CEO STAGE

GRAND PALAIS

Report & Replays

Adopt AI

Adopt AI Summit 2025 **at a glance.**

20.000 attendees

1000+ CEOs

3.000+ CXOs

650+ speakers

250+ exhibitors

7 stages

35+ country delegations

75+ country represented

14 country booths

Adopt ΛI

CEO stage speakers.

Guillaume Faury
CEO
AIRBUS

Nicolas Namias
CEO
GROUPE BPCE

Alexandre Bompard
Chairman & CEO
Carrefour

Christel Heydemann
CEO
orange

Ahmad O. Al Khowaiter
Executive Vice President of Technology & Innovation
aramco

Patrick Pouyanné
CEO
TotalEnergies

Estelle Brachlianoff
CEO
VEOLIA

Paul Hudson
Chief Executive Officer
sanofi

Olivier Gavalda
CEO
CA

Sophie Bellon
Chairwoman of Sodexo's Board of Directors
sodexo

Christophe Périllat
CEO
Valeo

Dr Najwa Aaraj
CEO
TII Technology Innovation Institute

Nabil Al Nuaim
CEO, Aramco Digital
aramco

Olivier Laureau
President and CEO
SERVIER

Bernard Fontana
CEO
edf

Benoît Coquart
CEO
legrand

Éric Petitgand
CEO
Crédit Mutuel Alliance Fédérale

Marie-Aude Thépaut
CEO
CNP assurances

Olivier Sichel
CEO
Caisse des Dépôts GROUPE

Hans de Cuyper
CEO
ageas

Dirk Hoke
CEO
VOITH

Guillaume Texier
CEO
rexel

Stéphane Pallez
CEO
FDJ UNITED

Alexander Vollert
CEO AXA Group Operations
AXA

Marie-Christine Lombard
CEO
GEODIS

Bruno Vaffier
CEO
cegid

Thomas Mackenbrock
Group Deputy CEO

Président Emmanuel Macron closing speech on the CEO stage.

Adopt AI

KEY HIGHLIGHTS OF THE CEO STAGE

Conference Program

The New Competitive Imperative: Navigating the AI Reality

Formulating a successful AI strategy begins with a clear-eyed assessment of the current landscape, separating tangible reality from market hype. The conversations on stage confirmed a clear consensus: the urgency of AI adoption is non-negotiable for future competitiveness. Success, however, will belong not to those who simply deploy the technology, but to those who move beyond experimentation to strategically identify and dominate AI's "sweet spots."

While the potential is immense, the path is littered with obstacles. Data from across the industry highlights a significant gap between ambition and execution, revealing a set of stark operational realities that must be confronted:

- **The ROI Gap**: A sobering one in five AI initiatives currently delivers a positive return on investment, signaling a widespread struggle to connect technological capability with tangible business value.

- **Pilot Purgatory**: An estimated 88% of AI pilots never reach full-scale production, becoming trapped in a cycle of experimentation without ever delivering enterprise-level impact.

- **The Value Hurdle**: The vast majority of companies, around 95%, experimenting with Generative AI have yet to see meaningful returns, indicating that the initial wave of enthusiasm has not yet translated into measurable performance.

This presents the central paradox leadership must navigate: AI adoption is mandatory for survival.

KEY HIGHLIGHTS OF THE CEO STAGE

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Leaders are caught between the pressure for short-term, visible ROI and the necessity of long-term, capital-intensive foundational work in data and infrastructure. Overcoming this tension requires a pragmatic and disciplined approach, starting with the establishment of a robust operational foundation.

The Foundations of Value Creation: The Three Pillars of a Successful AI Strategy

Successfully navigating the AI paradox requires disciplined capital allocation toward three non-negotiable pillars: Data, Infrastructure, and People. These are not merely IT projects but foundational enterprise investments that will determine the velocity and ceiling of future value creation.

Pillar 1: Data as the Bedrock

A robust data strategy is the essential prerequisite for AI success, as up to 80% of scaling effort is dedicated to preparing data. The challenge lies in unlocking the immense value of the estimated 95% of enterprise data that resides in unstructured formats. To harness this potential and provide the high-quality fuel required by AI models, organizations must prioritize the creation of unified data platforms, such as Data Lakes or Data Marketplaces, to effectively break down internal organizational silos.

Pillar 2: Sovereign and Sustainable Infrastructure

AI infrastructure is a dual-edged sword, enabling progress while presenting major operational, sovereign, and environmental concerns. The strategic solution is a hybrid AI architecture that deploys solutions across the ecosystem, from personal devices and the edge to the public cloud. This distributed model ensures AI functions are available where data is generated and decisions are made.

Furthermore, data sovereignty is a C-suite priority, requiring secure environments to protect sensitive data from external threats and laws. The growing environmental impact of AI, highlighted by soaring data center energy consumption, necessitates building sustainable and energy-efficient infrastructure as a core component of responsible AI strategy.

KEY HIGHLIGHTS OF THE CEO STAGE

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Pillar 3: The Human-Centric Transformation

Of the three pillars, the human dimension was consistently identified as the most critical and the most challenging. The ultimate goal is to foster an "AI for All" culture, where the entire workforce is trained, empowered, and confident in using AI tools. This requires a fundamental shift in mindset, moving from a few expert users to a pervasive, AI-native organization.

The core philosophy articulated by leaders is that AI is a tool for augmentation, not replacement. This is not merely a comforting narrative but a practical strategy for value creation. AI empowers employees by:

- **Automating Repetitive Tasks**: Freeing up human talent from low-value, administrative work that consumes valuable time and energy.
- **Enhancing Capabilities**: Providing every team with a "virtual colleague" that augments their skills, enabling them to be more strategic, creative, and customer-focused.
- **Creating Time**: Generating the organization's most precious and finite resource time which can then be reinvested in high-impact activities like innovation, customer relationships, and strategic growth.

Damien Gromier, CEO & Founder of Adopt AI

" "We need to encourage the CEOs and the companies for a massive adoption of AI. So let's make Adopt AI - the new Davos of AI."

"We are proud that the President Emmanuel Macron said that Adopt AI is for France and Europe, a vital necessity for all areas of business. Thanks to Artefact teams for initiating the summit and let's make it an annual international event!"

KEY HIGHLIGHTS OF THE CEO STAGE

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Five Strategic Highlights for C-Suite Leadership

While the AI journey is complex, the insights from the Adopt AI summit distill into clear and actionable strategic priorities for every executive leader. These highlights serve as a guide to navigate the path from initial adoption to enterprise-wide transformation.

1- AI is a Human Transformation, Not a Technological One.
The primary challenge and greatest opportunity lie with people. Success hinges on a company-wide cultural shift focused on continuous upskilling, fostering an "AI for All" mindset, and empowering employees with tools that create time and enhance their capabilities. The strategic goal is to augment human creativity and judgment, not replace it.

2- Value is Unlocked by Process Re-Invention, Not Technology Insertion.
Tangible ROI comes from fundamentally redesigning core business processes from the ground up. AI cannot simply be overlaid on inefficient, siloed workflows; it must serve as the catalyst for creating entirely new, more intelligent, and more efficient ways of operating.

3- Leadership Cannot Delegate the Revolution. AI adoption is a CEO-level strategic imperative. Leaders must personally champion the vision, drive the necessary organizational change, and establish the ethical guardrails for responsible deployment. This hands-on leadership is essential to create the psychological safety required for teams to experiment, learn, and fully embrace the transformation.

4- A Sovereign and Unified Data Foundation is Non-Negotiable.
Data is the fuel for AI, and data sovereignty is a critical pillar of trust and security. Building a secure, unified, and high-quality data ecosystem is the most critical foundational investment for any organization with long-term AI ambitions. Without it, even the most advanced models will fail to deliver value.

5- Pragmatism Must Overcome Hype: Focus on Scalable ROI.
While the potential of AI is immense, leaders must cut through the market noise and focus on tangible, measurable business outcomes. The journey must move swiftly from isolated experiments in "pilot purgatory" to scalable, mission-critical systems that are firmly anchored to real, defensible business value.

CEO STAGE - Day 1
25 November, 2025.

Exceptional Keynote.

French President Emmanuel Macron

Emmanuel Macron has served as the President of France since 2017. A former civil servant and investment banker, he studied philosophy at Paris Nanterre University and later graduated from Sciences Po and the École nationale d'administration (ÉNA), positioning him as a central figure in driving France's strategic technological and economic policy.

∧ **Context:** The strategic AI landscape requires an accelerated move beyond foundational AI research and computing capacity deployment toward mass AI Adoption across all sectors. This is the "vital necessity" for France and Europe to secure talent, fertilize the rest of the economy, and improve public-sector productivity, especially given that the US and China currently lead in LLM innovation and foundational capacity.

∧ **Investment and Capacity Delivery:** Since the February summit, France has secured €109 billion in private investment, primarily leveraging its asset of low-carbon, pilotable energy (nuclear) which last year exported 90 terawatt-hours. The government is delivering on its infrastructure agenda, securing 23 fast-track sites for industrial projects, with a new fifth site announced in Dunkirk providing over 700 megawatts of capacity.

∧ **Targeted Adoption Strategy (Oelia Plan):** The government's Oelia plan sets a clear target: by 2030, 100% of large groups, 80% of SMEs, and 50% of very small enterprises must integrate AI into their processes. This is supported by a network of 300 AI ambassadors and targeted training.

∧ **Public Sector Mandate:** AI deployment in state administration, hospitals, and public operators is now a rule. The strategy is to multisource the best private sector AI solutions within a controlled, open framework, moving away from a single-provider lock-in and a historical bias towards "non-European solutions" or slow, internally-invented programs.

∧ **Digital Talent and Training:** To underpin adoption, France is dramatically scaling its talent pool, aiming to increase the number of people trained in AI annually from 40,000 to 100,000. Furthermore, 50,000 civil servants will be trained through courses, boot camps, and workshops by the end of 2026.

∧ **Conclusion:** The entire strategy—focused on talents, ecosystem, infrastructure, and adoption—must be driven at the European scale under three principles: Simplification (deepening the single market), Innovation (promoting new European projects like the Important Project of Common European Interest/IPCEI), and Protection (implementing an "EU Preference" to avoid de facto non-European preference and better defend European champions).

> "The French territory France is clearly a place to invest and deploy your activities. We have a lot of talents and we are increasing our investment on human capital and we will go from 40,000 persons per year being trained in AI to 100,000 per year."

Opening Ceremony of the Adopt AI Summit.

Anne Bouverot, France's Special Envoy for AI

Vincent Luciani, Co-founder & Executive Chairman

ARTEFACT

About Anne Bouverot: As France's Special Envoy for AI, she leverages her extensive background in technology and telecommunications to shape and promote national and European strategies for artificial intelligence.

About Vincent Luciani: Vincent is a French entrepreneur who co-founded the company Artefact, where he now serves as Executive Chairman. He graduated from École Polytechnique and HEC Paris, where he is now teaching about AI and using data for business growth.

About Artefact: Artefact is a French consulting and engineering firm specializing in data and AI, and a leader in Europe. Headquartered in Paris, we are now present in 27 countries across all continents, with a team of 2,000 employees.

What significant developments have occurred since the AI Action Summit nine months ago?

⋀ **Anne Bouverot:** January opened with two shock waves: the US announced a $500 billion investment in AI infrastructure ("Stargate"), and a few days later, the Chinese model Deep Seek was developed for an estimated $6 million, showing that the race is still open for less expensive, more nimble development. This led to the AI Action Summit announcing over €100 billion in private AI infrastructure investment in France and €200 billion across Europe by private companies and the European Commission.

### What are the key challenges for successful AI adoption, particularly in Western economies?

⋀ **Anne Bouverot:** Successful adoption primarily rests on trust. Western economies like France, Germany, Europe, and the US tend to be more anxious about AI compared to faster adopters like India, Indonesia, and China. Fears are now focused on two main areas: democracy and misinformation, and the risk for work and jobs.

⋀ **Vincent Luciani:** The challenges are universal, but key steps are cultivating a culture of experimentation where non-technical people can easily try AI, learning how to scale beyond small experiments to achieve full impact, and the toughest part: redesigning core processes end-to-end and functions with AI at the core.

What are the final expectations for the outcome of the Adopt AI summit?

⋀ **Anne Bouverot:** The summit needs to look at adoption sector by sector to provide a real economic lever for increasing productivity, which is vital to maintaining the social protection model. AI must augment, not just replace tasks, as companies investing in AI have been shown to hire more people (though not necessarily for the same jobs) because they become more competitive.

⋀ **Vincent Luciani:** The three expectations are Learning (no silver bullet, must work step-by-step), Working (facilitating concrete opportunities through session breakdowns and involving the full ecosystem), and fostering a sense of Pride for European companies and their achievements.

"

"The message was clear. France and Europe are central players in the next wave of AI and companies, startups, researchers and politicians were all there."

