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AI EUROPEAN BAROMETER BY 

AI and European autonomy: between ambition and reality

14th Annual JFD Study
February 9th, 2026

2nd edition
European AI Barometer

JFD

Where Innovation Accelerates

Editorial

Artificial intelligence is establishing itself as the technological foundation of the coming decades. But behind the promise of efficiency and innovation, lies a more fragile reality: the **dependence of European companies** on solutions designed, operated and often controlled by players outside our continent.

An AI application is not a monolithic product. It is based on a **complex value chain**: data, infrastructure, models, integration, adoption. At each link, companies turn to **specialized providers**, cloud hyperscalers, framework publishers, model designers, who are rarely European. This technological dependence directly questions our ability to guarantee digital, industrial and strategic autonomy for Europe.

The aim of this study is to **dissect this value chain, to analyze** which suppliers companies use, to **measure the degree of dependence** it induces, and to **assess the real place occupied** by European players in this globalized technological landscape.

Through this prism, it is a matter of asking an essential question:

AI & European Autonomy: How to Reconcile Sovereign Choices, Excellence and Competitiveness?



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Summary

Artificial intelligence is now a central lever for competitiveness, economic transformation and sovereignty.

However, behind the acceleration of uses, the AI value chain remains largely dominated by non-European players, exposing Europe to a **growing technological dependence**, particularly on critical building blocks such as the cloud, computing power, semiconductors and AI models. This dependence is now structural. The infrastructure and industrial capacity needed to deploy AI are concentrated outside Europe, capturing most of the investments, valuations and value creation. It raises **major economic, industrial and geopolitical issues**, and questions the continent's ability to sustainably control its technological choices.

Nevertheless, European autonomy in the field of AI does not mean withdrawal or autarky. It is based on a pragmatic approach aimed at **regaining a capacity for choice, management and governance of dependencies**. Hybrid architectures, open source, internal skills development, public-private partnerships and sector specialization are all levers to strengthen this autonomy without sacrificing performance.

Europe has **solid assets that are still under-exploited**: recognized scientific excellence, world leadership in the distribution of open source, largely decarbonized energy and a strong entrepreneurial ecosystem. European players are emerging in several strategic parts of the AI value chain, showing real potential.

Yet persistent obstacles such as market fragmentation, investment gaps, over-regulation and difficulties in scaling up limit **the transformation** of this innovation into industrial capacity.

The challenge for the next few years is therefore collective: **to create the conditions for the emergence and growth of European AI champions**, in order to reconcile technological autonomy, economic competitiveness and trust.

Methodology

Held **qualitative interviews** with more than 30 senior executives from large corporate companies, European start-ups and experts in the artificial intelligence technology ecosystem.

Organized **three strategic committees** with our strategic partners to exchange ideas, challenge perspectives and collectively contribute to the conclusions of the study.

Conducted **desk research**, analysis of existing content (studies, articles, podcasts, etc.) and benchmarking of transformative European AI projects.

The first European AI Barometer – February 2025



The European AI Barometer assesses how AI can become a real **driver of ethical and societal progress** by measuring five pillars. The first edition of this barometer focused on 2 of the 5 pillars: **the inclusion of women and the adoption of AI** by companies, in order to understand what needs to change for a responsible and transformative use of AI in Europe.

The main conclusions of the first barometer are as follows:

A persistent under-representation:

Women represent only

26%



of employees in the AI sector in **Europe**,

22%



in the **world**,

29%



of AI **leaders** in **Europe** only.

A considerable potential:

The rise of women-led companies and initiatives like the Margarets Awards opens up opportunities for a more inclusive and innovative future in AI.

An uneven AI adoption:

Globally, women are only

33%

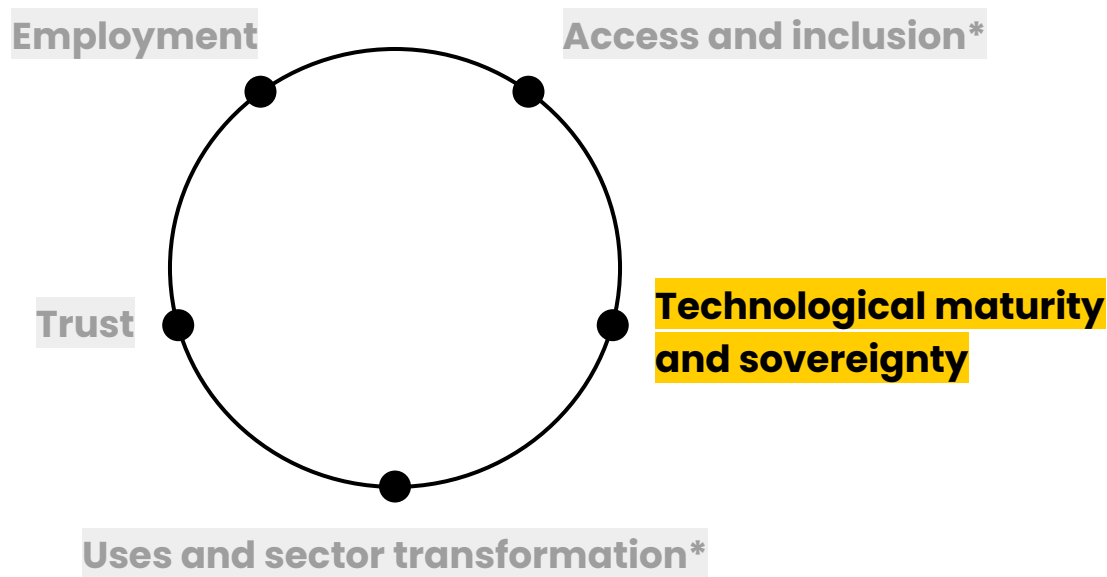
of **ChatGPT users**, reinforcing a usage gap.

Societal and economic risks:

This lack of diversity:

- increases algorithmic biases,
- limits innovation
- can widen the gender gap in employment.

For this 2nd part, this study focuses on one of the five pillars of our progress framework



*Pillars covered during the 1st AI Barometer (February 2025).

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State of play

**What place does Europe occupy
in the AI value chain?**

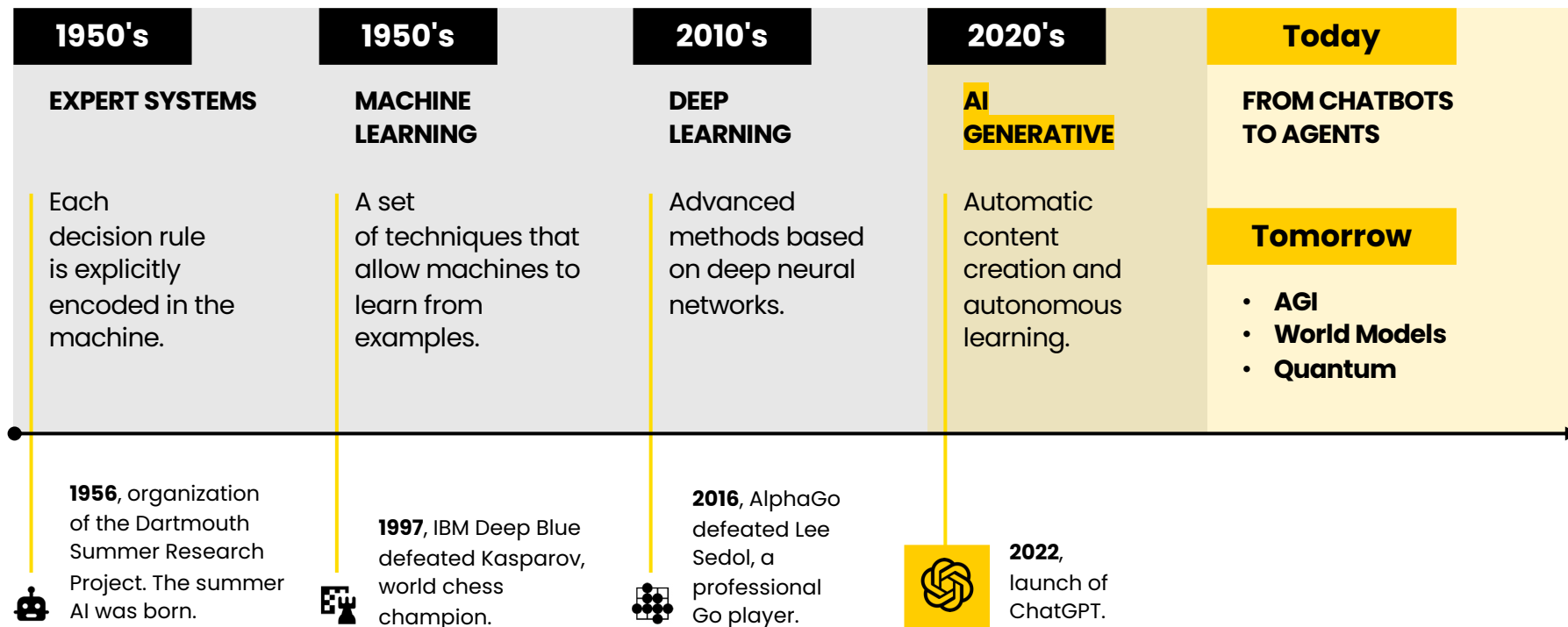
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1



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Machines have been learning to think for 70 years, and today everything is accelerating.



In 2022, ChatGPT brings AI into the mainstream

+1M

users in
5 days.

+100M

users in
2 months.

vs. **7 years** for the
World Wide Web

Today, it is

+9M

and

5B

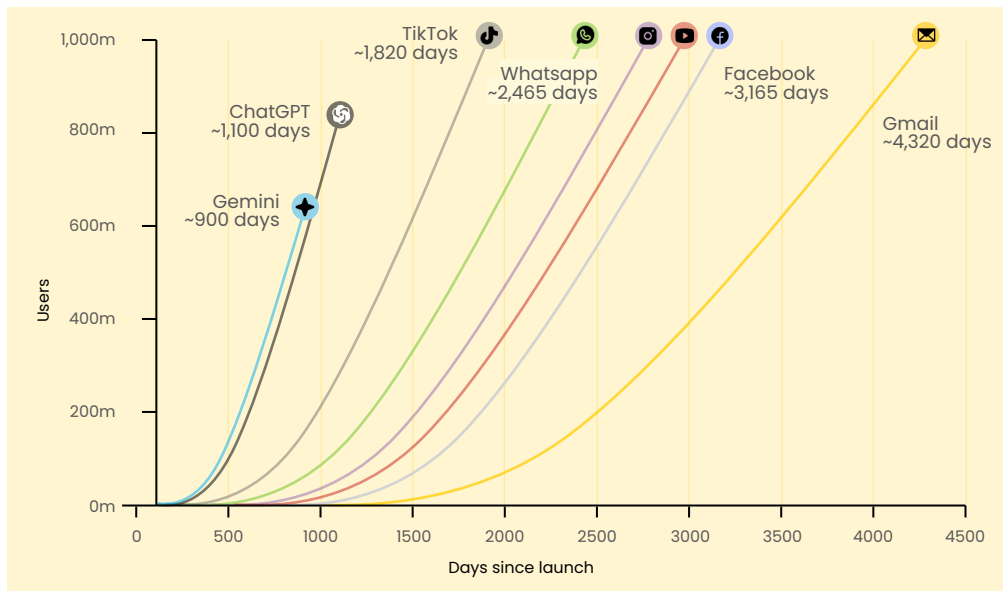
**weekly active
users .**

**monthly
visits.**

Sources: Reuters, official reports and communications from the companies studied.

Time-to-1-billion-users

Reaching one billion users is becoming the new key metric.

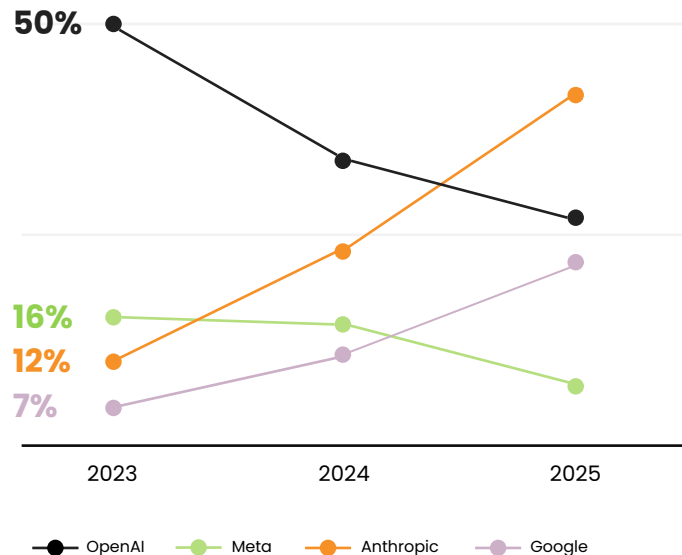


CHART

Source: Business, Media Reports | *Monthly users, except for ChatGPT (weekly). Gemini is measured from 05/10/2023, when its predecessor "Bard" was widely distributed.

This generative AI is also making its mark in the business world

Market Share Trends of Leading LLM Providers



Sources: Menlo Ventures (2025 – The State of Generative AI in the Enterprise)

Anthropic confirms its rise in B2B

Driven by the massive adoption of Claude Sonnet 3.5 and 3.7, the company is now the leader in the enterprise market.

