OpenAI | Economic Research

OCTOBER 2026

Europe's Agentic Opportunity:

Moving from breadth to depth with AI agents



Over the past six months, AI use has broadened across the EU.

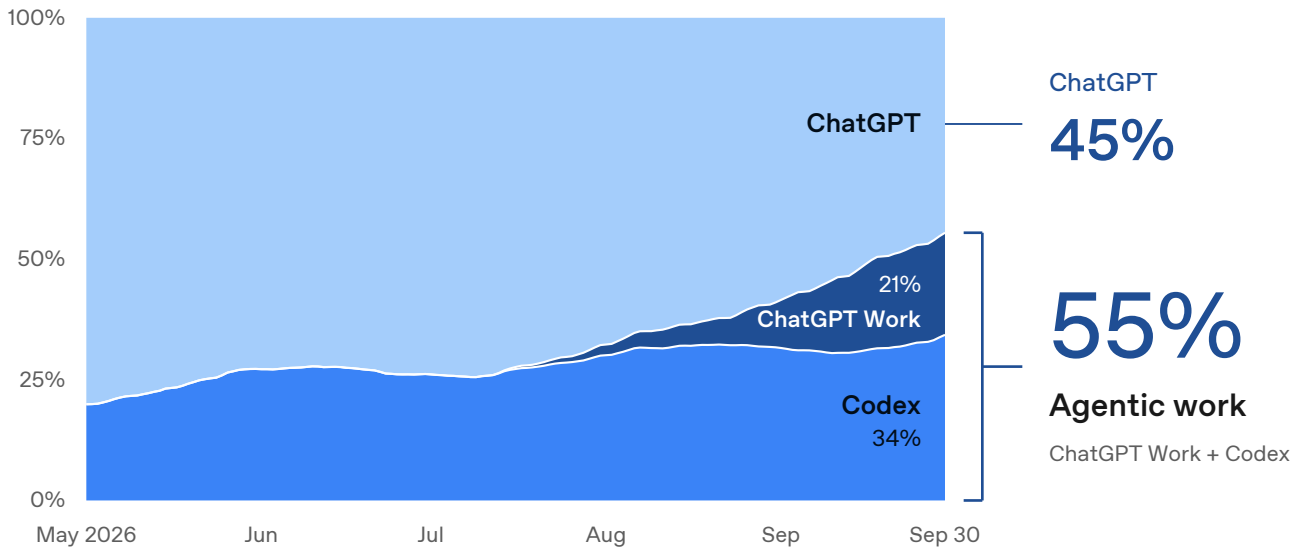
The opportunity now is to deepen that use through agentic capabilities. People are no longer only asking AI questions. They are using agents to carry out tasks from planning through completion. This shift is taking place as AI adoption accelerates across Europe. In 2025, 20% of EU companies with at least 10 people employed used AI, up from 13.5% in 2024. But broader adoption does not automatically translate into deeper use. The EU now has an opportunity to **close the gap between access and impact**.

Agentic work in the EU is growing rapidly

Figure 1:

Agentic token output in EU firms now exceeds 50%

Share of enterprise generated text tokens (excluding Other; 28-day trailing window)



