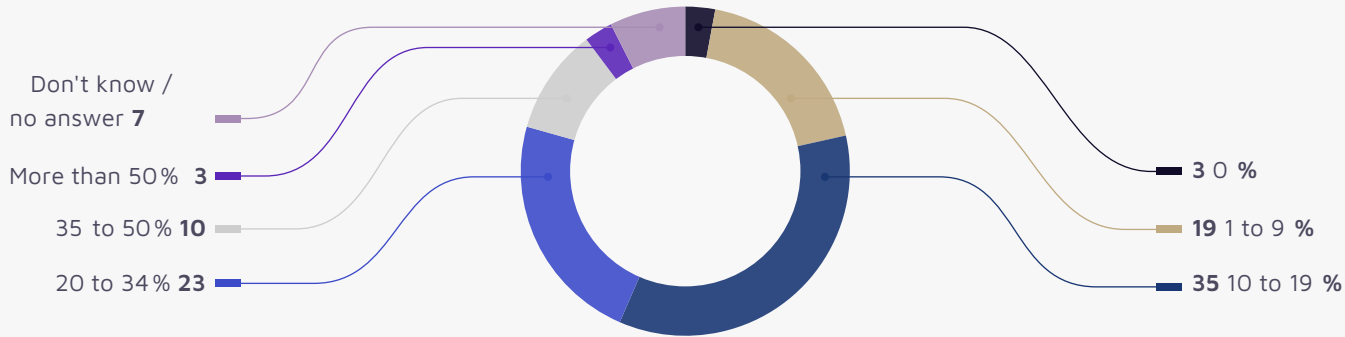
In order to assess profitability, companies are faced with the question of when the investment will be amortized and what return on investment (ROI) will be achieved. The answers from company decision-makers indicate that Applied AI is profitable, but often not in the short term. At around 80 percent, the vast majority of respondents state that only part of the expected ROI in the range of 1 to 34 percent has been achieved so far (see Figure 15). Only two percent report a value of 50 percent or more. One explanation for this observation could be that many companies

have only recently started AI projects and the ROI will therefore only be realized in the near future. In the qualitative interviews, it was stated that AI projects pay for themselves after twelve months at the latest.

Furthermore, the comparison of companies of different sizes again shows that a strategic approach to Applied AI pays off. This is more likely to be the case for large companies. And the decision-makers from these companies also report higher average values for this question.

FIGURE 15

**What percentage of the expected ROI has already been achieved with the AI applications?**



\* Percentage of company decision-makers surveyed; n=683.  
Source in each case: Handelsblatt Research Institute / valantic (2025)



**"It's not the case that AI pays off in terms of return on investment from day one. But in most cases the deployment is profitable after one year at the latest."**

Holger Riemenschneider,  
Director Technology, IONITY

In an industry comparison, respondents from telecommunications companies reported the highest results on average. Three quarters of them state that more than 20% of the expected ROI has already been achieved. Five percent have already achieved more than 50 percent. Most companies that fall into this last category are in the automotive industry with almost ten percent. At the same time, however, many respondents also report low values here. In this respect, the range is very wide.

The performance in the healthcare and pharmaceutical sectors as well as retail and consumer goods is still rather weaker. This fits in with the picture that these two sectors are laggards when it comes to AI. Regulation is likely to play a key role here, particularly in the healthcare sector.



**"Due to the higher security requirements, which are reflected in the regulation, it always takes a little longer in the healthcare sector compared to other industries, until new technologies are introduced."**