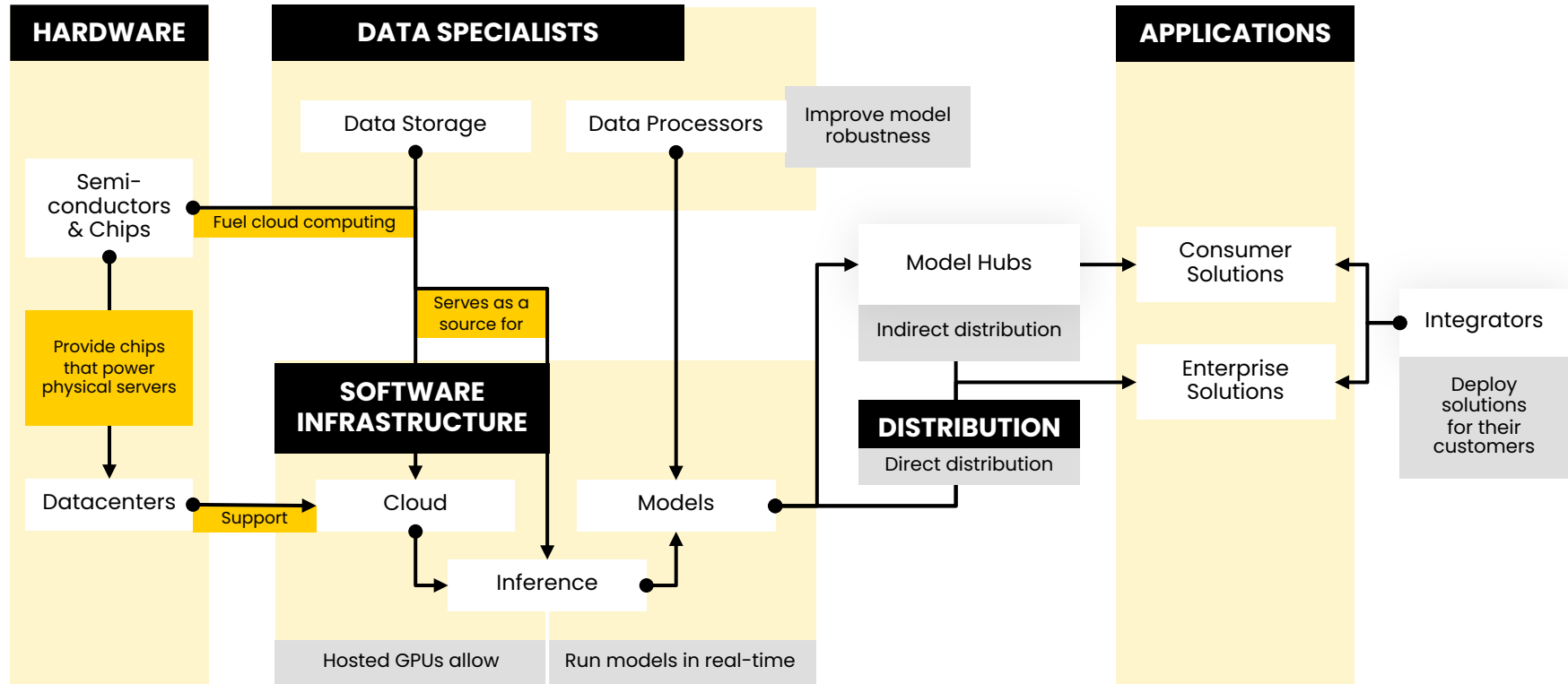
This success can be explained in particular by its excellence in code generation, which has become the flagship advanced use of LLMs, and its superior reliability, reduction of hallucinations and rise of "agent-first" architectures, which appeal to technical teams seeking productivity and robustness.

At the same time, Gemini is progressing thanks to rapid gains in performance and multimodality.

Conversely, OpenAI and Microsoft are losing ground. Historical leaders suffer from a perception of a less differentiating pace of innovation and difficulties in meeting the specific expectations of enterprise deployments.

Despite rapid progress in the technology ecosystem, open source is still struggling to gain traction in companies. Models such as Llama are maturing but remain less adopted than proprietary offers because they are held back by requirements for robustness, security and guaranteed support.

Behind generative AI and models, there is a complete value chain



A value chain whose main players are not European.

○ USA ● Europe ○ Asia

	Semi-conductors / Chips	Datacenters	Data Storage	Data Processors	Cloud	Inference	Models	Model Hubs*	Consumer Solutions	Enterprise Solutions	Integrators
1	NVIDIA	Equinix	Dell Technologies	Snowflake	AWS	CoreWeave	OpenAI	Hugging Face	Google	Microsoft	Accenture
2	AMD	Digital Realty	NetApp	Databricks	Microsoft Azure	Lambda Labs	Anthropic	ModelScope	Apple	Google	Capgemini
3	Intel	NTT	HPE	Palantir	Google Cloud	RunPod	Google Deepmind	TensorFlow Hub (Google)	Meta	Salesforce	Deloitte
4	Broadcom	China Telecom	IBM	Confluent	Alibaba Cloud	Vast.ai	Mistral	PyTorch Hub	Microsoft	SAP	PwC
5	Qualcomm	CyrusOne	Hitachi Vantara	Computer Science	Oracle Cloud	Nebius	Cohere	ONNX	Amazon	Oracle	EY
6	TSMC	GDS Holdings	Huawei	Teradata	Tencent Cloud	Scaleway	DeepSeek	OpenMMLab	ByteDance	IBM	Infosys
7	Samsung Electronics	Switch	Pure Storage	Cloudera	IBM Cloud	Iren	Qwen	LangChain Hub	Baidu	ServiceNow	TCS
8	Micron	KDDI	Western Digital	Slicing	Huawei Cloud	Vultr	Zhipu AI	PaddleHub	Samsung	Adobe	Cognizant
9	SK Hynix	Iron Mountain	Seagate	SAS	OVH Cloud	Nscale	xAI	FastAI	Huawei	Workday	Wipro
10	MediaTek	Telehouse	Fujitsu	Splunk	Salesforce	FluidStack	ByteDance	Hard Hub (Google)	Xiaomi	Zoho	DXC Technology
Ranked by	AI chip revenue	Installed capacity, surface area	Revenue	Revenue, Business Adoption	Market share	GPU capacity, funding raised	Performance, adoption, valorization	Popularity, Dev Adoption	Revenue, active users	Revenue, adoption	Revenues IT / practice IA

Sources: IDC, Gartner, Synergy Research Group, ReportPrime, LLM benchmarks, and public enterprise data
Disclaimer: this classification is indicative and is changing rapidly, it was made on January 26, 2026

*The ranking is based on community hubs of models adopted by developers; integrated cloud catalogs (Vertex AI Model Garden, AWS Bedrock, Azure AI) are excluded.

Europe remains a spectator of an unprecedented industrial project

"**The largest industrial project in history**" is how Sam Altman describes the race for AI. In the United States and China, the battle is not limited to algorithms: it is being fought at the very foundations (energy, materials, networks, hardware). Controlling these levers means holding the power to structure the global market. Meanwhile, Europe remains without champions capable of competing in these strategic areas.

Vulnerability to critical materials.

AI is based on critical materials. While France does not have exploitable deposits, Europe has identified deposits but has chosen not to exploit them, thereby increasing its dependence on imports.

In this area, **China has established itself as the nerve center of the global chain, accounting for 70% of extraction and up to 95% of refining.** A monopoly that gives China strategic power over GPUs, semiconductors and batteries, which are pillars of the AI revolution.

Sources : CNRS, Banque de France, Epoch AI, Siècle Digital, Les Echos, Submarine Telecoms

Geographical origin of capital owners in extractive companies, by commodity type.

	China	USA	EU
Rare Earths	65%	19%	1%
Nickel	13%	20%	21%
Lithium	54%	23%	3%
Copper	28%	26%	6%

A dependence on networks.

More than 99% of intercontinental internet traffic passes through **submarine cables**.

While Europe is a key geographical hub, it lacks industrial momentum: **GAFA companies now account for more than 50% of global investments in new submarine cables**, relegating European telcos to a secondary role and reinforcing strategic dependence on infrastructure that is critical for AI.

This dependence extends to satellite constellations, which are currently dominated by non-European players, notably Starlink (SpaceX), which holds **85%** of the global communications satellites market, undermining the resilience and sovereignty of the infrastructures necessary for AI.

70 % 
of the **European cloud** is controlled by **hyperscalers**.

This dependence is also reflected in computing power:

- The United States accounts for **75% of global GPU** cluster performance,
- China **15%**,
- And the EU **barely 5%**.

In this field, the **established giants AWS, Google Cloud and Azure** still dominate, but a **new wave of specialized players –neoclouds–** such as Nebius, CoreWeave and Iren are emerging with architectures tailored to run AI workflows.

FOCUS on European players upstream in the AI value chain 1/2



CHIPS

As a European designer of microprocessors for HPC and AI, SiPearl offers a sovereign alternative to the American and Asian giants. Its first processor, Rhea1, will power JUPITER, the European exascale supercomputer. In-house data centers, private cloud, and dedicated IT team: Sipearl has complete control over its chip design infrastructure, ensuring resiliency and autonomy.



"Our priority is to never compromise on control of our data and our technologies: that is the core of our model."

Philippe Notton, CEO & Founder



DATACENTER

PoliCloud offers a sovereign and frugal cloud infrastructure, based on interconnected micro-datacenters to secure sensitive data and provide computing power tailored to AI applications. Its solution guarantees resilience, flexibility and local integration, while reducing costs and environmental footprint, contributing to digital autonomy and European sovereignty.



"Our goal is to give each region the means to control its digital choices."

David Gurlé, CEO



CYBER

Jizô AI offers a sovereign solution, certified by ANSSI, for monitoring IT and industrial (OT) networks using AI to ensure their cybersecurity and compliance. The company favors European technologies and providers: French hosting, local generative AI (Mistral), open source software and in-house development. It strengthens organizations' digital autonomy by combining national security and in-house expertise.



"Our mission is to offer organizations, with the support of AI, control over their information systems, based on a solid and secure European ecosystem."

Audrey Amédéo, Founder & CEO

FOCUS on European players upstream in the AI value chain 2/2



NETWORKS

Sovereignty in AI relies primarily on control of data and the connectivity infrastructures that collect it. TERNWAVES is developing a disruptive technology that enables any connected object (sensors, smartphones, drones, etc.) to communicate with satellites already in orbit, offering a decisive advantage in terms of costs and time-to-market. Its solution provides continuous, ultra-resilient and discrete direct-to-device connectivity operating on European satellites, including in GNSS-denied or jammed environments. Conversely, competing solutions rely on US satellite infrastructure and have shown their limitations in terms of resilience in crisis situations, as recently observed in Iran.



"Sovereignty and performance should not be mutually exclusive: they require knowing how to embrace disruptive innovations, including those coming from European technology start-ups. »

Julie Duclercq, CEO & Co-founder

BIOMEMORY

STORAGE

A pioneer in mass DNA storage, Biomemory is developing a molecular computing technology designed for data centers: ultra-dense, sustainable and energy-efficient. Developed by CNRS/Sorbonne University, the solution is based on an intrinsically sovereign product and critical local components (French hosting and open source). Biomemory is helping to structure an emerging sector that is driving reindustrialization and European autonomy.



"Developing French DNA storage technologies means building a sovereign and sustainable infrastructure for the growing needs of AI."

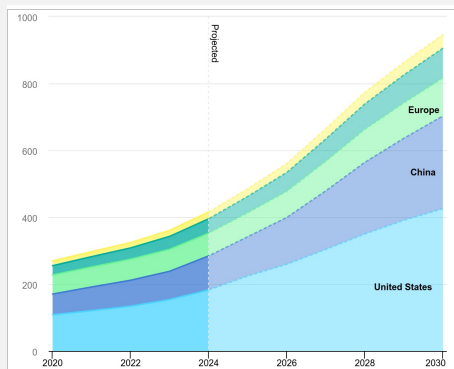
Erfane Arwani, CEO & Co-founder

Buying its energy peace of mind in an unstable geopolitical context

To meet the growing electricity needs of data centers, the tech giants rely on existing nuclear power plants. **Microsoft** and **Google** are multiplying long-term agreements with electricity producers and investing in dedicated capacity to quickly secure the computing power needed to develop large AI models.

Data center power consumption (TWh) by region.

Baseline scenario, 2020 to 2030.



- Half of this energy is absorbed by model training, and the other half by inference.
- **Some sites now exceed 1 GW**, the equivalent of a nuclear reactor.
- **By 2030**, AI-related consumption could climb to **between 620 and 880 TWh** : **15x** the annual electricity consumption of **Switzerland**.

This staggering demand is redrawing the global energy map.

In addition to electricity, **water** is now becoming a critical resource for AI. Cooling data centers requires large volumes of water, creating growing local tensions, particularly in regions already under water stress.

	Europe	USA
Share of national electricity consumption dedicated to data centers	2,5 %	4,5 %
Annual growth	+7 %	+18 %

 **In this race, France has a strategic advantage:**

A highly decarbonized electricity mix, based on:

- Nuclear power,
- **hydropower**,
- **renewables**,

guaranteeing sovereignty and low-cost electricity.

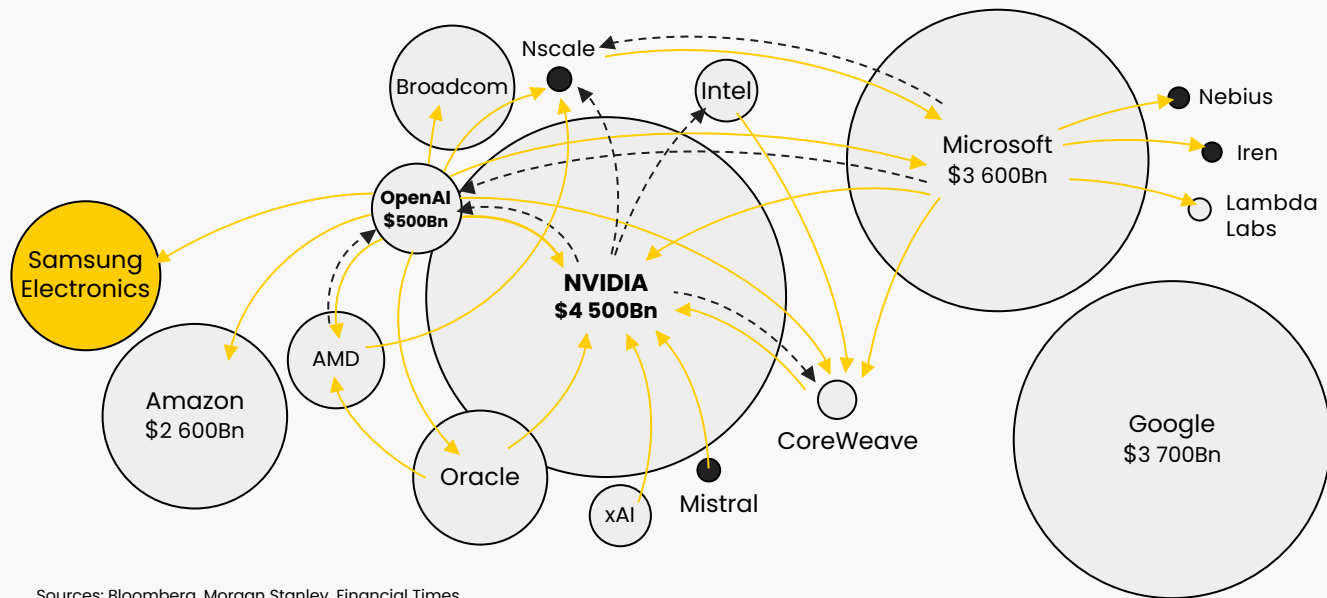
But this lever hides a paradox: as The Shift Project points out, AI remains as carbon-intensive as the economy it powers. The **high demand from data centers** could thus **slow down the decarbonization** of other strategic sectors.