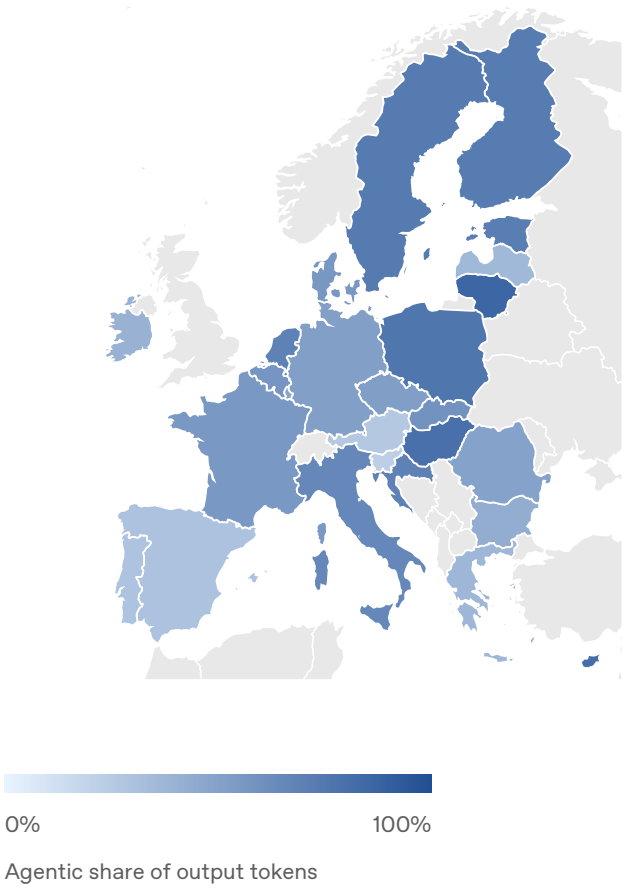
Note: An analysis of ChatGPT Enterprise and Business accounts. ChatGPT Work launched in July 2026.

Across the EU, the growing use of agents reflects both changing worker behavior and broader business adoption. By the end of September, following the launch of ChatGPT Work, agents via Codex and ChatGPT Work accounted for **more than 50% of output tokens** generated by firms in the EU.

Figure 2:

Agent use differs across EU member states

Agentic share of output tokens · September 2026



Lithuania	85%
Cyprus	81%
Hungary	79%
Poland	76%
Sweden	73%
Finland	72%
Estonia	71%
Netherlands	68%
Croatia	68%
Italy	65%
Slovakia	58%
Belgium	57%
Denmark	56%
Malta	56%
France	55%
Czechia	52%
Germany	51%
Romania	49%
Luxembourg	47%
Bulgaria	42%
Ireland	39%
Greece	37%
Latvia	35%
Spain	30%
Portugal	29%
Austria	26%
Slovenia	22%

Note: An analysis of ChatGPT Enterprise and Business accounts.

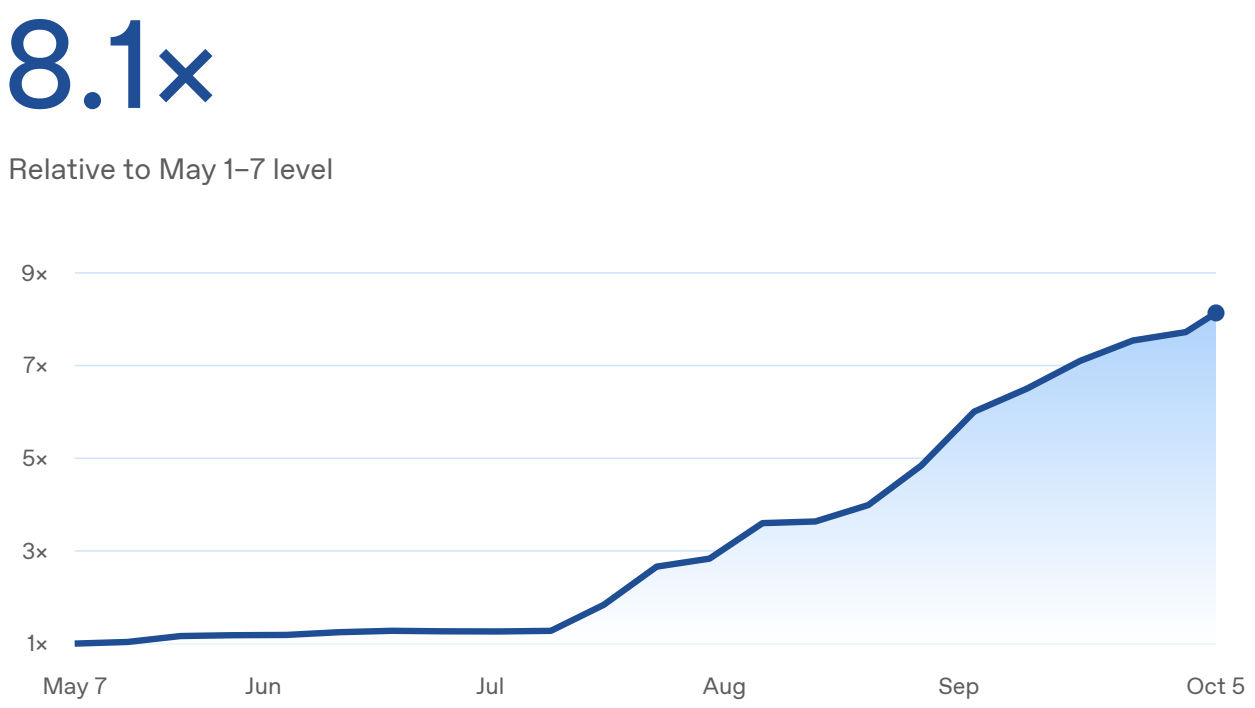
Alongside this steady rise across the EU, agentic use by firms still varies considerably across member states. At the high end, **85% of the tokens** that Lithuanian companies generate are **agentic** through Codex and ChatGPT Work. On the low end, 22% of tokens in Slovenia are for agentic use. Interestingly, countries with smaller populations like Cyprus, Estonia, and Lithuania have relatively high agentic use within their larger firms.