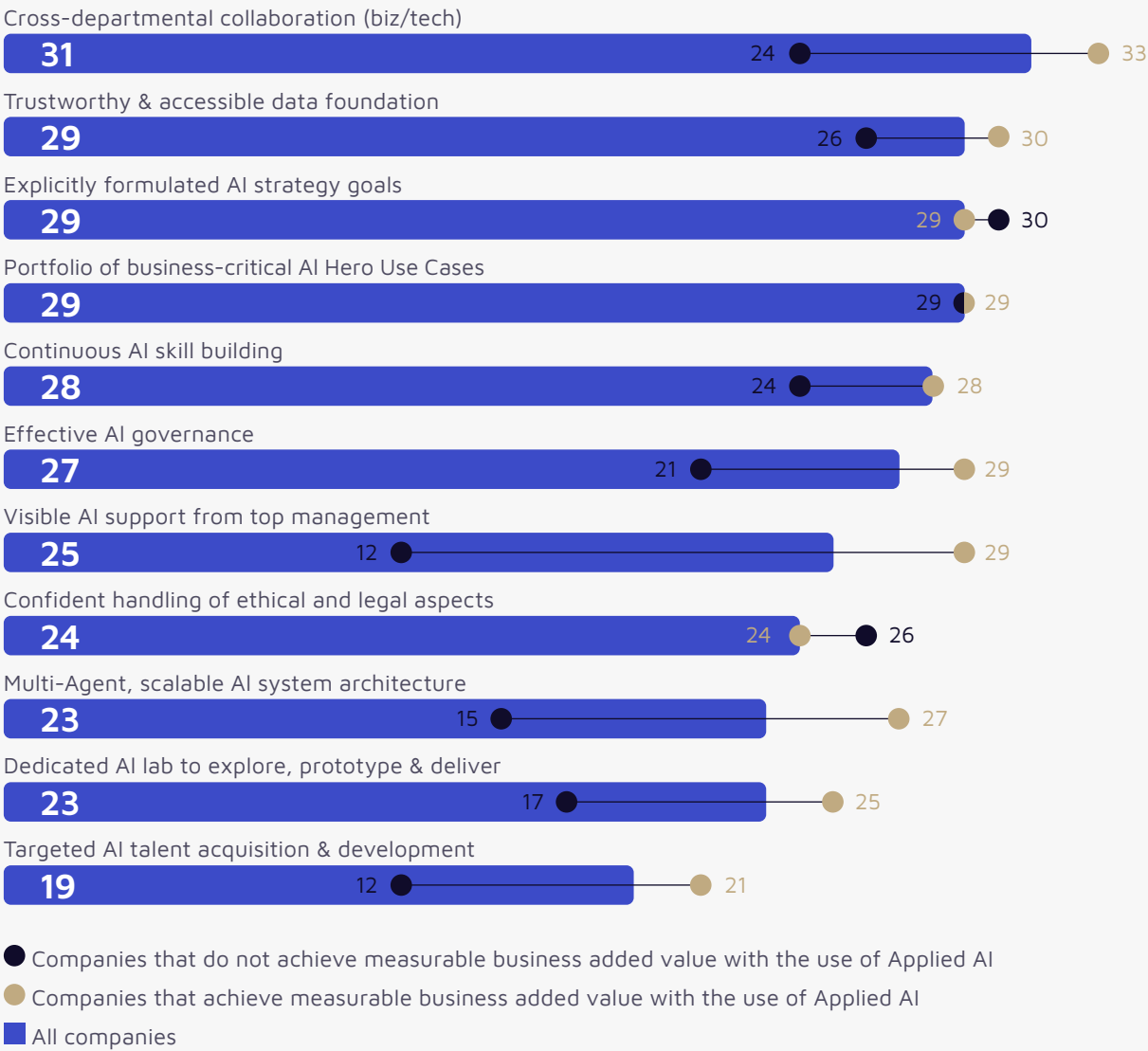
Holger Mägdefrau,  
Chief Financial Officer, Lohmann & Rauscher

## Success factors of Applied AI

In order for companies to exploit the potential of Applied AI as fully as possible, various success factors are crucial, which are discussed below. The analysis is based on a framework with eleven potential success factors that valantic has developed (see box valantic Framework for Applied AI Success Factors).

FIGURE 16


### Important success factors for Applied AI projects\*



\* Percentage of company decision-makers surveyed; multiple answers possible; in the conditional evaluation by added value, the answers with "Don't know / no answer" are not included, so the partial results do not form the overall average; n=678.  
Source: Handelsblatt Research Institute / valantic (2025)

valantic framework for Applied AI success factors

The decision-makers surveyed assessed the current status of the factors in the companies on a scale of 1 to 10, with the marginal values representing the worst or best status, which is defined below for each factor.



### Cooperation

Cross-departmental collaboration work on the implementation of AI applications

**01** = There is hardly any collaboration between departments on AI projects, which leads to isolated initiatives and suboptimal solutions.

**10** = There is intensive cross-departmental collaboration, which leads to synergetic and effective AI applications.



### AI lab

Cross-departmental collaboration (biz/tech)

**01** = There is no specialized environment for experimental development and agile testing of AI use cases.

**10** = The company has a well-equipped AI lab that enables agile prototyping and production of AI use cases.



### Management support

Visible support of AI-use by the management

**01** = AI is ignored or considered unimportant by management, resulting in a lack of support and resource allocation.

**10** = The management is an active advocate of AI, provides the necessary resources and promotes an AI-oriented corporate culture.




