UNLOCKING FRANCE'S AI POTENTIAL 2026

The next wave of AI is here – France must act to harness its impact

Technologies such as Agentic AI, advanced automation, robotics, and physical AI signal the arrival of a new wave of AI. With this new wave comes the potential to accelerate the pace of innovation, reshaping how businesses test ideas, build products, and run operations.

France is making progress in harnessing the potential of AI. **40%** of French businesses have now adopted AI (up from **30%** last year). The startup ecosystem is particularly strong. **80%** of French startups have adopted AI, ahead of the **76%** seen across Europe, and **90%** of these have seen their innovation timelines accelerate. France's most innovative businesses, such as startups Mindflow and Callyope, who are both featured in this report, are demonstrating how AI can be embedded into products and operations to drive innovation, improve efficiency, and create new value.

But this report identifies a watch-out. Despite stellar momentum among startups, the pace of adoption is too slow. France's adoption rate remains below the overall rate for Europe (**54%**) – and only **19%** of adopters have reached the most advanced stage, where the technology is integrated across operations and is driving deep transformation and productivity gains. At the current pace it would take until around **2035** for half of France's AI-adopting businesses to reach advanced levels of AI use. This matters because helping basic adopters to reach advanced AI use could unlock **€30.1** billion GVA for France between now and 2030.[1]

The current trajectory risks entrenching a two-tier economy, in which a narrow group of firms, sectors, and regions capture the full benefits of AI, while the rest fall behind. Without targeted action to equip businesses with the right skills, workforce capabilities, funding pathways, and regulatory clarity, the gap between firms able to move at speed and those that cannot will widen.

The report also finds a second clear strategic challenge: France risks losing its most innovative businesses. As startups scale, they report encountering friction: fragmented access to capital, complex procurement processes, regulatory uncertainty, and slower routes to market. As a result of these barriers, four in ten (**41%**) French startups would consider relocating outside of Europe to scale.

The opportunity for France is clear. In order to realise the potential of the next wave of AI technologies, it must take steps to both broaden the base of AI adoption across the economy, and ensure that it is not only a place where promising startups begin, but the best place for them to stay, grow, and scale. In practice, that means building on existing strengths and incentivising investment and adoption in new technologies.

Key findings

- **40%** of French businesses have now adopted AI, up from **30%** last year, representing a **33%** year-on-year growth rate. While this momentum is significant, adoption across France still trails the European average of **54%**.
- **56%** of large enterprises have adopted AI. SMEs, which make up the vast majority of French businesses, report an adoption rate of **38%**.
- Startups continue to lead the way, with **80%** reporting AI adoption, slightly above the European startup average of **76%** AI adoption.
- AI adoption is particularly strong across several key sectors of the French economy: the Information and Communications sector leads adoption at **61%**, followed by Financial and Insurance Activities (**52%**), and Manufacturing (**46%**). These sectors are increasingly using AI to improve operational efficiency and to accelerate innovation and develop new products and services.
- Among AI adopters, **70%** report productivity gains from AI (up from **66%** in 2025), and **88%** say that they expect AI to increase their growth over the next year.
- Investment by firms in AI has risen by **32%** year over year – outpacing businesses across Europe with a **26%** increase in investment in AI.
- Despite this momentum, **41%** of French startups say they would consider leaving Europe to scale their business and pursue greater access to capital and global markets.
- Businesses estimate that **47%** of their total tech spend goes toward compliance with national and international regulations.

	Overall	European average	Startups	Large enterprises	SMEs
AI Adoption	40%	54%	80%	56%	38%
Stage 1 Basic AI adoption (% of adopters)	64%	58%	45%	50%	49%
Stage 2 Intermediate AI adoption (% of adopters)	15%	18%	22%	22%	17%
Stage 3 Transformative AI adoption (% of adopters)	19%	22%	33%	24%	16%

A growing digital divide: Many businesses are not using advanced AI tools

While adoption is accelerating, celebrating adoption figures alone risks masking an underlying trend. Looking more deeply into how businesses are implementing AI, from initial experimentation to full transformation, we see that most organisations are still not innovating with AI.

