

AI is doing operating work. The evidence says more about what runs than what it earns.

Across 196 company-use profiles, operating-stage claims are more common than counted numerical outcomes. This describes the register's public evidence, not the whole industry.

196

company-adoption profiles

133

classified operating or scaled

54

with a counted numerical result

Three implications

1 Tie deployment to an operating decision and a measured baseline.

The register has 133 profiles classified operating or scaled and 54 with counted numerical results; 46 appear in both sets. That pattern supports a disclosure-level takeaway: described use is more common than a comparable result. For a rollout, name the accountable operator, baseline, exposure denominator, override/decision rights, and value measure before scale-up.

2 Make the operating handoff part of the product.

Suppliers should fit into existing systems, support the result after launch, and show full costs. The case register includes 21 vendor-attributed outcomes among 54 counted results; attribution identifies who reports a result, not independent assurance.

3 Keep attribution, reach, and assurance separate.

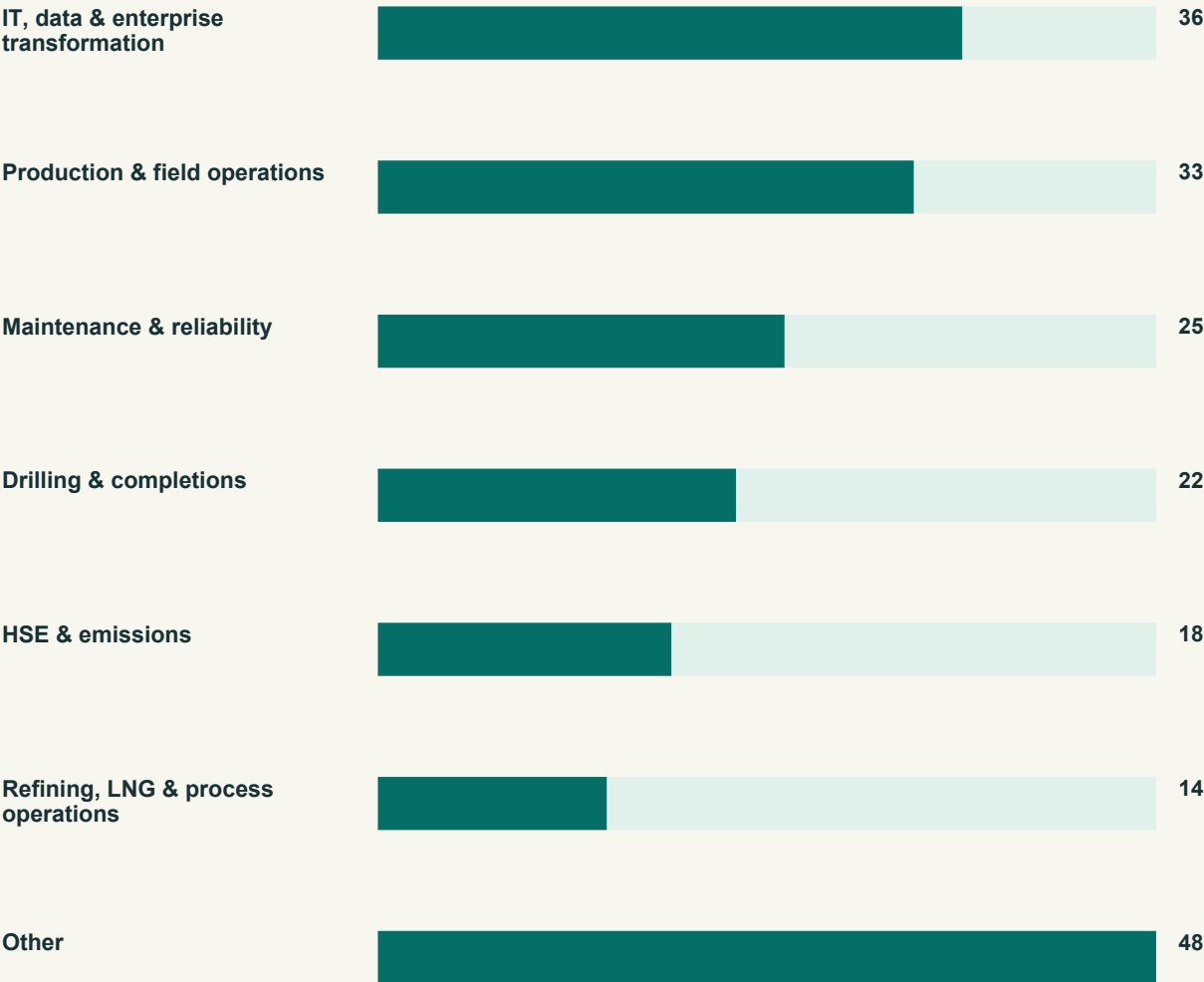
Of 54 result-bearing profiles, 32 are operator-attributed, 21 vendor-attributed, and one independent-attributed. These source labels do not grade the truth of a claim. Pair every result with its source, denominator, period, counterfactual, and review status.