### Corporate strategy

Explicitly formulated AI-strategy goals

**01** = AI is not considered in the corporate strategy, there is a lack of specific AI-related objectives.

**10** = AI is anchored in the corporate strategy as a key driver of competitiveness, and clear goals have been defined for the use of AI in the company.



### Use cases

Portfolio of business-critical AI Hero Use Cases

**01** = The company has difficulties recognizing relevant AI use cases and implementing them successfully

**10** = The company is very competent in the identification and implementation of AI use cases; the use cases worked on are essential for long-term business success.



### AI talents

Targeted AI talent acquisition & development

**01** = The company is not or hardly in a position to recruit and develop AI experts; there are no employees with relevant AI skills.

**10** = The company is a leader in attracting and developing AI talent, building strong internal AI expertise.




### Ethics

Confident handling of ethical and legal aspects

**01** = The company has no guidelines for ethical or legal issues related to AI, which creates risks and uncertainties and prevents or delays the meaningful use of AI.

**10** = The company is confident with regard to ethical and legal aspects of AI use; the confident handling of ethical implications makes the company capable of acting.



### Skill Building

Continuous AI skill building

**01** = Employees are not prepared for working with AI systems and there is a lack of appropriate training programs.

**10** = The workforce is comprehensively trained and confident in using AI systems, which enables effective human-AI collaboration.




### Governance

Governance structures for data & AI

**01** = There is a lack of clear governance structures for data and AI; a lack of clarity in responsibilities and processes means that the necessary data and information for the application of AI is not available.

**10** = Robust governance structures are in place that ensure clear responsibilities and effective processes for data and AI management.



### Data

Trustworthy & accessible data foundation

**01** = The available data quality is insufficient and not trustworthy, which impairs the effectiveness of AI applications.

**10** = The company has a high-quality, quality-assured database, which is crucial for successful AI applications.



### Platform

Multi-Agent, scalable AI system architecture

**01** = The AI system architecture is rigid and not scalable, which limits growth and adaptability.

**10** = The AI architecture is Multi-Agent and scalable, supports innovation and can grow with the company's changing requirements.



According to most respondents, of the eleven factors for future projects, cross-departmental collaboration is the most important (see Figure 16). Almost a third (31 percent) consider this aspect to be important for the success of AI applications. Integration into the company's processes usually affects several specialist departments, as many processes run across departments. It is important that all departments and technology experts work together so that companies can maximize the potential of the applications. Data experts are also needed here: AI applications can only work with the right data basis. This is also the view of business decision-makers, 29% of whom cite the data basis as an important success factor. Anchoring AI in the corporate strategy, identifying use cases, continuous AI skill building and effective AI governance are also essential.

Most respondents from large companies with 1,000 or more employees are in favor of anchoring AI in the corporate strategy as an important success factor. This again fits in with the aforementioned explanation that the strategic focus of Applied AI is more pronounced in large companies - and also pays off. In addition, visible support from management is one of the five most frequently mentioned success factors.

On the other hand, AI labs and AI talent are less of a focus when it comes to success compared to the other factors. Some intelligent applications have now been developed to such an extent that they can be implemented and used in a low-code or no-code approach without in-depth knowledge of the technology. Attracting AI talent is still important. But a few years ago, the shortage of skilled workers was still a key hurdle to slow AI adoption. Now, AI talent is less critical to success.



**"The development of AI applications based on AI models is generally easier today than traditional software development. Foundational models provide the basis so that the models themselves no longer need to be developed, only the applications based on them. This also makes the recruitment of AI talent less of a bottleneck for successful implementation in companies."**

Zied Bahrouni,  
CEO, Motius



**"When it comes to AI success factors, the most important thing for me is defining responsibility and objectives - in other words, ownership. We are not introducing AI in order to introduce AI, but to achieve something with it - such as increased efficiency. Before implementation, it is therefore necessary to clarify in which area and with which AI application these goals can be achieved."**

Felix Jahnen,  
Chief Digital Officer, Krombacher Group

The group of most frequently mentioned success factors is also reflected in the differentiated sector analysis - with a few exceptions. In the telecommunications industry, for example, AI labs are also considered a very important success factor. In addition, respondents from this sector as well as from beverage and food manufacturers state more frequently that a confident handling of ethical and legal AI aspects is important.