Basic adoption:
64% of businesses remain focused primarily on more basic uses of AI and incremental gains (e.g. driving efficiency gains and streamlining processes), rather than innovation (e.g. developing new products or disrupting industries). These businesses are using publicly available chatbots for routine tasks or purchasing ready-made AI solutions.

Intermediate adoption:
15% have advanced to the intermediate stage of AI adoption. These companies are integrating AI across multiple business functions, resulting in efficiency improvements and more innovative customer experiences.

Transformative adoption:
19% of businesses have reached the most transformative stage of AI integration, using advanced AI systems, combining multiple models, creating custom AI systems, or deploying agentic or autonomous AI – up from **17%** last year. At the current pace of growth, it would take until **2035** for half of France's AI-adopting businesses to reach this level of advanced AI use. This is where the real productivity value concentrates and drives growth and competitiveness. Transformational AI is not only about doing existing work faster; it enables new products and services, new routes to market, and new operating models.

This progression toward advanced use cases is not as fast as it could be. France's rate of advanced adoption – **19%** of all AI adopting businesses – leaves it marginally behind the overall figure for Europe (**22%**). Crucially, it is also not keeping pace with the innovation of new AI technologies – further demonstrated by a decrease in the share of AI adopters that have launched a new AI-driven product or service, from **40%** in 2025 to **34%** this year.

This poses a core competitiveness challenge. As innovation cycles compress, the ability to deploy advanced AI safely and at scale becomes a key differentiator. In practice, this means moving beyond isolated pilots toward AI that is embedded into core systems, supported by high-quality data, strong governance, and AI-ready talent.

Without deliberate action to support businesses in their progression toward advanced AI use, the gap between pioneering businesses and other players will continue to widen. This will limit the translation of this momentum into large-scale productivity gains and sustainable economic transformation. If businesses currently using AI in basic ways (primarily for efficiency gains) were to achieve the same productivity gains as those that have already reached an advanced stage, where AI fundamentally redefines their business model, this could unlock **€30.1 billion** in GVA by 2030.[2]

The next wave of AI threatens to widen the divide if businesses are not prepared

Next-generation AI technologies – such as agentic AI, physical AI, and advanced robotics – will play a defining role in the next phase of AI-driven innovation. These technologies move beyond traditional AI tools by enabling systems to plan, reason, and take actions autonomously across complex tasks. As these capabilities mature, they have the potential to reshape industries, accelerate innovation cycles, and unlock entirely new business models.

However, the data suggests that, while awareness of these technologies is beginning to grow, most organisations are still some distance from deploying them:

Less than a quarter of businesses (**23%**) say they have heard of agentic AI – on par with the European figure of **24%**.

Of those who are familiar with the technology, only **4%** report that they have fully deployed agentic AI – marginally ahead of the equivalent Europe-wide figure of **3%**. A further **10%** are experimenting with or piloting the technology.

The majority of businesses do not feel ready to adopt these emerging technologies, but startups emerge as a bright spot:

Only **19%** of businesses say they feel ready to adopt next-generation AI technologies, such as agentic AI – contrasted with **67%** of startups who report they are ready.

12% of all businesses say they are only somewhat ready, and nearly three-quarters (**71%**) say they are slightly ready or not ready at all. This is more than double the proportion in Europe who say they are slightly ready or not ready at all (**33%**) – suggesting significant work to do in boosting France's broader AI readiness.

The Information and Communications sector leads the way in terms of next-gen AI readiness (**41%**), followed by Financial & Insurance Activities (**27%**) and Manufacturing (**22%**).

Those that have adopted agentic AI are already realising tangible benefits across their business. The most commonly reported are faster decision-making and execution (**33%**), increased operational efficiency or productivity (**30%**), and improved scalability of operations (**28%**).

Businesses point to persistent constraints that prevent them from moving from shallow adoption to deeper transformation, and from readiness to real deployment: **36%** cite skills shortages as a barrier to adopting next-generation AI technologies, while **30%** cite insufficient internal financial resources, and **24%** cite legal uncertainty arising from AI and digital regulation.

