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Fostering AI resilience in the EU labour market

Samuel Goodger
Pietro Valetto
Elizabeth Kuiper

INTRODUCTION

The world is entering a new technological era, with artificial intelligence (AI) emerging as a general-purpose technology at an unprecedented speed. With around a third of people in the European Union using generative AI tools in 2025,[1] this technology is already impacting how we work, our relationship to work and labour demand in certain sectors. Unlike previous waves of automation, the utility of generative AI extends into cognitive, non-routine tasks, raising novel questions about how different occupations are valued and how education and training systems should adapt.

In 2026, the EU must confront these changes amid economic and geopolitical uncertainty, war, demographic and climate crises, and declining trust in democratic institutions. While the EU AI Act[2] represents a first step in regulating how AI systems are used in the EU, AI's implications for Europe's broader political economy require new thinking and policy frameworks ready to ensure societal resilience and mitigate potential harms.

Against this backdrop and building on the EPC's work on digital transformations,[3] this brief provides an early data-driven assessment of the EU labour market's readiness for AI. Following a review of EU legislative action, institutional capacity and policy priorities in this field, and of the evidence base of predicted exposure to AI in today's labour market, we analyse patterns of AI exposure and complementarity across the Union. In doing so, we assess positive or negative labour market effects along geographic and demographic lines including gender, education, age and income. The brief concludes with actionable policy recommendations aimed at addressing this transformation from the perspective of equality, skills development, demographic change and the societal implications for welfare state policies.

BACKGROUND

EU policy in motion

The 2024 EU AI Act, adopted with the goal of fostering a trustworthy environment for AI development and use, governs how AI technologies may be deployed according to a risk-based framework ranging from low, to medium, to high and unacceptable-risk use cases. The use of AI in employment contexts falls under the Act's 'high-risk' category, triggering provisions such as stricter risk management standards, data logging requirements and information disclosures.

Large language models (LLMs) however, which power most common AI tools used to automate or augment workplace tasks, fall under a separate regime targeting general-purpose AI (GPAI) systems. Governed by a Code of Practice[4] until final standards are adopted, providers and deployers of GPAI face specific obligations. The Act also – at the time of writing, subject to ongoing simplification efforts[5] – instructs AI system providers and deployers to promote users' AI literacy, defined as the skills, knowledge and understanding required for informed use. Beyond this, the AI Act does not explicitly address AI's broader labour market dynamics, leaving space for a dedicated initiative.

The 2024-adopted Platform Work Directive[6] governs the algorithmic management of workers, though it remains largely confined to the gig economy. The Directive enshrines rules on the transparency and explainability of automated monitoring and decision-making systems, introduces "human-in-the-loop" requirements for significant decisions and grants workers the right to access their data. Complementing this Directive, the 2018 General Data Protection Regulation[7] (GDPR) provides safeguards regarding automated decision-making, including profiling, and data subject rights applying to AI-powered workplace tools.

From a non-legislative perspective, the 2025 EU AI Continent Action Plan[8] recognises the need to boost Europe's AI workforce, address talent shortages and foster AI skills at all levels, coordinated by the "AI Skills Academy".[9] These efforts complement the Union of Skills,[10] the European Commission's broader initiative to build a future-proof workforce. Skills and employment indicators are monitored in the EU Social Scoreboard,[11] a key component of the European Pillar of Social Rights. Meanwhile, the 2025 Apply AI Strategy[12] focuses on accelerating industrial adoption by identifying priority AI use cases across sectors such as healthcare and manufacturing.

The upcoming Quality Jobs Act, expected in the second half of 2026, may help address gaps between AI adoption and workplace governance by supporting fair wages, good working conditions, access to training and fair job transitions for European workers. However, the Act's 2025 Roadmap[13] focuses on "implementation and enforcement of existing EU protections", limiting new action to "targeted complementary measures" not already covered.

Recent institutional debates also reflect growing attention to these issues. Following the European Economic and Social Committee's 2025 Opinion on "Pro-worker AI",[14] the European Parliament adopted a report in late 2025 on Digitalisation, artificial intelligence and algorithmic management in the workplace.[15] Building on a comprehensive study,[16] the report calls on the Commission to submit a dedicated proposal addressing these challenges. It highlights, in particular, the risk that AI may contribute to the "phasing out of certain entry-level jobs, which traditionally serve as an essential gateway into the labour market" and the need to set high standards for AI and algorithmic management in the workplace if the EU is to benefit from the digital transition.