Exceptional Keynote.
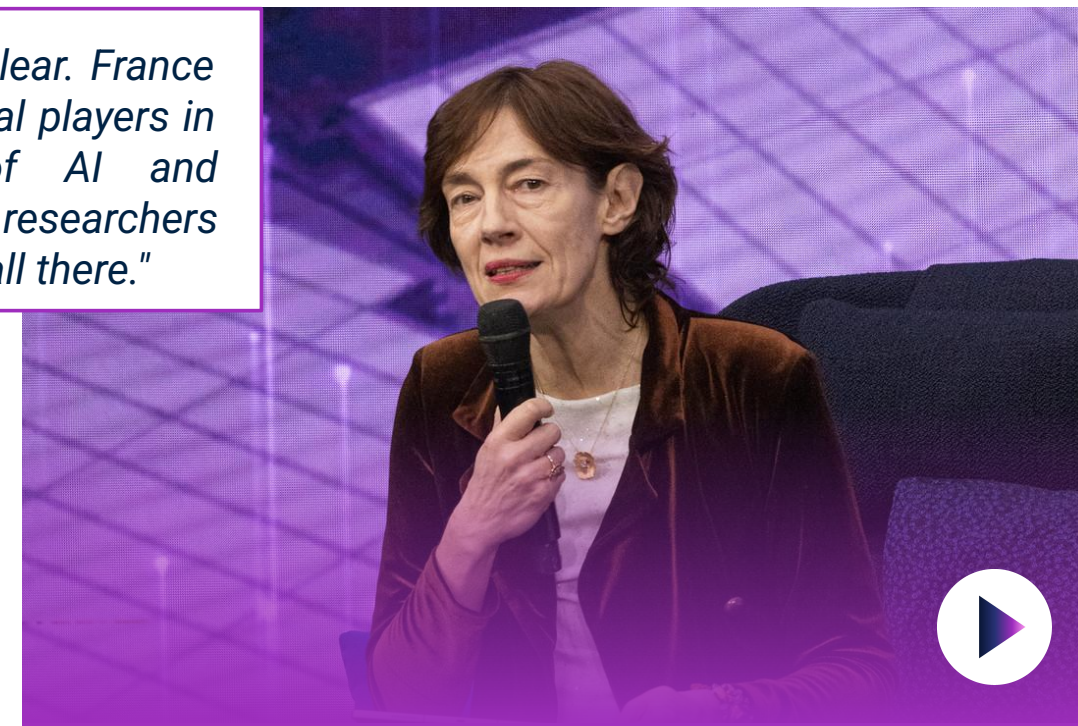
Philippe Aghion, 2025 Nobel Memorial Prize in Economic Sciences

About Philippe Aghion: A leading economist and recipient of the 2025 Nobel Memorial Prize in Economic Sciences for his work with Peter Howitt on endogenous growth theory, specifically the paradigm of "growth through creative destruction". His work emphasizes that long-run growth is driven by cumulative, entrepreneurial innovation seeking temporary rents, which inevitably displaces older technologies.

- **Context:** AI is the latest technological revolution, reigniting the historical fear of mass unemployment seen during the steam engine and electricity revolutions (Luddites, Keynes' predictions). The core challenge is managing the inherent conflict in a market economy: needing innovation rents to motivate new activity while preventing yesterday's innovators from using those rents to block subsequent creative destruction.

- **Growth Potential of AI:** Philippe Aghion is "cautiously optimistic" because AI automates tasks not only in the production of goods and services (productivity effect) but, more importantly, in the production of ideas. AI facilitates the faster recombination and selection of new ideas, enabling the discovery of new activities and boosting growth potential.

- **The Competition Barrier:** The main barrier to harnessing AI's potential is the lack of competition, echoing the "Schumpeterian conundrum." The dominance of superstar firms (Google, Microsoft, Amazon) in areas like the cloud and GPUs risks stifling new entry and innovation, just as they eventually dampened growth after the initial boost of the IT revolution.

- **Harnessing Potential through Policy:** To mitigate anti-competitive risks, appropriate competition policy is crucial, including promoting open source initiatives, extending acts like the Digital Markets Act to the entire AI value chain (including the cloud), and scrutinizing M&A for their effect on future entry/innovation. Regulation must be carefully balanced to avoid becoming a barrier to entry for smaller firms.

- **Managing the Labor Market:** While AI will destroy some jobs, it will also create new ones via the productivity effect (increased firm competitiveness and demand) and by enabling new activities. The solution is not halting AI but adopting robust labor market policies like the Flexicurity system of Denmark, which provides income security, state-funded retraining, and job placement assistance during transitions.

- **Environmental Potential:** AI consumes energy, but the net effect can be positive. For example, Veolia (a French water company) used AI to manage its aeration system in purification stations, resulting in a reduction of CO_2 emissions by over 6%, with the AI energy use being less than 1% of the savings.

- **Conclusion:** Prosperity depends on the right interplay of technology and institutions. The speaker is optimistic about the technology but less so about the institutions. The fear is not that the technology is flawed, but that political instability (e.g., populism in France) or institutional inability will prevent the right competition, labor market, and industrial policies from being put in place to harness AI's fantastic power.

> "My fear is not at all on the technology. My fear is that we will not be able to put the right institutions in place to harness the fantastic growth, employment and and environmental power of AI."

With AI Leadership, Aramco powers a new era of growth.

Ahmad O. Al Khowaiter, Executive Vice President Technology & Innovation

aramco

About Ahmad O. Al Khowaiter: Since April 2023, Ahmad O. Al Khowaiter is the Executive Vice President of Technology & Innovation at Aramco. He served previously as Senior VP and CTO since 2015. His academic background includes a B.S. in Chemical Engineering from King Fahd University of Petroleum and Minerals, an M.S. in Chemical Engineering from the University of California, and an M.S. in Business Administration from the MIT Sloan Fellowship Program.

About Aramco (Saudi Aramco): Saudi Aramco is a state-owned oil and natural gas company. Revenue (2024): $472 Billion; Employees (2024): $\approx$ 70,000; HQ: Dhahran, Saudi Arabia. Mission: To reliably and sustainably supply energy and chemicals to the world while driving global innovation and efficiency.

Grand Palais, Paris.
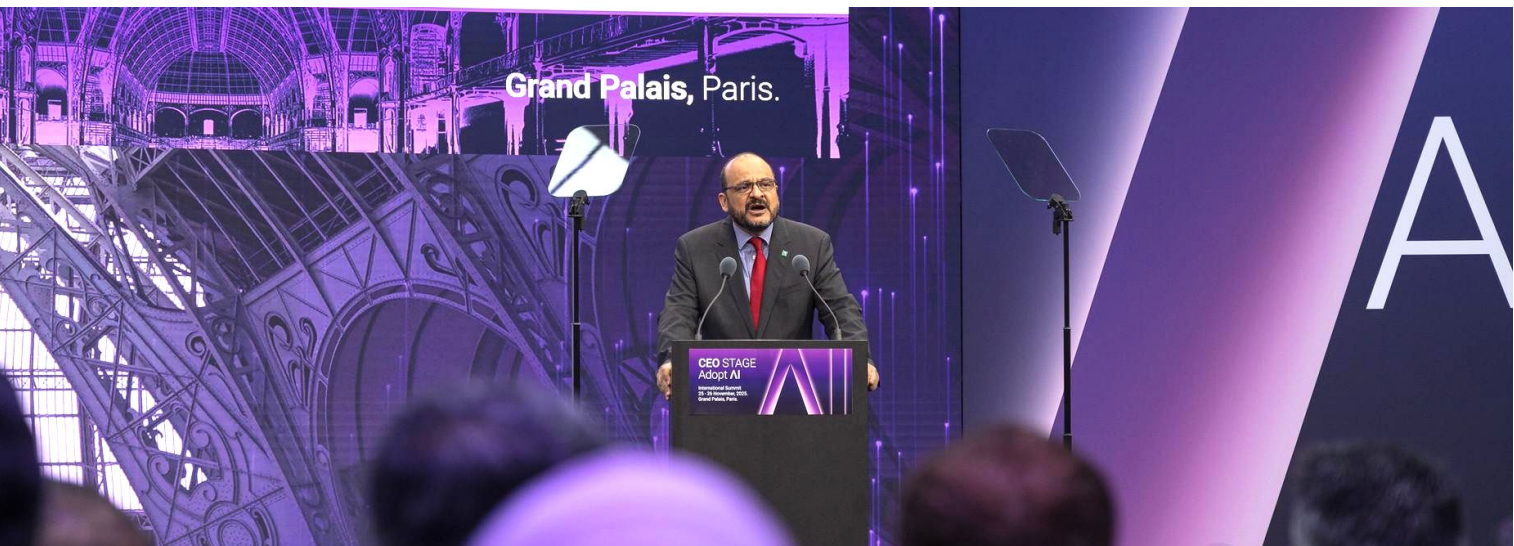
Λ Context: The global economy is transforming rapidly, marked by new supply chains, moderating inflation, and evolving energy mixes where demand continues to rise substantially. This analog challenge is now overlaid with a digital revolution where AI is the age-defining technology, creating a generational opportunity across every industry, yet demanding a strategy to ensure inclusivity, openness, and shared progress.

Λ The Crucial AI-Energy Nexus: Data centers consumed ≈ 415 terawatt-hours of electricity last year (nearly France's total consumption), a number expected to more than double by 2030. Conversely, AI is critical for producing energy more efficiently, sustainably, and affordably to meet rising global demand by 2050, making its deployment in energy one of the most important fields.

Λ Aramco's Tri-Pillar Digital Strategy: The company's digital strategy is built on infrastructure (operating powerful supercomputers like Damon 7 and Nvidia Superpods), data (access to over 90 years of proprietary data and billions of daily new data points), and talent (hiring scientists and training all employees on AI solutions).

Λ Industrial AI Use Cases & Value Realization: Aramco has identified and is scaling over 400 AI use cases—from using robots/drones for inspections and predicting operational failures to using industrial multi-agent AI to reduce maintenance planning time from days to hours. In 2024, $\approx\$2$ billion of the $4 billion in technology-realized value was driven by AI solutions.

Λ Sustainable & Operational Excellence: AI analytics are deployed to better understand, manage, and minimize methane emissions. Drilling prediction models guide optimal operating windows, and digital twins optimize processes, thereby reducing power usage and lowering overall carbon emissions, which helps maintain Aramco's position as one of the lowest upstream carbon intensity producers.

Λ Global Collaboration and Expansion: International partnerships are a central pillar of Aramco's strategy. Key collaborations include a venture with Pascal Quantum Computing for the Middle East's first industrial quantum computer. Furthermore, Aramco Ventures, with $7.5 billion in AUM, is opening a new office in Paris to deepen collaborations and investments in French deep-tech startups and next-generation technologies across Europe.

Λ Conclusion: Policy, investment, and infrastructure are aligning to create a fertile ecosystem for growth, but the future demands more talent, computing power, and energy. Progress must be shared, innovation must empower, and global ambition must be guided by collaboration to seize the AI opportunities now.

> "We've identified more than 400 use cases which we are continuously working on and scaling across our operations. We believe we can accelerate efficiency, reliability and safety throughout our value chain."

Learning from Neighbours:
How Lithuania is tackling AI Adoption.

Edvinas Grikšas, Minister of the Economy & Innovation of Lithuania

About Edvinas Grikšas: As the Head of the Innovation Policy Group at the Ministry of the Economy and Innovation, Edvinas Grikšas is central to formulating and driving Lithuania's national agenda for technological advancement, focusing on key areas like AI adoption and digital transformation across public and private sectors.

- **Innovation Strategy:** The national plan is structured around '3E'—Innovation, Investment, and Institutions—which is fundamentally a framework for AI usage and fostering a faster, "startup-like thinking" culture within public institutions.
- **Challenge-Based Approach:** The government successfully employs a rapid, challenge-based approach, demonstrated by launching a €1 million call for technological solutions within 24 hours of a hybrid attack involving air balloons. This yielded 35 applications, proving the ecosystem's agility.
- **Infrastructure & Ecosystem:** Lithuania is building a national AI Factory (Lit AI) to serve as a competence hub for academia, startups, public sector, and industry, addressing the limited high-performance computing resources. The ultimate vision is a Regional Gigafactory, a nearly €5 billion project with neighboring countries.
- **Regulatory Leadership & Talent:** Lithuania is starting from a position of strength, ranking 7th in EU open data maturity and 16th in the global startup ecosystem (over 1,500 startups). It is leading the EU by launching the first-in-Europe AI Sandbox to attract foreign companies and is planning deregulation efforts during its 2027 EU presidency.
- **Conclusion:** Lithuania's goal is to become the AI hub in Central and Eastern Europe and to reach 5% of its GDP generated by the ICT sector. The combination of strong talent (5% of the workforce is ICT, above the EU average), foundational data maturity, and strategic infrastructure like the AI Factory and AI Sandbox provides a comprehensive path to significantly increase the current 9% AI adoption rate in its enterprises.

- **Context:** The core challenge for Lithuania, mirroring a broader European trend, is addressing a productivity slump, for which the government sees AI, robotics, and digital innovation as the essential, strategic answer to maintaining economic growth (currently almost twice as fast as the European average).

> "We launched a wide approach of initiatives and incentives for SMEs, for startups, and for the public sector. (...) We have a dream to be the AI hub in Central and Eastern Europe, and that is how we are moving toward this goal. The next step is our regional gigafactory, an almost €5 billion project with Poland, Estonia, and Latvia, and our AI factory, Lit AI, will set the initial course in this direction."

Visionary Keynote - Embodied, safe, secure: The next chapter of AI by TII.

