AI EUROPEAN BAROMETER BY JFD

Press Release
Paris, 9 February 2026

JFD presents the results of the 2nd edition of its 2026 European AI Barometer "United by Tech"

From left to right: Veolia, Septeo, Kantar, Carrefour, EY Fabernovel, Ciblijob, FDJ UNITED, Mastercard, Epitech, L'Oréal Group, Bpifrance, JFD, Casino Group, La Poste Group, LVMH, La FrenchTech, PBA, Allianz, Kantar, Upmeet, Hub France IA.
Photo credit: François Tancré

Europe facing the scale-up challenge: the decisive role of private players in sustaining the innovation ecosystem and ensuring European sovereignty.

A few days before the AI Impact Summit, which will bring together global innovation leaders in India, JFD, the leading growth accelerator, unveils the second volume of its European AI Barometer entitled "United by Tech". This was produced with EY Fabernovel and 30 international economic leaders, all leaders in Europe, including Allianz, Bpifrance, Carrefour, Epitech, FDJ UNITED, Casino Group, Kantar, L'Oréal Group, La Poste Group, LVMH, Mastercard, Septeo, Veolia…

Their message is a call to positive action: **to transform our technological champions into global leaders thanks to the striking power of large**

corporations. A challenge of scale to preserve the European innovation ecosystem and provide the means to remain competitive at the global level.

Indeed, after consolidating an innovation ecosystem, European AI players are now facing three systemic challenges to sustain their development in the region and strengthen European sovereignty in the global innovation race:

1. **Financing**: the absence of pension funds and corporate venture capital limits market depth for fundraising campaigns exceeding €100 million. With **AI investment 7 times lower than in the US**, Europe is allowing its champions to seek financing and therefore ties across the Atlantic.
2. **The AI value chain**: Europe holds only **5% of global computing power**. It does not yet control the entire AI value chain, whereas American hyperscalers control every link.
3. **Legislative complexity**: 13,000 legislative acts in the EU compared to 3,500 in the US over five years. This complexity, combined with market fragmentation, is prompting **23% of AI start-ups to consider moving abroad**.

1. The situation may seem alarming, yet Europe holds key assets:

- With **15% of global scientific publications on AI**, Europe confirms its academic excellence (ahead of the US and India).
- **81% of AI start-up founders choose to remain on the continent**, proving the attractiveness of the ecosystem.
- Europe saw its **fundraising increase by 18% in 2025** (€55 billion), driven by unprecedented momentum in artificial intelligence, which now accounts for a quarter of global investments.

What they need now are **business and industrial partners** that will enable them to scale up and consolidate their leadership position.

In this regard, governments have already played an important role in supporting the innovation ecosystem, but under budgetary pressure, they cannot bridge the gaps on their own. Public procurement of innovation reaches an average of 9% in Europe, rising to 20% in the United States and 25% in South Korea.

2. The 9% Cap: Developing a culture of innovation modelled on the *Mittelstand*

In this context, JFD and its "*United by Tech*" coalition of 30 economic leaders, have set an ambitious but achievable goal: **to reach 9% of innovative procurement from European start-ups within two years**, in order to align the dynamics of the private sector with European public procurement efforts and foster the emergence of world-class technology champions.

This “demand shock” is the decisive lever for retaining our talent and offering them opportunities here, rather than across the Atlantic. Europe has a historic opportunity in applied and industrial AI (vertical, frugal models). Having successfully nurtured champions, the challenge now is to consolidate and accelerate.

For JFD and the 30 economic leaders of the European AI Barometer, private demand is the driving force behind transforming our agile start-ups into a true “Mittelstand” of innovation: a network of medium-sized companies that are solid, profitable and capable of supporting European industry in the long term.

The objective is clear: to move from a Proof of Concept approach to one of industrial partnership, in which large companies secure their own future by nurturing sovereign technology suppliers capable of competing with American or Asian giants.

"The European AI Barometer is a roadmap for the future. We have the talent and a more mature innovation ecosystem. What we need now are contracts and alliances to successfully scale up. At JFD, we are working to ensure that large groups view entrepreneurs as strategic industrial partners. Sovereignty cannot be decreed, it must be built collectively." — **Delphine Remy-Boutang, Founder & CEO of JFD**

The second edition of the European AI Barometer will be officially presented to the Ministry of Economy, Finance and Industrial, Energy and Digital Sovereignty on 9 February to **Anne Le Hénanff, Minister Delegate for Artificial Intelligence and Digital Technology**, who emphasises that *“Digital sovereignty, which has been the guiding principle of my work from day one, does not mean self-sufficiency, but rather the ability to choose, qualify, secure and control.”*