Sources: IEA Energy and AI, Schneider Electric, The Shift Project

For several months now, billions have been circulating... Between the same hands and without crossing the Atlantic

Agreements are multiplying to secure key AI infrastructures and capabilities, driving up the valuations of the same providers and financial partners.

80 to 90% of US GDP growth in 2025 will come from the AI sector, with around **40%** of this growth coming from circular activities. This concentration is now fueling fears of a bubble around the ecosystem.



Sources: Bloomberg, Morgan Stanley, Financial Times

Disclaimer: this diagram is indicative and subject to rapid change; it was created on December 5, 2025.

In this landscape,

Google

appears to be the most **integrated** and **autonomous player** in the GAFA, relying less than its competitors on strategic alliances and reinforcing, through its **vertical integration**, fears of concentration and competitive imbalance.

The size of the circles represents the valuation (early December 2025).

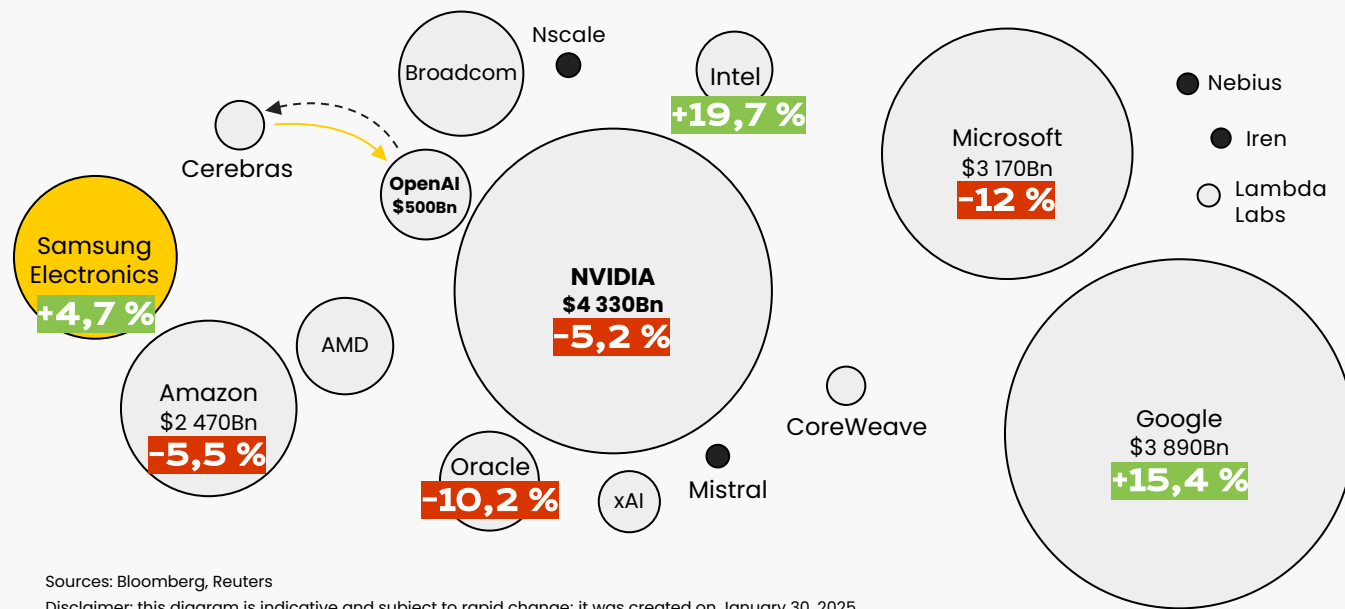
○ USA ● Europe ● Asia

→ Capacity
- - - Funding

Today, less frenzy, more volatility and risks of correction in 2026

In January 2026, **Intel, Alphabet, and Samsung Electronics** are on **the rise**, driven by strong results and an already visible improvement in their **semiconductor** and **cloud**-related operations.

Conversely, **Microsoft, Amazon, NVIDIA, and Oracle** are **declining**: their share prices reflect a slowdown in new AI contracts and high CAPEX levels that have yet to translate into revenue.



Sources: Bloomberg, Reuters

Disclaimer: this diagram is indicative and subject to rapid change; it was created on January 30, 2025.

Regarding private valuations,

xAI

raised **\$20 billion** in **Series E**.

Meanwhile, the **OpenAI-Cerebras** partnership aims to expand their **large-scale** computing capabilities.

The size of the circles represents the valuation (mid-January 2026).

○ USA ● Europe ● Asia

→ Capacity
- - - Funding

In 2025, venture capital remains concentrated on a few AI players

Across all sectors,
Europe saw its
fundraising increase
by

18 % 

in 2025 (€55 billion).

The iconic fundraising rounds by Mistral AI and Revolut signal the **beginning of a European repositioning**, even though the United States still largely dominates the **global top five** (OpenAI, Anthropic, xAI).

FOCUS on the AI sector



With a third consecutive quarter **exceeding \$45 billion invested**, the market remains heavily driven by the United States, which alone accounts for **89%** of the amounts dedicated to AI in 2025 (\$97 billion, +154%).



The United Kingdom is driving growth (**+40%**, €20 billion raised), regaining its position as the most active European market.



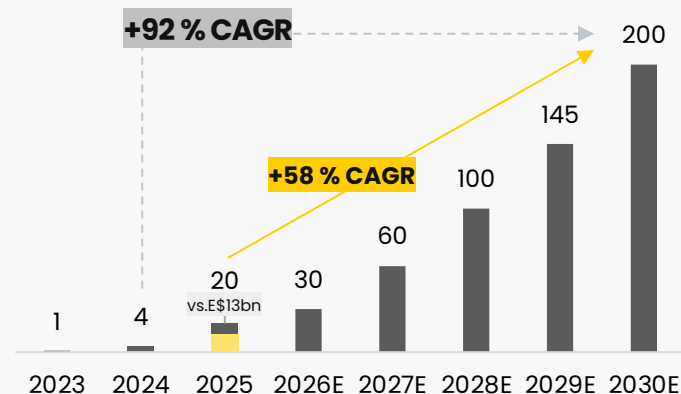
Germany is in decline (**-2%**).



France remains **stable** but highly **dependent** on a few **mega-rounds**.

Sources: Baromètre EY du capital-risque 2025, CBInsights State of AI Q3'25, Les Échos, Madyness

OpenAI revenue projections (in billions of dollars)



OpenAI is now projected to exceed **\$20 billion** in revenue in 2025, well above the \$13 billion previously forecast, while the more recent European momentum is accelerating: Mistral AI has announced that it is targeting **more than €1 billion** in revenue by the end of 2026.

The same race for AI, different strategies for the GAFA

Google

is aiming for **total vertical integration of AI**, from chips to Gemini models to consumer applications, in order to remain the **technological leader** ahead of OpenAI and Nvidia.

Meta

is betting on **open source** (Llama) and **immersive AI** to reinvent social interactions, from advertising to XR experiences.

Apple

favors **partnerships**, particularly with **Gemini** (after testing OpenAI and Anthropic), to enhance **Siri**, without entering the race for foundation models.

Amazon

captures the value of AI by positioning itself as the **leading cloud and hardware infrastructure** provider through AWS.

Alphabet, Microsoft, Amazon, and Meta are expected to invest some \$400 billion by 2025 to develop their artificial intelligence capabilities.

“That's more than the European Union spent on defense last year.”

notes the **Wall Street Journal**.

Sources: Wall Street Journal, Stratechery

Keeping control of our AI models also means preserving our identity

Foundational AI models **are not neutral**: they reflect the **culture, languages**, and **values** of the datasets that have shaped them. Recent studies show "default" cultural and geopolitical alignments (often Western and English-speaking) that persist **even when the language** of the prompt is changed.

And these biases add up:

- + Massively non-European training data
- + Benchmarks that are not very sensitive to local contexts
- + Infrastructure dominated by non-EU players

We obtain answers that appear to be **"compliant" but are not necessarily compliant with US**.

Without vigilance, our models advise according to other values, grade differently, or normalize practices outside our frame of reference.

Sources: HAI Stanford « Mind the language gap »

Faced with this shift?

SMALL BUT SMART

Gone are the giant models that think "outside the box" – the future of AI is moving towards **truly intelligent** models: specialized, modular, and integrated into the business.

DATA > MODEL

European data: **contextualized, rich** and well-governed is our No. 1 asset.

HABS

HUMAN AUGMENTED BRAIN SYSTEM

HABS AI, a French deeptech company founded in 2023, develops a non-intrusive brainwave analysis technology to decipher emotions, attention and cognitive states in real time. Its solution guarantees data sovereignty: local processing, no biometric data storage, cognitive security and ethical architecture.



Olivier Locufier,
CEO

"The uniqueness of the brain corresponds to perfect randomness, forming a sovereign space protected from any digital capture or standardization."

Cognitive AI

ontbo

Ontbo is a cognitive AI company that provides AI agents with a layer of context and long-term memory, making them more relevant, explainable and efficient. This innovative API offers temporal reasoning, reduces the number of tokens by avoiding recalculating information already learned, and improves the quality of responses over time.



Athénais Oslati,
CEO

"By placing transparency, data control, and technological sovereignty at the heart of its vision, Ontbo helps organizations deploy more reliable, responsible, and effective AI."

Cognitive AI

Barriers are holding back innovation and autonomy in Europe

A tendency toward overregulation

Between 2019 and 2024 :

13k legislative acts adopted by the EU, against **3 500** in the US.



Regulatory inflation has consequences: administrative burdens, high legal costs, and self-censorship in the face of rules that are difficult to interpret.

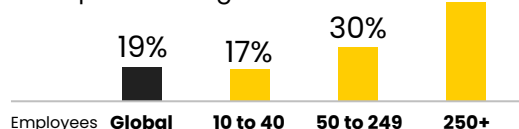
On average, the cost of compliance represents 1.8% of revenue, and rises to 2.5% for SMEs.

Added to this are announcements without concrete results and scattered initiatives, giving the impression of a scattered approach rather than a coherent strategy.

Sources: European Commission Draghi Report, European Investment Bank

Adoption varies depending on the country and type of company.

In Europe in 2025, the share of companies using AI:



And disparities exist within the EU depending on the country. In 2025, the proportion of companies using AI among the following countries is:



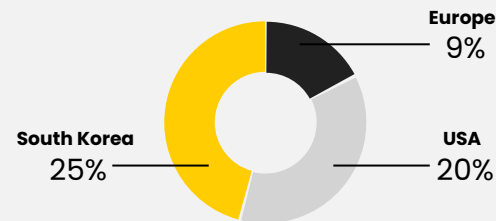
How can we explain the Nordic countries' lead in adopting AI in Europe?

→ A more technology-driven business environment, digital maturity, and a culture of experimentation.

Sources: Eurostat 2025

Insufficient collaboration with start-ups

In the public sector, the share of innovation procurement in 2025:



In the private sector, the share of innovation procurement from start-ups in 2025: **<5%** In France

What are the main obstacles?

→ Complex procurement processes, lack of strategic alignment, reluctance to move beyond the pilot phase, and limited risk appetite.

Sources: Atomico State of European Tech 2025, Observatoire des relations startups/ grands comptes 2023

And yet, our regulatory framework can be seen as a competitive advantage

While American Big Tech companies are redefining the boundaries of intellectual property through landmark litigation, Europe has chosen to set the rules of the game through legislation, with the GDPR and then the AI Act, making it the **first region in the world with a comprehensive framework for responsible AI**.

Meta

June 2025

Thirteen famous authors are suing the company for using their books to train LLaMA, its AI model. The judge ruled in Meta's favor, invoking "fair use," which allows certain uses without explicit consent. The case reveals a worrying gray area in the permissiveness of US law.

ANTHROPIC

Fall 2025

Anthropic agrees to pay \$1.5 billion to settle a controversial lawsuit. The company is found guilty of using pirated books to train its models. On this case, the judge points out that while legal copies may fall under "fair use," illegal content constitutes a clear violation.

Sources: Le Monde, L'Usine Digitale, EY
(Europe Attractiveness Survey 2025, European AI Barometer 2025)

Finding the right balance to build trustworthy AI

Recent studies show that **strict rules** on data protection and responsible use of AI increase customer and citizen confidence in sharing their information.

56 %

of decision-makers believe that European regulation has enhanced the continent's appeal over the past three years.

61 %

of decision-makers anticipate a positive impact of the AI Act on their organization.



Upmeet is an AI-powered meeting assistant that automatically transcribes, analyzes, and generates meeting minutes, allowing teams to focus on discussions. The company guarantees that data is hosted and processed exclusively in the EU, and invests in proprietary technology to limit dependence and diversify suppliers.



Ruben Djan,
CEO & Cofounder

"Data control and localization are at the heart of our model: digital autonomy is a requirement, not an option."

Productivity

Europe, architect of open source and specialized models



A European **leadership** in open source that lowers barriers to entry

Europe is home to several **open source champions** (Hugging Face, Probabl...) that structure an open technological base used worldwide.