Growth extends to smaller businesses

Agentic use is not limited to firms; it is also growing rapidly among small and medium-sized businesses. This analysis defines small or medium businesses as businesses with 200 or fewer associated users.

Figure 3:

Agentic weekly active users in EU SMBs grew 8.1x since May



Note: This analysis defines small or medium businesses as businesses with 200 or fewer associated users.

Small and medium businesses are the backbone of EU employment, accounting for 63% of its private sector employment and contributing over 5 trillion Euros to the EU economy each year. Since May 2026, weekly active agentic use by small and medium businesses in the EU **grew by more than 8x**. A major part of this growth followed the introduction of ChatGPT Work.

Figure 4:

Growth in agentic weekly active users among EU SMBs varied since May

Weekly active users of ChatGPT Work or Codex
Relative to May 1–7 · September 29–October 5, 2026



Note: This analysis defines small or medium businesses as businesses with 200 or fewer associated users.

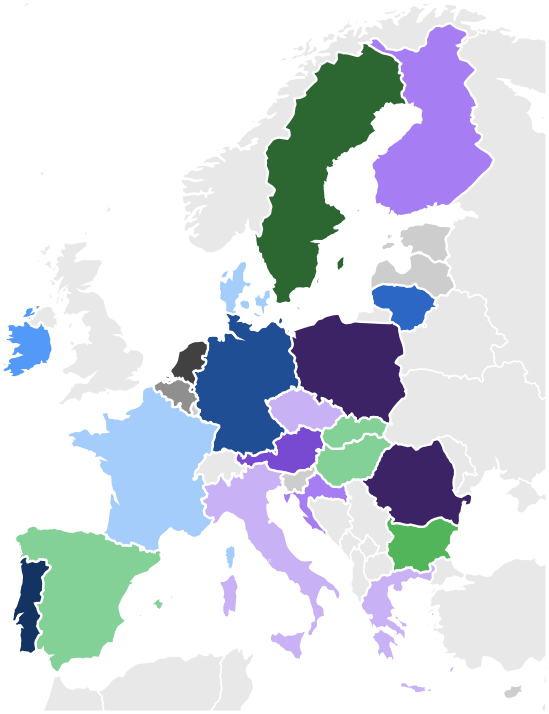
Every EU country reached more than 5 times its May level of agentic weekly active users within small and medium businesses. Belgium, Italy, and Luxembourg grew the fastest over this period.