Unless these barriers are addressed, the next wave of AI innovation risks reinforcing the emergence of a two-tier AI economy – where a small group of early adopters rapidly deploy advanced capabilities while the majority of organisations remain in earlier stages of experimentation.

Case study - Mindflow

Founded by Paul-Arthur Jonville, Mindflow is focused on augmenting human intelligence through AI agents and large-scale automation.

Jonville's personal experience with disability, which requires him to rely on voice-recognition software, helped shape what he calls an "automation mindset" and inspired his vision to bring automation into the corporate world.

Together with co-founder and CTO Fabrice Delhoste, the company set out to improve on existing tools by building a platform that enables enterprises to create, deploy, and manage automation using no-code and AI agents. Their technology supports a wide range of use cases, from IT and cybersecurity operations to repetitive back-office processes, helping organisations reduce manual workloads and streamline complex tasks.

Mindflow's approach allows businesses to automate processes such as employee onboarding or security operations, significantly reducing time spent on repetitive actions. By integrating AI into these workflows, teams can shift their focus toward higher-value, strategic work, while maintaining oversight through transparent, auditable flow-based systems rather than traditional code.

The platform leverages AWS, including Amazon Bedrock, to accelerate development, integrate multiple large language models, and maintain flexibility across different client needs. This infrastructure enables Mindflow to scale globally while focusing on delivering practical value rather than rebuilding core technologies.

With around 100 enterprise customers, Mindflow typically begins by identifying dozens of high-impact automation use cases, expanding gradually across teams and functions. The company estimates that 20 to 40% of corporate tasks can be automated, positioning AI as a tool to enhance productivity and decision-making.

Looking ahead, Mindflow sees AI as a way to democratise technical capabilities, allowing non-developers to build complex automation and take on more strategic roles. As the company expands internationally, including into the US, its broader goal remains human-centric: giving people back time by transforming how organisations operate and enabling closer collaboration between humans and AI systems.

France risks losing its startup leaders

As highlighted in last year's report, France's AI startup ecosystem is one of its strongest assets. However, founder flight is no longer a distant concern, but a real and growing risk. A significant share of startups report that they would consider relocating to pursue faster scaling, greater access to capital, and deeper access to global markets: **41%** of French startups say they would consider leaving Europe to scale their business. This is on par with the average across Europe of **38%** of startups that would consider relocating.

When asked why they might consider leaving Europe, startups consistently cite their ability to grow and scale. The top five reasons are:

- Greater availability of funding (**54%**)
- Faster ability to scale internationally (**49%**)
- Better access to global markets (**45%**)
- More favourable or predictable regulation (**38%**)
- Lower operational costs (**32%**)

These findings reinforce a central theme of this year's report: in an accelerated innovation cycle, competitiveness is increasingly shaped by speed – and founders will follow the pathways that reduce friction and shorten time-to-market.

However, founder flight is not inevitable. Startups are clear about what would make Europe a more attractive environment for scaling. Among startups that say they would consider relocating, the following factors would encourage them to stay:

- Greater availability of venture and growth funding (**65%**)
- A clearer regulatory environment that supports innovation (**52%**)
- Strong access to European customers and markets (**47%**)
- Strong ties to local ecosystems (**41%**)
- A predictable and stable policy environment (**40%**)

These levers align with a broader competitiveness agenda: where France becomes both a great place to start a business, and a great place to scale.

Case study - Callyope

Callyope, a healthtech startup, is using AI to help predict and prevent mental health crises by providing clinicians with more objective and continuous patient insights.

The company was co-founded by CEO Martin Denais, Rachid Riad (a neuroscientist specialising in AI-driven speech analysis), and Xuan-Nga in response to a major gap in psychiatric care, where clinical decisions are often based solely on conversations rather than objective data.

Callyope's technology focuses on analysing speech patterns to detect symptoms associated with conditions such as schizophrenia, bipolar disorder, and depression. Variations in speech (such as disorganisation, sentence length, or speaking speed) can indicate changes in mental state. The company has developed an AI foundation model capable of assessing these signals and anticipating relapses using as little as 30 seconds of speech.

Through a mobile app, patients can record voice journals and choose how and when they are monitored, enabling remote and continuous assessment while encouraging active participation in their care. Clinicians can access more frequent insights, while patients can also involve trusted caregivers through the platform.