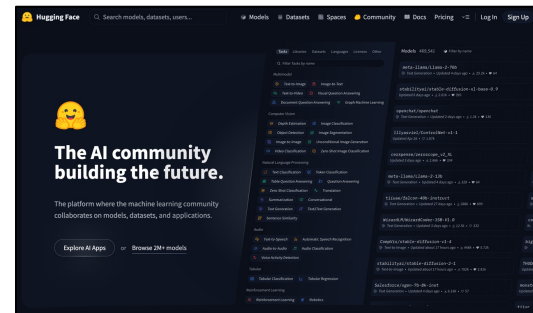
This strategy **reduces the competitive advantage** of integrated players, as it creates a **common infrastructure** on which thousands of teams can build, and makes the tech giants themselves dependent on open tools driven from Europe.

Hugging Face

Global AI model platform ("AI GitHub"), founded by French entrepreneurs:

- **>1.8M** models,
- Valuation of **\$4.5 billion**;

Enables the distribution and standardization of open source on a global scale.



Probabl

Reference ML library with:

- **>2.5 billion** downloads;
- Inria spin-off that raised **€13 million** in October 25;

Ensures a robust, long-lasting, and open ML foundation, reducing reliance on proprietary solutions.



A deliberate strategy of specialized models, supported by a shared infrastructure

Europe favors sector-specific AI specialization—particularly in healthcare, energy, climate, and defense—rather than a race toward large, generalist models with prohibitive costs. This strategy is in line with global trends: worldwide investment in vertical AI reached ~\$3.5 billion in 2025, with nearly \$1.5 billion (~43%) concentrated in healthcare. This focus on critical use cases is also evident in defense, as illustrated by Harmattan AI, a French autonomous drone start-up that raised \$200 million with Dassault Aviation.

THEREMIA

HEALTH

Theremia is developing an AI platform for precision medicine in neurology and psychiatry, optimizing prescriptions using proprietary algorithms. Winner of the 2025 Margaret Awards, the start-up prioritizes European hosting of sensitive data and in-house development of critical components, ensuring sovereignty, compliance, and digital autonomy in a strategic sector.



"Keeping control of our models and data is a strategic issue for European health and competitiveness."

Iris Maréchal, Co-founder & CEO



HEALTH

Axoltis Pharma, a French biotech company, is developing an innovative treatment for Charcot's disease and raised €18 million in December 2025 to complete its Phase 2 trial. The company uses AI and advanced modeling with InSilicoTrials, a European partner, to create digital twins of patients, optimize doses, and ensure the sovereignty and security of patient data.



"The more European patient databases are, the better: strengthening European databases is essential to guarantee the safety, efficiency, and quality of in silico modeling, which is increasingly crucial to accelerating the development of treatments."

Yann Godfrin, CEO



LEGAL

Ordalie develops proprietary analytical AI for researching, analyzing, and drafting legal content, with end-to-end technological expertise (in-house development, secure local hosting), while remaining agile in its choice of AI models to ensure a balance between autonomy, security, and operational efficiency.



"Our goal is to remain on a local, lean infrastructure to ensure sustainable autonomy and complete control over our technology."

Léa Fleury, Co-founder & CEO

CIBLIJOB

HR

CIBLIJob automates and secures in-booth applications via an AI-assisted phygital device designed for people who are digitally excluded, offering a local, personalized experience with no data disclosure. The solution is based on interchangeable AI bricks that meet stringent security, non-discrimination, and performance requirements. It is testing European models such as Mistral with a view to full integration by mid-2026, thereby strengthening autonomy and digital sovereignty.



"Our architecture is evolving to ensure control over usage and limit dependencies, while guaranteeing security and performance."

Samia Gentil, Founder

"To preserve our **digital sovereignty**, we need to fill the private capital gap in Europe. Pension funds and industrial players are almost absent, which limits market depth. Without a rise in CVCs and a massive effort by public investors to create a market capable of supporting long cycles, we will remain **dependent on the United States for fundraising above €100 million.**"



Véronique Jacq
Director
of the Digital Venture
Investment Division

bpifrance



Our role is to activate **industrial capital**. We mobilize corporate investors to transform seed innovation into market leadership.

Without massive investment, Europe is struggling to scale up its AI assets.

Many EU Member States, already **weakened** by high levels of **public debt**, have **limited scope** to invest heavily in innovation and strategic technologies.

	Europe	USA	China	Others
R&D/PIB Expenditure	2,22 % target 3%	3,59 %	2,56 %	3,41 % Japan
Share of major deals in Europe for fundraising > €100m		50 %	➡➡➡➡➡➡	
Investments in AI startups and scale-ups		x7 vs. Europe		

Sources: Eurostat, European Commission, Atomico, IMF

European capital markets are undersized

Less than **1/3**
of US venture capital.

Over the last ten years, VC funding in the EU has represented less than one-third of that in the United States, relative to GDP.

This weakness can be explained by lower liquidity and limited risk appetite in Europe. The European market lacks diversity among its private investors: there are hardly any pension funds, little presence of industrial players, and corporate venture capital (CVC) is still underdeveloped.

The scale-up wall

European companies struggle to raise the funds they need to **scale up and accelerate their growth.**

Many AI start-ups/scale-ups turn to **investors outside the EU and US funds** are capturing the majority of large financing rounds:

- Mistral, for example, raised **€1.7bn** with the majority coming from US funds.
- Dataiku is no longer majority-controlled from France.

Fragmentation of the European market is driving our start-ups and their talent abroad

A huge market broken up into 27 pieces

Divergent tax systems, fragmented VAT rules and administrative complexity: **operating in Europe costs €10–20k per year in cross-border compliance**, a real obstacle to competitiveness and scalability.

And beyond that, the absence of a truly unified capital market and competition between states disperse resources: Germany is investing, the United Kingdom is attracting pilot projects, Portugal and Poland are creating hubs, but there is no unified vision to foster the emergence of a European "Airbus of AI".

Proof that Europe is now perceived as a secondary market, too complex to support rapid growth, European AI start-ups are arbitrating:



generate most of their revenue in North America.



in their domestic market.

In this context, Ursula von der Leyen's recent announcement in **Davos ("registering a company in any EU Member State in 48 hours, entirely online")** illustrates the desire to relaunch a more integrated European tech sector. It remains to be seen whether this initiative will be enough to move from a "Europe of 27" logic to a core group of driving countries, capable of aligning market, capital and regulation to bring out AI champions.

23 % of AI start-ups

are considering **relocating** their headquarters to the **United States** due to a lack of a competitive environment.

41 % of AI start-ups

identify **access to talent** as the first **obstacle** to their development.

77 % of European companies

consider the **lack of qualified personnel** to be a major **obstacle** to investment.

Without an ecosystem capable of retaining its talent, Europe finances start-ups... but let the value created go elsewhere.

In the longer term, restrictions on the US H-1B visa could open a window of opportunity for Europe, particularly to attract certain foreign talent, notably from India, provided it offers a unified market and competitive conditions.

Sources: Commission Européenne, Sifted AI, EIB

And yet, the European entrepreneurial ecosystem is booming

An entrepreneurial dynamic that accelerates

The European entrepreneurial ecosystem is experiencing a real boom. This momentum can be explained in particular by the lowering of barriers to entry, thanks to no-code tools, AI and ecosystems that are now mature.

+60%



new companies created in Europe in 2025
(vs. 2023), with

27k

founders committed to
innovation projects.

The founding advantage is consolidating

Despite the rise of Asia, Europe remains an anchor for AI entrepreneurs, a trend that has been enduring for nearly a decade. The most dramatic growth is in **India** and the **United Arab Emirates**, where the number of founders has more than doubled in 10 years.

4/5



European founders are now building their businesses in Europe, and the share of AI founders based on the continent has increased from **74%** to **81%** in recent years.

This increase mainly reflects the lowering of barriers to entrepreneurship (no-code tools, GenAI, etc.) and the growing maturity of European ecosystems, rather than the age of European companies.

European champions are no longer American copies.

Gone are the days when Europe was content to imitate, its leaders are now inventing their own categories, particularly in AI.

Lovable

Automates application creation with unprecedented speed, to go from concept to product in minutes.

n8n

Reinvents workflow automation with an open-source, AI-native approach that offers complete flexibility and advanced control.

Synthesia

Revolutionizes video production with hyper-realistic AI avatars, allowing businesses to create content at scale without cameras or studios.

Sources: Atomic

Europe also excels in academic training and research initiatives

With **15%** 
of global scientific publications in AI,
Europe confirms its academic excellence, despite
more limited industrial value as measured by patents.

	China	USA	Europe	India
Share of AI patents granted worldwide	70%	14%	3%	0,4%
Share of scientific publications in AI worldwide	23%	9%	15%	9%

Sources: Stanford AI Index, ELLIS, European Commission, Inria

ellis Federating European scientific excellence in AI

The European Laboratory for Learning and Intelligent Systems embodies the European ambition of a "CERN of AI", with **more than 1,800 members, 40+ sites in 17 countries and more than 500 PhD students and postdocs in advanced AI**. The network connects Europe's leading centres of excellence to limit talent drain, strengthen skills and maintain world-class research.

euroHPC Giving Europe computing power

Backed by EuroHPC supercomputers and more than €10 billion in public investment over 2021–2027, **AI Factories** offer sovereign capacity to train, test and industrialize cutting-edge AI models. They aim to give European players access to computing resources comparable to those of American and Chinese big tech.

INRIA Transforming research into industrial impact

With around 200 project teams and a portfolio of more than 120 deeptech start-ups, **INRIA** is one of the scientific and entrepreneurial drivers of European AI. Its work is extended in practice by more than 100 European Digital Innovation Hubs (EDIH) co-financed by the EU, which support SMEs and public actors in the concrete adoption of AI.

In this rather bleak outlook, how can we work on our autonomy?

EU-INC

Le 28e régime européen franchit un nouveau cap entre Davos et Strasbourg

Intelligence artificielle

Retour en France, ambitions mondiales : Yann LeCun prépare AMI Labs, sa nouvelle aventure dans l'IA

Le chercheur français veut repenser l'intelligence artificielle à la racine.

Harmattan AI, première licorne de défense de la French Tech 🦄

Mistral AI lève 1,7 milliard d'euros et devient une décacorne

Thales et Dassault Aviation scellent un partenariat pour développer une IA souveraine dédiée au combat aérien du futur

Next Frontier AI

Germany, France and the European Commission launch Frontier AI Initiative at the Summit on European Digital Sovereignty.

Sources: Maddynews, Le Siècle Digital, Les Echos, L'Usine digitale, Élysée

Working on autonomy through uses and talents: the case of India

For a responsible, inclusive and deeply contextualized AI

- With its **IndiaAI Mission program** (USD 1.2 billion), India wants to move from being a **digital consumer** (+700M Internet users) to an **AI developer**.
- By capitalizing on its **colossal market** and its **appetite for digital technology**, India is developing **AI applications dedicated to national priorities** (translation, agriculture, health, sustainable cities) adding a **new layer to the India Stack**.

Key challenges for its "Make AI in India" ambition

Large **rare earths deposits** but limited **industrial processing** and an entire infrastructure to be built.

Microsoft Amazon Intel Cognizant announce massive investments.

The Indian government has announced a plan to **purchase +10k GPUs** through public-private partnerships.

India/Europe: a bilateral relationship where innovations and talents circulate

- European groups such as **Airbus, Michelin, Capgemini and Schneider Electric** operate centers of excellence in India, while **Tata Consultancy Services is opening an AI hub in Paris**.
- The Indo-French Center for Applied Mathematics (CNRS) in Bangalore embodies sustainable **scientific cooperation on AI and its applications**.
- India, co-chair of the **AI Summit 2025, will host the 2026 edition**, confirming its key role in global AI governance.



A pool of talent

1.5M

engineers trained each year.

+18k

published AI research papers

and

397

Patents obtained in 2024.

"SkillTheNation Challenge" to democratize access to AI

- Every citizen is invited to **train in AI for free** through the public platform **Skill India Digital Hub**.
- This device aims to create a generation capable not only of using AI, but also of **becoming a player in the Indian economy of tomorrow**.

An Indian AI ecosystem that is gaining maturity

India has risen to the **top 10 in the world**, at a level comparable to **France or Germany** with:

\$1.39 bn

of private investment in AI in 2023.

50 listed companies for a cumulative valuation of

\$150 bn.

AI autonomy

Utopia or achievable goal?

AI EUROPEAN BAROMETER BY JF

2



UNITED BY TECH

“Sovereignty no longer means self-sufficiency, but the ability to choose, assess, secure, and govern.”



Anne Le Hénanff

Minister Delegate for Artificial Intelligence
and Digital Affairs
Ministry of the Economy, Finance and
Industrial and Economic Sovereignty



MINISTÈRE
DE L'ÉCONOMIE,
DES FINANCES
ET DE LA SOUVERAINETÉ
INDUSTRIELLE ET NUMÉRIQUE

*Liberté
Égalité
Fraternité*

Autonomy, rather than sovereignty

Autonomy does not mean doing everything on your own.