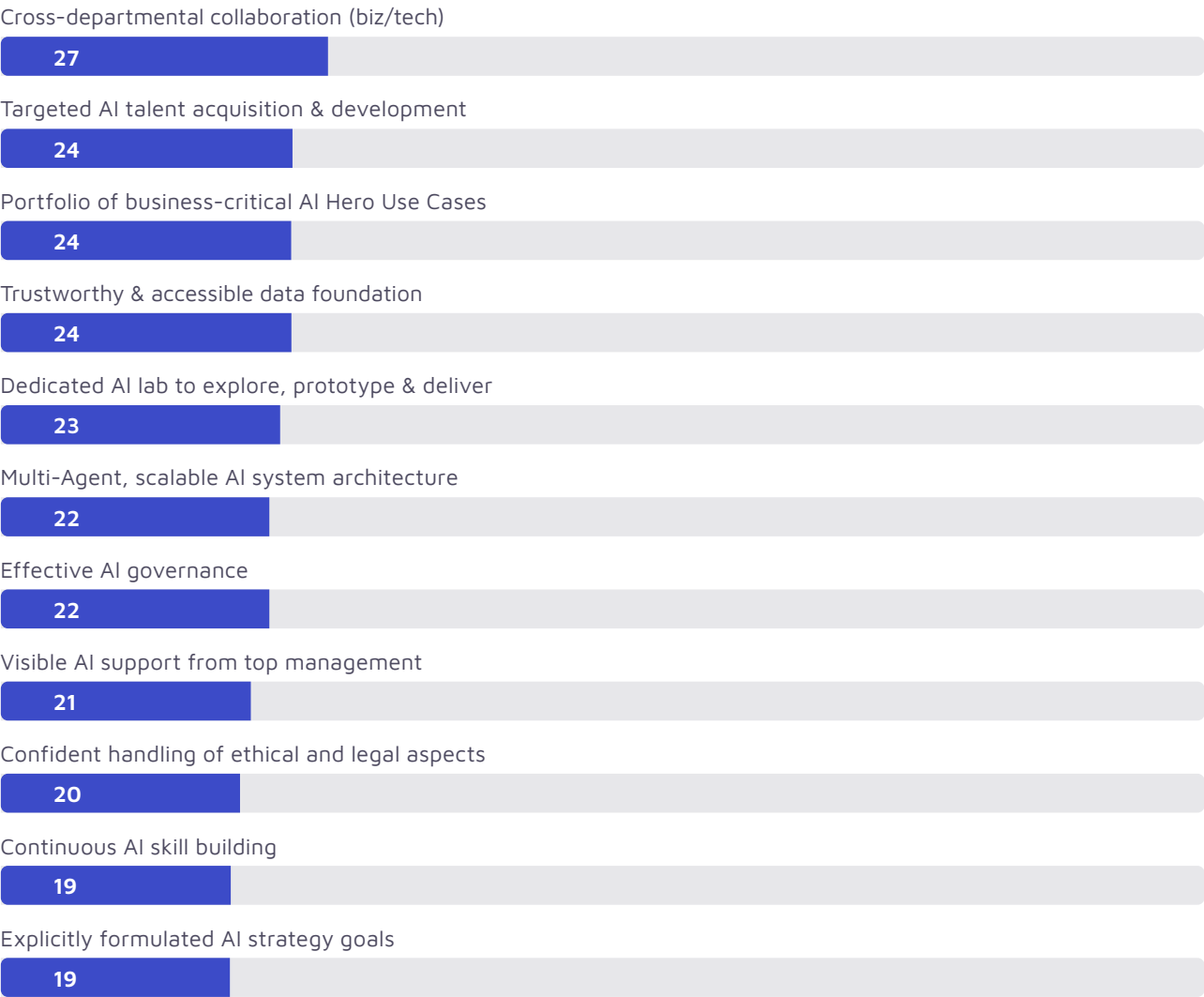
An analysis of the success factors, which differentiates according to whether companies are already achieving added value, also provides interesting findings. For example, cross-departmental collaboration is considered an important factor in successful companies that have achieved added value. Otherwise, the differences in the most frequently mentioned success factors between the two groups are rather smaller. However, it is also noticeable that the successful companies particularly emphasize the visible support from management and the system architecture among the remaining factors. In this respect, these points should not be neglected either.

