WITSA AI Member Survey 2024

July 2024

AI is a game-changer for industry and society, as it can radically transform the way we live, work, learn, and play. AI can unleash the power of data, creativity, and innovation, creating new possibilities and opportunities for people and organizations. AI can also help us solve some of the most pressing problems and challenges that we face as a global community, such as climate change, poverty, health, and education. AI is not just a tool, but a partner and a catalyst for human progress.

In response, policymakers have proposed a variety of regulations to address concerns that this coming wave of AI systems may cause harm. Minimizing potential harm from AI systems is an important goal, but so too is maximizing the potential benefits of AI systems.

In response to these developments, WITSA has undertaken a number of initiatives, including webinars on AI regulation that address the road ahead for international AI regulation, and how best to ensure that the promise of AI delivers on its potential while managing perceived risks and fostering a regulatory environment that encourages innovation, best practices, consensus standards and collaboration. Other recent WITSA AI activities include our new 'Building Trust and Delivering on the Promise of Artificial Intelligence' paper, which recommends a careful and common-sense approach to addressing the risks arising from the rapid innovations in artificial intelligence, putting the spotlight on best practices, standards and regulation, as well as WITSA's "AI Declaration: Shaping the Future Through Ethical, Inclusive, Sustainable and Innovative AI".

This report summarizes the key findings from WITSA's 2024 Member AI Survey, featuring a plurality of responses from national tech industry associations from 80 countries and markets around the world. WITSA members are uniquely positioned to assess the market and regulatory conditions in their own markets.

About WITSA

The World Innovation, Technology and Services Alliance (WITSA) is an alliance of tech industry associations from 80 countries and economies. WITSA is dedicated to advocating policies that advance industry growth and development; facilitating international trade and investment in tech products and services; strengthening WITSA members' national industry associations; and providing members with a broad network of professional contacts. WITSA's signature platform, the World Congress on Innovation & Technology (WCIT), is the premier global industry sponsored tech conference.

WITSA members are leaders in a globally interconnected marketplace. Because the challenges facing the tech industry are undisputedly global in nature, WITSA continuously strives to advance international public policies that foster the tech industry's growth and development. With a focus on promoting industry cooperation and knowledge sharing, WITSA facilitates international trade and investment in tech products and services, contributing to the digital transformation of the global economy. WITSA makes it possible for its members — ranging from Mongolia and Argentina to Kenya and the United States — to identify common issues and priorities, exchange valuable information, and present a united position on industry issues.

Survey Results:

AI is a Top Concern among Tech Associations All Around the World

Survey Responses make clear that AI is overwhelmingly important to national tech associations all around the world. AI is critically important to national tech associations around the world for several compelling reasons:

- **Inevitability and Transformation**: AI is an inevitable technological advancement that is transforming industries and professions. National tech associations must stay abreast of AI developments to remain relevant and provide their members with up-to-date information and resources.
- **Impact on Work**: AI is reshaping the nature of work by automating tasks, influencing knowledge work, and creating new professions. Associations need to guide their members through these changes, ensuring they are prepared for the evolving job market.
- **Educational Role**: Tech associations play a crucial role in educating their members about AI's impact and possibilities. By harnessing AI, associations can improve their services and operations, fostering a more informed and technology-proficient community.
- **AI Literacy**: Enhancing AI literacy is essential for professionals across industries. Associations can help bridge the awareness gap, integrating AI literacy into licensure and continuing education requirements.
- **Innovation and Positive Outcomes**: AI acts as a catalyst for innovation across various sectors, such as healthcare, education, and transportation. Associations can leverage AI to drive advancements and improve outcomes in these areas.