Rather, it is:

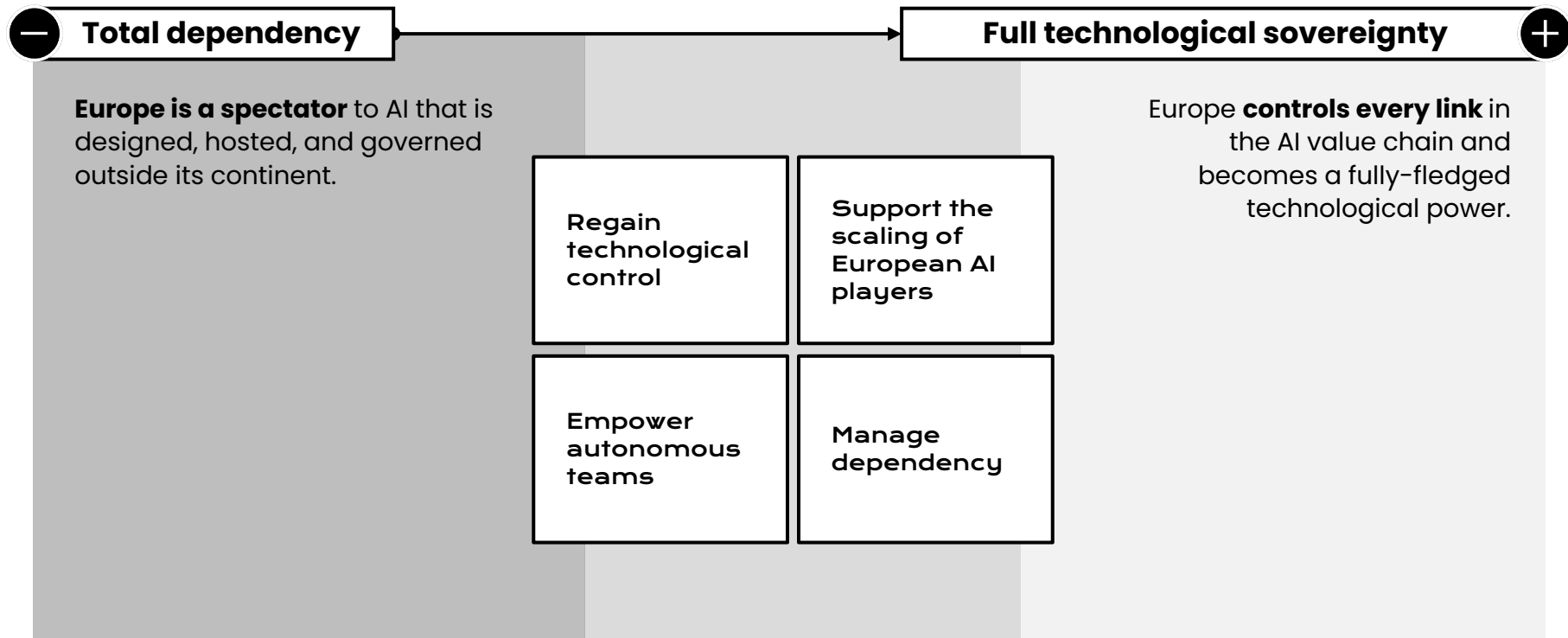
- **Act freely** and independently, without external constraints.
- Maintain **continuity** and avoid lock-in.
- **Decide, create** and **control** its strategic levers.

In the context of AI...

This means:

- **Design, produce and control** AI infrastructures, models, data and usage **without critical dependence outside Europe.**
- **Control data and ensure ethics** to guarantee **accountability** and **trust.**
- **Deploy AI** in **strategic sectors** with sustainable competitiveness.

Which levers can drive greater autonomy?



Regain technological control: a lever for strategic competitiveness

In an increasingly concentrated AI ecosystem, technological control is becoming a major strategic challenge.

It is neither about **internalizing** everything nor about **giving up the best market standards**, but about restoring a real capacity for choice and arbitration, enabling companies to differentiate themselves and adapt over time.

Regaining technological control means:

- **Understand and control the critical building blocks of AI:** targeted in-house development, hybrid architecture combining on-premise, sovereign cloud and public cloud, ...
- **Choose dependencies** consciously and reversibly.

In this context, **open source emerges as a central lever for autonomy**. Trajectories such as those of **DeepSeek, an LLM created in China in 2024**, show that it is possible to compete technologically at a very high level while **limiting dependence on hyperscalers**, thanks to open, auditable and flexibly deployable models.

Septeo chooses sovereignty through its end-to-end data control



Septeo is a major player in software **publishing** for **professionals in legal, accounting, real estate, HR, training** and **hospitality sectors, markets** where data sensitivity is an absolute imperative.

The company has made the strategic choice of **total technological sovereignty** to guarantee **maximum confidentiality** to its customers and avoid any use of data by third parties. To control their value chain, Septeo has freed itself from an over-dependence on GAFAM by building its own data and AI capabilities. While the company uses **high-performance open source models** (Mistral Small 24B, GPT OSS, Qwen-3, etc.), the priority remains the **control of the execution environment and the ethical integration of AI into its solutions**.



"We chose to build our own foundation to ensure that we are not dependent on third-party AI. Today, this bet is more justified than ever, it is a necessary condition for trust."

Poly Sok, AI Director, Septeo

Use case

Building your proprietary infrastructure, a foundation of autonomy

By investing early in **the purchase of GPUs** and opting for **on-premise hosting**, Septeo has long bucked the market trend, which favored full cloud adoption. This choice, now justified by confidentiality and compliance issues, gives them limited dependence on non-European suppliers. By using open source and locally hosted models, the company is able to perfectly meet their business use cases **without compromising the security and control of their customers' sensitive data**. This technological pragmatism is the cornerstone of their autonomy strategy.



An example of a technical challenge' success of a high-performance AI freed from GAFAM. JFD is committed to promoting this alternative as a market standard: by connecting this 'Sovereign by Design' offer to major public and private contractors, we are helping to make this European sovereignty an obvious strategic choice for buyers.

"At Allianz France, digital autonomy is embodied in shared governance and the ability to orchestrate our technological choices in line with our strategy as a European leader. We invest in people to develop our own solutions, while remaining attentive to European best practices and innovations, in order to guarantee both operational performance and the trust of our customers."



Isabelle Hébert

Member of the Allianz France Executive Committee
in charge of Data, Communication, Marketing and Strategy
Allianz France



Allianz France: the art of mastery through an in-house philosophy



At Allianz France, **digital autonomy** is a fundamental requirement, driven by a Germanic culture of **data sovereignty and intellectual property**.

Since 2017, the company has chosen to internalize its AI skills: a team of **25 specialists develops algorithms and platforms** in-house, while pooling services at the group level. The **data is hosted in France**, with backup in the Netherlands. The technology stack favors **open source** and the **GraphQL API** to ensure **agility** and **reversibility**. SaaS is avoided as much as possible: each integrated solution must ensure that **the data never leaks**.



"Our digital sovereignty means cultivating our in-house expertise, while remaining open to innovation and the European ecosystem."

Florian Lagardère, Head of Big Data & AI, Allianz France



Use case

Shared governance open to innovation

The company has developed an **internal platform** for the provision of **AI agents**, facilitating the **distribution** and **pooling of solutions** among the group's subsidiaries. This approach makes it possible to **rationalize investments** and **ensure data control**, while remaining agnostic on the technological bricks: integration is done via API, and the open source stack allows modules to be plugged or unplugged according to business needs. Also, the accelerator at the Allianz Riviera in Nice, selects AI startups every year **to create synergies and enrich the ecosystem**, without ever losing control over governance and security.



This approach demonstrates that sovereignty is based above all on human capital and control of the code. JFD is the partner of this strategic independence. Beyond technology sourcing, we identify Deeptech talent and European open source building blocks that can be seamlessly integrated into their internal architecture. By qualifying these assets (compatibility, reversibility), we enable Allianz to accelerate its innovation without ever compromising its data governance.

"Digital autonomy should not be a defensive stance, but a driver for accelerating business. Our challenge is simple: to optimize our processes and customer journeys with AI, while maintaining control of our data and systems. This is how we create value, sustainably and at scale."



Emmanuel Grenier

Executive Director Supply-Chain, E-Commerce,
Data and Digital Transformation
Carrefour



Carrefour: digital autonomy at the service of retail excellence



Artificial intelligence is at the heart of Carrefour's digital transformation. The company has **implemented its own AI solutions** across its core processes, both at **headquarters level and in-store**: assortment, promotion, pricing, supply chain, customer experience, store operations, etc.

The company thus ensures a **smooth and sustainable integration** with its **technical base**, while strengthening its **digital autonomy** toward its suppliers. Beyond performance, **explainability, interoperability, reversibility and strict compliance with the European regulatory framework** are key criteria in the choices made by the company, in order to guarantee control of data and uses.



"Digital autonomy is a necessary ambition and an ongoing challenge. We build our own solutions with the imperative of mastering our core processes and limiting dependence on external suppliers. »

Arnaud Grojean, Chief Data & Analytics Officer, Carrefour

Use case

L'Analytics Factory

At Carrefour, this Analytics & AI expertise centre brings together teams of data scientists, data engineers and data translators, a specific role that embodies the link with the business teams on a daily basis.

These teams are responsible for **building and developing AI solutions** (more than 50) that equip the company's core processes at scale. They rely on **an industrial data foundation built over many years**, and favor **open source** libraries and **containerization**. In this way, Carrefour reduces the risk of dependency and remains in control of its technologies.



Carrefour demonstrates that it is possible to combine global power and local control thanks to an open architecture (containers). JFD intervenes here as an accelerator of Open Innovation. We understand their interoperability constraints and we source for them the Talents and startups capable of 'plugging' sovereign AI bricks into their business processes. By connecting the retail giant to the agility of the European ecosystem, we strengthen their competitiveness while diversifying their technological dependence.



"Technology designed **by everyone and for everyone** is the prerequisite for truly shared progress. At Groupe Casino, we automate what frees up time and professionalizes our decisions, while keeping people at the center. Autonomy means giving teams **valuable time, reducing complexity and securing what matters:** data, customers, and performance."



Stéphanie Zolesio

CEO Casino Real Estate & FinTechs
Groupe Casino



Groupe Casino approaches digital autonomy with pragmatism and proximity



At Groupe Casino, **digital autonomy is a core value**, which is confronted with the reality of **a group undergoing full transformation**. Historically international, Casino is now focused on **proximity**: flow management – at the heart of their model (goods, people, finances) – makes autonomy essential, particularly for **data security and control**. As a result, many tools and models have been internalized, particularly at Cdiscount, and strategic data is stored in the Saint-Étienne datacenter.

Today, the approach remains resolutely **pragmatic**: the choice of tools must **serve proximity with franchisees**, without sacrificing security or user experience, in a context where every investment counts.



"Autonomy means moving forward with pragmatism: giving time and value to our franchisees, without ever losing sight of the reality on the ground."

Philippe Bourquin, Head of Innovation & New Business – IGC Groupe Casino



Use case

Casino Pro integrates AI to support franchisees

To support the group's **B2B shift**, more than **80%** of AI uses are concentrated on the core business, with **thoughtful interoperability**.

Casino has developed the **Casino Pro platform**, which uses AI to automate franchisees' assortment: generation of product sheets, merchandising training, choice optimization. "C Pro" was designed in-house: the main challenge is **saving franchisees time** and the **quality of service** offered to them. This approach illustrates the **ongoing compromise between autonomy, performance and budgetary constraints**.



In a context of strong budget constraints, technology should not be an expense, but a lever for immediate performance for teams. JFD accelerates this transformation by acting as a connector of sovereignty. We don't just source solutions; we align Casino's critical needs (reversibility, security) with the agility of Europe's top talent. The objective? To guarantee that each technological brick directly serves the human autonomy of franchisees.

Mastercard localizes its payment infrastructure to create a sustainable and distributed network



Europe occupies a strategic position at Mastercard: the region accounts for nearly a **third of global revenue**, with more than 9,000 employees and a **regional headquarters in Waterloo**. This European hub is also home to the **Cyber Resilience Center**, a reference center for cybersecurity and payment resilience.

For Mastercard, digital autonomy is not limited to technology: it is also embodied in the **transmission of values and support for the local economy**, particularly **SMEs and medium-sized companies**. This strong presence is accompanied by major investments in innovation and infrastructure, illustrating the group's commitment to ensuring continuity of service and supporting European growth.



"At Mastercard, digital autonomy is our commitment to supporting the local economy, assisting SMEs, and promoting our values of inclusion and resilience across Europe to ensure the sovereignty and security of the entire ecosystem."

Barbara Sessa
Managing Director France, Mastercard France



Use case

Investing in more resilient infrastructure

In October 2025, Mastercard announced a major **investment of €250 million** in three data centers in the Île-de-France region. This strategic initiative aims to **strengthen security, resilience, and proximity of services** for European customers.

Thanks to these infrastructures, Mastercard improves the **continuity of payment services**, meets **local regulatory requirements**, and supports **digital growth** in France and Europe, all while supporting innovation, technological sovereignty, and job creation in the region.



The opening of data centers in France is an important step for the development and resilience of the digital ecosystem. JFD acts as the catalyst for value here. An infrastructure only makes sense through the services it propels: our role as a business growth accelerator is to connect this local computing power to the agility of the best Fintechs and talents. In this way, we transform a technical capacity into an innovation hub, ensuring that the solutions of tomorrow are not only hosted, but invented here.

Support the scaling of European AI players: a collective project

Scaling up AI is not the responsibility of an isolated start-up or a large group acting alone. It requires a coordinated orchestration between public and private players and start-ups.

Innovation already exists in Europe. The real challenge is to create the conditions for its industrial diffusion.

Scaling AI therefore means:

- **Align supply and demand**, by connecting start-ups to the real use cases of large enterprises;
- **Secure critical building blocks** (access to computing, data, infrastructure, trust frameworks) through public-private partnerships;
- **Actively support scale-ups**, well beyond the seed stage, with appropriate financing, but also industrial coaching, visibility and access to key accounts;
- **Structure acceleration ecosystems**, capable of transforming technological innovation into contracts, deployments and jobs.

Without this chain of support and connection, AI remains confined to **fragmented initiatives**, unable to reach a European critical mass.

Balancing innovation and responsibility: L'Oréal puts trustworthy AI at the heart of progress and collective well-being

As a **global leader in beauty** and a signatory to the EU AI Champions Initiative, L'Oréal cultivates **strategic digital autonomy** to drive its Beauty Tech transformation. Supported by a community of **8,000 digital, tech, and data experts**, AI enhances the Group's historic pillars—science, technology, and creativity—within a rigorous framework of data security and governance. Its strategy prioritizes **resilience, reversibility, and partner diversification**. It relies on agile multi-model architectures that enable the selection of the most frugal and efficient solutions, with sustainability and carbon footprint reduction guiding every technological choice. By collaborating with global leaders and champions of the European ecosystem, L'Oréal combines **cutting-edge innovation with the protection of its assets**.

“At L'Oréal, we believe that the power of AI is multiplied when combined with collective effort. Through open innovation, we are co-creating the future of beauty by combining agility and scale to transform every technological innovation into a lever for rapid and responsible growth.”