HOW TO READ THESE COUNTS

One row is one company-adoption profile, not one unique company. Profiles can overlap in company, asset, and program. Stage, department, outcomes, and source attribution are analyst-coded from dated public records; missing numbers do not mean missing value.

Where company-use profiles sit

Top six primary analyst-coded departments plus Other (the remaining 48 profiles). Bars use one common 0–48 profile scale.



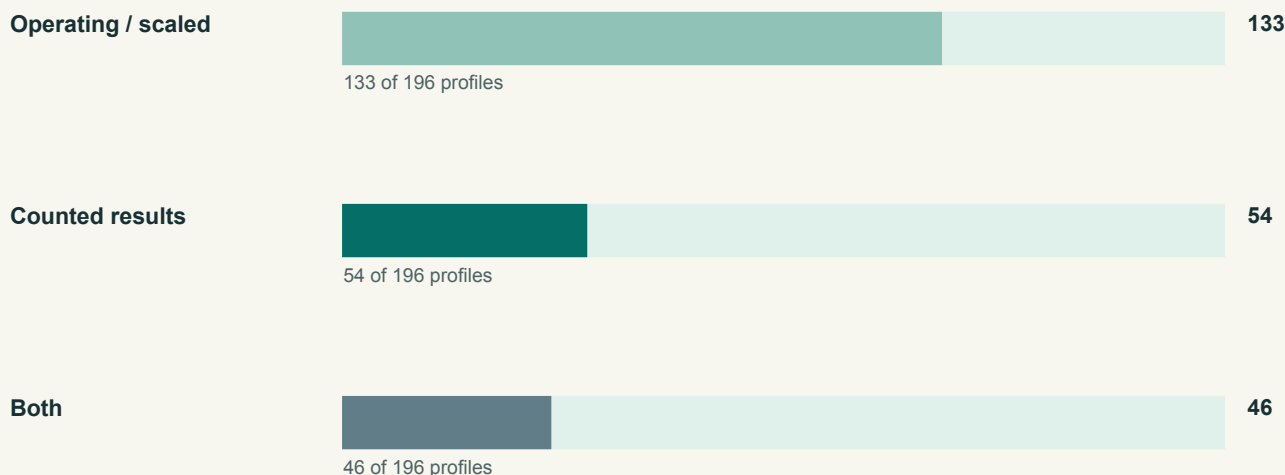
Operating implication

The visible portfolio has both enabling data/enterprise work and core production, maintenance, and drilling workflows. Operators should tie data-platform investment to decisions with named owners and field measures. Suppliers can make reusable integration and value measurement part of delivery.

Counts do not show spend, unique-company prevalence, or which department creates more value. One primary function is assigned to each profile; multi-function workflows are simplified for display. The CSV retains all 14 departments.

Operating stage and numerical evidence overlap

Three separate bars use the same 196-profile denominator: operating/scaled, counted results, and their intersection. These sets overlap; this is not a funnel.