Dr. Najwa Aaraj, CEO

Technology Innovation Institute

About Dr. Najwa Aaraj: Dr. Aaraj is the CEO of the Technology Innovation Institute (TII) and previously served as Chief Researcher for its Cryptography and Autonomous Robotics Research Centers. She earned a Ph.D. with Highest Distinction in Applied Cryptography and Embedded Systems Security from Princeton University and has over 18 years of global experience at firms like IBM, Intel, and Booz & Company.

About the Technology Innovation Institute: TII is the applied research pillar of the UAE's Advanced Technology Research Council (ATRC). HQ: Abu Dhabi, UAE; Mission: To drive scientific and technological leadership and create transformative technology solutions; Revenue: Estimated between $100M and $250M; Employees: Estimated 1,001−5,000 scientists and researchers, focusing on 10 dedicated research centers, including the developers of the Falcon LLM series.

⋀ **Context:** AI is transitioning from a tool for "insights" (e.g., SVMs, vision networks) to a system with real-world "impact" and "action," gaining agency and embodiment in both virtual/cyber space and physical environments (humanoids, robotic systems). The core challenge is establishing the necessary trust, safety, and security standards to govern these autonomous, decision-making systems deployed across defense, energy, and agriculture sectors.

⋀ **Shift to Embodiment and Action Models:** The progression is from traditional neural networks and LLMs to "word models" , self-improving/self-calibrating models, and finally, Embodied AI leading toward Artificial General Intelligence.

⋀ **Agent Proliferation and Architecture:** Proliferation of agents capable of automated decision-making and real-time deployment. An agent's architecture—comprising a goal setter, goal planner, memory, policy loop, and execution—closely mirrors the human brain's cognitive function.

⋀ **The 4 Dimensions of Governance:** Safety (ensuring predictability, explainability, and alignment in open-ended environments); Security (protection against hacking and attacks, ensuring confidentiality); Privacy (safeguarding human privacy as AI agents/robots gain root access to systems and enter houses); and Sovereignty (ownership of data, models, and weights).

⋀ **Engineering for Trust and Machine Identity:** The focus must shift from engineering solely for intelligence to engineering for smart intelligence, emphasizing human-AI symbiosis grounded in security, privacy, and transparency by design. A crucial unsolved problem is establishing machine identity (AM systems) for agents and robots, analogous to human passports/cryptographic keys.

⋀ **Confidential AI and Regulation:** TII is actively researching Confidential AI using technologies like Fully Homomorphic Encryption and trusted execution environments to ensure privacy while maintaining utility. Regulations must be dynamic and leverage regulatory sandboxes to avoid stifling innovation.

⋀ **Conclusion:** The question is not if AI will be part of our lives (the answer is yes), but how we can coexist and ensure AI is secure, safe, and trustworthy. This requires cross-border collaboration and the use of regulatory sandboxes to enable technology deployment and testing.

> "*Today AI can take actions. We're seeing them being deployed for planning missions, for real-time decision making, for action planning, deciding the next step in the course of action across the defense sector, the energy sector, the agricultural sectors and and others.*"

Special Interview: Unlock your AI ambitions.

Biljana Weber, Senior VP and Managing Director for Northern Western Europe

HPE

About Biljana Weber: An IT executive with 25+ years at IBM, Microsoft, and HPE, she leads HP Northern Western Europe driving business transformation and AI initiatives there.
About Hewlett Packard Enterprise: A leader in essential enterprise technology, bringing together the power of AI, cloud, and networking to help organizations achieve more.

Where does Europe stand in the global AI race, and what does sovereign AI practically mean for European organizations?

∧ **Biljana Weber:** Europe is at an inflection point, moving beyond pilots into the next phase of enterprise-wide integration, cross-functional collaboration, and governance in implementing AI solutions. The EU AI Act provides a strong foundation and boundaries for trustworthy AI, which will be a huge competitive advantage for European companies competing globally on high standards. Current AI adoption in Europe is around 13.5%, with Nordics leading at 28%. France is strong in academic research and sovereign AI, but enterprises lag with less than 10% adoption.

Does the EU AI Act slow down or accelerate innovation?

∧ **Biljana Weber:** The regulation is accelerating EU innovation by creating clear rules for responsible and trustworthy AI, which is crucial for long-term economic success. While often considered complex due to 24 different languages, an AI model that works across this complexity under strict EU rules becomes super competitive globally. Europe is leading the way in trustworthy AI.

What are the biggest concerns and motivations from customers?

∧ **Biljana Weber:** The concern is no longer "am I missing out?" but a more pragmatic "Is my organization advancing fast enough?" Leaders are now focused on measuring employee readiness alongside model quality and cost.

What should be on the agenda of every CEO and CIO right now regarding AI?

∧ **Biljana Weber:** Key agenda points include:
- Data Quality: Adopting a data product mindset and implementing the right data governance, as every AI system is only as good as its data.
- Sovereignty and Security: Deploying solutions securely and in a sovereign way using hybrid solutions, which often results in successful AI Factory implementations.
- Governance & Adoption: Implementing the right governance system and actively tracking the level of organizational adoption.

What distinguishes AI leaders from AI laggards in successfully scaling AI?

∧ **Biljana Weber:** Leaders have moved beyond technology and focused on governance. While technology is rapidly advancing, the leaders are characterized by CIOs and CEOs working closely on the why (the company's purpose for transformation), the operating use cases, the governance model, and ensuring the organization and employees are ready to embrace and believe in the new solutions.

What is a blind spot that leaders often underestimate when it comes to AI?

∧ **Biljana Weber:** The most common blind spot is the network fabric. Companies invest in GPUs, compute power, models, and data governance, but forget that none of it works without the right network enabling connectivity, low latency, security, and high throughput. The network is the "neural system" of the AI solution, not just plumbing, and its performance will define the ROI and overall success of the implementation..

> "The organization that are successful are those who are deploying it company wide where you have a clear collaboration between legal, tech, HR and business units."

Alexander Rinke, Co-CEO & Co-founder celonis

About Alexander Rinke: Alexander co-founded Celonis, starting the company in Europe and establishing the Process Intelligence category. His mission is centered on leveraging technology to make processes work better for people, companies, and the planet.

About Celonis: Celonis is the market leader in Process Intelligence, working with nearly 1,500 customers globally, including the world's largest companies. The company has over 3,000 employees worldwide, with a fast-growing office in France. Their mission is to improve business processes to significantly impact company performance.
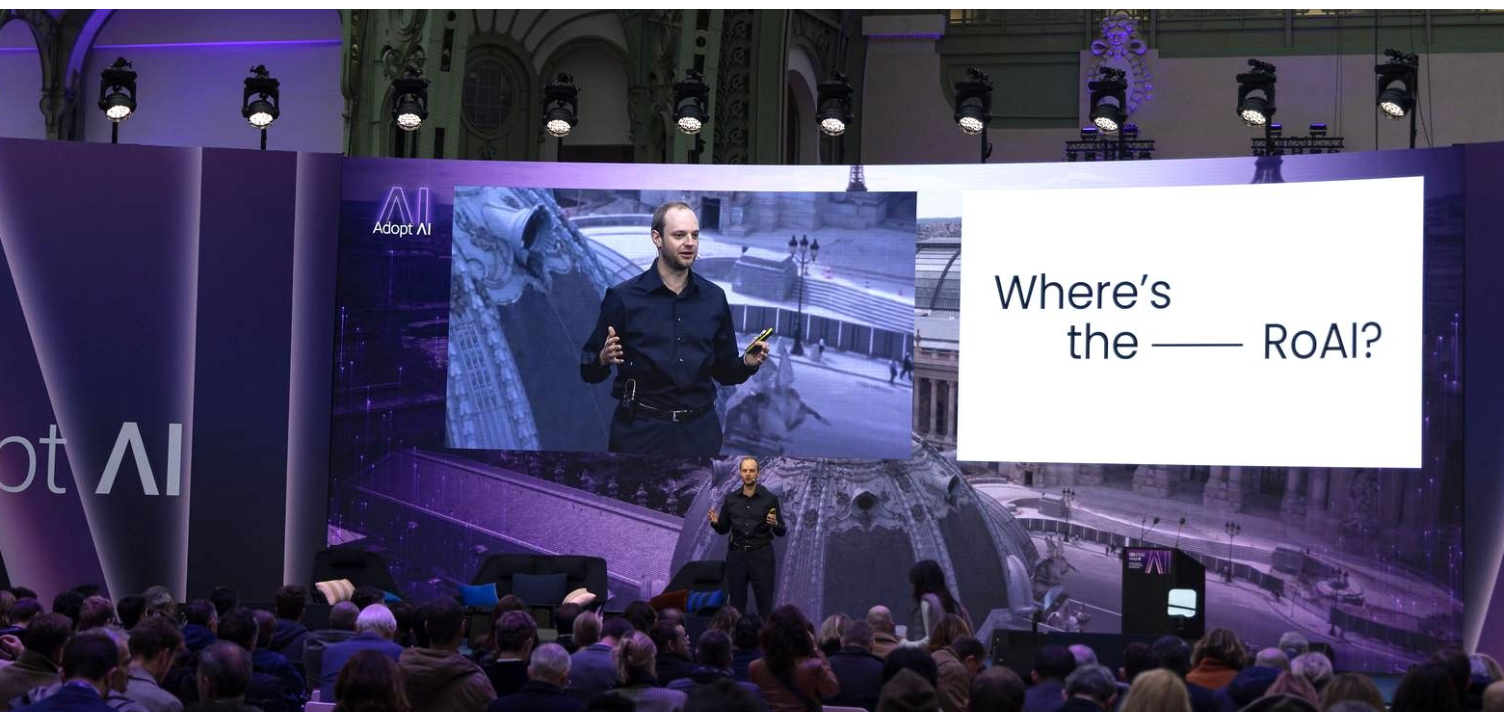
- **Context:** The central challenge in enterprise AI adoption is that companies are struggling to see a measurable return on investment (ROI). Data from MIT and IDC suggests that only 5-11% of AI pilots deliver a measurable impact, meaning nearly 90% of companies are not seeing a clear bottom-line benefit from their AI investment. The failure stems from treating AI as a siloed technology (like easy-to-adopt ChatGPT) rather than a practice of transforming operations.
- **The Enterprise AI Adoption Crisis:** Despite pervasive AI hype, 89% of companies see no measurable benefit from their investment. This failure stems from adopting AI as a siloed technology, like just using ChatGPT, rather than treating it as a strategic, core practice for transforming daily operations. To shift from pilot projects to demonstrable outcomes, enterprises must realize that AI is not a singular tool but an embedded, multi-faceted operational agent requiring fundamental process reform.

- **The Process Intelligence Graph as Context:** The core issue is that AI lacks the context of how work actually gets done. Rinke introduces the Process Intelligence Graph, Celonis's digital twin, which extracts data from disparate systems (SAP, Oracle) and off-system work (emails, Excel) to create a single, accurate model of the business flow. This graph provides the missing operational context layer, ensuring that AI agents can be deployed effectively and strategically where they can generate the highest value, bridging the gap between raw data and business change.
- **The "Analyze, Design, Operate" (ADO) Model:** The solution to the adoption crisis lies in Celonis's three-step ADO framework. First, Analyze makes invisible processes fully transparent to identify where to automate or insert AI. Second, Design allows companies to model and establish the ideal AI-driven 'target state' for every process. Third, Operate ensures the continuous orchestration of these new processes, unifying AI solutions with existing human and system workflows for sustained performance improvement.
- **Demonstrable, Rapid Financial Value:** Rinke emphasizes that Process Intelligence delivers massive and rapid financial impact, citing multiple examples from Celonis's "Champions League" of customers. [04:29] Renault realized over €15 million in value in the first year alone. [03:40] Vinnmar re-engineered its Order-to-Cash process for a 40% productivity boost. [12:19] Additionally, Fiserv showed a transformational trajectory, moving from $100 million to $300 million in realized value across three years, validating the technology's long-term power.
- **Conclusion:** The future of the enterprise is AI-driven and composable. This requires an open ecosystem approach, allowing companies to compose future processes and automations using their chosen tools. The essential starting point for this transformation is a deep understanding and optimization of core business processes.

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"We are talking about enterprise AI and enterprise AI is not about just one single technology. It's really about a practice of transforming your operations to infuse AI into the core of what you do every single day."

Fireside Chat: Accelerating AI Adoption across Europe.

Adrian Mcdonald, President EMEA

Mike Mattacola, General Manager International

DELL Technologies

CoreWeave

About Adrian Mcdonald: Adrian McDonald is the President of Dell Technologies for Europe, Middle East, and Africa (EMEA), overseeing the company's regional strategy and operations.
About Dell Technologies: A leading global technology company providing integrated solutions, Dell Technologies reported $88.4 Billion in Revenue in FY2024, employs over 133,000 people, and is headquartered in Round Rock, Texas, with a mission to drive human progress through technology.

About Mike Mattacola: Mike Mattacola is responsible for CoreWeave's growth and expansion into new markets. His expertise includes global operations, strategy, transformation and cross-functional leadership.
About CoreWeave: CoreWeave is the Essential Cloud for AITM, purpose-built to scale, support, and accelerate breakthroughs in AI innovation.

> "We're seeing dramatic improvements in healthcare. I personally believe that most human ailments will be curable within the next 10 years."

∧ **The "Control" Imperative:** The single most pressing concern for European CEOs regarding AI investment is the absolute need for control over their data. This includes ensuring security, compliance, legal jurisdiction, and optimal performance, which drives the shape of their future investment strategies.