Béatrice Dautzenberg
Global Beauty Tech Services & Open Innovation Director, L'Oréal Groupe

“For L'Oréal, trustworthy AI is AI that respects our values: ethics, diversity, and responsibility.”



Ariane Thomas
Global Tech Director of Sustainability
L'Oréal Groupe

Use case

Accelerating open innovation with the Beauty Tech Atelier at Station F

To nurture this strategic autonomy, L'Oréal is focusing on **open innovation** with initiatives such as the **Beauty Tech Atelier**, the world's first accelerator dedicated to Beauty Tech. Each semester, an international cohort of start-ups benefits from **six months of support**, combining mentoring, access to experts, and co-development. This program identifies and nurtures the most **promising start-ups in AI, data, e-commerce, and sustainability**. The start-ups gain access to the L'Oréal ecosystem, technical resources, and a global network of partners. Since 2018, more than 100 start-ups have been supported, **51% of which are international and 23% are impact-driven**. The Beauty Tech Atelier embodies L'Oréal's commitment to co-creating a **more inclusive, responsible, and sustainable beauty industry**.



A shared belief: technology at the service of users. We believe that the success of Beauty Tech depends not only on algorithms, but also on human adoption. JFD is part of this dynamic by opening up the ecosystem: we facilitate encounters with entrepreneurs who have mastered the new codes of customer experience. It is this openness that allows technical innovation to become part of everyday life and lead to lasting commercial success.

La French Tech, a driver of innovation and digital sovereignty for France and Europe

French Tech embodies France's ambition to **place the national and European ecosystem at the heart of the AI revolution**. Led by Mission French Tech, it brings together more than 700 companies, 90 institutional players, and 12 major partner groups. Its model, which inspires many countries, is based on **personalized support, business networking** (12,000 qualified connections in two years), and **training** (2,000 startups trained in public procurement through "Je choisis la French Tech Académie"). **Innovation is central**, an ambition particularly supported by the "Je choisis la French Tech" program, which aims to **increase public and private procurement** from French start-ups by 2027, with the support of a network of more than **700 companies and 99 institutional players**, and the collective commitment of €1 billion in purchases by 12 major groups.



"At La French Tech, our responsibility is clear: to support French start-ups in transforming innovation into European technological leadership."

Julie Huguët

Julie Huguët

Director of the French Tech mission, Directorate General for Enterprise Ministry of the Economy, Finance, and Industrial, Energy and Digital Sovereignty

Use case

French Tech 2030

French Tech 2030 is a program led by Mission French Tech. It **supports and promotes French companies** that develop **cutting-edge technologies that are highly strategic for France's digital, economic, and industrial sovereignty**.

The 2025 cohort consists of **80 start-ups that are deploying infrastructure or developing solutions** to help build a sovereign digital ecosystem, particularly in the fields of artificial intelligence, cybersecurity, robotics, space, quantum technology, and semiconductors. This cohort has already raised €1.3 billion (as of December 2025), with 45 existing or planned factories, 353 patents registered, 3,200 jobs created, more than €130 million invested in R&D in 2024, and €138 million in revenue in 2024.



Innovation cannot be decreed, it must be organized. Public momentum has launched the dynamic, and economic reality must now sustain it. JFD provides this industrial relay. We have been working for 14 years to secure growth. By connecting French gems to the purchasing power of large groups and private capital, we are transforming political ambition into real market share. This is our role as Market Maker: to ensure that sovereignty survives investment cycles.

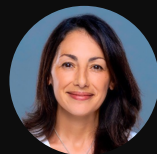
Hub France AI: accelerating French digital sovereignty through the strength of the ecosystem



Hub France IA is a **non-profit association** under the French law of 1901 whose mission is to promote the **adoption of responsible, ethical, and sovereign AI** and to support its **deployment in France and Europe**. As an independent association, its role is to inform and influence the debate on the major challenges of AI.

The association brings together key players—from start-ups to large corporations, and all stakeholders—around the **production of the commons necessary to accelerate the use of AI and technological mastery**.

Guided by scientific and technical rigor, Hub France IA produces **numerous annual publications** to help businesses, citizens, and public authorities better understand AI, disseminate best practices, and raise awareness of the impact of AI.



“Europe has played a pioneering role in providing an ethical and democratic framework for AI. The challenge now is to transform this regulatory lead into operational capabilities by bringing together stakeholders around concrete projects at the European level. Our technological sovereignty and the vitality of the European democratic project depend on this ability to move from rules to action.”

Rim Tehraoui
President, Hub France IA

Use case

The French AI Factory

The AI Factory France, funded as part of EURO-HPC and **led by GENCI**, with the support of Hub France IA and other stakeholders, offers concrete proposals **at the European level** to address the triple challenge of AI computing, data, and skills through a range of services. In particular, the project will strengthen the French center of expertise and technical support, helping users access these various services to **make the most of these complex technologies**. This center is a **unique asset in Europe** and should enable it to support all AI Factories in the deployment of their infrastructure and services.



JFD and Hub France IA are joining forces and pooling their networks in order to collectively influence global competition. This alliance aims to structure a continuum between innovation, industrialization, and large-scale adoption. By connecting the solutions of our respective ecosystems, we are helping to accelerate the deployment of sovereign AI and transform technological innovation into tangible economic value.

Paris Business Angels: facilitating the seed funding of French start-ups

Paris Business Angels is one of France's leading business angel networks. With the support of its 200 entrepreneur and executive members, PBA invests in around 20 French start-ups each year, with tickets ranging **from €150k to €1m in the first rounds**. More than 80% of the applications analyzed today **relate to AI, across all sectors** (deep tech, healthcare, cybersecurity, etc.).

It is important to remember the catalytic role played by Business Angels: beyond their ability to **mobilize significant amounts of capital** in the first rounds, they provide **strategic support, operational expertise, and privileged access to their networks**. Their involvement is therefore crucial in structuring and accelerating the development of the most promising projects.



"It is crucial to build a sovereign, ethical, and sustainable European AI. On the one hand, by strengthening cooperation between investors—BA, VC and PE funds, institutional investors—and between EU countries, which are far too fragmented. And on the other hand, by directing more savings towards innovation and promoting our strengths, namely our talent pool and our carbon-free energy."

Olivier Baroux
President, Paris Business Angels

Use case

Staying at the forefront of transformative topics

The creation of an AI expertise center, led by specialists in the field, enables PBA to systematize its use in order to **strengthen the relevance of decisions**, without ever replacing human intuition. Using dedicated tools, **AI is deployed throughout the investment cycle**: from **sourcing** (qualitative and quantitative expansion of deal flow), to **reviewing files** (automated analysis of opportunities and risks), **throughout the process of supporting startups** (optimization of commercial prospecting, competitive, technological, and regulatory monitoring activities, etc.), and finally to the **preparation of exits** (identification of the most relevant VC funds for each project).



JFD leverages the strategic financial lever (Capital). Paris Business Angels embodies the investment model of tomorrow: enhanced by AI, yet guided by humans. JFD acts as a Deal Flow partner. By directly connecting our most promising entrepreneurs with this "Smart Money," we feed their selection process with qualified opportunities. This alliance is critical to financing the seed stage of tomorrow's champions.

EuraTechnologies: the strength of an entrepreneurial ecosystem dedicated to AI autonomy

As a leading hub for innovation and start-ups in Europe, EuraTechnologies is a key player in the development of **high-performance, responsible and autonomous AI**. At the crossroads of public and private sectors, and bridging local and European scales, the hub supports entrepreneurs building tomorrow's AI. It promotes French and European innovation while **collaborating with major global players**, such as through the AI Experts Club.

EuraTechnologies has built an ecosystem that brings together start-ups, researchers, large corporations and institutions, with a clear ambition: to **foster the emergence of AI champions** integrated into **sustainable European value chains** and to strengthen **technological sovereignty**. EuraTechnologies is part of the regional European Digital Innovation Hub (EDIH) consortium, helping start-ups, SMEs and public players adopt AI technologies.



“European strategic autonomy in AI is not about autarky, but about controlling our capabilities to design, deploy and decide. It is built through ecosystems capable of transforming local research and innovation into solutions that can be deployed at scale.”

Steven Bourgeois
Public Affairs Director, EuraTechnologies

Use case

The AI incubator: fostering the emergence of European AI champions

Launched in 2025, EuraTechnologies' AI & Data incubator builds on **more than ten years of support** for AI start-ups and on the AI Experts Club. It helps scale **local innovations with strong European potential** through a **network of experts, targeted training** programs and **access to funding**.

Designed as a **real-world testing ground**, the incubator enables start-ups to run POCs under real conditions and **accelerate their development** by collaborating with companies seeking innovation. It relies on strategic partnerships with **key AI and research players**, including CITC, INRIA, La Cité de l'IA, and the Université Catholique de Lille.

 EuraTechnologies embodies the belief that true technological innovation draws its strength from local territories — genuine laboratories for experimentation and talent. The collaboration between JFD and EuraTechnologies aims to mutually enrich our respective networks by combining local talents and start-ups with the firepower of European corporates and investors. In doing so, it reinforces and validates their model for democratizing AI.

Turning AI into order books: JFD secures the innovation ecosystem to accelerate growth



Since 2012, JFD has been the benchmark growth accelerator for the tech ecosystem. In the global race for AI, Europe faces a threefold challenge: **capital, talent and market adoption**. Our mission is to **connect innovation with the industrial strength** of large corporations.

We align five key forces of the economy — **talent, capital, corporates, media and public authorities** — to accelerate innovation. As a strategic catalyst between start-ups, decision-makers and investors, **we strengthen business models and generate concrete, qualified business opportunities**. We connect top-tier tech talent with senior executives and investors to secure and sustain the growth of our innovation ecosystem.



"In a market where access to capital is tightening, the key challenge of 2026 is commercial traction. At JFD, we secure entrepreneurs' trajectories by turning cutting-edge innovation into order books and tangible revenue. JFD is the business growth accelerator that brings together the agility of start-ups and the industrial strength of major corporations to drive sustainable growth."

Delphine Remy-Boutang, Founder & CEO, JFD

Use case

3 strategic pillars serving growth

ACCELERATE – Closing the Skills Gap: we source emerging tech profiles and help turn their potential into leadership.

CONNECT – Closing the Capital & Market Gap: we connect start-ups, investors and large corporates to convert innovation into contracts.

INSIGHTS – Anticipating disruptions: our AI Barometer equips decision-makers to navigate future trends with accuracy.

JFD bridges the skills, capital and market gaps by developing talents into leaders and turning innovation into order books.

JFD, where *innovation accelerates*, means:

- €300 million raised by our accelerated start-ups
- 400+ tech leaders (C-Level & Founders)
- 25 million cumulative audience

Empower autonomous teams: skills as a strategic lever in the age of AI

Technological autonomy in AI is inseparable from a profound cultural transformation within companies.

Historically, AI has mainly been deployed through "**black box**" **solutions**, integration projects led by external service providers, and business teams that are **highly dependent on rare, centralized and hard-to-access skills**.

Today, a new transformation model is emerging based on:

- **increasing internalization** of AI skills,
- **product-oriented** rather than project-oriented organizations,
- **and much closer partnerships** between companies and AI suppliers.

In this context, European AI players such as Mistral or H Company are changing their business model. They no longer limit themselves to the supply of models, but **collaborate in an integrated mode with their customers**, placing their engineers at the heart of the customer teams, thus promoting the transfer of skills and methods.

Epitech, the French school that trains the architects of a cyber-autonomous Europe



Epitech plays a key role in **building a European digital autonomy**. With its 6,000 students, the school instills a real culture of technological arbitration.

The school champions independence by actively exposing its students to **multi-cloud environments**. This hands-on approach pushes future professionals to design agnostic architectures and master reversibility, critical skills that are highly sought-after, especially in the context of the GDPR and the AI Act. By relying on **open operating systems**, Epitech is developing a strong entrepreneurial culture (16% of business creations excluding freelancers) and is developing its own internal AI tools.

The school collaborates closely with the public sphere and is committed to national awareness of AI through its ambassadors.



"Digital sovereignty begins in education. By exposing students to AI in open and reversible environments, Epitech is training a generation capable of choosing its technologies rather than being subjected to them."

Laura Hassan
Managing Director
Epitech



Use case

"Test – Learn – Feedback"

At Epitech, pedagogy is **based on business projects**, where students are challenged to choose and argue their technological solutions.

This translates into an obligation to deploy their codes on several clouds to prove the interoperability and agility of their systems, making benchmarking a daily practice. This process forces them to integrate the issues of **traceability, safety and reversibility** by design.

This approach culminates in large-scale projects of general interest, such as the hackathon with the Presidency of the Republic, which brought together 850 students on concrete issues.



JFD is working alongside Epitech to build a strategic pipeline of architects trained in reversibility and interoperability. By connecting these agile talents to large infrastructures, we transform educational excellence into concrete industrial power.

“Following our investment in H Company in 2024, we are delighted to continue and further materialise our collaboration with a leading technology player. This initiative is part of our ambition to integrate agentic artificial intelligence into our processes and to foster a dynamic of continuous improvement. This partnership also reflects our commitment to contributing to the development of the French tech ecosystem.”



Stéphane Pallez
CEO
FDJ UNITED



FDJ UNITED places people and proximity to the tech-professions at the heart of digital autonomy

With more than one third of its workforce coming from tech backgrounds, FDJ UNITED has made **digital autonomy** and **agile organisation** strategic pillars.

The company favours a **hybrid architecture**, combining **sovereign data centres** located in France and across Europe for sensitive data, and **public cloud** for analytics and AI, with systematic data de-sensitisation. Tech, business and data teams are brought together in mixed, co-located agile squads alongside business teams to ensure close collaboration and accelerate innovation, while guaranteeing security and scalability.

It is this vision that led to the signing of a partnership with **H Company**, a French AI platform with an agentic AI development approach deeply embedded at the heart of business teams



“Digital autonomy means giving everyone the means to act, with data and AI accessible to all, within a framework of proven, trusted technologies for our teams as well as for our clients and partners.”