People do different kinds of work with AI in the EU

Growth figures show how quickly agentic use is expanding, but not how people are using AI to work. By classifying individuals' messages for work use, we can better understand how people use AI for work across different regions.

Figure 5:

Distinctive work tasks show nuance in work activities across the EU



EU country without published data

Cyprus, Estonia, Luxembourg, Latvia, Malta, Slovenia

- Research laws, precedents, or other legal data
  Austria
- Advise others on business or operational matters
  Belgium
- Diagnose system or equipment problems
  Bulgaria
- Examine materials or documentation for accuracy or compliance
  Czechia, Greece, Italy
- Teach academic or vocational subjects
  Germany
- Explain financial information
  Denmark, France
- Develop educational programs, plans, or procedures
  Spain, Hungary, Slovakia
- Identify business or organizational opportunities
  Finland, Croatia
- Advise others on educational or vocational matters
  Ireland
- Compile records, documentation, or other data
  Lithuania
- Develop business or marketing plans
  Netherlands
- Prepare legal or regulatory documents
  Poland, Romania
- Research healthcare issues
  Portugal
- Advise others on the design or use of technologies
  Sweden

Note: This analysis is based on messages from users with Free, Go, Plus, or Pro plans. Each label highlights the IWA—a category of work activity defined by the US Bureau of Labor Statistics— that is most common in work-related messages from each country, relative to its overall frequency across the EU. Data is drawn from a random sample of messages in 2026 Q3.

Source: OpenAI Signals

Workers in EU firms with most AI use per user are pulling ahead, but the global gap remains

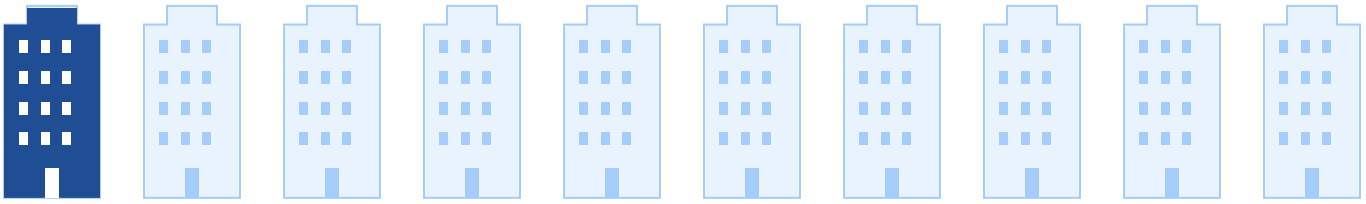
Frontier firms represent the top 10% of firms by output tokens per active user. EU-based companies accounted for **nearly 10% of the global frontier firms** for token output per user in September. North America accounted for roughly 65% of these frontier firms.

Figure 6:

EU countries make up 10% of frontier firms globally

Frontier firms by geography

10% EU countries



Each building represents 10% of frontier firms.

North America	65%	EU countries	10%
APAC	13%	South America	1%
Other EMEA countries	11%	Unmapped	<1%