- **Representation and Advocacy**: As AI continues to advance, associations represent the interests of their members, advocating for ethical standards, fair policies, and regulations that benefit the industry and society as a whole.
- **Influence in Policy Making**: Tech companies expect associations to leverage their collective influence to shape AI policies that are conducive to innovation and growth. This includes engaging with policymakers to ensure that the interests of the tech industry are represented in the legislative process.
- **Guidance on Best Practices**: Associations are expected to provide guidance on best practices for AI development and deployment. This helps companies navigate the complex landscape of ethical AI use and regulatory compliance.
- **Facilitating Collaboration**: Companies look to associations to facilitate collaboration between industry players and stakeholders. This collaboration can lead to the development of industry standards and the sharing of best practices.
- **Advocacy for Balanced Regulation**: There is an expectation for associations to advocate for balanced regulations that protect consumers and society while also allowing for the flexibility needed for technological advancement and competition.
- **Global Policy Alignment**: Given the global nature of technology and markets, companies expect associations to work towards aligning AI policies at an international level, promoting a harmonized approach to AI governance.
- **Tech Trade**: Associations play an important role in facilitating B2B trade opportunities for the burgeoning AI industry in their markets. By fostering a community of like-minded professionals and companies, tech associations create an environment that is conducive to the growth and success of B2B trade.
- **Disruption**: Tech associations assist their member companies and society at large in addressing the disruptions caused by AI, including by providing education resources and training programs, policy development, Supporting R&D, establishing ethical guidelines, provide networking opportunities for stakeholders, and offering resources and programs to assist workers whose jobs may be affected by AI.
- **GDP Contribution**: AI is expected to contribute substantially to global economic activity, potentially delivering additional global economic activity of around $13 trillion by 2030, or about 16 percent higher cumulative GDP compared with today. This amounts to 1.2 percent additional GDP growth per year[1]. This growth presents opportunities for tech associations to lead in economic development as well as assisting in upskilling the workforce to meet the needs of the evolving job market, help bridge global disparities by promoting inclusive growth and international collaboration and support their members in navigating the economic shifts caused by AI, so as to ensure they can capitalize on AI-driven opportunities.

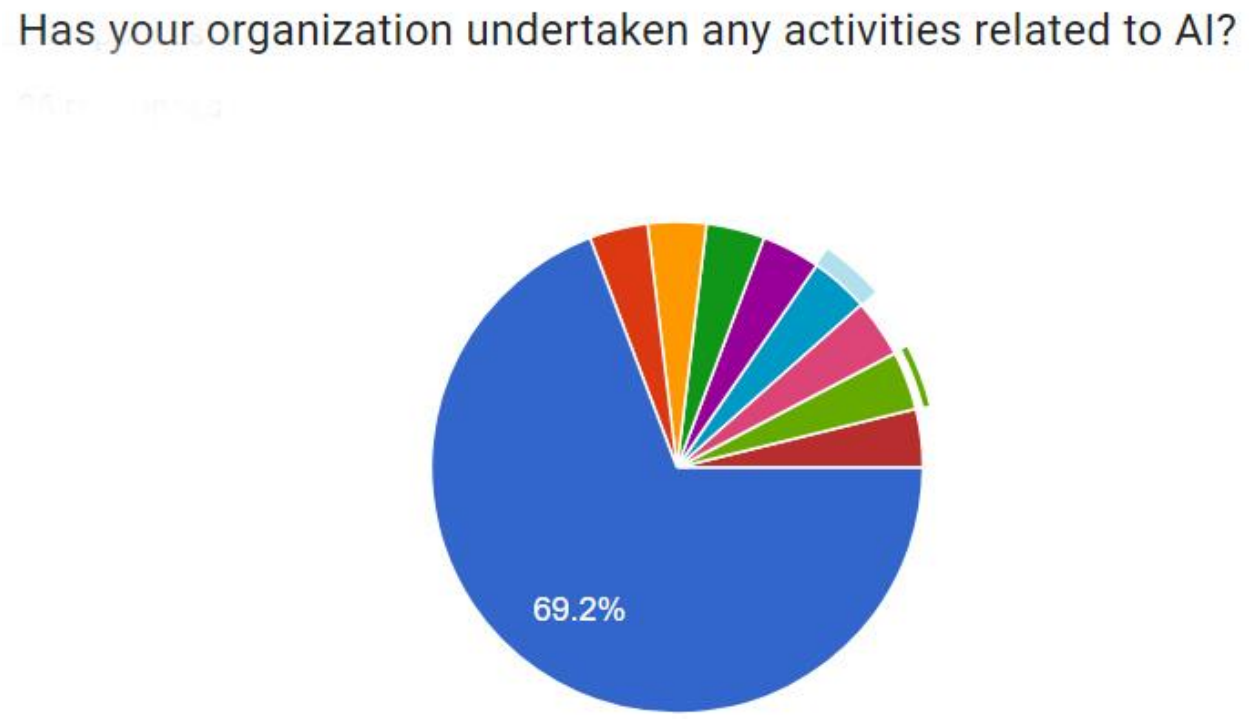
The WITSA survey found that AI's overwhelming importance to national tech associations lies in its transformative potential, the need for education and literacy, its impact on work and innovation, and the role of associations in advocacy and representation in this rapidly evolving landscape. Nearly all tech associations expect to further increase their AI activity levels in 2024 and beyond.