At the national level, several member states have adopted targeted approaches. Germany's AI Observatory,[17] part of the Federal Ministry of Labour and Social Affairs, monitors the economic and social implications of AI for the labour market by commissioning research and developing indicators to inform policy. The French LaborIA[18] initiative similarly tracks how AI is driving reskilling needs and transforming workforce structures. In 2024, Denmark updated its national AI strategy[19] with a dedicated focus on ethical deployment, workforce competitiveness and public sector adoption, supported by new funding commitments.

Evidence of AI's impact on the labour market

Every technological revolution has historically reshaped the workplace, leading to both job creation and displacement. In this sense, AI is no different from previous general-purpose technologies, such as steam power, electricity or personal computing. However, the speed at which today's Generative AI (GenAI) tools have been adopted, and the pace at which their capabilities improve, has few parallels.

GenAI is distinct from past waves of automation because it mainly affects non-routine tasks,[20] including scientific research, programming, creative writing and illustration. These tasks are typically associated with white collar jobs, a category that has historically been the most shielded from automation-linked displacement. Current frontier AI models can match or exceed expert human performance across multiple domains,[21] and their capabilities are expanding rapidly. Big Tech companies are set to invest almost €600 billion in 2026 alone[22] in new data centres to scale model training and deployment – roughly equivalent to Belgium's GDP. In May 2025, Anthropic CEO Dario Amodei warned that within five years, GenAI could eliminate up to half of current entry-level white-collar jobs, increasing unemployment by 10–20%.[23]
In the EU, reported enterprise AI adoption ranges from below 5% in Romania to over 40% in Denmark,[24] reflecting differences in economic structure, digital infrastructure and sectoral composition. Observing how front-runner member states are navigating AI deployment and worker protections may yield valuable lessons for EU-level policy design.

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At the aggregate level, however, it is difficult to conclude that the AI transition is already producing significant productivity gains.[25] The OECD estimated in 2024 that AI could contribute 0.25–0.60% to productivity growth and 0.4–0.9% to labour productivity over a decade.[26] It certain cases, AI has even been observed to intensify work rather than reduce it, owing to an increased need

for human oversight and verification of AI-generated outputs.[27]

Labour market data also remains mixed. Data from the US and Denmark has found no clear relationship between AI exposure and aggregate employment outcomes.[28] However, a study looking at the US found stagnating employment for workers in the most AI-exposed fields since late 2024[29] – though no comparable effect has yet been observed for mid- or late-career workers.[30] Applied to Europe, high levels of collective bargaining coverage suggest that AI-driven adjustment may manifest primarily as reduced hiring rather than immediate layoffs, protecting incumbents while shifting adjustment pressures onto new entrants. Another review of EU economic data found that AI adoption may increase productivity by 4% on average[31] – with no observed short-term effects on employment figures. These productivity gains vary by employer size, however, with medium and large enterprises better placed to benefit.

Although most Europeans express optimism about AI adoption in the workplace,[32] only a minority of workers report receiving guidance or training on its use.[33] Uncertainty around changing skill demands, and concerns about bias in AI systems, particularly in recruitment,[34] remain widespread. Women are particularly exposed to AI-linked labour displacement due to their concentration in occupations such as translation and administrative work.[35] At the same time, while AI may partially level the playing field for entry-level employees in white-collar fields, it may also increase competition and reduce firms' incentive to invest in training, exascerbating income polarisation and inequality.

Two further challenges are already emerging. Workers who stand to benefit the most from upskilling are the least likely to engage with it. At the same time, evidence on large-scale public workforce retraining programmes is mixed,[36] with programmes offering limited wage recovery for participants. More broadly, many Europeans lack[37] the baseline digital and critical-thinking skills needed to thrive in today's economy – let alone in the future. This points to the need for a fundamentally different approach to skills policy, centred on building 'hybrid intelligence': combining technical AI literacy with domain expertise and uniquely human capabilities.[38]

Considering the pace of advancement, current predictions on occupational exposure and complementarity rely on assumptions about AI capabilities that may soon be outdated. Moreover, employment effects ultimately depend on real-world adoption. Increasingly popular agentic AI systems – capable of autonomously planning and executing multi-step tasks with minimal oversight – may extend displacement risks further into complex occupations currently considered safe, raising governance challenges that existing frameworks are not designed to address.[39] That said, this uncertainty runs in both directions. Demand for cheaper AI-powered services may prove more elastic than current estimates assume, and new occupations will absorb some displaced workers. Policies should thus be designed for a range of scenarios.

This points to the need for a fundamentally different approach to skills policy, centred on building 'hybrid intelligence': combining technical AI literacy with domain expertise and uniquely human capabilities.