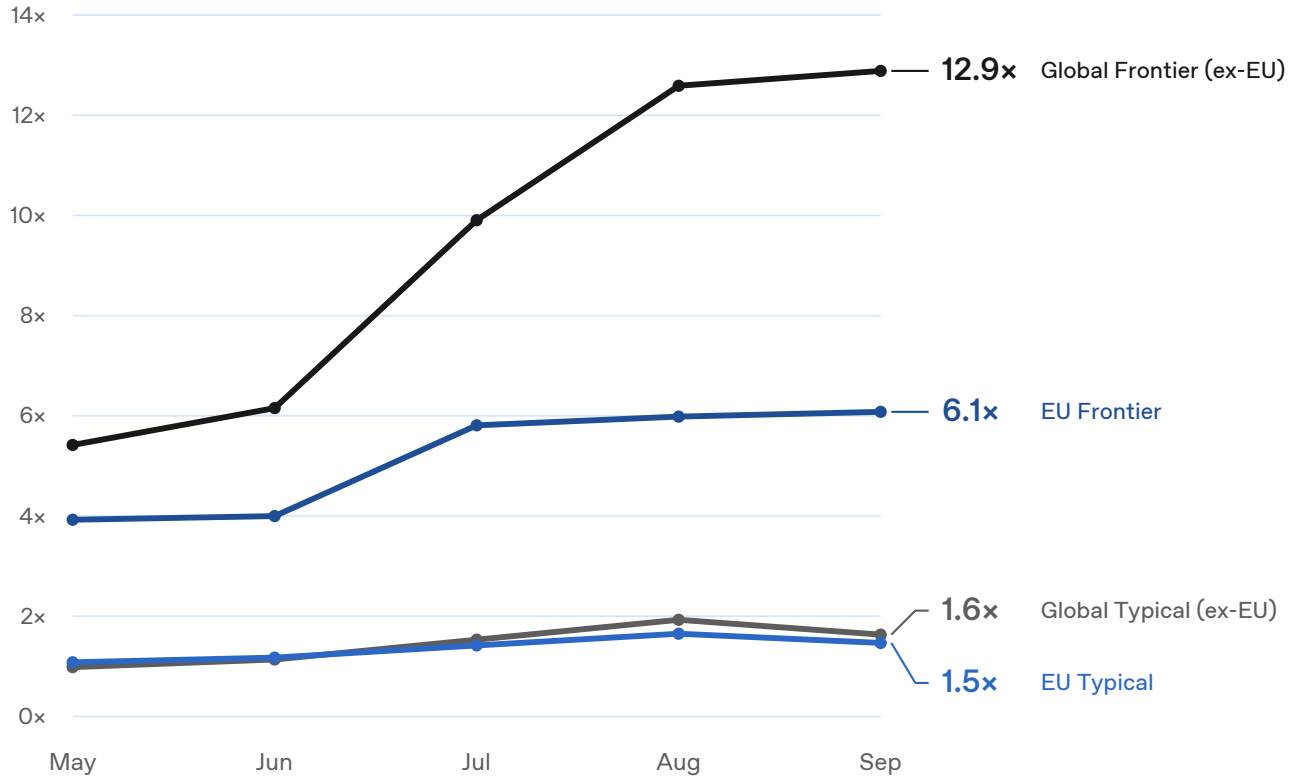
Note: sample includes only ChatGPT Enterprise and Business accounts.

Figure 7:

Frontier EU firms pulled ahead of typical firms, but not as much as frontier firms across the globe

Output tokens per active user in last 28 days, relative to typical firms in May

May–September 2026



Note: sample includes only ChatGPT Enterprise and Business accounts. Global firms only include firms outside of the EU.

Frontier firms are defined as the top 10% of firms by output tokens per active user.

As agentic capabilities and use increased, the gap between users in typical firms and top firms widened. In September, frontier EU businesses generated **over four times more** output tokens per active user than typical EU businesses. Yet, firms at the global frontier generated **more than two times** as many output tokens as frontier EU businesses.

These figures reveal a substantial gap in how intensively businesses use AI. As agentic capabilities advance, the EU's opportunity is to turn broader adoption into deeper use, stronger businesses, higher productivity and meaningful benefits for workers. Closing that gap means helping businesses move beyond experimentation, giving workers the skills and confidence to use AI, and making advanced capabilities more accessible and affordable.



"Europe is now in a new era of AI, with tools that can carry out tasks for people. More than half of the AI use among our EU enterprise and business customers now involves these tools, and the number of small business users has grown 8x across the region. Yet there is still plenty of room for AI use to grow across the EU. Giving people the tools, skills and confidence to use AI well will help build stronger businesses and growing economies, with benefits felt across Europe."



– Sarah Friar, Chief Financial Officer, OpenAI

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