[1] Modeling the global economic impact of AI | McKinsey

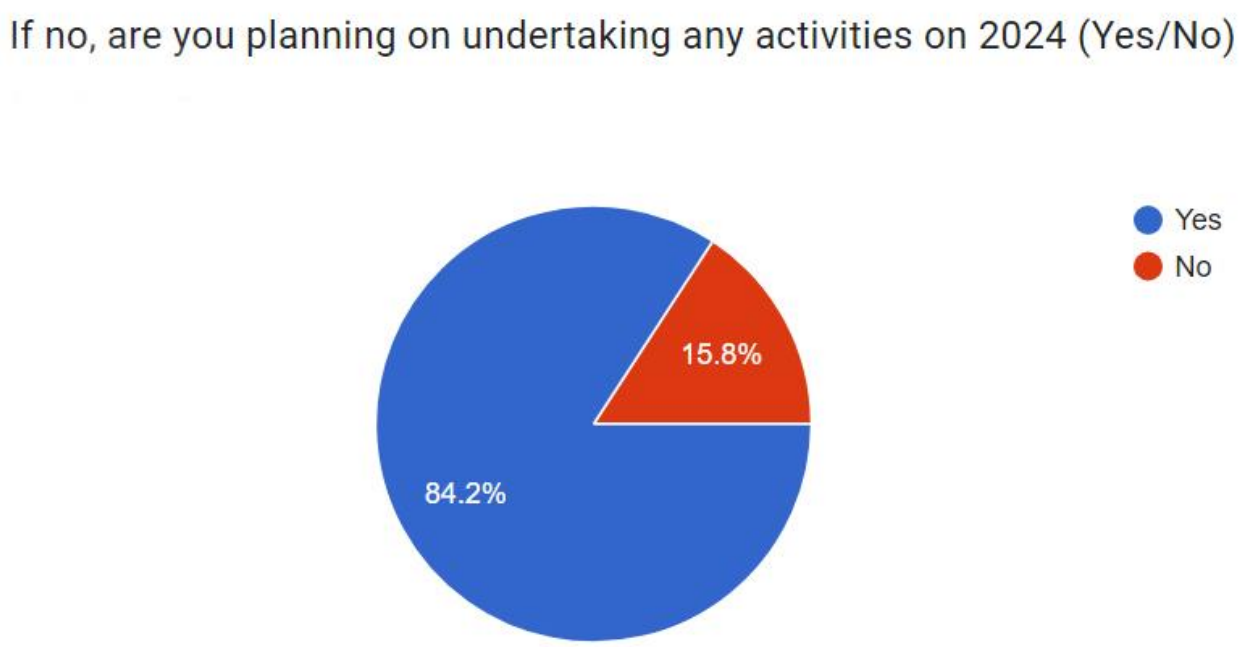
AI Policy Participation Is a Given!

The survey queried WITSA tech associations about their involvement in official AI policy bodies or committees at national or international levels. Only 4% of members indicated that they had not yet undertaken any activities related to AI. Many associations have created dedicated activities and committees dedicated to AI and related fields, work with their governments in producing national AI strategies and policies, best practices, consensus standards, as well as skills and educational frameworks.

Nearly 70 percent of WITSA's tech associations have already undertaken key activities related to AI, such as creating dedicated AI chapters, organizing Webinars, AI tech conferences, big data and AI hackathons, offering expert opinions in various national AI tech competitions and grant applications, and working closely with key government departments and regulators to create national AI strategies, to ensure that the benefits of AI are be realized across their respective markets. Many members are also actively involved in developing voluntary consensus standards, to ensure interoperability, safety and reliability, adaptability, risk management and public trust.



An even greater number of tech associations plan on making AI a key focus in 2024.



Active Contributions: Most WITSA member associations actively participate in technical committees, provide feedback on AI policies, and contribute to the development of AI standards and certifications.