The solution is currently undergoing clinical validation, with multiple trials across French hospitals involving around 1,000 patients. The model has been trained on a large, multilingual speech dataset covering thousands of individuals and a range of neurological conditions, supporting its accuracy and robustness.

Callyope runs its infrastructure and training workloads on AWS, enabling scalable experimentation and development. Beyond technology, AWS has supported the company in navigating regulatory requirements and building connections across the healthcare ecosystem.

As it begins deploying its platform in psychiatric hospitals, Callyope aims to integrate into clinicians' daily workflows, improve remote monitoring capabilities, and expand research partnerships. Its long-term vision is to become a central "super-assistant" for mental health professionals, helping them save time, access better data, and ultimately improve patient outcomes at scale.

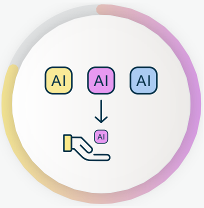
Businesses value choice and capability in the AI and cloud landscape

In a rapidly evolving technological environment, companies report that accessing the best-in-class tools and services is central to maintaining competitiveness.

French businesses say this access to the broadest range of technology solutions supports competitiveness as they seek to innovate, deploy AI solutions, and scale beyond domestic markets. **84%** of businesses say access to global technologies is important for their adoption of AI – including both current AI users and those who are still considering its use – while **82%** say such access is important for innovation, and **86%** say it is important for enabling them to scale quickly. These findings reflect the increasingly global nature of the digital economy, where AI capabilities are often developed across international landscapes.

When selecting tools and technologies, French businesses consistently report that their priorities are speed, scalability, resilience, and security. In practice, this means organisations prioritise solutions that meet the needs of their customers and support rapid growth, rather than focusing primarily on the geographic origin of a technology provider.

As a result, companies typically combine services from multiple technology providers, regardless of whether they are based in France, in the EU, or elsewhere. Businesses select services and tools based on capability, performance, and compatibility with existing systems.



81% of businesses say they have adequate choice to select and switch between different providers of AI technologies.

90% report that they currently use a mix of providers from different regions.

For businesses that use technology from providers based outside their home country, the top reasons for this are a wider range of features or product offerings (**55%**), better scalability, performance or integration options (**51%**), and competitive pricing or favourable commercial terms (**46%**). Taken together, these preferences point to a broader emphasis on flexibility, capability, and choice when businesses think about digital sovereignty.

This reflects citizens' attitudes. When asked what digital sovereignty for Europe means to them, citizens most commonly cite Europe's ability to develop and scale homegrown AI champions that can compete globally (**55%**) and strong data protection, privacy, and cybersecurity standards (**52%**). When it comes to public investment in Europe, citizens say that the highest priorities should be healthcare and life sciences (**74%**), energy security and green transition (**63%**), and skills, education, and workforce training (**58%**), while only **9%** say that Europe-funded and Europe-based cloud infrastructure should be a priority for public spending.

Three critical barriers hold back businesses from transformative AI use in France

While the nation is moving fast, several barriers and structural challenges must be addressed to ensure that momentum translates into broad-based, sustainable growth.

1. Navigating fragmentation

Even where AI adoption is progressing, businesses report that scaling AI solutions across borders introduces additional complexity. Companies operating in multiple markets must navigate different regulatory frameworks, compliance processes, and legal interpretations, which can create operational friction and increase the cost of deploying AI at scale. For many organisations, this fragmentation slows the pace at which AI-driven solutions can be expanded internationally.

This scaling friction is compounded by the broader compliance burden businesses already face as they navigate regulatory fragmentation, which is particularly high in France vs the European average:

Businesses estimate that **47%** of their total tech spend goes toward compliance with national and international regulations. This compares to **46%** last year – and a European average of **42%**.

When asked what makes up this **47%, 52%** of businesses cite legal consultations or external advisory services, followed by relationship management with supervisors and responsible government authorities (submitting queries, participating in consultations, engagement with government officials) (**46%**), and employee training on compliance requirements (**41%**).

83% say compliance costs have increased over the past three years, marginally higher than the **81%** in Europe. **81%** expect these costs to rise further over the next three.