This brief contributes empirically by applying a two-dimensional analytical framework that moves beyond binary automation exposure measures. First, it applies the AI Occupational Exposure Index (AIOE) methodology,[40] which accounts for recent advances in GenAI capabilities to estimate the extent to which it can perform tasks associated with different occupations. Second, following Pizzinelli et al.'s approach,[41] the brief extend this measure with a complementarity dimension that captures whether AI is more likely to substitute for or augment workers in a given role. This produces a three-way typology: high-exposure workers who are likely to benefit from AI (high complementarity), high-exposure workers at risk of displacement (low complementarity), and low-exposure workers who remain comparatively unaffected. Using EU-SILC microdata from 2024 (700,000 observations across 26 member states[42]) is then used to map AI's effects across countries, demographic groups and income levels. The following analysis presents key findings before discussing their implications for EU policy.

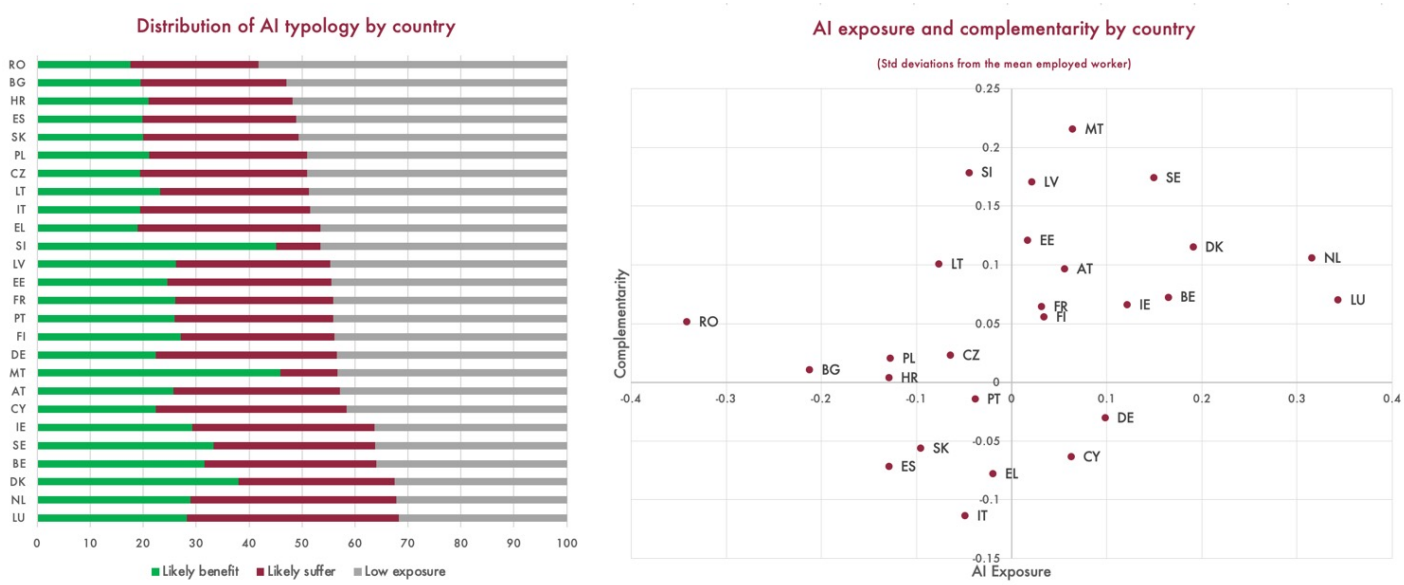
STATE OF PLAY

Geographic patterns in exposure

According to our analysis, AI exposure levels split EU member states into two clear groups.[43] Figure 1 reveals that the most exposed economies are predominantly wealthy and services-oriented: Luxembourg, the Netherlands and Denmark have around two-thirds of their workforces in high-exposure roles, followed closely by Belgium, Sweden and Ireland. At the other end, Romania, Bulgaria, Croatia and most of Eastern Europe see fewer than half of workers in high-exposure occupations, reflecting a larger share of employment in manufacturing and lower-skill roles that AI is less likely to reach – at least for now.

Figure 1

AI EXPOSURE, COMPLEMENTARITY AND TYPOLOGY BY COUNTRY



Source: Data produced using EU-SILC data for 26 member states, considering all survey respondents that report current employment in 2024. Values represent the z-score, e.g. the number of standard deviations from the EU average. The typology classifications are as follows: Likely benefit if positive exposure and complementarity z-score; Likely to suffer if positive exposure and negative complementarity z-score; Low exposure if negative exposure z-score.