Sébastien Rozanes
Chief Digital, Data & AI Officer
FDJ UNITED

Use case

Giving business teams the keys to data and AI

FDJ UNITED has launched a **business empowerment initiative** around data and AI, enabling teams to directly use analytics tools and initiate AI projects in self-service.

Empowering business teams allows data experts to refocus on more complex, high-value-added AI topics.

A key challenge is also to provide teams with the ability to experiment with European solutions, such as Mistral AI, with which a POC was led by sales teams and integrated into the broader business reflection on CRM transformation.



This perfectly embodies our conviction: technology is nothing without agile human organisation. Their mixed teams prove that transformation succeeds when tech and business act as one. We connect their teams with the best talents and deeptechs to turn their requirement for independence into a sustainable competitive advantage.

Manage dependency: integrate risk management at the heart of AI strategies

In a globalized AI ecosystem, dependency is largely inevitable. Thus, in a BANI world —Brittle, Anxious, Non-linear and Incomprehensible — marked by geopolitical, economic, technological and regulatory polycrises, the real question for organizations is not "are we dependent?" but "on whom, on what, and under what conditions?".

In this context, managing dependency becomes a strategic exercise:

- **Map critical dependencies** across every link in the AI value chain;
- **Continuously assess** associated geopolitical, economic, regulatory, and operational risks;
- **Design fallback strategies** to address potential disruptions.

These fallback strategies are based on:

- **Diversifying AI suppliers** to avoid dependency;
- **Embedding reversibility and interchangeability** principles from the very design of AI solutions;
- **Building evolving and proactive procurement policies** that can adapt to market changes.

“For a mission-driven public service company, AI is of course a technological revolution, but it is also a responsibility. At La Poste, our position is clear: to protect our data and our customers’ data, and to remain in control of our uses. Prioritising European solutions is not an ideological choice, but a fundamental requirement to uphold trust and security, and to sustain our competitiveness in a world where digital sovereignty is a cornerstone of our independence.”



Nathalie Collin

Deputy CEO, in charge of the Consumer and Digital branch
Groupe La Poste



La Poste Groupe: building its independence between trust, performance and reversibility



La Poste prioritises a strategy of **digital independence** to secure service continuity and **control its exposure** to global ecosystems considered volatile.

Within the Group, technological decisions are guided by a risk assessment and value creation framework. Operational safeguards such as **reversibility and interoperability** are regarded as fundamental, concrete mitigation measures against the growing risks of dependency.

By building on strong internal **engineering capabilities** (over 200 AI experts), Research & Innovation activities are anchored in France, benefiting the national economic fabric. Overall, this approach combines agility, sovereignty and long-term partnerships.



“Our sovereignty is built through engineering. Reversibility, interoperability, and major investment in our teams are our safeguards against the risk of dependency.”

Pierre Etienne Bardin
Chief Data Officer
Groupe La Poste



Use case

Building use cases on European solutions

For industrial and sensitive use cases, La Poste actively **mobilises the European ecosystem**.

- **DALVIA**: a Generative AI project designed to help healthcare professionals analyse sensitive medical records. To guarantee sovereignty and data protection, La Poste chose to combine the model from French provider Mistral AI with the highly secure hosting services of NumSpot.
- **DOC IA**: an information structuring solution based on documents, which also leverages Mistral and the European cloud provider OVHcloud to meet the trust requirements expressed by certain clients.



Infrastructure only matters through its uses. La Poste is building industrial confidence. JFD accelerates business. For sovereign AI not to remain an isolated technical process, it must meet its market. JFD helps identify and connect the best start-ups capable of meeting strict reversibility standards, turning security requirements into a driver of industrial growth.

“In a data-driven economy, intuition alone is no longer enough to steer transformation. Digital autonomy is built through the ability to diversify technology partners, orchestrate AI solutions, and objectively assess market realities. Testing, learning, and measuring become essential to move beyond observations and equip decision-makers with data-backed evidence. In this way, human capital—supported by AI—becomes an even more powerful performance lever. At Kantar, this is what we call Intelligence for Brand Growth.”



Cécile Lejeune
CEO
Kantar France

KANTAR

Kantar accelerates insights and strengthens its operational digital autonomy by leveraging the diversity of LLMs

KANTAR

Kantar is an Anglo-Saxon group, with deep historical French roots (formerly Sofres). Data lies at the heart of its business and value creation. For more than five years, Kantar France has been accelerating the integration of AI across three main dimensions:

- In **France**, all its employees have a **Copilot license**. Adoption is massive, with a **98% usage rate**.
- In **partnership with Microsoft**, the group is **automating its core business** by training AI across its entire analytics value chain. However, humans remain central to understanding and delivering the best responses to customer needs.
- Finally, Kantar **France tests and develops its own AI solutions** for its customers – predictions, digital twins, etc. – in partnership with start-ups that are almost exclusively European.



"AI allows us to explore our data from a new perspective: faster, richer, and always in service of our clients' business."

Monique Kim-Gallas, Client Development Director, Kantar France

Use case

Leveraging the diversity of LLMs for enriched marketing insights

In partnership with **AdaptivAI**, the group delivers innovative AI solutions.

- **The Generative Brand Tracker** enables the exploration of how LLMs perceive a brand by generating thousands of prompts across different LLMs. Objective: compare brand image, reputation, and price positioning versus competitors.
- **Synthetic Qual** is a qualitative focus group creation tool. It enables exploratory analyses based on AI-generated personas, built using different LLMs to form a focus group that can be interviewed and whose responses can be analyzed.



Where some decipher the future through data; JFD mobilizes the ecosystem. Kantar has transformed its business by leveraging AI and European start-ups to produce predictive insights. JFD builds on this technological intelligence to take action. We connect this vision with decision-makers and talents to turn information into strategic opportunities.

“Building on several years of experience with Hubgrade solutions and strong expertise in data management, Veolia is now accelerating its digital transformation through AI. By deploying innovative solutions such as **Veolia Secure GPT** and its **“Talk to My Plant”** program, Veolia reinforces its position as a global reference player in **ecological transformation**, through the large-scale deployment of **responsible artificial intelligence** in support of our operations.”



Stuart Stock

Group Chief Information Officer
Veolia



Veolia breaks free from dependencies by cultivating technological autonomy



At Veolia, the Group's CIOs convey a clear message: relying on European AI solutions is a key lever for **sovereignty, compliance, and operational resilience**.

The company has made **digital autonomy** a structuring principle of its strategy: **ensuring the continuity of essential services** requires the ability to choose and change suppliers independently.

In this spirit, the company has implemented a **proactive procurement policy**: anticipating contract renewals, preparing teams for supplier changes, and rejecting technological lock-in. Veolia adopts an **agnostic approach**, multiplying tests, pilots, and technology watch initiatives. The objective: select the most suitable solutions, while remaining attentive to data localization, performance and costs. Calls for tenders systematically include GDPR and AI clauses, validated by the cybersecurity team.



"At Veolia, we continuously test solutions to identify the best options and maintain control over our technologies, so that innovation remains always at the service of frontline operations."

Meriem Riadi, Chief Information Officer, Veolia France, activité Eau

Use case

Conversational AI serving frontline operations

In partnership with Mistral, Veolia launched the **"Talk to my Plant" program** across several of its entities worldwide. Objective: leverage data and AI to improve operational excellence in the water, energy, and waste sectors.

In France, on the Water activity, a conversational AI project is being tested on nine pilot sites. The goal is to enable agents **to interact directly with** water and sanitation plant operating data, obtain actionable recommendations, and automate certain tasks after validation.

This AI facilitates onboarding for new employees, optimizes on-call duty and improves access to field information. The approach focuses first on solving concrete operational problems, before adding an AI layer. This operating model is consistent with the **Lean approach** carried out within the company.



Technological independence relies on mastering one's ecosystem, and excellence in sourcing is the key. To remain truly agnostic and sovereign, organizations must have full visibility over European alternatives. JFD operates within this requirement: we act as a radar capable of identifying and connecting organizations with DeepTech start-ups and talent that traditional channels fail to detect. In doing so, we ensure a continuous flow of innovation aligned with their sovereignty standards.

Regaining margins of autonomy

What concrete actions can we take to strengthen European digital autonomy?

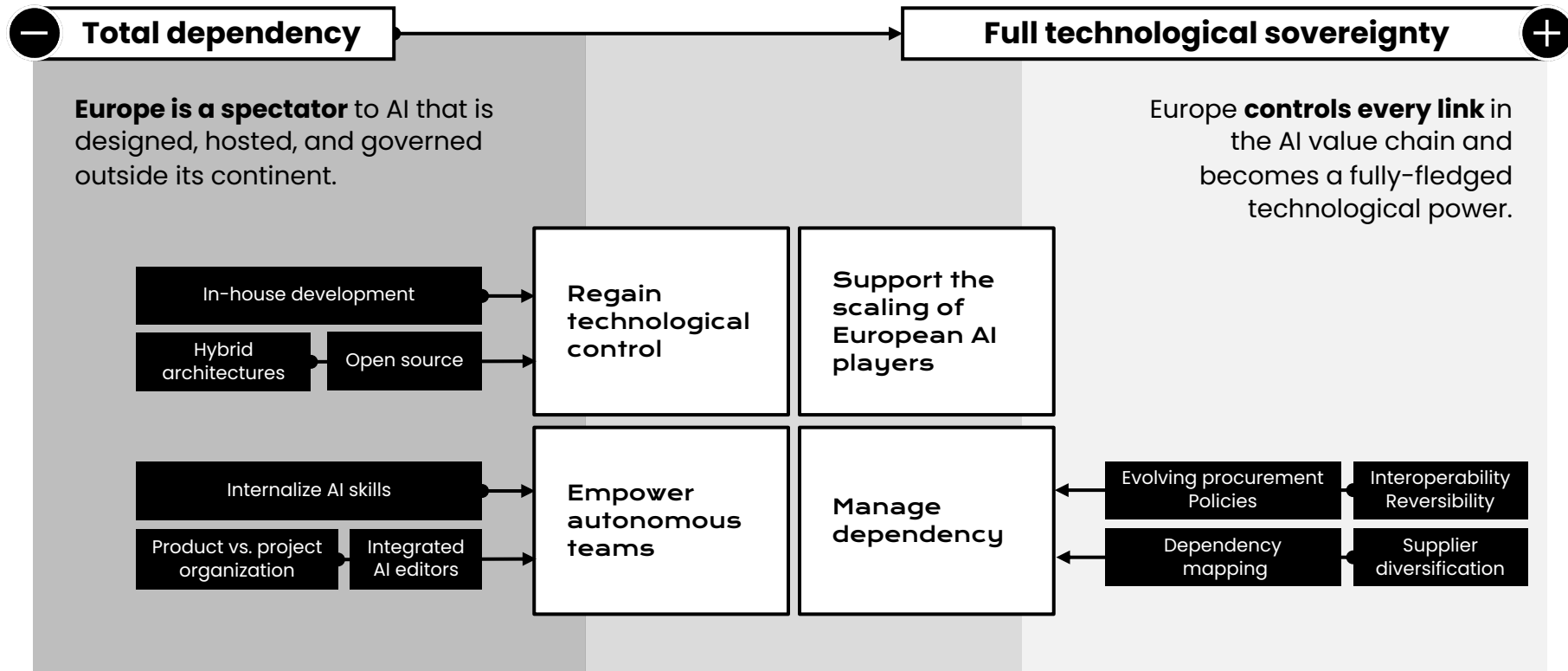
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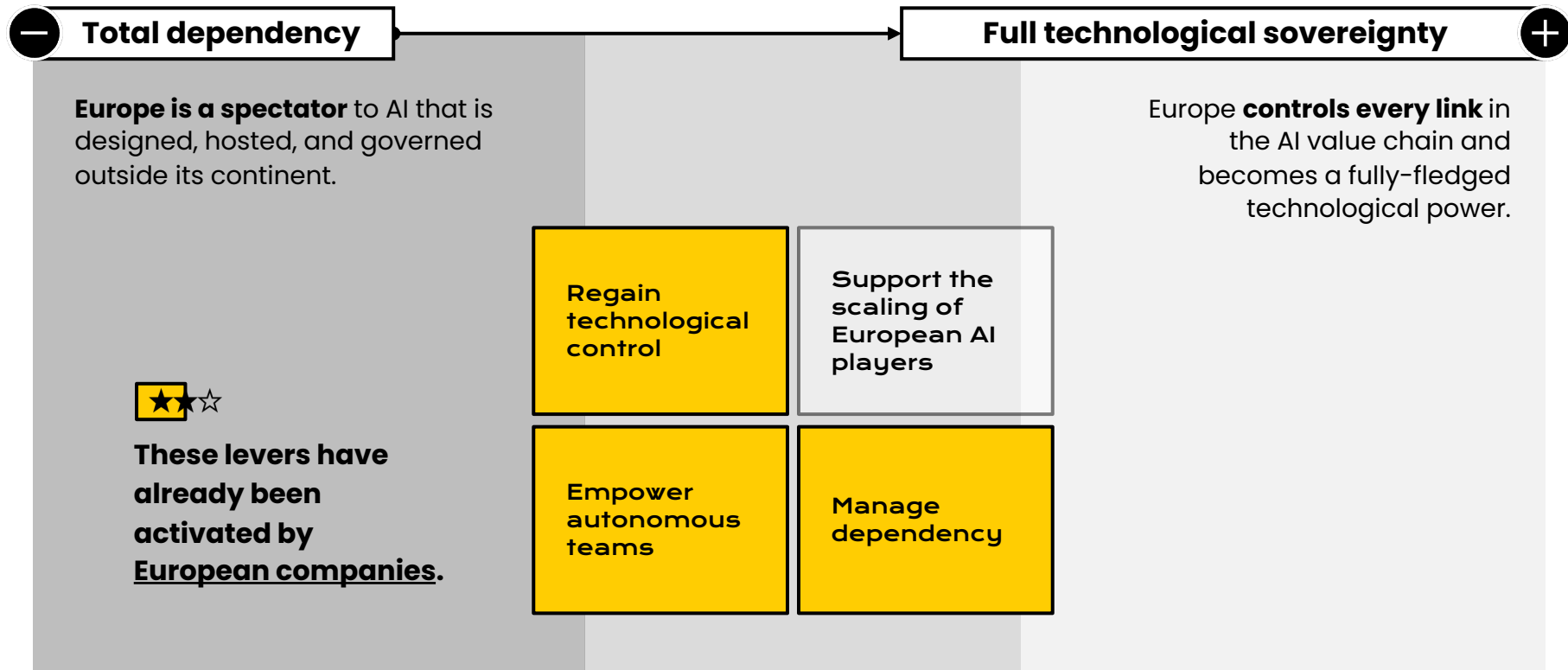