Fragmentation across regulatory systems introduces additional barriers for businesses seeking to scale. Addressing this challenge will be important to ensure that companies can expand AI-driven innovation.

2. Access to a skilled workforce

Skills shortages remain a major structural constraint on the adoption and expansion of AI. Deploying AI solutions at scale often requires sustained investment in talent and organisational capabilities. However, many businesses report that they lack the internal resources required to move from experimentation to full deployment.

41% cite shortages of AI and digital skills as a barrier to adopting or expanding AI.

34% cite insufficient internal workforce capacity.

These challenges are reflected in businesses' self-assessments of their capabilities. Only a minority report having a strong AI skillset today, while most say their skills need improvement:

Only **24%** say they currently have a strong AI skillset – marginally higher than the **22%** in Europe.

49% say they have some AI skills but need improvement, and **27%** say they are only just beginning to develop AI skills.

84% expect AI skills to be important in their industry over the next five years.

The technical roles that businesses feel will be more important in the next five years are: software developer (**51%**), followed by data governance or privacy officer (**48%**), and solutions architect (**30%**).

Together, these findings suggest that while businesses recognise the strategic importance of AI capabilities, many organisations remain at an early stage of building the internal expertise required to deploy AI at scale.

3. Innovation without incentives

Access to finance remains a key structural constraint. Many businesses report that they lack dedicated AI budgets, and those that do often allocate only a small share of IT spend toward AI, limiting their ability to move beyond pilots and narrow use cases:

31% cite insufficient internal financial resources as a barrier to adopting or expanding AI.

28% cite unclear ROI or an unclear business case as a barrier.

46% say they do not have a dedicated AI budget.

88% expect AI to take a larger share of IT spend over the next three years, predicting it to rise to **21%** of their total IT budget on average.

Businesses report that limited external support, weak demand signals, and complex procurement processes make it harder to justify the risk and investment required to scale AI across operations or develop new AI-driven products.

63% say government support – such as grants and tax incentives – is crucial or very important in their decision to adopt AI.

34% say a lack of incentives or external support discourages investment in AI.

37% say other business priorities take precedence over AI investment.

Public sector demand also has the potential to accelerate the diffusion of AI technologies across the economy. Governments can act as early adopters and large-scale customers for AI solutions, creating opportunities for businesses to develop and deploy innovative technologies. However, businesses report that accessing these opportunities is often challenging.

42% say opportunities to sell to the government are crucial or very important in their decision to adopt AI – significantly higher than the Europe-wide figure of **30%**.

36% cite complex or slow public procurement processes as a challenge to scaling AI solutions.

While public procurement can play a significant role in supporting innovation, separate research suggests SMEs are too often sidelined in these processes. Only **9%** of digital SMEs believe the public sector is fully prepared to purchase their innovative digital products and services. **43%** report never having participated in a public sector procurement process, and of those who have participated, **47%** have dropped out mid-tender. Rectifying this could generate **€117 billion** in gross value added (GVA) and create **1.8 million** SME jobs.[3]

If these barriers persist, France risks missing its window of competitiveness just as global AI capabilities accelerate.

Recommendations: Unlocking France's AI future

1. Scale France's strengths

France already has many of the foundations and the ambition required to compete in an accelerated AI era – with a strong innovation ecosystem supported by world-class research institutions, a dynamic startup landscape, and growing levels of investment in emerging technologies. Together, these elements provide an important platform for AI adoption and development.

Businesses themselves recognise the importance of strengthening these foundations as AI capabilities accelerate globally. When asked what matters most for supporting growth in their business and industry, French businesses point to:

- Access to the most advanced AI tools and services (**44%**)
- Skilled AI talent (**42%**)
- Private investment and venture capital (**39%**)

71% of all businesses agree that Europe has the infrastructure and ecosystem needed to scale globally, while **53%** rate Europe as highly or somewhat competitive as a global hub for AI and innovation. France's startups are a testament to the support given to these innovative businesses. The challenge is now how quickly France can scale what already works so that transformation and innovation spread beyond a handful of businesses and into the wider economy – and crucially, how to retain the very startups who are some of France's most innovative businesses.