The more important question is whether high-exposure workers are positioned to benefit or to suffer. Belgium, Denmark and Sweden stand out as the most favourably placed: high overall exposure, but with more workers likely to benefit. In practice, this means there are more workers with tasks that may be enhanced, not displaced, by AI. Conversely, Luxembourg, the Netherlands and Ireland combine high overall exposure with higher numbers set to suffer: fewer members of their highly exposed workforce hold the complementarity protection to turn AI into an advantage, suggesting that more workers are at risk of displacement.

The most concerning cases are Greece and Italy. Neither is among the most exposed countries overall, but their workforce outlook is among the worst in the EU, with suffering shares of 34% and 32% respectively, against just 19% set to benefit. Eastern economies sit at the lower end of overall exposure, but their exposed workers also skew toward suffering – a pattern to watch closely.

Demographic dimensions

In order to account for the demographic dimensions of AI, we also examine which parts of the workforce face the greatest exposure to AI, as influenced by age, education, gender and income. These findings mirror existing labour market divisions and prior studies of AI disruption along sectoral lines. Entry-level service roles, often filled by women or younger workers, largely see higher exposure, while less-exposed manufacturing or higher professional roles are more often covered by men or older workers.

Figure 2 reveals a clear age gradient: mid-career workers aged 25–44 are the most exposed and best positioned to benefit – often thanks to specialist experience – while both exposure and complementarity declining steadily on either side.[44] Younger workers are more likely to be in higher education or training and thus face lower barriers to upskilling in response to AI. As such, while age effects vary considerably in quality and scale, the most urgent age-related policy challenge may be mid-career reskilling.

Disaggregating by education level shows a similar pattern. Workers with the lowest levels of education report significantly lower exposure and complementarity.[45] Those with mid-level education fall slightly below the EU average, while highly educated workers are most likely to benefit. This reflects the current reality that higher qualifications significantly raise earnings potential.[46] Should this relationship weaken, advanced education may lose some attractiveness.

The same polarisation persists when looking at the gender divide, as women see more harmful exposure than men.[47] The driver is well-established: over-representation in clerical and administrative service roles raises women's exposure, while their under-representation in managerial and professional positions limits the protection offered by complementarity. Women's rising educational attainment[48] may shift this balance over time, but current structural gaps remains large and visible in the data.

Finally, the income gradient is the most consistent pattern in the dataset. The bottom six deciles show both low exposure and complementarity, but the story flips from eight upward, where both rise sharply. Top earners in the highest and second-highest income brackets are simultaneously the most exposed and the most likely to benefit from AI.

If middle-income earners, the principal contributors to income tax revenues,[49] lose out, this could create unprecedented inequality within white-collar professions and resentment towards those who maintain or improve their status. As the tax base narrows, the need for redistribution would likely increase – just as welfare systems are already under strain from shrinking working-age populations.

At the same time, AI creates new opportunities. To some extent, it enables those without expensive formal education or training to perform work previously reserved for credentialed or highly experienced professionals. Firms already place a premium on AI skills in hiring, which may partially offset age or education-related disadvantages.[50]

These patterns point to a labour market where, at least in the near term, AI is likely to reinforce existing inequalities. The resulting pressures, from increased redistribution needs to changing returns on education, make this not only a labour market question, but a central challenge for European policymakers. AI touches on education and training, fiscal and welfare policy, and the need to address demographic, geographic and intersectional disparities.

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Figure 2

AI EXPOSURE AND COMPLEMENTARITY BY DEMOGRAPHIC GROUPING

Source: Data produced using EU-SILC data for 26 member states indicated in Figure 1, considering all survey respondents that report current employment in 2024. Values represent the z-score, e.g. the number of standard deviations from the EU average.

PROSPECTS

Beyond the findings discussed above, other concerns emerge when thinking about the adoption of increasingly advanced and autonomous AI systems. These include *cognitive erosion*, or *de-skilling*[51] as complex tasks are increasingly outsourced to AI; algorithmic management and surveillance; labour intensification; and maintaining of human agency and autonomy. While outside the scope of this brief, policymakers must take these issues into account as they contend with fostering societal resilience.

The EU's existing digital and social policy acquis provides a foundation, but one not yet suitable to address the scale or speed of GenAI's labour market effects. While the forthcoming Quality Jobs Act presents a critical legislative opportunity to close this gap, its current Roadmap falls short, focusing on enforcing existing protections. Non-legislative instruments offer complementary levers, but must be met with institutional capacity and ambition. The window for reform remains open, as AI deployment choices are not yet locked in.

The recommendations that follow target EU instruments and policy processes where timely intervention can steer AI adoption toward augmentation, protect vulnerable workers and safeguard the fiscal foundations of European welfare systems.