Diverse Involvement: The level of involvement varies, but many are actively engaged in AI organizations and have advisory roles in government agencies. assisting in promoting AI policies and providing advisory work.

Key activities embarked upon by tech associations include (in order of relevance, as indicated in the survey responses) are provided below:

Educational initiatives (e.g. webinars, events, newsletters): These are crucial for keeping members informed about the latest technological advancements, best practices, and industry standards. Webinars, events, and newsletters serve as platforms for knowledge exchange, continuous learning, and professional development, which are essential for fostering innovation and maintaining a competitive edge.

Member outreach/working groups: These groups facilitate collaboration among industry professionals, creating opportunities for networking, mentorship, and the sharing of expertise. They also help in identifying common challenges and developing collective strategies to address them, thereby strengthening the industry as a whole.

Government lobbying/collaboration: Many tech associations have produced comments on behalf of their corporate members in response to regulatory and legislative proposals concerning AI. By engaging with government entities, tech associations can influence policy-making that affects the industry. They provide expert insights and feedback on regulatory and legislative proposals, ensuring that the interests of their corporate members are represented and that the regulations foster a conducive environment for technological growth.

Market intelligence/reports: Access to comprehensive market intelligence allows members to make informed business decisions. These reports provide valuable data on market trends, consumer behavior, and emerging opportunities, which are vital for strategic planning and investment.

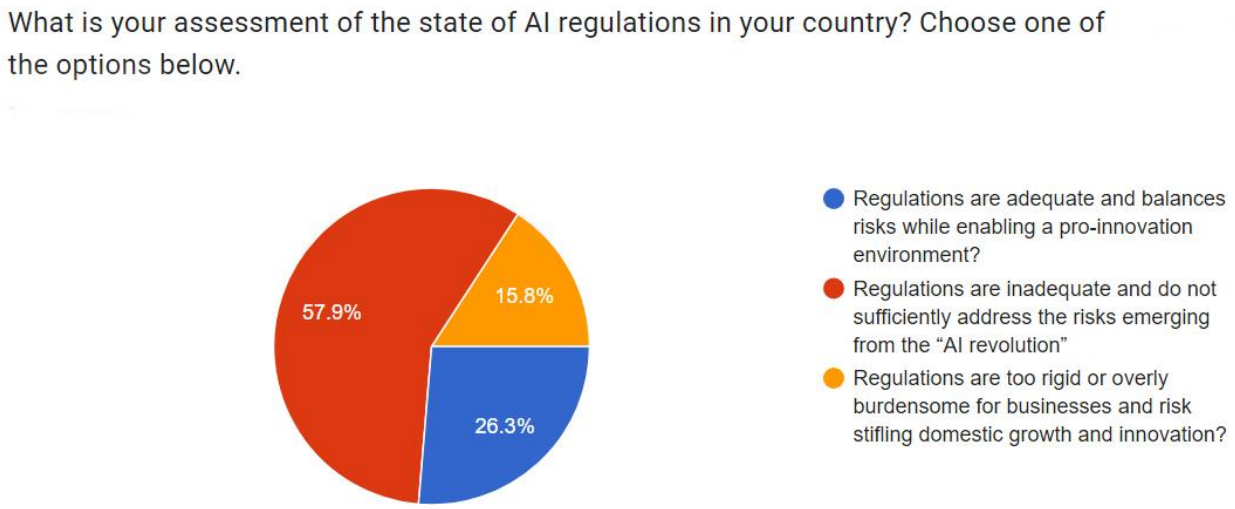
Reports and studies: In-depth reports and studies conducted by tech associations offer authoritative analysis on various aspects of the industry. They serve as benchmarks for performance, highlight areas for improvement, and guide research and development efforts.

Public/Private partnerships: Collaborations between public and private entities can accelerate technological advancements and facilitate the implementation of large-scale projects. These partnerships often lead to the development of innovative solutions that address societal challenges and contribute to economic growth.