2. Make the public sector France's and Europe's flagship AI adopter

Governments can accelerate AI diffusion, build trust, and unlock large productivity gains – yet legacy systems currently hold adoption back. Public sector transformation is one of the most powerful untapped AI accelerators.

- Deploy AI across public services: Systematically integrate AI to reduce administrative burdens, improve service delivery, and enable predictive, data-driven decision-making. This works to drive trust in these technologies and broader diffusion of the technology – **68%** of businesses say they are most likely to increase their AI adoption when the public sector leads.
- Harmonise international standards and digital public services across member states: Create common data standards, interoperable platforms, and shared digital identities so AI-enabled public services can operate seamlessly across borders – enabling cross-country innovation and improving citizen experience. Alignment with international standards should be prioritised to ensure interoperability between Europe and the rest of the world and to strengthen the competitiveness of European firms. This should build on existing EU initiatives, including eIDAS, the European Digital Identity Wallet, and the Interoperable Europe Act, and ensure they are supported by adequate resources, including IT solutions and sustained investment that allow public administrations to fully harness the benefits of AI at scale.
- Accelerate both public and private sector adoption through streamlined procurement: Digitise, accelerate, and simplify public procurement processes so startups, scale-ups, and digital SMEs can deploy AI solutions across public services rapidly. Open, competitive procurement creates early demand and real-world validation for European innovators—transforming public sector contracts into a genuine launch pad for scaling across markets, rather than a closed shop for incumbent champions. This approach builds market momentum while ensuring governments have access to the best solutions available.

Impact: Faster and improved service delivery, reduced public sector costs, stronger citizen trust, and large-scale market demand for AI innovation.

3. Incentivise investment in AI technologies

France will not achieve economy-wide AI transformation without stronger investment and simpler growth conditions. Three in five say government support is crucial or very important in their decision to adopt AI. If France wants to accelerate AI investment, regulatory clarity and access to finance must improve in tandem.

- Replace growth cliffs with growth pathways: Unlock the potential of the digital single market by simplifying regulation to reduce compliance costs, removing overlapping requirements and ensuring harmonised enforcement. Reform size-based regulatory thresholds that discourage firms from scaling AI solutions and receiving investment, and promote free data flows with trust to promote digital cooperation and development.
- Reward companies scaling globally from France and Europe: Introduce government incentives, faster procedures for infrastructure development, including for grid connection and permitting, and support tied directly to AI investment, workforce expansion, and cross-border scaling.
- Create frictionless growth capital for AI scale-ups: Standardise investment frameworks across member states to unlock cross-border venture and growth funding for AI-driven companies.
- Encourage increased collaboration between government and business to improve access: Europe can harness public-private partnerships to support early-stage startups with access to key services and infrastructure, support industry-specific growth programmes, and help scale-ups build investor networks.
- Simplify and speed access to EU digital and innovation funds.

Impact: Stronger investment flows, lower compliance costs, faster commercialisation of AI innovation, and improved investor confidence in Europe as a unified digital market.

4. Build AI readiness

Increasingly, the greatest constraint on advanced AI adoption is capability rather than access to technology. Without AI-literate leadership, technical expertise, and workforce readiness, businesses remain limited to low-impact use cases. Additionally, businesses should carefully develop their AI strategy and data governance with an approach of “responsible by design”, to ensure they are using the technology to its full potential, safely, and securely. In the AI economy, skills and organisational capability are prerequisites for advanced use.

- Embed AI literacy across education systems: France must integrate applied AI skills, responsible AI literacy, and data competencies into educational curricula or risk widening the already existing digital skills gap.
- Accelerate AI workforce development: Public-private partnerships for training can rapidly upskill both current employees and those new to the industry in AI deployment, governance, cybersecurity, and automation. Through accessible training and certifications, public institutions and the private sector can work together to create pathways into tech careers while addressing the immediate skills shortages businesses face.
- Target SME capability building: Support applied training and advisory services to help small and medium-sized businesses adopt advanced AI systems. Targeted programmes should provide hands-on guidance for deploying AI in operations, customer service, and product development – ensuring business transformation extends beyond large enterprises to drive broader economic impact.
- Strengthen business readiness to scale: Support organisational capability with dedicated funds to support AI readiness (development of AI strategies, responsible AI governance, and data governance frameworks). Build government capacity and support the development of the internal expertise required for economy-wide AI integration.