1. Embed AI-specific workplace provisions in the Quality Jobs Act

The forthcoming Quality Jobs Act should introduce provisions addressing GenAI's observed and predicted impacts on job quality, working conditions and career trajectories. The Act's Roadmap currently limits action to "targeted complementary measures", which may be insufficient given the emerging evidence base. In the Act, the European Commission should propose expanded employer risk assessments for AI deployment affecting job design, workload and skill requirements. Building on the European Parliament's report, this should also include extension of the Platform Work Directive's consultation and transparency requirements to all sectors.

2. Mandate quarterly monitoring of AI's labour market effects

To ensure that systematic, comparable data on how AI affects employment, wages and training uptake is available, the European Commission should work with Eurostat and the OECD to improve AI-labour indicators drawing on existing data infrastructure. These should track capital-labour substitution signals, wage polarisation, sectoral employment shifts and training uptake rates, disaggregated by occupation, gender and age group. Without comparable data, distinguishing AI-specific trends from broader structural changes will be difficult. Eurostat should therefore collect data from member states on a quarterly basis, building an evidence base for adaptive EU-level governance, and feeding into stress-testing capacity (see point six).

3. Focus EU training programmes on mid-career resilience

Skills initiatives should prioritise upskilling mid-career workers and women in white-collar roles, given their high exposure and complementarity to AI. Such learning should be embedded in the workplace and see co-investment from employers, following best practices from several member states. Preserving structured entry-level pathways is equally important: apprenticeship frameworks and sectoral upskilling partnerships under the Pact for Skills can help ensure that labour market entry is not bypassed altogether, as AI raises expectations for entry roles.

4. Mainstream hybrid intelligence as a guiding framework for future skills policy

In parallel to expanding lifelong learning initiatives, new paradigms such as specialist AI training and hybrid intelligence must be developed and implemented for a resilient workforce. The European Commission, member states and the private sector, under the Pact for Skills, should update the European Skills, Competences, Qualifications and Occupations qualification to track cognitive flexibility and interdisciplinary capability across age groups and sectors. The occupations most resilient to AI are those requiring precisely this blend; without common standards, skills investment risks reinforcing narrow technical or soft-only training paradigms, leaving workers unprepared for future tasks that may emerge.

5. Align the next MFF's funding and investment instruments with AI exposure patterns

A share of the next Multiannual Financial Framework (MFF) should be informed by the geographic concentration of AI exposure. This includes cities at risk of rising inequality and lower-exposure peripheral regions at risk of falling further behind. Instruments such as the European Social Fund+ and Just Transition Fund should integrate AI-readiness criteria, directing investment towards digital infrastructure, SME AI adoption support and workforce development in regions with wide preparedness gaps, particularly given the dramatic variation in AI adoption across member states.

6. Stress-test welfare systems for AI-driven fiscal disruption

Using the latest insights on AI capabilities, matched with up-to-date occupational exposure metrics, the European Commission's fiscal and macroeconomic monitoring bodies should stress-test welfare state financing models against AI-driven erosion of the tax base and unemployment insurance systems. Policymakers should use these findings to launch dialogues on revenue diversification, including digital services levies and capital income taxes. These discussions should be embedded in the European Semester's fiscal surveillance, ensuring

AI's labour market effects shape country-specific recommendations.

7. Strengthen social dialogue for equitable AI adoption in the workplace

Amid accelerating AI adoption, social partners must be equipped with accessible tools, data and mandates to support deployment that favours augmentation rather than substitution. Workplace governance will shape shape AI's impact as much as technical progress. Drawing on best practices such as German works councils' co-determination on technology deployment and Denmark's tripartite governance model, the EU should encourage workplace AI agreements through future Council Recommendations, under the European Pillar of Social Rights and through the EU level Sectoral Social Dialogue Committees. Such agreements must specify consultation procedures and impact assessments, while helping identify emerging roles and responsibilities within firms and sectors as innovation progresses.

Conclusion

AI's capabilities already show signs of reshaping the world of work, including which skills are valued and who is employed, with effects concentrated on the groups that have historically financed European welfare systems.

Addressing these risks, the seven recommendations presented above aim to steer workplace governance ahead of disruption, strengthen the evidence base, pivot skills investment toward those most at risk, mainstream hybrid intelligence, anchor MFF investments in exposure estimates and prepare welfare systems for largely unexplored fiscal scenarios.

What this analysis cannot fully capture is what comes next. Agentic AI is advancing faster than occupational exposure methodologies can track. Its effects on the labour market will require continuous monitoring beyond what current datasets allow. The window for shaping this transition, while preserving European welfare states, is open. It will not remain so indefinitely.

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