∧ **The Build-vs.-Buy Verdict:** For most workloads, the strategic answer is "Buy" (via Cloud) to ensure continuous access to the newest, most efficient compute technology. The "Build" (on-prem) option is generally only justified for the most sensitive workloads where "you need to sleep at night."

∧ **Coreweave's European Mission & Differentiation:** Coreweave is solving the historic two-year tech lag in Europe by rapidly deploying eight data center regions to provide the latest compute. Differentiation is achieved by evolving into an "expert platform" (through acquisitions like Weights & Biases), offering specialized AI expertise alongside cloud infrastructure to help companies build and deploy solutions.

∧ **Adoption Pathways in Europe:** The prevailing trend for European firms is to initially utilize the open-source route to prove ROI (starting budgets around €100k). Training proprietary models from scratch remains prohibitively expensive (increments of €10M+).

∧ **The European Ambition & Urgency:** AI represents Europe's largest GDP accelerator opportunity since the industrial revolution. European leaders must have the courage to act immediately, as companies that fail to adopt AI will inevitably disappear within the next 5-10 years, noting that 90% of all workloads are expected to be AI-driven by 2030.

∧ **AI as a Fundamental Business Model Disruptor:** Dell Technologies is now an AI-first company, successfully breaking the sales growth/cost growth equilibrium by leveraging AI to optimize processes. This resulted in Q2 sales up 19% and costs down 4%, demonstrating tangible financial results from digital transformation.

∧ **The Primacy of Compute Infrastructure:** Everything in AI starts with compute. European enterprises must gain access to the latest GPU technology immediately to avoid becoming obsolete (potentially 5x-30x slower) and to benefit from the significant cost reductions (every 18-24 months) that come with new infrastructure.

> "If we don't accelerate the pace of trying to deploy AI across Europe, we're going to get behind. I think in 5 or 10 years we'll start to see legacy companies that have been here for a long time that aren't adopting AI, they will disappear."

Fireside Chat: The Future of AI in Health.

Paul Hudson, CEO sanofi

About Paul Hudson: Since 2019, Paul has been leading Sanofi's transformation into a modern healthcare company. Under his leadership, Sanofi is driving breakthroughs in medicines and vaccines, while putting social impact, company culture, and sustainability at the heart of its strategy.
About Sanofi: The French multinational pharmaceutical and healthcare company reported 2024 revenue of approximately €47.05 billion and employs around 90,000 people worldwide, headquartered in Paris, with a mission to practice science to improve people's lives.

You say a CEO should not delegate the AI revolution, but lead it. What does that mean?

Λ **Paul Hudson:** CEOs must lead from the front, rather than delegating the AI strategy to the CIO or CTO, who often fall into the trap of trying to build everything in-house (e.g., their own Large Language Model), which is usually impossible. Effective leadership involves incubating, encouraging, allowing for failure, and most importantly, looking for a demonstrable Return on AI (ROAI)—a concept used internally to stop the proliferation of small, non-scalable "pilots" and demand a true return, not just a use case.

Introducing these changes often meets resistance, especially when breaking vertical silos. How do you handle that?

Λ **Paul Hudson:** Most large companies build AI vertically. Sanofi made a transversal decision to integrate AI across functions 4 years ago. This was met with resistance, as employees felt their role was to curate and "spin" data for the CEO. An example is a CEO agent predicting a $100 million out-of-stock event 1.5 years away by combining Quality, Finance, HR, and Site data, something no single human could do. This agent-driven, real-time data access has led to a major cultural shift, reducing the annual budget presentation from 3,000 slides to just 12.

How is AI changing your manufacturing process, particularly with digital twins?

Λ **Paul Hudson:** Sanofi has 300 manufacturing lines across 38 sites that suffer from capacity loss (up to 20% weekly) due to "minor stoppages." A "shop floor agent" was introduced that ingested all SOPs, history, manuals, and best practices. Using a wearable device, the agent provides predictive intervention to operators. The shop floor workers were reportedly "thrilled" because the real-time, predictive guidance allows them to keep the lines moving, demonstrating AI's immediate, on-site value.

How much of a game-changer is AI on the R&D front?

Λ **Paul Hudson:** AI will not deliver a "cure for cancer" by simply perfecting data, as human biology is too heterogeneous. However, AI is critical for improving the chances of success in the 15-year-long drug discovery pipeline. The technology helps to reduce the phase one failure rate from 90% to 80% through better design and screening, using generative AI to run simulations for molecules that cannot even be synthesized in a lab. Biology and regulators still move at their own pace, but AI allows Sanofi to find "more miracles" and improve success rates.

How do you reconcile the cutting edge of medicine with growing public skepticism toward traditional medicine, like vaccines?

Λ **Paul Hudson:** The current "fourth industrial revolution" will bring more specific, more efficacious, and safer medicines, allowing the industry to "drug the undruggable." This future will align with growing fiscal pressure on governments post-COVID. Governments are increasingly prioritizing Population Health Management to get citizens back to work and contribute to GDP.

> "
> *"The organization that are successful are those who are deploying it company wide where you have a clear collaboration between legal, tech, HR and business units."*

AI spotlight: A scientist's view on the future of intelligence.

Sriram Raghavan, VP AI Research

IBM®

About Sriram Raghavan: Sriram Raghavan is a distinguished technologist and Vice President at IBM Research AI, where he leads global research in AI foundations and applied AI. With a deep background in computer science and database systems, he focuses on the intersection of scalable AI architectures and enterprise adoption.

About IBM: International Business Machines (IBM) is a global technology and consulting giant driving innovation in hybrid cloud and artificial intelligence. Their mission is to be the catalyst that makes the world work better, focusing on enterprise AI and quantum computing.


∧ **Raghavan identifies that while AI is rapidly advancing, scalable enterprise adoption faces barriers** regarding energy consumption, hardware footprint, and the lack of engineering discipline. The industry must pivot from the artistic ambiguity of "Generative AI" to the rigorous standards of "Generative Computing."

∧ **Intelligence per Watt:** Contrary to the narrative that AI requires infinite capital, "intelligence per watt" has improved 5x in the last two years. This efficiency allows AI to migrate from data centers to edge devices and mobile phones.

∧ **Small Language Models (SLMs):** IBM is doubling down on models categorized as "nano," "micro," and "tiny" (sub-1 billion parameters). These models, recently released under Apache 2 licenses, run on single GPUs or even CPUs while maintaining performance levels comparable to much larger models from six months ago.

∧ **Beyond Transformers:** While Transformers are powerful, they are computationally expensive. IBM is developing hybrid architectures (combining Transformers with State Space Models) to balance accuracy with extreme efficiency.

∧ **Explainable Math:** Research is pivoting toward models based on "continued fractions" (number theory). Unlike standard black-box networks, these architectures promise high explainability, allowing users to understand *why* a model generated a specific result.

∧ **Software Discipline:** Current AI development relies on insecure, hard-to-optimize prompts (an "artistic exercise"). Raghavan argues for treating models as software artifacts with modularity, encapsulation, and version control.

∧ **Modular Functionality:** Using technologies like "Activated LoRA," organizations can inject specific capabilities (adapters) into a model without retraining it. This moves the industry toward a programming model (Project Malia) where developers write testable, secure code rather than natural language essays to control AI.

∧ **The future of AI lies in "disruptive modular model architectures"** that are efficient enough to run locally and integrated into the software ecosystem through well-defined abstractions, turning AI models into programmable first-class citizens.

"

"Today we program models with massive prompts. Prompts are very hard to optimize. Prompts are highly insecure... The question we started asking is for AI to really scale you have to bring back software discipline into how models are being used."
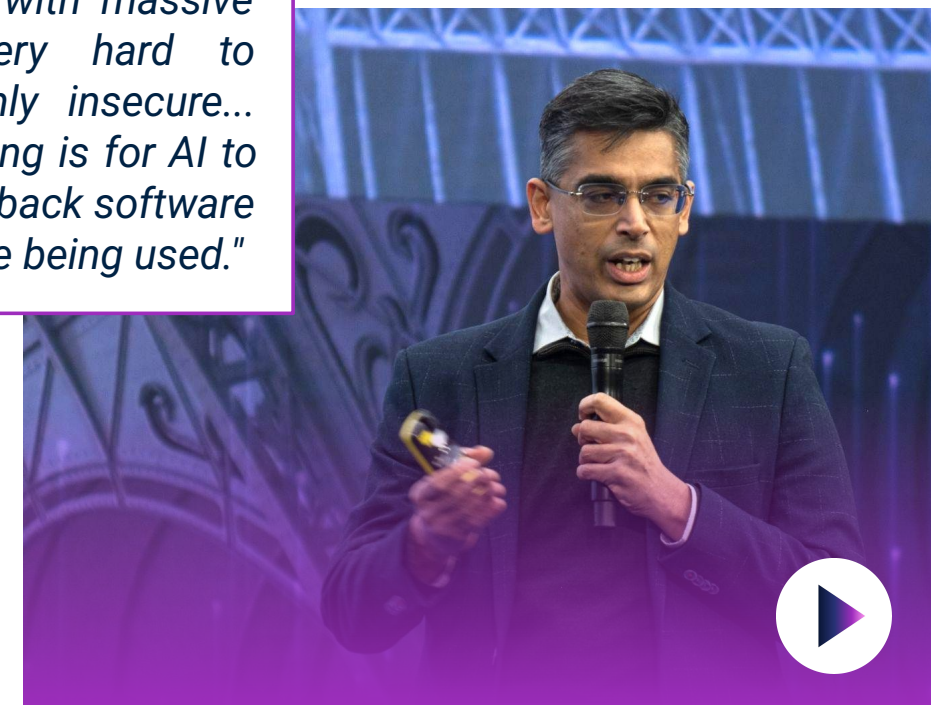
AI Serving patients: from target to treatment.

Olivier Laureau, President

Virginie Dominguez, EVP Digital, Data & Information Systems

SERVIER

About Olivier Laureau: President of Servier, responsible for steering the group's long-term strategy under its unique non-profit governance structure.
About Virginie Dominguez: Executive Vice President of Digital, Data & Information Systems, leading the convergence of technology and scientific research within the organization.
About Servier: An independent global pharmaceutical group governed by a non-profit foundation, HQ in Suresnes, France, with ~€5.3B in revenue and 22,000 employees.


> "Patients cannot wait. They don't have time for them. This is not just a metric. It's hope."

- **Discovery & Recruitment:** Using causal AI and digital twins, the team has already identified three new breakthrough targets. Furthermore, AI optimizes global site selection for clinical trials and identifies eligible patients for rare diseases worldwide, ensuring faster access to potentially life-saving drugs.

- **The "Hybrid" Engine:** Success relies on a **hybrid operating model** where R&D scientists and engineers work in unified multi-disciplinary teams, supported by a state-of-the-art data platform built on Google Cloud.

- **Ethical Framework:** Governance is strictly "human-in-the-loop." AI is never treated as a "black box"; it must be explainable or supervised, ensuring patient data remains anonymized, secure, and compliant with EU regulations.

- While AI will not cure all diseases overnight, it is pivotal for the immediate future of **early diagnosis, personalized treatment, and supply chain reliability**. Because Servier is foundation-owned with no shareholders, it can prioritize these long-term technological investments solely for patient benefit rather than short-term profit.

- **Metric-Driven Acceleration:** AI is not theoretical at Servier; it is actively slashing analysis times (e.g., from weeks to hours) and aims to cut drug time-to-market by up to 4 years.

- **Foundation-Led Innovation:** The company's unique non-profit structure allows for bold, long-term capital investment in AI without the pressure of short-term shareholder returns.

- **Explainability is Mandatory:** Servier enforces a strict "no black box" policy, requiring that all AI applications in clinical settings remain explainable or human-supervised.

- The core challenge in pharmaceutical R&D is the high failure rate and long development cycles; currently, the probability of success for a therapeutic project is **below 5%**, and it takes **10 to 15 years** to bring a drug to market. Biology's complexity, especially in rare diseases, often exceeds traditional research capabilities, creating an urgent need for data-driven acceleration.

- Servier is deploying AI to radically alter these metrics, with the bold ambition to **double the probability of success** and reduce time-to-market by **two to four years**.

- **Operational Velocity:** Concrete results include reducing novel therapeutic target assessment from two hours to five minutes and cutting real-world data analysis from three weeks to half a day.