What the overlap says

133 profiles are classified operating or scaled; 54 have a counted numerical result; 46 appear in both groups. Thus 87 operating/scaled profiles have no counted result, while 8 counted-result profiles remain at pilot. Numerical outcome disclosure is less common than described operating use in this collection. Missing counted results do not establish missing benefit.

Economics need a matched project bridge

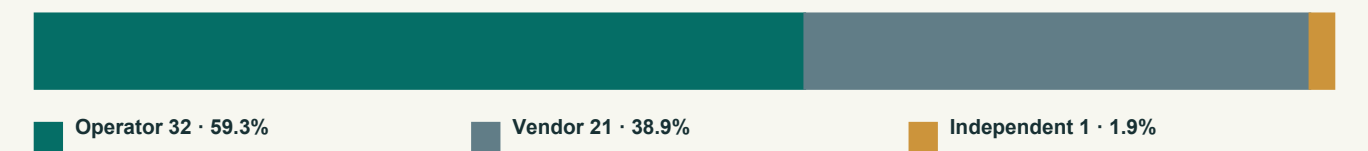
No profile is coded with a complete project cash-cost / collected-cash reconciliation. Ecopetrol is a useful partial exception: it reports US\$1.88m 2025 AI investment, US\$3.50m 2025 portfolio benefits, and a separate 7% estimated cumulative ROI since 2021. The periods and bases do not match; it is not a project-level net cash ROI.

A financial claim is more decision-ready when it names the initiative, all-in implementation and ongoing costs, baseline, period, cash conversion, and overlap with other benefits. Do not read absent cost data as evidence of poor economics.

Full Ecopetrol source locator is linked on page 4 and in the row-level CSV.

Who reports the counted results?

Among 54 counted numerical-result profiles: 32 operator, 21 vendor, 1 independent attribution. Attribution is not an assurance rating.



Four records show what these counts can and cannot establish

AI-235 · Reach counterexample · production ExxonMobil ExxonMobil / XTO describes closed-loop gas-lift optimization across 1,300+ Permian wells and reports about 2% average oil uplift in its operator-authored SPE abstract. A material operating example, with counterfactual and control-boundary detail still limited; JPT article is member-exclusive beyond its accessible summary. Source 2025-10-01 Locator: Accessible abstract and first paragraph; lines 592–620 Open original source	AI-146 · Reach counterexample · emissions Petrobras Petrobras attributes 10,000 tCO2/year lower emissions to real-time AI industrial-flare control. Issuer presentation does not disclose baseline, plant count, measurement period, or calculation method; it does not name Smart Tocha as the source of the full result. Source 2025-11 Locator: Slide 158, Accelerate value generation through digital technologies Open original source
AI-147 · Economics counterexample · partial bridge Ecopetrol Ecopetrol reports US\$1.88m AI investment and US\$3.50m benefits in 2025, plus an estimated 7% cumulative ROI since 2021. The annual portfolio investment/benefit and cumulative ROI use different periods and bases. No all-in project cost or cash-conversion bridge is disclosed. Source 2026-03-04 Locator: 2025 sustainability annex, PDF page 209 (printed page 209); issued 4 March 2026 Open original source	AI-208 · Independent-attribution example · task test Snam Snam / Engineering Group's technical preprint reports 95% component identification and 90% correct assignment to drawing sections. This is a task-specific document extraction evaluation, not independent verification of operating savings or field impact; complex diagrams remain a limitation. Source 2025-11-05 Locator: Sections 3.1, 4 (Tables 1–3) and 5; abstract uses different summary accuracy figures Open original source

Register method: 196 Record_type=company_adoption profiles; one analyst-coded primary department; Outcome_counted excludes overlapping AI-033 / AI-038 aggregates. Grades denote provenance, not independent validation. Source: Energy AI Observatory README, 5 Oct evidence-method note. Report generated 2026-10-08; register updated 8 October 2026.