Impact: A workforce and business base capable of deploying AI at scale, faster productivity growth and business transformation, and broader diffusion of advanced AI across the economy.

The window for AI transformation is narrowing – France must act to translate adoption into impact

France enters the next phase of AI adoption with clear momentum, but also with a growing need to translate that momentum into deeper and broader-based transformation. Adoption is rising, investment is increasing, and many businesses are already reporting tangible productivity and growth benefits. Yet, progress remains uneven. Advanced AI use is still limited, readiness for next-generation AI technologies is low across much of the business landscape, and too many businesses remain constrained by gaps in skills and finance, while reporting that regulatory fragmentation limits their ability to scale. As innovation cycles compress and AI capabilities continue to evolve, the distinction between basic adoption and transformative use will become increasingly important.

The challenge, therefore, is not simply to increase the number of firms using AI, but to ensure that more businesses are able to deploy it at scale to innovate and disrupt their industry. That will require reducing fragmentation, improving access to skills and funding, supporting startups as they scale, and ensuring that businesses have the flexibility to choose the technologies that best meet their needs. Without these shifts, AI adoption risks remaining broad but shallow, with the benefits concentrated among a relatively narrow group of firms. With these shifts, France will be better placed to ensure that the next wave of AI contributes to productivity, resilience, and innovation across the wider economy.

Appendix

Methodology

The fieldwork for this study was undertaken by Strand Partners' research team for Amazon Web Services. This research has followed the guidance set forth by the UK Market Research Society and ESOMAR. For the purposes of this study, business leaders are defined as founders, CEOs, or members of the C-suite in organisations.

'Citizens' are nationally representative members of the public based on the latest available census.

For inquiries regarding our methodology, please direct your questions to: polling@strandpartners.com.

In France:

- We conducted a survey targeting 1,000 nationally representative members of the public, ensuring representation based on age, gender, and NUTS 1 region.
- Additionally, we surveyed 1,000 business leaders, representative by their business size, sector, and NUTS 1 region.

Sampling:

Our sampling process used a mix of online panels that are recognised for their validity and reliability. These panels are carefully curated to ensure diverse representation across various demographics. For the business leaders, the panels are selected with a consideration for organisational size, sector, and position within the company. Our objective with the sampling strategy is to achieve an optimal mix that mirrors the actual distribution of our target populations in the respective markets.

Weighting Techniques:

Post-data collection, we applied iterative proportional weighting to correct any discrepancies or over-representations in the sample.

Survey:

This study was designed with the objective of delving deep into the digital landscape:

- Usage Patterns: This survey gauges the evolving patterns of digital technology usage. We are particularly interested in examining the adoption and implementation levels of technologies, focusing on cloud computing and artificial intelligence.
- Perceptions and Attitudes: The survey seeks to unearth the prevailing perceptions and attitudes towards digital technologies, understanding the perceived benefits, challenges, and potential ramifications of both present and emerging tech solutions.
- Barriers and Opportunities: The survey scrutinises the predicted challenges and potential avenues that both businesses and individuals anticipate on their digital trajectory. This involves pinpointing challenges, from skill deficits to regulatory complications, and recognising opportunities for growth, innovation, and market development.
- 'Size of the Prize': The survey sheds light on the economic repercussions and growth prospects linked with digital transformation. By elucidating the 'size of the prize', we aspire to stress the importance of digital transformation and foster further investments and technology adoption.

References

1. Based on analysis comparing productivity gains reported by basic AI adopters with those reported by advanced AI adopters in this survey. If basic adopters were to achieve the same productivity gains as advanced adopters, this could unlock an estimated €30.1 billion in GVA for France between now and 2030. The economic modelling methodology underpinning this estimate is detailed in the Unlocking Ambitions report 2024.
2. Ibid.
3. Modernising public procurement could drive 1.8 million new jobs for Europe's digital SMEs.