> "We are free in our decision. We have no shareholder... That's the purpose which every day move our 22,000 employee... to be dedicated to the therapeutical progress for the benefit of the patient."
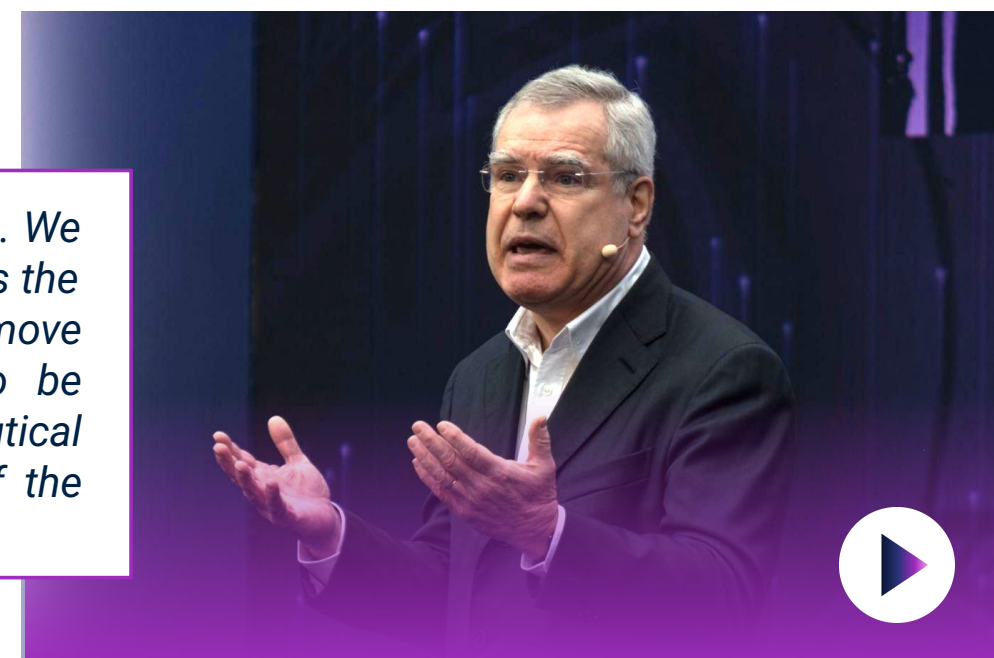
Scaling AI: Learnings to accelerate business transformation.

Alexander Vollert, Group COO

About Alexander Vollert: Alexander Vollert serves as the Group COO of AXA. With a strong background in business transformation and operations, he leads the global strategy for technology, data, and operational excellence, focusing on integrating AI into legacy insurance frameworks.

About AXA: A global leader in insurance and asset management headquartered in **Paris, France**. The company reported nearly **€102 billion in revenue (2023)** and employs approximately **147,000 people** worldwide. Their mission is "Acting for human progress by protecting what matters."

- **End-to-End Redesign:** AI cannot fix broken workflows. Success requires a revival of classic process redesign, dissecting value chains not by steps, but by AI capabilities: Understanding, Knowledge, Analytics, and Orchestration.
- **Agile Collaboration:** To solve the friction between "decomposable architecture" and business needs, AXA mandates that business leaders and tech teams physically sit together in agile setups to ensure alignment.
- **Value Measurement:** Rejecting the notion that AI ROI is unmeasurable, AXA has deployed 400+ use cases globally by adhering to a strict "Learn, Adopt, Repeat" cycle where economic rationale is mandatory.
- **Psychological Safety:** Since technological change now outpaces human adaptability, leadership's primary role is creating certainty in an uncertain environment through transparency, training, and daily AI rituals.
- **Institutional Learning:** To avoid redundancy in a scarce talent market, AXA enforces a global model where specific entities build AI capabilities once for the entire group to reuse, preventing siloed development.
- **The "wait and see" approach** is dangerous because scaling speed is limited by human behavior and data readiness, not just software. You cannot "scale faster later" to catch up; you must start early to build the necessary organizational muscle.
- **Process Redesign is Prerequisite:** You cannot overlay Agentic AI on disconnected legacy systems; you must redesign processes end-to-end using AI capabilities as the new building blocks.

> " **"You cannot scale faster later. You can only scale fast at the beginning because the speed of scale is limited by the data... and by the adoptability of our human behavior."**

- **AXA faces the monumental task of applying AI to a legacy environment containing over 3.5 billion documents, 95% of which are unstructured data.** The core challenge is not just technical implementation, but managing the "unprecedented speed of change" across a decentralized organization while bridging the gap between aging IT infrastructure and modern agentic AI needs.
- **Data Foundation:** Despite the hype, 80% of effort must still go into data cleaning and accessibility. Without tapping into unstructured documents, creating value for customers or bots is impossible.

Visionary Keynote.

Christophe Périllat, CEO

Valeo

About Christophe Périllat: An experienced automotive executive with a strong engineering background, Périllat has served Valeo for over two decades, currently leading the company's strategic pivot toward electrification and advanced assistance systems.

Valeo has made bold strides in artificial intelligence. Integrating AI in their technologies for the past 20 years in rear cameras and in all perception systems, Valeo has led the way in integrating cutting-edge AI into assisted and autonomous driving technologies.

At Adopt AI, he will share his perspective on how artificial intelligence is reshaping the automotive world, from improving safety and intelligence to driving more sustainable mobility.

∧ **Operational Acceleration:** Valeo has aggressively adopted Generative AI in R&D. Through a partnership with Google, 100% of software engineers are trained in GenAI. Consequently, 25% of certified automotive code is now AI-generated, a massive leap from 0% just 16 months prior.

∧ **The Rise of Physical AI:** The transition to Software-Defined Vehicles (SDV) centralizes computing power, enabling "Physical AI." Unlike traditional perception modules that simply categorize objects, Physical AI understands dynamic laws (inertia, grip, braking distance) and reasons like a human driver to predict trajectories rather than just react.

∧ **Hybrid AI Strategy:** While "End-to-End" models (learning driving behaviors directly from raw data) offer adaptability, validating them is difficult. Valeo adopts a "Hybrid AI" strategy, combining proven modular safety systems with progressive end-to-end enhancements to ensure explainability and fail-safe reliability.

∧ **GenAI Simulation:** To validate these systems, Valeo utilizes GenAI to create infinite simulation scenarios from single images—adding rain, fog, or night conditions—to rigorously test perception algorithms against edge cases without needing physical fleets for every scenario.

∧ **Christophe Périllat:** No single European player possesses enough data to compete globally in the race for autonomous driving. Success requires a "constellation of European players" pooling data as a common good to achieve the critical mass necessary for robust AI training and road safety certification.

∧ **Conclusion:** The question is not if AI will be part of our lives (the answer is yes), but how we can coexist and ensure AI is secure, safe, and trustworthy. This requires cross-border collaboration and the use of regulatory sandboxes to enable technology deployment and testing.

∧ **While legacy ADAS (Advanced Driver Assistance Systems) have saved millions of lives,** the industry is hitting the "limit by design" of rule-based approaches which cannot account for every driving variable. The challenge is shifting from reactive programming to AI-driven cognitive systems to accelerate road safety and autonomous capabilities.

> *"25% of our certified automotive code is already today AI generated which is up from 0% 16 months ago. That's an unbelievable acceleration."*

Exceptional Keynote.

Roland Lescure, Minister of the Economy, Finance and Industrial and Energy Sovereignty of France

About Roland Lescure: Roland Lescure is a French economist and politician who served as the Minister Delegate for Industry and Energy. With a strong background in finance (formerly Chief Investment Officer at CDPQ), he focuses on reindustrialization, energy transition, and digital sovereignty.

∧ **Infrastructure & Talent:** Europe possesses the necessary "brains and networks" to compete globally. Lescure emphasizes that France and Europe are becoming the "place to be" for AI due to world-class universities, thriving startups, and expanding data center infrastructure ("Server & Cerveau").

∧ **Values as Strategy:** Strict regulation and ethical values are framed not as constraints, but as competitive advantages. Citing recent cyberattacks in Denmark and child safety breaches, Lescure argues that "digital sovereignty" allows Europe to prosper while protecting citizens, creating a safe, distinct alternative to unregulated markets.

∧ **Energy & Capital:** To support AI, the state commits to providing cheap, carbon-free electricity through a renewed mix of nuclear and renewable energy. Furthermore, Lescure pushes for a "Capital Markets Union" to offer a stable, less volatile financing alternative to the US markets for European ecosystems.

∧ **The ultimate hurdle is societal adoption.** The industry must move beyond B2B productivity narratives and convince the general public ("the thousands outside this building") that AI benefits them directly as citizens, not just consumers. The "Adopt AI" manifesto must translate into tangible improvements in civil service and daily life to prevent social fracture.

∧ **European Unity is essential;** just as the Euro unified currency, a shared AI strategy based on "brains, networks, and values" will unify the digital economy.

∧ **Regulation is a feature, not a bug;** protecting democratic values and data security differentiates European AI as a premium, stable alternative to global competitors.

∧ **Infrastructure is the bottleneck;** success relies on massive state-backed investments in low-carbon nuclear energy and the unification of European capital markets to fund growth.

∧ **Lescure draws a historical parallel between the current AI revolution and Europe's post-war reconstruction (Coal & Steel Community)** and the 1990s creation of the Euro. The core challenge is to forge a united European AI strategy that combines economic power with political unity, positioning Europe as a leader in "progressive democracy" AI rather than just a market participant.

> " *Digital sovereignty can actually be a competitive advantage of Europe... A way of having champions that can win the global competition while staying strong and in contact with our values.*"

AI's Tipping Point: Scaling Ecosystems into Global Economies.

John W.H. Denton AO, Secretary General

ICC

Julien Billot, CEO   SCALE|AI

About John W.H. Denton AO: Secretary General of the ICC, he leads the organization's strategic direction, focusing on enabling global trade and engaging with the G20 and WTO.
About the ICC: Headquartered in Paris, the ICC represents over 45 million companies in 100+ countries, promoting international trade, responsible business conduct, and global regulation.

About Julien Billot: CEO of Scale AI, an experienced tech executive (formerly in the Telco industry) leading Canada's Global Innovation Cluster for Artificial Intelligence.
About Scale AI: Based in Montreal, Scale AI acts as an investment and innovation hub, managing $300M+ in funding to support AI adoption across Canadian supply chains.

> **"**
> *"Unless the approach taken is inclusive... some of the progress we want to see will be thwarted and some of the scaling up will be inhibited and we'll end up with fragmentation."*

∧ **The global AI landscape is currently defined by a "race for regulatory approaches" rather than just technological supremacy.** The core challenge is the lack of coherence between nations; while speed of innovation is high, the fragmentation of standards and the exclusion of the "Global South" (developing economies) risk thwarted progress and a loss of digital sovereignty.

∧ **The "Dual Mandate" Strategy (Canadian Model):** Billot outlines a critical industrial strategy: nations must balance AI adoption with domestic creation. Canada subsidizes AI adoption for companies only if they utilize Canadian-built solutions and IP. This prevents the "Telco mistake" seen in Europe—subsidizing the purchase of foreign tech to the detriment of local industry.

∧ **SME Productivity & Risks:** Both speakers identify Small and Medium Enterprises (SMEs) as the primary beneficiaries of AI scaling, with a potential 15% productivity gain if infrastructure is correct. However, SMEs are the most vulnerable to regulatory fragmentation. Scale AI has funded 200 projects (total value $1 billion CAD), with two-thirds of funding specifically targeting SMEs to bridge this gap.

∧ **Sovereignty vs. Global Platforms:** Denton warns that if advanced economies set all the rules, emerging markets will reject them, leading to a splintered digital world. To counter this, the ICC is building an AI-enabled global dispute resolution platform to unlock $1.8 trillion in underutilized economic activity, designed as a "global-first" tool rather than a jurisdiction-specific one.

∧ **Infrastructure as a Prerequisite:** Inclusivity is not just policy; it is infrastructure. Without investment in local capabilities and respectful engagement with the Global South, scaling becomes impossible. Innovation is not exclusive to Paris or the US; it requires a decentralized yet coherent approach to standards.

∧ **Scaling AI requires a "referee" to build trust.** The future relies on a virtuous cycle: creating local demand satisfied by local solutions (sovereignty), which are then exported via aligned global standards (interoperability). Without this balance, public trust will erode, and political pushback will stifle technological gains.

> **"**
> *"You don't want to do in AI what happened in the telco industry in Europe, which is basically subsidizing adoption and basically destroying the telco industry in Europe."*

Fireside chat.

Alexandre Bompard, Chairman & CEO
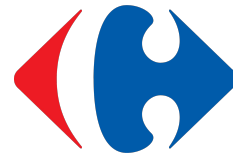
Since 2017, **Alexandre Bompard** has been leading Carrefour, one of the world's largest retailers with operations across Europe, Latin America and Asia.

Under his leadership, Carrefour is accelerating its digital transformation, integrating artificial intelligence to optimize supply chains, enhance customer experiences and reduce food waste...

Looking back at your journey through media and retail, how do you approach tech and innovation personally and professionally?

∧ **Alexandre Bompard:** The primary quality required for leadership today is curiosity; one does not need to be an engineer to drive innovation, but one must provoke curiosity within the organization.

∧ **Coming from "old world" industries** (linear TV/Radio and brick-and-mortar retail) threatened by disruption, the goal has always been to reconnect legacy structures with innovation.

∧ **This process involves trial and error**; for instance, at Fnac, he launched a successful e-reader platform (Kobo) and a failed music streaming service, yet he maintains that leaders must "do it again" regardless of failures to survive the journey.

How did you successfully drive innovation and cultural change within a massive ship like Carrefour (100B turnover, 500k people)?

∧ **Alexandre Bompard:** Upon joining, the management held a mistaken belief that food retail was immune to digital disruption; the first step was establishing the conviction that innovation is essential for survival.

∧ Innovation cannot be siloed in a corner; it must be democratized across the entire social body of the company to transition from a legacy firm to a digital-oriented, agile organization.

∧ While Carrefour may not yet rival tech-born giants in pure tech competitiveness, it has successfully established legitimacy and leadership in the digital transformation of brick-and-mortar retail.

What specific role does AI play at Carrefour, and what are the concrete use cases?

∧ **Alexandre Bompard:** The goal is not to perform "innovation theater" but to use AI as a pragmatic transformation tool.