In the previous assessment, the focus was on future AI projects and the relevant success factors. Looking back at previous projects, a differentiated assessment of their importance emerges (see Figure 17). Cross-departmental collaboration is also mentioned most frequently as a success factor, and the data basis is also attributed a major contribution to the successful progress of previous projects. However, AI talent still plays a greater role in the assessment of older projects - unlike when looking ahead. It is possible that more in-depth AI expertise was required when implementing earlier applications. This will be different in the future, as the applications will be easier to use.

In addition to a suitable data basis, cross-departmental collaboration, strategic anchoring and a focus on use cases are crucial for the success of Applied AI.

FIGURE 17

Factors with the greatest contribution to the successful progress of Applied AI projects in the past\*



\* Percentage of company decision-makers surveyed; multiple answers possible; n=483.  
Source: Handelsblatt Research Institute / valantic (2025)

In order for companies to fully exploit the potential of AI applications, they should be well positioned, particularly with regard to the key success factors. According to the decision-makers surveyed, this is certainly the case in the vast majority of companies (see Figure 18). Around 70 percent of companies are rather well

positioned for each success factor. According to the respondents, these companies are closer to the ideal state (scale value 10) than to the worst state (scale value 1). In each case, slightly more than ten percent even see their company as being exactly in the ideal state.

However, slightly more than ten percent of decision-makers state that the current state of the success factors are still rather poor. Although this only represents a minority, there is still a greater need for action.

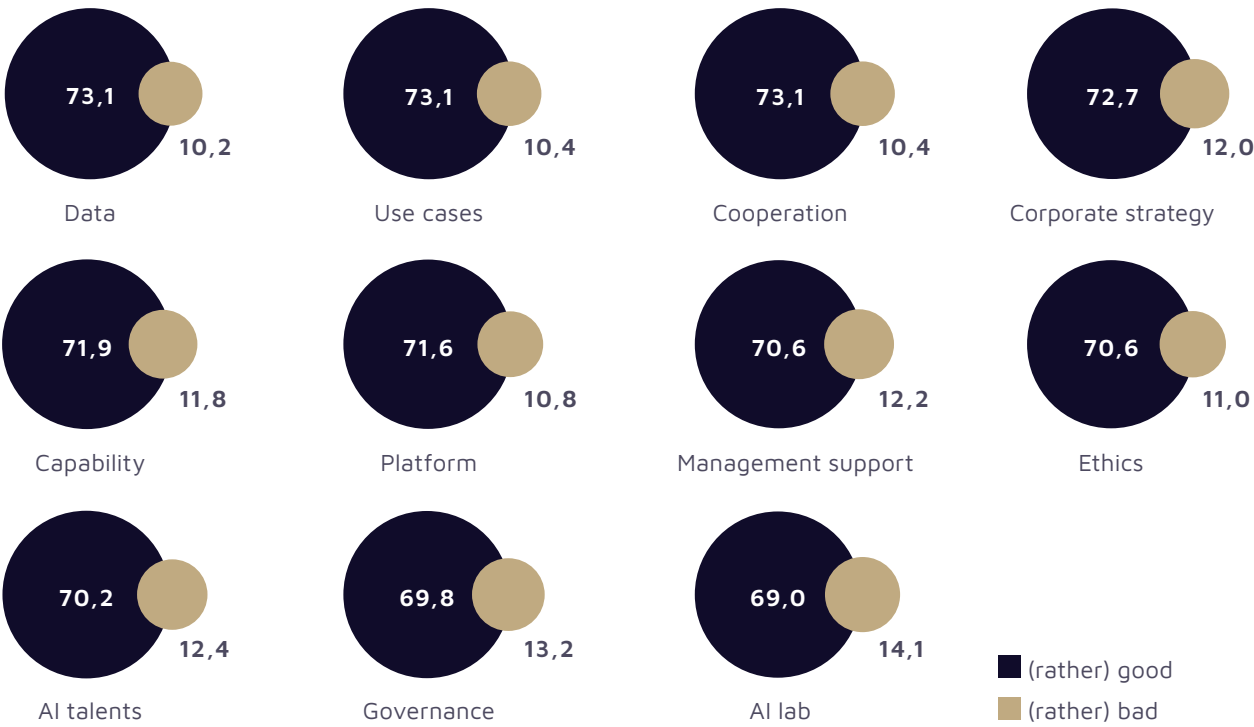
With regard to company size, it can be seen that the development of success factors tends to be more advanced in larger companies with 1,000 or more employees.