Tech Associations are Divided on the Adequacy of the State of AI Regulations

The survey findings found a diverse range of perspectives within the tech industry regarding AI regulations. Below is a summary of the views expressed on the adequacy of AI regulations in WITSA member home markets:

- **Concerns About AI Regulations**: WITSA associations from the emerging markets often expressed concerns that current AI regulations in their economies are not sufficient to address the risks associated with the AI revolution. Effective AI governance requires oversight mechanisms that are often outlined in national AI strategies. A national AI plan provides a strategic direction for the development and integration of AI technologies. Without it, there may be a lack of clear guidelines and objectives, leading to uncertainty and low confidence in the regulatory environment. Moreover, a comprehensive AI plan often includes a policy framework that addresses ethical, legal, and societal implications of AI. In its absence, countries may struggle to establish regulations that are seen as adequate or trustworthy. Many developing countries are still in the early stages of developing and implementing AI national strategies, as the technology is relatively new and can be expensive to implement. Without these mechanisms, there may be concerns about the enforcement and adequacy of AI regulations.
- **Believing in Competent Regulations**: Nearly one-third of the members view the existing AI regulations as adequate, striking a balance between risk management and fostering a pro-innovation environment. This perspective is important because it suggests that some regulations may already be effectively addressing key concerns while also allowing for innovation and growth within the industry. It aligns with the idea that a nuanced approach to AI policy is emerging, particularly in the United States, where sector-specific regulations are being crafted.
- **Finding Regulations Overly Burdensome**: A significant minority of members feel that AI regulations are too strict and could potentially hinder business growth and innovation. This viewpoint is crucial as it underscores the delicate balance regulators must achieve to ensure that laws protect consumers and society without stifling technological progress. The concern is that overly restrictive regulations could lead to a competitive disadvantage, especially if they limit the ability of businesses to innovate and adapt to new AI applications.



The relevance of these findings lies in their implications for future policymaking and the development of AI technologies. They suggest a need for ongoing dialogue among industry stakeholders, policymakers, and the public to develop regulations that are both effective in addressing risks and flexible enough to support innovation. As AI continues to transform industries, the regulatory landscape will need to evolve to reflect the complex realities of AI integration into society and business operations.

Tech Associations are Divided on the State of AI Readiness

The survey findings from the national tech industry associations regarding AI readiness reveal a spectrum of preparedness across different markets. Below is a summary of the findings from the WITSA 2024 AI Member Survey:

Medium Confidence: Nearly half of the associations rated their home markets as only somewhat ready for AI. This indicates a moderate level of preparedness, where there is awareness and some infrastructure in place, but significant gaps remain. This could be due to a variety of factors, including limited access to high-quality data, insufficient talent pools, or lack of comprehensive AI strategies. The moderate scores suggest that while there is a foundation to build upon, more investment and development are needed to fully leverage AI technologies.

High Confidence: Nearly forty percent of the associations expressed greater confidence in their country's AI readiness. This higher level of confidence suggests that these markets have more robust AI ecosystems, with better access to technology, skilled professionals, and supportive policies. However, they indicated that there is still room for improvement, particularly in terms of scaling AI applications and addressing ethical considerations.

Low Confidence: About 10 percent of the associations had low confidence in their home markets' AI readiness. This low rating reflects significant challenges and a lack of readiness that could hinder the adoption and development of AI. The least developed countries often have the lowest confidence in their AI state of readiness due to a combination of factors, including lacking the necessary

infrastructure, such as data storage and modern computing hardware, which are essential for developing and implementing AI technologies. They often have more immediate concerns, such as education, healthcare, and basic services, which take precedence over significant investment in digital transformation. Moreover, these countries frequently experience a gap in the level of education and technical skills required to develop and manage AI systems effectively and are less able to invest in the costly research and development needed for AI. While AI systems require large amounts of data to learn and perform tasks well, the least developed countries typically do not have access to such vast datasets or the means to process them efficiently. They often lack a national AI strategy, resulting in a lack of clear policies and regulations governing AI, leading to uncertainty and low confidence in the system's readiness.

Highest Confidence: A small group of tech association, at 6 percent, showed great confidence in their country's AI readiness. This exceptional level of confidence what demonstrated by the largest tech markets that are leaders in AI innovation and deployment, featuring advanced infrastructure, strong government support, and vibrant ecosystems that foster innovation. These countries serve as benchmarks for others looking to enhance their AI capabilities.