"Technological autonomy is not about turning inwards; it is a prerequisite for competitiveness. As shown by the European leaders surveyed in the European AI Barometer 2026, dependence is not inevitable when it is built pragmatically and managed effectively. By combining global power with European technological building blocks, our companies can gradually regain control of their value chain and transform innovation into a sustainable competitive advantage." — **Jean-Christophe Liaubet, Innovation Leader EY France**

3. Leading by example: transforming autonomy into performance

The Barometer highlights leaders who have already understood that their autonomy is a competitive advantage:

Allianz France is internalising its AI skills to retain control over its intellectual property.
Carrefour is rolling out its own AI solutions on a large scale to digitise its stores and speed up its operations, while retaining complete control.
Epitech cultivates independence by encouraging its students to think beyond tools, while maintaining ethics and sovereignty.
FDJ UNITED combines security and agility through a hybrid architecture and has partnered with H Company to place sovereign agentic AI at the heart of its business lines.
Group Casino is localising its digital sovereignty by hosting its data in its own data centre in Saint-Étienne and is developing the Casino Pro platform for its franchisees in-house.
Kantar draws on its billions of data points and proprietary AI, supplemented by technology partners, to provide the intelligence that accelerates brand growth.
La Poste Group develops innovative AI use cases for its businesses and customers within an ethical and sovereign framework.
L'Oréal Group favours an agile multi-model strategy, relying on partner diversification and open innovation to deploy trusted AI systems in support of its Beauty Tech ambition.
LVMH combines excellence in craftsmanship with the power of AI to enhance the customer experience and shape the future of luxury.
Mastercard is localising its infrastructure with a €250 million investment in France.
Ordalie relies on a lean, local infrastructure to ensure sustainable autonomy and complete control over its technology.
Septeo is building a European LegalTech champion to preserve technological sovereignty and accelerate the daily work of essential legal and regulated professions.
SiPearl is providing Europe with its own microprocessor to run critical AI without foreign dependence.
Veolia combines field experience and sovereignty with "Talk to my Plant", its AI programme developed with Mistral AI.
Upmeet secures the intellectual capital of meetings thanks to 100% European data sovereignty.

Consult the complete 2026 European AI Barometer titled "United by Tech": https://www.joinjfd.com/barometre/

Official presentation of the European AI Barometer 2026 on 9 February at 6.30 p.m. at the Ministry of the Economy, Finance and Industrial, Energy and Digital Sovereignty: Press accreditation

METHODOLOGY & STRATEGIC COMMITTEE
After exploring access, inclusion and sectoral transformations in 2025, the European AI Barometer analyses maturity and autonomy in 2026. The aim of this study is to audit the AI value chain, analyse which suppliers companies use, measure the degree of dependence this creates, and assess the real position of European players in this globalised technological landscape. Through this lens, the barometer answers a key question: ***AI & European autonomy – how can sovereign choices, excellence and competitiveness be reconciled?*** Conducted with EY Fabernovel, JFD's 14th annual study identifies concrete levers for competitiveness and autonomy by aggregating rigorous data analysis and the vision of 30 economic leaders: Allianz, Axoltis Pharma, Biomemory, Bpifrance, Carrefour, CibliJob, Epitech, EuraTechnologies, FDJ UNITED, France Digitale, Group Casino, HABS, Hub France IA, JFD, Jizo AI, Kantar, La French Tech, La Poste Group, L'Oréal Group, LVMH, Mastercard, Ontbo, Ordalie, Paris Business Angels, PoliCloud, Septeo, SiPearl, Ternwaves, Theremia, Upmeet, Veolia…

ABOUT JFD
Founded in 2012, JFD is a growth accelerator that forges strategic commercial alliances between innovative entrepreneurs, corporate executives and investors. By aligning the economy's five vital forces — Talent, Capital, Corporates, Institutions and Media — JFD acts as a catalyst, transforming cutting-edge innovation into real economic performance. Through its three growth levers — Accelerate, Connect, Insights — JFD secures the path of today's leaders to build the resilient champions of the future economy, ready to tackle major technological challenges.
JFD — Where Innovation Accelerates.
Key figures: €300 million raised by accelerated startups | A network of +400 Tech Leaders | +500 business connections/year
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ABOUT EY FABERNOVEL
EY is committed to building a better working world, creating long-term value for our clients and our people as well as for society and the planet as a whole, while strengthening trust in the financial markets. By relying on data processing, AI, and new technologies, EY teams contribute to creating the trust necessary for our clients to shape a future proofed against the most pressing challenges of today and tomorrow. Through a full range of services ranging from audit to consulting, including tax, strategy, and transactions, EY teams are able to deploy their expertise in more than 150 countries and territories. In-depth sector knowledge, an international and multidisciplinary network, as well as an ecosystem of partners as vast as it is diverse, are assets that will allow EY to participate in the construction of a more balanced world.
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