∧ **Use Case 1 (Operations):** Utilizing a data lake of 10 billion transactions to optimize local assortments and fix prices in real-time, significantly improving customer service.

∧ **Use Case 2 (Strategic Expansion):** drastically reducing the time required to analyze potential store locations; what previously took 9 months of surveys with an 80% failure rate is now accomplished in 2 minutes with higher predictive accuracy via AI.

∧ **Use Case 3 (CX):** Developing "AI Agents" to curate products and create intimacy with customers, fundamentally changing the shopping experience.

> "Do we have a chance to be the continent where the use of AI, the scale of AI, the applications of AI could be the most developed? I think so."

Bruno Vaffier, CEO **cegid**

About Bruno Vaffier: Current CEO of Cegid, focusing on the strategic transition of the company towards practical AI automation and "Useful AI" that drives operational efficiency.

About Cegid: A leading European provider of cloud business management solutions for finance, HR, CPAs, retail, and entrepreneurial sectors. Key Figures: €852M+ Revenue (Transcript cites >€1B run rate), ~4,400 Employees, HQ in Lyon (France), serving 750,000 clients globally.

How is Cegid positioning its AI strategy compared to the general market hype?

Λ **Bruno Vaffier:** Vaffier distinguishes Cegid's approach by emphasizing action over conversation. While the market focuses on Generative AI for content, Cegid integrates AI directly into operational processes to generate tangible business value. Their philosophy is not to build "AI that speaks," but "AI that takes action" within critical workflows (Finance, HR, Retail) to deliver measurable results.

Why have businesses been slower to adopt AI compared to individual consumers?

Λ **Bruno Vaffier:** The lag stems from a "copy-paste" error. Companies attempted to transplant personal use cases (drafting letters, searching for info) directly into professional settings without adapting them. This approach failed to generate ROI because text generation alone does not equate to business value. He cites an MIT study suggesting 95% of AI projects failed to deliver ROI because they focused on content generation rather than process re-engineering.

Can you provide a concrete example of AI delivering actual ROI in a business process?

Λ **Bruno Vaffier:** He illustrates this with the "Client Invoice Lifecycle." Instead of just drafting an invoice, Cegid's AI manages the entire end-to-end process: monitoring due dates, automatically sending reminders via WhatsApp or voice, verifying payments against accounting records, and sending thank-you notes. This level of automation allows companies to save up to 70% of the time previously spent on administrative tasks.

### Will this level of automation inevitably lead to human job displacement?

Λ **Bruno Vaffier:** Vaffier refutes the replacement theory, arguing for a "duo" model where technology and humans work hand-in-hand. First, AI requires human configuration, supervision, and continuous improvement. Second, client feedback indicates that the time freed up by AI (the 70% admin savings) is being reinvested into higher value-added tasks, innovation, and creating new services, rather than reducing headcount.

How does Cegid view Digital Sovereignty and the increasing regulation of AI?

Λ **Bruno Vaffier:** Far from fearing regulation, Cegid welcomes it as a catalyst for adoption. Clients are currently hesitant due to data security concerns and fears regarding trade secrets. A clear, balanced regulatory framework creates clarity; clarity builds trust; and trust is the prerequisite for widespread corporate adoption.

> "
> *"We don't build AI that speaks. We build AI that takes actions in the processes to deliver actual results."*
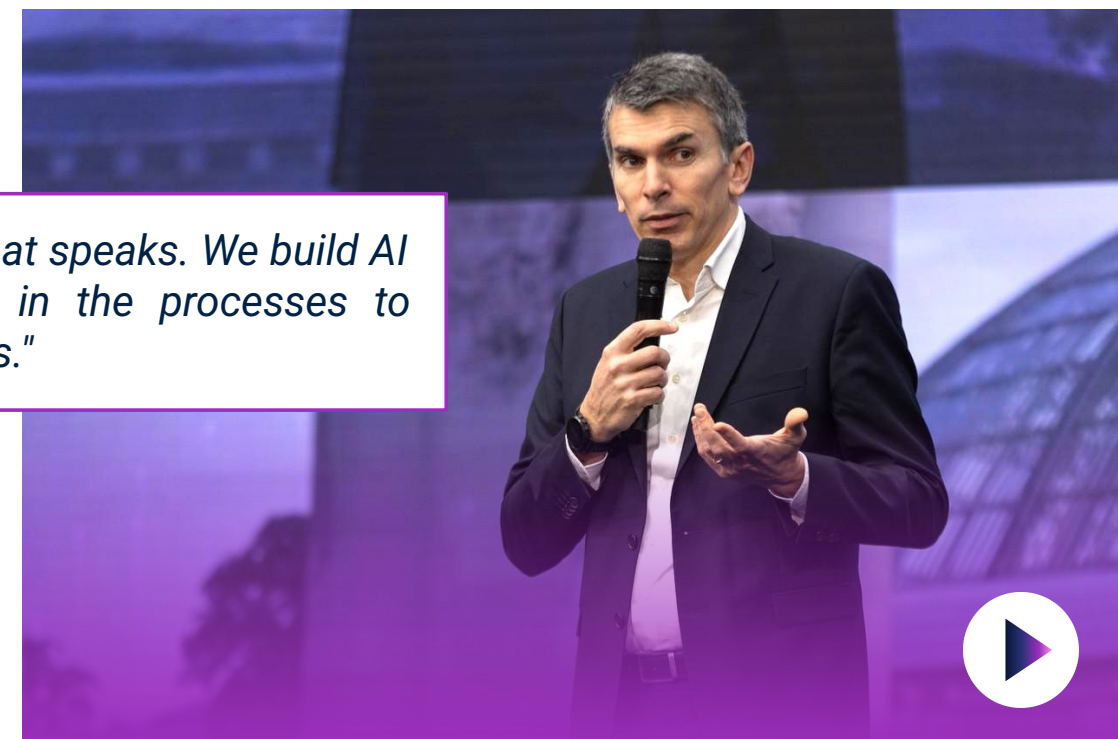
Special Interview.

Christel Heydemann, CEO

We are honored to welcome **Christel Heydemann, Chief Executive Officer of the Orange Group since 2022,** and a **Board Member since 2017.**

In her recent public appearances, including the AI Action Summit, she reaffirmed her deep conviction that AI is a major revolution - and that the telecom industry is playing a pivotal role in the new era: delivering best in class connectivity, exceptional network quality, large-scale infrastructure and robust cybersecurity.

How does the AI revolution represent a unique historic opportunity for Europe to regain technological initiative?

∧ **Christel Heydemann:** We are at the beginning of a disruption that exceeds previous mobile or web revolutions; the entire ecosystem is being reshaped. While current "winners" are undefined, Orange is committed to ensuring that Europe and Africa emerge as key players in this new landscape rather than just consumers of technology.

To what extent does a telco operator enable large-scale AI adoption?

∧ **Christel Heydemann:** Next-generation networks are a prerequisite for massive adoption. Orange projects that more than two-thirds of network traffic will be AI-driven by 2030. The critical challenge is managing this surge—distinguishing between secure traffic, human-generated content, and "bad bots"—but agile connectivity remains the "must-have" foundation for the AI era.

What challenges lie ahead for making European players competitive on a global scale?

∧ **Christel Heydemann:** Europe fails to benefit from its scale (450 million consumers) due to regulatory fragmentation. Despite GDPR setting a standard, every country enforces distinct consumer protection and data privacy laws. This prevents companies like Orange from scaling products seamlessly across its eight European markets. Orange aims to build a platform to help partners navigate this, but simplification of the European framework is essential for competitiveness.

### How does your partnership strategy balance open innovation with sovereignty?

∧ **Christel Heydemann:** Orange employs a hybrid strategy: collaborating with US big tech (OpenAI, Meta) for general LLMs while utilizing open-source solutions (Mistral) for critical, sensitive use cases. For network management and incident detection, Orange trains its own models on internal data to protect intellectual property and "know-how." The operational philosophy is to "test fast and fail fast" to avoid missing technological waves.

How is AI leveraged for customer transformation and internal efficiency?

∧ **Christel Heydemann:** With 300 million customers and millions of daily interactions, AI is vital for data-driven decision-making. It allows for precision in capital expenditure, such as identifying exact network improvement locations in dense areas like Paris. Currently, over half of Orange employees utilize internal AI tools, driving efficiency across all business lines.

" *"People will lose their job not because AI will replace human beings but because all the human beings will be trained on AI and will be more qualified to do the same job."*
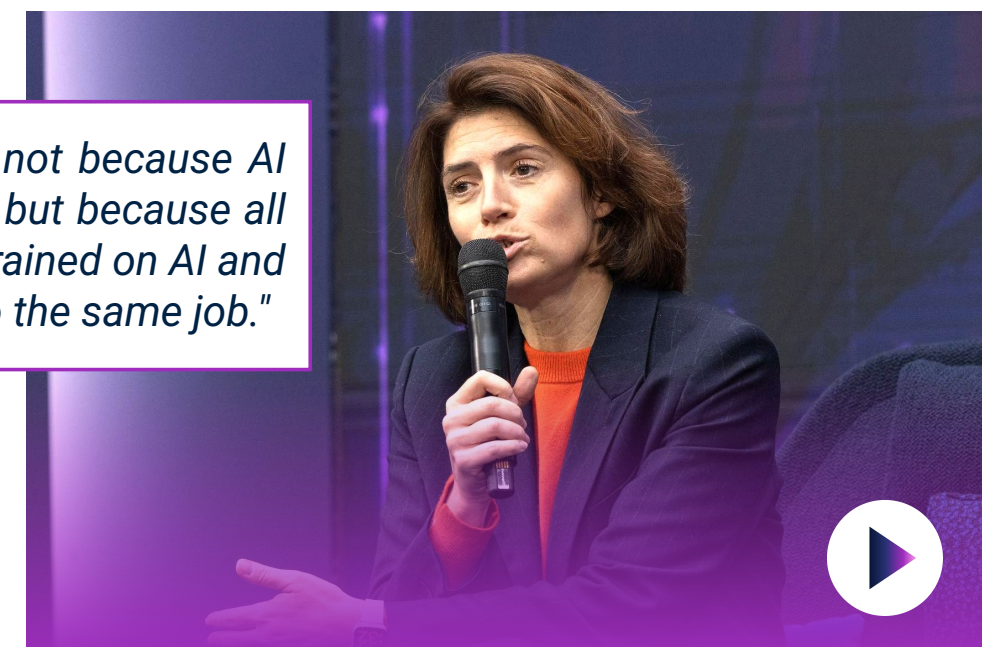
Adopt AI. Adapt AI. Cut through the hype to find AI sweet spot.

Sami Al Ajmi, Senior Vice President of Digital & Information Technology

About Sami Al Ajmi: As the Senior Vice President of Digital & Information Technology at Aramco, Sami Al Ajmi leads the company's digital transformation strategy, focusing on integrating 4IR technologies and AI into industrial operations.

About Aramco: Headquartered in Dhahran, Saudi Arabia, Aramco is the world's largest integrated energy and chemicals company. With a workforce of approximately 73,000 employees and revenue exceeding $440 billion (2023), its mission is to drive the global energy transition while maximizing value from its hydrocarbon chain.

∧ **The global AI narrative is currently polarized between "unbounded optimism" and skepticism regarding practical business outcomes.** Sami Al Ajmi highlights a critical efficiency crisis, citing Gartner data that only one in five AI initiatives delivers positive ROI, and MIT reports indicating 95% of companies experimenting with GenAI have yet to see real returns. The core challenge is not adoption, but navigating the "middle road" to identify where AI truly creates measurable value.

∧ **Aramco differentiates between "adopting" (buying compute/models) and "adapting" (integrating into complex realities).** This strategy generated $1.8 billion in third-party verified value in the last year alone. Success relies on democratizing knowledge; Aramco has trained over 6,000 subject matter experts (SMEs) to co-design solutions with data scientists, ensuring models address actual operational pain points rather than remaining abstract experiments.

∧ **AI is now embedded across the value chain. In Upstream, advanced pro-physical models predict rock and fluid properties in real-time to reduce drilling risks.** In Downstream, global optimizers provide a 360-degree view of assets to improve margins. In Corporate functions, proprietary LLMs automate supply chain and finance reporting. These initiatives are supported by a massive data foundation of 10 billion daily data points.

∧ **Aramco is expanding its global footprint by opening an Aramco Ventures office in France and investing $2 billion in its digital arm, Aramco Digital.** Sami Al Ajmi concludes that while adoption is no longer optional, adaptation is the true leadership metric required to turn hype into decades of sustainable value.

∧ **Value Measurement:** Rejecting the notion that AI ROI is unmeasurable, AXA has deployed 400+ use cases globally by adhering to a strict "Learn, Adopt, Repeat" cycle where economic rationale is mandatory.

∧ **Pilot Purgatory is Real.** With 88% of AI pilots failing to reach production, leaders must shift focus from experimentation to verified value generation.

∧ **Human-in-the-Loop is Non-Negotiable.** Value emerges only when SMEs co-design AI solutions; dropping models into processes without domain adaptation rarely works.

∧ **Ecosystem Expansion.** Aramco is solidifying a France-Saudi innovation corridor, leveraging partnerships (Thales, Pasqal) and sovereign investments to build a robust AI infrastructure.

> "
>
> *"You can buy the models and compute. But unless you adapt AI to your processes and complex realities, it will not scale or unlock value."*

From the SaaS era to AI era: The future of Knowledge Work.