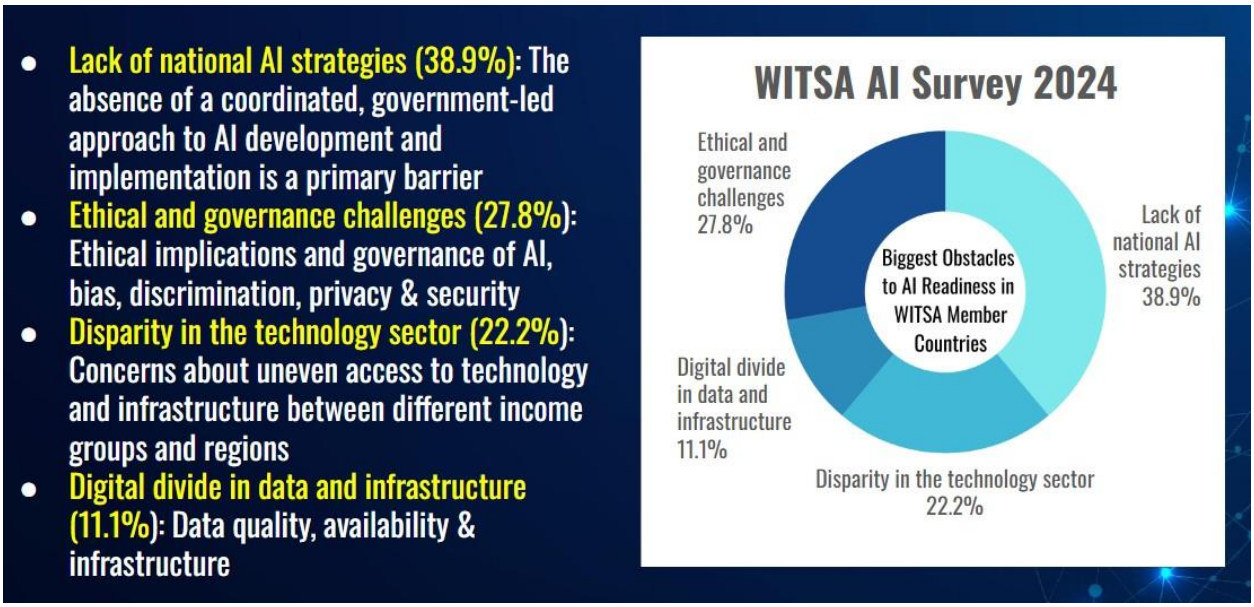
The relevance of these findings lies in their ability to highlight the disparities in AI readiness across different regions and economies. They underscore the need for targeted efforts to bridge the readiness gap, such as investing in education and training, developing clear AI policies, and fostering international collaboration. As AI continues to evolve, it will be increasingly important for countries to assess their readiness and take proactive steps to ensure they can fully benefit from AI advancements.

Tech Associations Provided Nuanced Insights into the biggest obstacles to AI readiness

The survey findings from national tech industry associations regarding the barriers to AI readiness are telling of the challenges that countries face in harnessing the full potential of AI technologies. Below is a summary of the findings from WITSA's survey:

- **Lack of National AI Strategies (38.9%)**: ***The absence of a coordinated, government-led approach to AI development and implementation is a primary barrier***, particularly those from developing countries and emerging markets. National strategies are critical as they provide a roadmap for AI development, including priorities for research and investment, ethical guidelines, and plans for workforce development. Without such strategies, countries may struggle to coordinate efforts across different sectors and miss out on the economic and social benefits of AI. The importance of national AI strategies is underscored by the fact that countries with such strategies tend to have a higher likelihood of success in implementing AI across multiple dimensions.
- **Ethical and Governance Challenges (27.8%)**: ***Nearly a third of tech associations around the world believed that ethical considerations and governance challenges are the paramount concern as AI technologies can pose risks such as bias, discrimination, and violations of privacy and human rights***. Establishing ethical principles, standards, and regulations is essential for ensuring AI is used responsibly and gains public trust. The development of a framework for AI governance that encompasses all stages of policymaking is crucial for achieving societal values like fairness and sustainability.