For all companies, it is particularly important to be close to the ideal state for the important

success factors. In the case of the factors most frequently mentioned in Figure 16, this is more likely to be the case for cross-departmental collaboration, the appropriate data basis and use cases, although many companies still need to take action here. the same applies to anchoring AI in the corporate strategy. However, there is a somewhat greater need for action when it comes to empowering employees. This is greatest in the group of the most important success factors for effective governance structures.

FIGURE 18

Current state of success factors in the company\*



\* Percentage of corporate decision-makers surveyed; (rather) poor: sum for scale values 1-5; (rather) good: Sum for scale values 6-10; explanation of the marginal scale values in box "valantic Framework for Applied AI success factors"; difference to 100 percent: "Don't know/no response".  
Source: Handelsblatt Research Institute / valantic (2025)

CHAPTER 3

# Conclusion

AI is the digital technology on which great expectations will rest in the coming years. The benefits already achieved are only a small part of the overall potential. In view of the accelerated progress made in recent years, further development is likely to be exponential, meaning that the benefits of AI for companies will rapidly increase.

However, AI will not be the only technology shaping the digital future of companies. Companies also believe that long-established technologies such as the Internet of Things, cloud computing and cybersecurity technologies are essential for their future success.

For many of the companies surveyed, their AI applications are already associated with measurable added value. However, this is not the case to the same extent in all sectors. While companies from the telecommunications, transport and logistics and production sectors are generally further ahead, retail and consumer goods as well as food and beverage production are lagging behind in this respect.

These added values of Applied AI are currently evident both in the form of financial benefits and efficiency gains. According to the experts surveyed in the qualitative interviews, the profitability of AI applications should be realized within a few months.

A number of factors are crucial for the successful use of Applied AI. These include the right data basis, as is well known. However, good data alone does not make for success. Rather, it depends on a bundle of factors. This is also reflected in the survey results. For example, respondents whose companies are already generating added value usually consider several factors to be equally important. By contrast, data stands out as an important success factor for those who are not yet generating added value.

For companies to be successful with AI, they need to take action in the areas of use cases, collaboration, employees and strategy in particular. The use of AI is not an end in itself, but should help companies with specific tasks. Without suitable use cases, the technology will not develop its full potential. It is therefore important to identify these before deployment.

Cross-departmental collaboration is also important. In particular, if the business and technology sides pull together and drive the implementation forward together, applications can be developed that are technologically feasible and economically viable.

Success also depends on the employees. This is not about the need for a large number of specialists. In view of the progress made in developing the technology, this is no longer necessary. However, all employees across the board must be empowered to use AI applications.

In view of these success factors, it is clear that AI applications are not simply an operational project, but have a strategic dimension. It is therefore also important for companies to anchor AI in their corporate strategy. Assuming that this is more likely to be the case for larger companies, the results show that such a strategic approach has a positive impact on potential.



**"In my view, the success of AI projects is largely linked to the employees. It's about how well we manage to train the workforce for AI - across the board, not as specialists. It is also necessary to motivate them to use the applications."**

Holger Mägdefrau,  
Chief Financial Officer, Lohmann & Rauscher

When it comes to use cases and success factors, the companies' respective industries are relevant, as these aspects vary to some extent and depend on industry-specific framework conditions. For example, effective AI governance structures are seen as the most important success factor in the healthcare and pharmaceutical sector, which is more heavily regulated.

As a result, the majority of companies have not yet reached the ideal state in terms of these success factors. This means they are not yet exploiting the full potential of Applied AI. However, those that act quickly now can be one step ahead of the competition.



## About us

valantic is one of the fastest growing digital consulting, solutions and software companies on the market. more than 500 blue chip customers already rely on valantic - including 33 of 40 DAX companies and a large number of international market leaders. With more than 4,000 digitalization experts, valantic is represented in 18 countries worldwide.

Around 2,000 successful digitization projects in the last five years have shown that valantic's experts understand their customers' challenges precisely. From strategy to tangible implementation, they have the necessary expertise to accompany projects from start to finish and make them successful. In doing so, they combine technological competence with industry knowledge and humanity.

valantic advises companies on all challenges of digital transformation, helps them to better manage their corporate performance and to leverage the potential of data and artificial intelligence. In addition, valantic supports its customers in optimally shaping the customer experience, profitably using core digitalization technologies and optimizing company processes across the board.

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