Ivan Zhao, Co-founder & CEO

About Ivan Zhao: Co-founder and CEO of Notion, a design-centric product leader focused on unbundling SaaS fragmentation and integrating AI into knowledge management.

About Notion: San Francisco-based productivity platform valued at ~$10 billion with over 35 million users, dedicated to providing an all-in-one connected workspace.

What core problem was Notion originally designed to solve regarding the SaaS landscape?

Λ **Ivan Zhao:** The primary objective was to solve the fragmentation caused by the explosion of point solutions in the SaaS market. While the last 15 years focused on unbundling suites like Microsoft Office to the cloud, the current strategic necessity is "rebundling" workflows. Notion aims to be a unified platform rather than a point solution, consolidating context into a single layer to increase efficiency.

How did Notion transition from a traditional SaaS tool to an AI-first product so rapidly?

Λ **Ivan Zhao:** The transition was accelerated by Notion's existing architecture, which naturally favors Large Language Models (LLMs). LLMs require deep context to be useful; because Notion had already consolidated user context into one place, their AI agents had immediate access to necessary data. Furthermore, LLMs are a horizontal technology that pairs well with horizontal building blocks—Notion acts as "Lego for software," turning its previous onboarding complexity into a strength for AI adaptability.

How is "Agentic AI" changing knowledge work, and what are the current use cases?

Λ **Ivan Zhao:** While "agent" is a buzzword, early indicators from the programming sector reveal a massive shift in productivity. Top-tier developers ("10x engineers") are evolving into managers of multiple coding agents, effectively becoming "40x engineers" by supervising work rather than writing every line of code. This shift—from pedaling a bicycle to driving a car on the information superhighway—is beginning to permeate other sectors like Customer Support, where unified context allows one human to handle 500 tickets instead of 50.

## Will we see the rise of "one-person unicorns" or CEOs managing only AI agents?

Λ **Ivan Zhao:** While teams will shrink and leverage increases, human oversight (like a CFO) remains essential. We are currently in the "Watermill Era" of AI: just as early factories swapped water wheels for steam engines without redesigning the factory, companies are currently slotting AI into old workflows. True productivity gains will occur in the next five years when organizations fundamentally redesign their structures to accommodate the "steam power" of LLMs, decentralizing power and changing physical/digital layouts.

In a volatile market where AI startups rise and fall quickly, how does Notion ensure long-term survival?

Λ **Ivan Zhao:** Beyond strong profitability, Notion differentiates itself through values inspired by the pioneers of the Bell Labs era: technology must be either "very useful" or "very beautiful." Survival is not just about the technology stack, which changes rapidly, but about maintaining a culture dedicated to craftsmanship and utility that outlasts market cycles.

> "I think we're in the early days. We're still in the watermill era of language models. We haven't start rethinking how organization could be different."
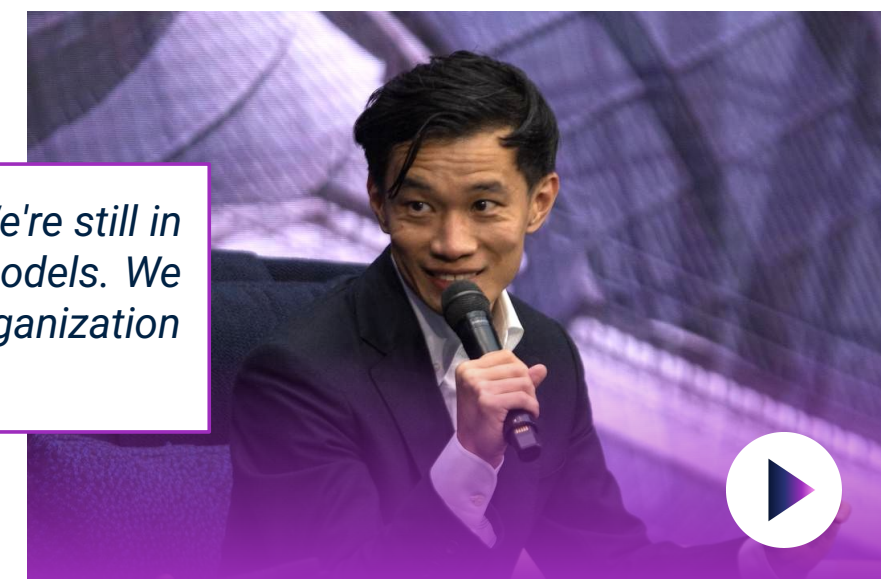
Turning AI innovation into scalable ROI.

Jean-Christophe Morisseau,
EMEA Director, Enterprise IT Solutions

Lenovo

About Jean-Christophe Morisseau: A seasoned executive at Lenovo Infrastructure Solutions Group (ISG) in EMEA, responsible for driving the strategy and sales of enterprise IT solutions, including AI, Hybrid Cloud, and Edge computing, to help organizations modernize their infrastructure.

About Lenovo: A global technology powerhouse (Fortune Global 500) delivering "Smarter Technology for All." Revenue: ~$56.9B (FY23/24) | Employees: ~77,000 | HQ: Beijing, China & Morrisville, USA.

∧ **While AI technology is accelerating rapidly, enterprise adoption lags behind due to specific inhibitors:** financial risk, lack of tangible ROI, data sovereignty issues, and a shortage of internal expertise. A Lenovo/IDC study of 3,000 CIOs reveals that while deployment intent has jumped from 11% to 42% in one year, customers cannot match the market's speed and are rejecting "cloud-only" models in favor of hybrid approaches.

∧ **To bridge this gap, the market is shifting into the "Agentic Era," requiring a distributed "Hybrid AI" architecture that spans from devices ("pocket") to the edge, data center, and cloud.** This approach ensures AI computation occurs exactly where data is generated—whether in autonomous vehicles, factories, or personal devices—maximizing efficiency and data security.

∧ **The strategic business case for this hybrid model rests on three drivers:** Productivity (currently personal/workforce efficiency), Agility (faster deployment and competitive reaction speeds), and Innovation (enhancing customer experiences, such as use cases in F1 and FIFA).

∧ **Success relies on a "Factory" approach:** leveraging 80+ vetted ISVs (Innovators Program) and pre-validated blueprints to deploy ready-to-use agents. By combining Nvidia's accelerated computing/software with Lenovo's end-to-end infrastructure, enterprises can bypass experimental phases and implement proven solutions for immediate business outcomes in sectors like retail, manufacturing, and healthcare.

∧ **Organizations must move beyond theoretical AI to "business outcome ready" use cases.** The path to scalable ROI lies in leveraging a global partner ecosystem to implement reliable, energy-efficient (water-cooled), and distributed AI solutions immediately, rather than waiting for internal maturity.

∧ **Enterprise AI adoption is hindered by the speed gap between tech evolution and organizational readiness;** the solution is utilizing pre-validated ISV "agents" rather than building from scratch.

∧ **The future of AI is Hybrid, not Cloud-only;** data sovereignty and latency demands dictate that compute must exist across the entire chain, from Edge devices to Data Centers.

∧ **Scalable ROI is achieved by shifting focus** from "AI experimentation" to deploying specific, verticalized use cases supported by robust global infrastructure.

> "We are also entering a new era of Gen AI which is the agentic era... the architecture and the way we will be building solution has to be much more distributed... and that's where we go into a new concept which is an hybrid AI concept."

CEO Panel: Driving Operational Efficiency and Customer Experience with AI. (1)

Guillaume Texier, CEO
REXEL

Dirk Hoke, CEO
VOITH

Thomas Mackenbrock, Deputy CEO Group

About Guillaume Texier: CEO of Rexel, a global expert in the professional distribution of products and services for the energy world.
About Rexel: French group specializing in the distribution of electrical supplies; Revenue ~ €19B, ~26,000 employees, HQ in Paris.

About Dirk Hoke: Identified as the leader steering the Voith Group through its digital modernization and sustainability transformation.
About Voith Group: German technology company (Hydropower, Paper, Turbo); Revenue ~ €5.5B, ~22,000 employees, HQ in Heidenheim.

About Thomas Mackenbrock: Deputy CEO of Teleperformance (TP), leading global digital business services and CX transformation.
About Teleperformance: Global digital business services leader; Revenue ~€10B, ~500,000 employees, HQ in Paris.

How is AI facilitating sustainability and the energy transition in your industries?

∧ **Guillaume Texier:** Notes a paradox: AI drives data center energy demand (accounting for 2/3 of Rexel's recent growth) but is also the solution to supply chain bottlenecks. Rexel uses AI to solve skilled workforce shortages by drastically reducing administrative time; quoting processes that took hours now take minutes.

∧ **Dirk Hoke:** AI is applied across the entire value chain—hydropower and paper making—to optimize consumption of water and energy while reducing waste. The group uses real-time condition monitoring to minimize downtime and CO_2 emissions, often embedding AI so deeply that clients and employees don't even realize algorithms are running.

∧ **Thomas Mackenbrock:** Connects sustainability to the "Cloud Campus" model. By enabling remote work for tens of thousands via secure AI-backed infrastructure, TP reduces commuting (Scope 3 emissions) while simultaneously improving quality outcomes and employee work-life balance.

∧ **Legacy Knowledge Preservation:** For industrial firms, AI is the critical bridge to capture and query the tacit knowledge of retiring experts regarding long-lifecycle assets.

∧ **Organizational Redesign is Mandatory:** AI is not a productivity add-on; it requires a fundamental restructuring of roles (e.g., sales workflows) to unlock more than "25% of the value."

∧ **The "Customer Zero" Mandate:** Adoption fails if it is top-down only; executives and employees must use AI in personal workflows ("Customer Zero") to build the intuition needed for enterprise scaling.

> "
> "We say 'If Voith knew what Voith knows'... by now having a platform where you can ask... you get answers across the whole 227 sites that we have on a global side."

CEO Panel: Driving Operational Efficiency and Customer Experience with AI. (2)

Can you share concrete examples of digital solutions transforming operations?

Λ **Dirk Hoke:** Highlights "Mill One," a condition monitoring system for paper production. It synthesizes data from thousands of sensors into a single, role-specific dashboard (CEO vs. Technician). For hydropower, they use radar and AI to predict failures in assets that have 100-year lifespans, ensuring maintenance occurs only when necessary to prevent downtime.

Λ **Guillaume Texier:** Focuses on "Inside Sales" (50% of workforce). Previously, only 20% of orders (basic ones) were optimized. Now, AI-driven internal chatbots and technical documentation tools allow agents to handle complex technical queries instantly, optimizing 80% of their time and reducing the need to consult scarce internal experts.

Λ **Thomas Mackenbrock:** Positions TP.ai as an "operating system" rather than just a tool. He cites collections as a use case where "Agentic AI" handles routine interactions while human talent manages complex cases, creating a symbiosis that drives better financial outcomes.

> " *"You as an individual have to be customer zero... try to incorporate AI in your daily life and then for the company."*

> " *"If you do AI without thinking about how to change your organization to adapt to the new world, you're probably going to unlock one quarter of the benefits."*

How do you handle knowledge sharing and scaling AI across diverse organizations?

Λ **Dirk Hoke:** Addresses the "Baby Boomer" retirement cliff. The group is building a platform to capture the tacit knowledge of experts leaving the workforce (using video/audio) to ensure maintenance know-how for equipment lasting decades is preserved. They also use internal chatbots to solve the "If we knew what we know" problem, connecting 227 global sites.

Λ **Guillaume Texier:** Emphasizes confidentiality and organizational redesign. Implementing AI requires a "confidential environment" for proprietary data. More importantly, he argues that IT architecture must change; systems must now talk to each other via AI layers rather than being siloed in a single ERP.

Λ **Thomas Mackenbrock:** Adopts a "Co-creation" strategy, running 400+ AI projects jointly with clients. TP launched company-wide training not just on AI hard skills, but specifically on "Human Empathy," reinforcing that human ingenuity becomes more premium as routine tasks are automated.

Special Keynote:

Howard Wright, VP, Startup Ecosystem

About Howard Wright: Howard Wright serves as the Vice President of the Startup Ecosystem at NVIDIA, where he leads global initiatives to engage startups, venture capitalists, and researchers. With over 35 years of experience in the technology sector, his mandate is to democratize access to NVIDIA's full stack of software and hardware to accelerate innovation.