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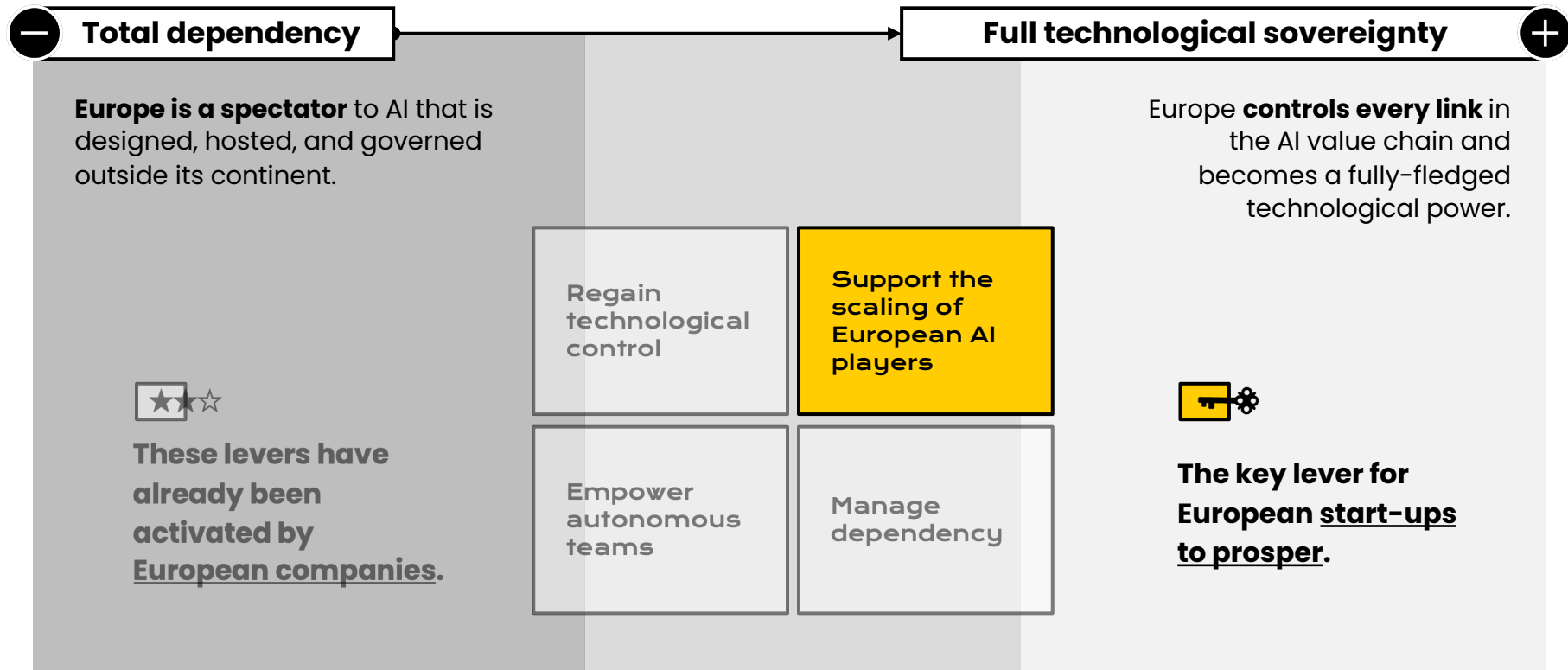
Strategic levers to build European autonomy



Strategic levers to build European autonomy



Strategic levers to build European autonomy



How can we support the scaling of European AI players?

Two levels of action:

1 Private sector

- Institutionalize **multi-vendor POCs**.
- **Reinvent procurement** : factor in the cost of dependency.
- **Break down silos** to accelerate innovation.

2 Europe

- Make the European offer **visible**.
- Build **sector coalitions** to amplify impact.
- Embrace a differentiated positioning on **trusted AI**

1 Private sector — Institutionalize multi-vendor POCs.

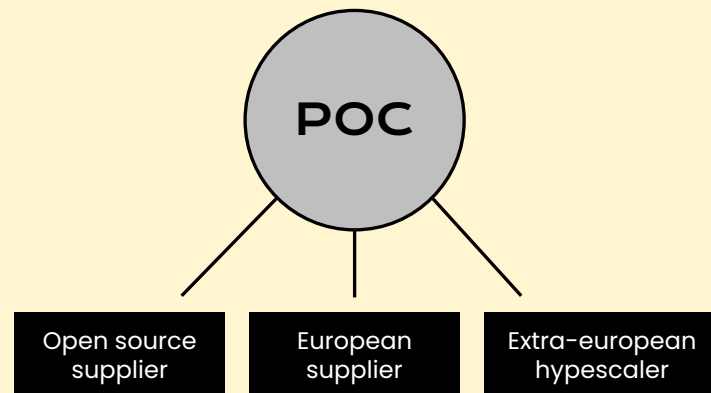
Technological dependencies are created from the very first choices. To avoid them, autonomy starts with a simple method: **test** several options before deciding.

Rather than relying on a single pilot, the goal is to run short, comparable POCs on key AI use cases, evaluating multiple AI solutions in parallel — open source, European players, hyperscalers, ... This approach makes it possible to compare concrete criteria such as performance, cost, security, compliance, and ease of migration, based on factual evidence.

The objective:

Limit AI project lock-in and maintain credible technological options over the long term.

The multiplication of POC opportunities also benefits European AI start-ups: by being exposed to real-world use cases, they improve their models, performance, and ability to scale.



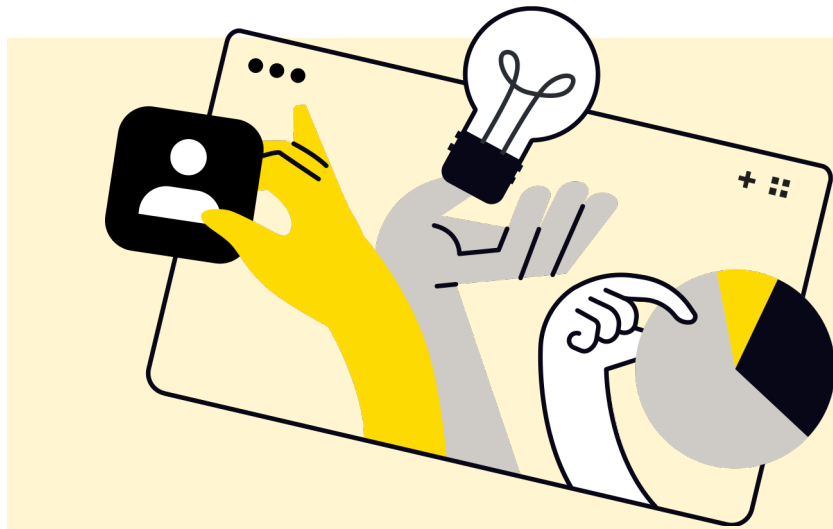
1 Private sector — Reinvent procurement : factor in the cost of dependency.

Regaining control over technological choices requires **evolving procurement criteria**.

Price and time-to-market are no longer sufficient: reversibility, interoperability, architecture portability, data residency, and auditability must become standard decision criteria.

In practical terms, this means **contractually securing exit options, anticipating migration scenarios, and retaining credible alternatives** from the very start of the relationship with a supplier. This approach prevents **lock-in** that would otherwise **close the market to new AI players**, particularly European ones.

By factoring in the **cost of dependency**, companies **durably open up their supply chains** and create **favorable conditions for the integration and scaling of European AI start-ups**.

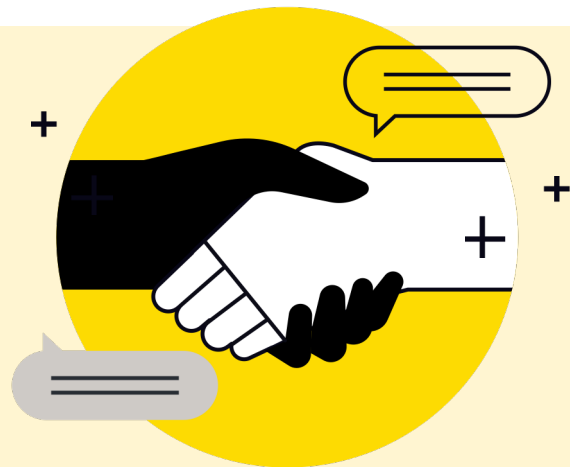


1 Private sector — Break down silos to accelerate innovation.

On AI topics, European companies are still moving forward in a **fragmented way**, both internally and across players within the same sector. This fragmentation **limits the visibility** of European start-ups, **duplicates experimentation**, and **slows down scaling**.

Accelerating progress requires organizing the **sharing of key feedback and lessons learned** — validated architectures, security requirements, technology choices, success and failure factors — across functions, countries, and subsidiaries, but also between companies, through **peer groups** and **sectoral communities**.

Sharing **expands the addressable market for European AI start-ups** beyond their national markets, facilitates cross-border deployment, and enables companies to access proven solutions on a continental scale more quickly.



2 Europe — Make the European offer visible

Europe has a **rich AI ecosystem**. It is supported by a number of public and private initiatives, funding programs, and leading technology players. However, this offer remains **difficult to understand** for decision-makers and procurement departments of large European companies.

This fragmentation **directly hampers European AI start-ups**, which struggle to be identified, referenced and deployed on a large scale at the European level. Structuring a real **go-to-market strategy** for the European AI offer would make this offer more readable, actionable and usage-oriented.

Supported by an authority identified at the European level – on the model of a **Europe Tech** – this approach **would facilitate the access** of start-ups to major accounts and **accelerate their scaling up** – not only at the national level but above all at the European level.

Examples of European initiatives

Funding

Next Frontier AI

horizon
europe

Compute capacity



Data and Sovereign Cloud



LMM open-source

EURO*LLM

Adoption



2 Europe — Build sectoral coalitions to amplify impact

Faced with players that vertically integrate technology, data, and markets, what is at stake for Europe? **Coordinating efforts** across Member States and **pooling what is currently fragmented**: computing capacity, sectoral data, standards, funding, and industrial outlets.

The creation of **structured sectoral coalitions** – on the model of Airbus – in key sectors such as health, energy or defence would make it possible **to align European states, public actors, large groups and AI start-ups** around common roadmaps, with clear objectives and shared resources.

These coalitions create **a stable framework for the industrialisation** of European AI solutions, facilitate **cross-border deployments** and provide start-ups with concrete conditions to test, deploy and scale AI.

Recent initiatives – the **Franco-German summit** on European sovereignty in November 2025 or the **EU AI Champions coalition**, formed at the AI Action Summit in February 2025 – demonstrate that such a dynamic is possible.



2 Europe — Embrace a differentiated positioning on trusted AI

Europe must assume a clear strategic positioning: that of a **trusted, governed, and frugal AI**.

Within the European regulatory framework, the models developed and deployed in Europe are, **by design**, more ethical, easier to audit and better governed. The challenge is to turn this into a market standard.

This positioning favors modular architectures, the structuring use of open source and the development of specialized models, optimized for specific use cases. European initiatives such as **OpenEuroLLM** illustrate this approach.

By making trust and efficiency a competitive advantage, Europe creates a **favorable environment for the emergence and scaling of AI start-ups** aligned with these requirements.

Funded by the EU, this initiative aims to develop open-source, multilingual language models that comply with European standards.

Objective : provide a sovereign, transparent and reusable basis for private companies and public services.



What's next? Towards new models for Europe

AI World Models

A **refocusing of European talent** on post-LLM approaches is taking place. With AMI Labs and its three billion dollars raised, **Paris is becoming the hub** for the development of **world models**: predictive and non-generative models, capable of simulating the dynamics of the physical world and anticipating the consequences of actions.



Around **Yann LeCun**, the AI leading figure who has just launched his start-up, leading figures in artificial intelligence — including Alexandre Lebrun, CEO of Nabla, and Laurent Solly, former VP for Europe at Meta — share this vision.

This helps strengthen a European ecosystem ready to explore alternative architectures that could lead to AI models with general intelligence.

Quantum & AI Gigafactories

Revised on January 20, 2026, the EuroHPC framework expands its mandate to incorporate a **quantum** pillar and roll out industrial-scale **AI gigafactories**, backed by strategic **public-private partnerships**. It establishes funding and public procurement rules while preserving the interests of start-ups and scale-ups.



The amendment introduces added flexibility for partners, enabling improved performance while reinforcing Europe's leadership in AI and quantum technologies.

The framework aligns with the **Quantum Europe Strategy**, which seeks to establish the EU as a sovereign leader in high-performance computing for industry and science through the consolidation of infrastructure, talent, and critical supply chains.

The strategic committee



The strategic committee 1/2



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About JFD

JFD | Where Innovation accelerates.

Founded in 2012, JFD is a growth accelerator that forges strategic business alliances between innovative entrepreneurs, corporate leaders, and investors. By aligning the five vital forces of the economy—Talent, Capital, Corporates, Institutions, and Media—JFD acts as a catalyst, turning cutting-edge innovation into real economic performance.

Through its three growth levers—Accelerate, Connect, and Insights—JFD strengthens the trajectory of today's leaders to help bring forward the champions of tomorrow, resilient in the face of major technological challenges.

Key figures

- €300M raised by accelerated startups
- A network of 400+ Tech Leaders
- 500+ business connections per year

For more information: www.joinjfd.com

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UNITED BY TECH

Thank you

AI EUROPEAN BAROMETER BY **JFD**

JFD

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