- **Disparity in the technology sector (22.2%).** Nearly a quarter of tech associations believe that uneven access to technology and infrastructure between different income groups and regions are the most significant obstacles to AI readiness. This includes disparities within the technology sector, including gaps in infrastructure, skills, and innovation capacity. High-income countries often have more developed technology sectors, which give them a clear advantage in AI innovation and implementation. Conversely, lower-income economies may lack the necessary resources and talent, which can hinder their AI development efforts. Addressing these disparities is essential for equitable progress in AI readiness globally[1].
- **Digital Divide in Data and Infrastructure (11.1%)**: The digital divide, characterized by gaps in data availability, quality, governance, internet access, connectivity, and digital literacy, is another critical barrier, highlighted by over ten percent of the WITSA membership. These gaps can lead to reliance on foreign technology and introduce challenges such as language disparities and biases. Bridging the digital divide is crucial for fostering inclusive AI development and ensuring that all countries can benefit from AI advancements[3].



The relevance of these findings lies in their implications for policy-making and international cooperation. They highlight the need for comprehensive national AI strategies, ethical and governance frameworks, efforts to reduce technology sector disparities, and initiatives to bridge the digital divide. As AI continues to evolve, addressing these barriers will be key to ensuring that AI technologies contribute positively to society and economies worldwide.

Summary & Conclusion

Whether the promise of AI will deliver on its potential depends on how well businesses, AI developers, governments and other stakeholders manage perceived risks while fostering a regulatory environment that encourages innovation, best practices, voluntary standards and international collaboration.

Existing AI systems raise real concerns about bias, privacy and intellectual-property rights, and as the technology continues to advance, other problems could still become apparent. Nevertheless, the key is to balance the promise of AI with a sound judgment of the actual risks, and to be ready to adapt accordingly.

The WITSA AI Member Survey 2024 highlights the overwhelming importance of AI to national tech associations around the world. AI is seen as a game-changer that can transform industries and societies, solve pressing global challenges, and drive innovation and progress.

Tech associations play a crucial role in educating their members about AI, advocating for ethical standards and balanced regulations, and providing guidance on best practices. However, there is a divide among tech associations regarding the adequacy of AI regulations.

The survey also reveals a spectrum of AI readiness across different markets, with some countries being more prepared than others. The barriers to AI readiness include the lack of national AI strategies, ethical and governance challenges, disparities within the technology sector, and the digital divide.

Trade associations within emerging markets voiced concern that the current AI regulations may not be equipped to mitigate the risks ushered in by the AI revolution as effective AI governance can only be established when national AI strategies are in place. These are critical as they provide a roadmap for AI development, including priorities for research and investment, ethical guidelines, and plans for workforce development, and serve as a guide for the development and assimilation of AI technologies into the societal fabric. Conversely, the absence of a national AI blueprint can result in a regulatory vacuum, characterized by ambiguous guidelines and objectives, which in turn breeds uncertainty and undermines confidence in the regulatory framework. WITSA therefore believes that a comprehensive national AI strategy should encompass a policy framework that conscientiously addresses the ethical, legal, and societal dimensions of AI deployment. Without such a framework, nations may find themselves grappling with the challenge of instituting regulations that are perceived as both sufficient and credible.

It is noteworthy that many developing nations are at the nascent stages of formulating and executing such national AI strategies. This is a golden opportunity for collaboration between industry leaders and governmental authorities. By joining forces, we can co-create AI governance models that not only safeguard against potential risks but also harness the transformative power of AI to catalyze economic growth and societal advancement.

WITSA believes in proactive approach where industry expertise and government oversight converge to foster an environment ripe for innovation and responsible AI integration. This partnership, when realized, will lead to the establishment of trust in AI systems, thereby accelerating the adoption of AI across various sectors and contributing to the global competitiveness of these emerging markets.

Overall, the WITSA 2024 AI Survey demonstrates the need for ongoing dialogue, collaboration, and targeted efforts to ensure that AI technologies are harnessed responsibly and for the benefit of society and economies worldwide.

As a global tech community, we stand ready to steer the course of innovation and the responsible stewardship of artificial intelligence, by collaborating closely with governments and other stakeholders

to craft a future where AI serves as a cornerstone for trust, progress, inclusivity, and sustainability. We recognize that the promise of the AI age is not just in the sophistication of algorithms or the accumulation of data but in the empowerment of individuals and communities across the globe. By supporting an environment where innovation thrives under the guidance of careful and competent governance, WITSA member associations will ensure that AI is a force that empowers society for the good of all, underpinned by a vision that is as human-centric as it is technology-driven, with a commitment to a future where technology and humanity advance hand in hand, creating a world where the marvels of AI are matched only by the care with which they are wielded.