About NVIDIA: NVIDIA (NASDAQ: NVDA) is the world leader in accelerated computing and the pioneer of the GPU, headquartered in Santa Clara, California. With fiscal year 2024 revenue of $60.9 billion and over 29,000 employees, the company powers the world's most advanced AI factories and aims to solve challenges that ordinary computers cannot.
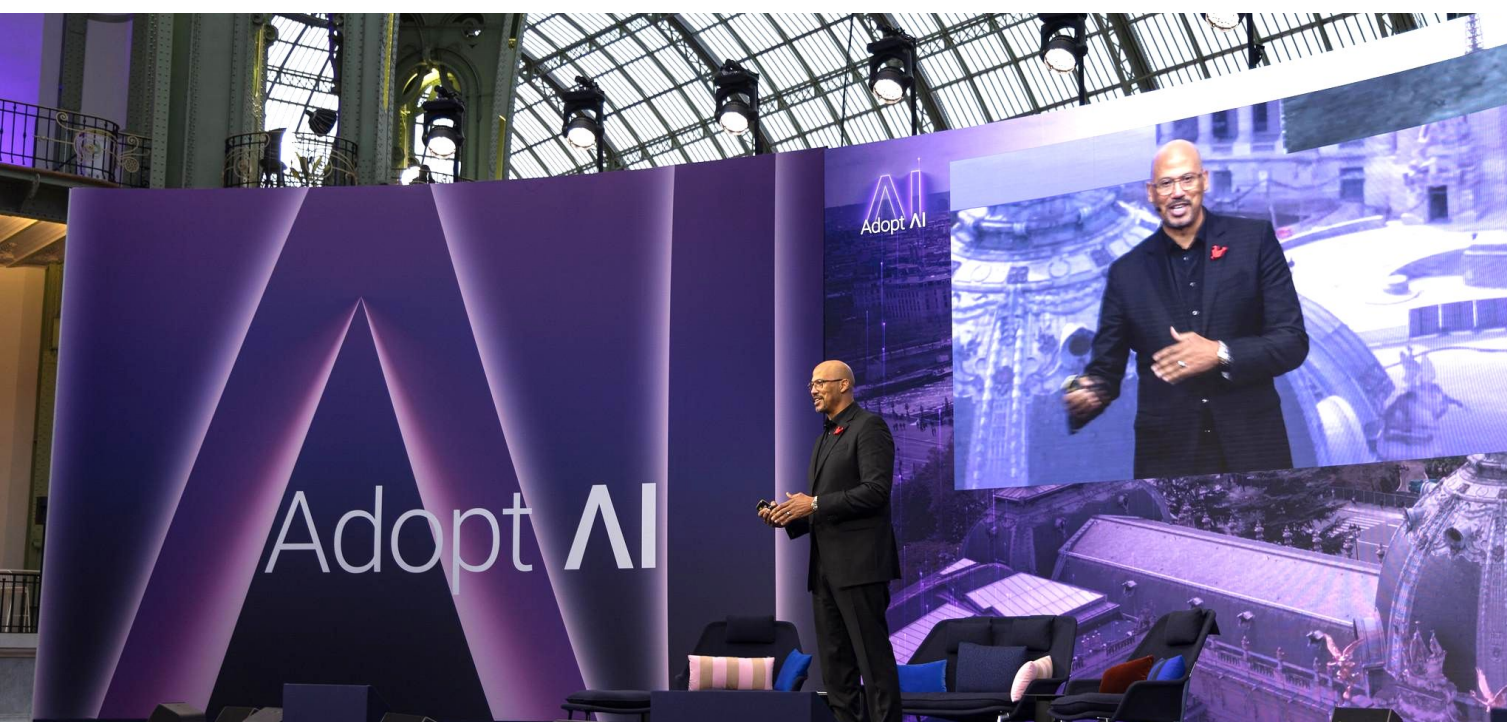
∧ **Wright frames the current technological landscape not as an evolution, but as a revolution—specifically the "Fourth Industrial Revolution."** He posits that Generative AI represents a shift comparable to the French Renaissance, requiring audacity and intellect to transition from traditional computing to a new era of generative capabilities.

∧ **NVIDIA is actively reshaping the narrative around data centers, moving away from the historical view of them as passive "storage" facilities.** Wright defines the modern infrastructure as "AI Factories," where data is compressed, synthesized, and continuously proving its efficiency and precision to create intelligence rather than just archive information.

∧ **The company's strategy involves a holistic "flywheel" that connects the entire value chain, from "Nvidia Cloud Providers" (NCPs) like Mistral and Scaleway to VCs and researchers.** Wright emphasizes that NVIDIA acts as a "router for success," providing the underlying infrastructure (GPUs, DPUs, networking) to mechanize AI so that vertical industries can become smarter without NVIDIA becoming a bottleneck.

∧ **The keynote highlights France's pivotal role, citing partnerships with over 750 French AI startups utilizing NVIDIA's compute and APIs.** Wright specifically celebrates "LightOn" as the first NVIDIA Inception startup in France to go IPO, using this as proof of the region's maturing ecosystem and the effectiveness of NVIDIA's support structure.

∧ **Wright announces "GenC," a new nerve center and intelligence hub for research and infrastructure in Paris.** This initiative is positioned as a "violent orchestration of ones and zeros," designed to be additive to the wider startup ecosystem and provide the computational power necessary for the next wave of local innovation.

∧ The session closes with a direct call to action for entrepreneurs to "come build with us," positioning NVIDIA not just as a vendor, but as a co-traveler in the "hero's journey" of startup building, offering cash, compute, and competency to those with bold ideas.

> **"**
> *"This is not just another technology. This is not an improvement on a technology. What this really is is a revolution, not necessarily an evolution... Gen AI is going to represent this fourth industrial revolution."*

Adopt ΛI
GRAND PALAIS

Sophie Bellon, Chairwoman of the Board of Directors

Sodexo is the world leader in sustainable food and quality of life services, present across education, healthcare, workplaces, and leisure.

Sophie Bellon is a strong advocate for the service industry. She is committed to ensuring that its social value and its impact at the local level are recognized. She is also deeply engaged in driving Sodexo's mission to create positive impact, social, societal, and environmental, fully in line with the company's historic purpose.
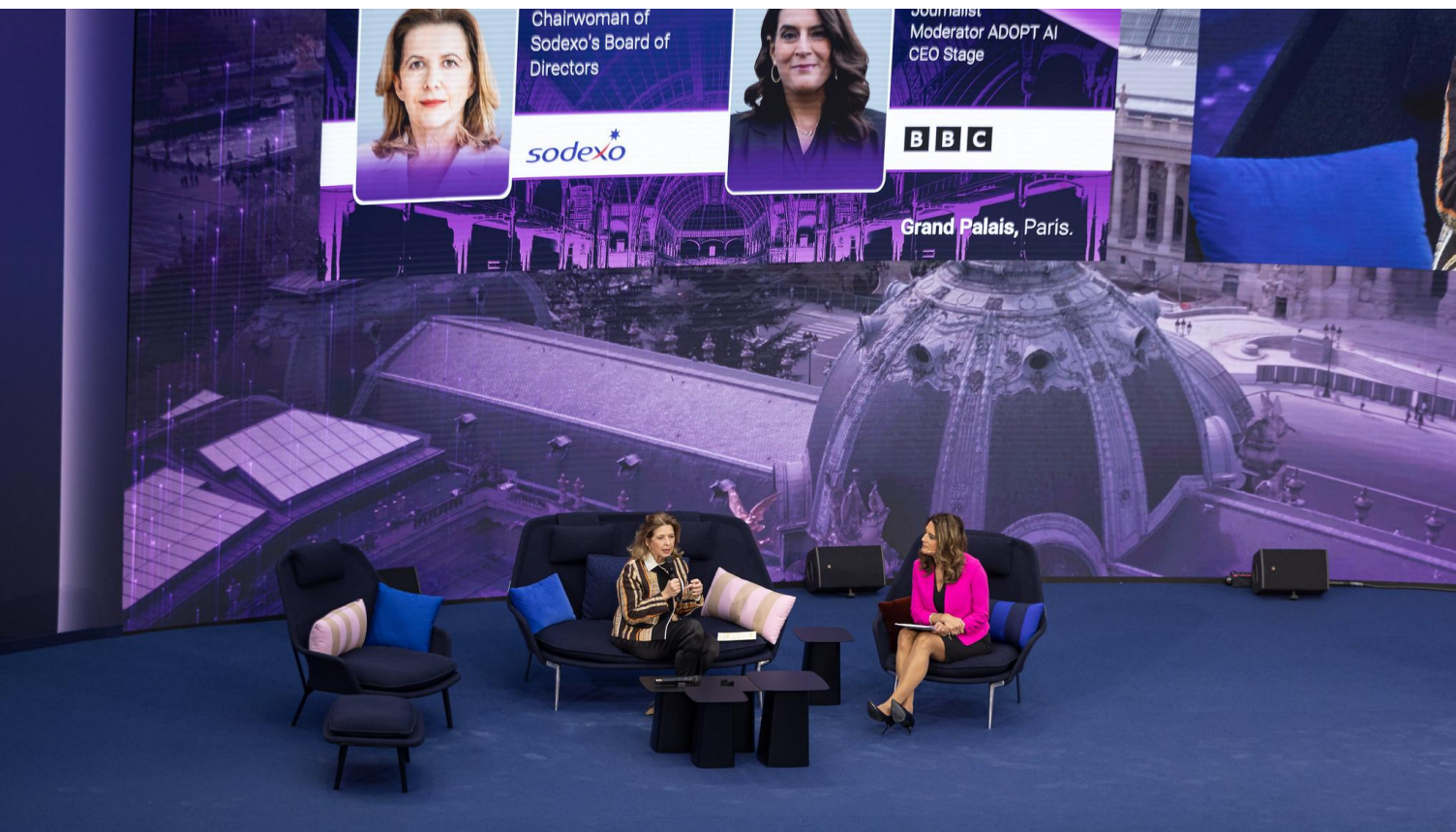
How is AI integrated into a people-centric food services company like Sodexo?

∧ **Sophie Bellon:** Technology is ubiquitous, functioning primarily to eliminate repetitive tasks so employees can focus on food quality and consumer experience. Bellon cites specific internal tools: "Power Chef" for forecasting site attendance to optimize staffing, and "Menu AI," which designs dietary-compliant menus 50 times faster than manual methods. On the consumer side, a proprietary app connects 6 million users for pre-ordering and "grab and go" services, alongside the deployment of autonomous stores in venues like the Seattle Mariners Stadium to reduce wait times.

What are the primary challenges in adopting AI within the organization?

∧ **Sophie Bellon:** The hurdle is cultural rather than technological. As a "people company," the challenge lies in change management—convincing the workforce of the value of new tools and training them on new workflows. Leaders must demonstrate that these shifts improve daily working conditions rather than just adding complexity. Adopting digital tools is a gradual process that varies by country and digital maturity, but Bellon emphasizes there is "no way back" regarding the transition.

Does the reduction of repetitive tasks spark fear regarding job losses among staff?

∧ **Sophie Bellon:** Bellon dismisses the notion of mass displacement, arguing that in a growing company, roles will evolve rather than disappear. She asserts that the "human link" remains irreplaceable, stating that "a smiley is never going to replace a real smile," particularly in high-touch environments like hospitals or schools. The strategy involves extensive reskilling to help employees transition into roles that require higher emotional intelligence and creativity, positioning AI as an augmentation tool rather than a replacement.

How is technology accelerating Sodexo's sustainability and waste reduction goals?

∧ **Sophie Bellon:** Sodexo utilizes data tools to manage Scope 1 and Scope 2 emissions for B2B clients. A tool referred to as "C" tracks the carbon impact of specific sites and ingredients (e.g., red meat), allowing clients to benchmark their performance against similar locations. regarding waste, Bellon highlights the "Leanpath" system (transcribed as "LIN pass"), where food waste is physically weighed and categorized. She provides a use case from a Florida campus where a chef used data on watermelon rind waste to innovate a pickle product, demonstrating how data drives culinary creativity and circular economy practices.

> "I really think that in a world that is more and more digital, the human link is important... a smiley is never going to replace a real smile when you are in a hospital bed or when you have a kid in school."

Industrial AI and Europe's Attractiveness:
Insights from Aramco Digital and Mistral AI.

Nabil Al-Nuaim, CEO   aramco

Cédric O, Co-founding advisor   MISTRAL AI_

About Nabil Al-Nuaim: Currently the CEO of Aramco Digital, leading the digital transformation and industrial AI strategy for the energy giant.
About Aramco Digital: The technology subsidiary of Saudi Aramco (HQ: Dhahran; Revenue: ~$495B; Employees: ~70,000), focused on industrial digital enablement and sovereign cloud.

About Cédric O: Former French Minister of State for the Digital Sector, currently a co-founder and shareholder at Mistral AI.
About Mistral AI: A Paris-based leader in Generative AI (Valuation: ~$6B; Employees: ~350-400), specializing in open-weight models and enterprise deployment.

> "In business, there is not such thing as love. There is only evidence of love. And so the fact that Aramco considers Europe as a place to grow technology... shows something about Europe."

How is Mistral AI bridging the gap between models and industrial application?

Λ **Cédric O:** Digital transformation is about systems and organization, not just technology. Mistral AI employs a "boots on the ground" strategy with forward deployment engineers working directly alongside clients. The goal is to reinvent entire legacy processes—dealing with non-API compatible software and human workflows—rather than simply swapping tools. This deep vertical integration is necessary because 95% of enterprise AI projects fail when they lack this systemic approach.

Why are Aramco and global players choosing France and Europe for AI investment?

Λ **Nabil Al-Nuaim:** Europe offers a critical ecosystem for AI expansion driven by three factors: a unique talent pool rooted in elite mathematical engineering (crucial for AI), a forward-thinking regulatory framework, and an established industrial base. Aramco Digital aims to leverage these assets to become a global leader in industrial AI applications and new economy sectors.

Λ **Cédric O:** The investment by Aramco is "evidence of love," validating Europe's technological viability. Europe possesses three distinct assets: world-class talent (France ranks highly in Fields Medals), a dense network of industrial incumbents determined to adopt AI, and a geopolitical opportunity. As the US and China compete, Europe offers a "third way" for nations in Asia and the Middle East seeking independent technology partners.

What are Aramco Digital's strategic priorities and new focus areas?

Λ **Nabil Al-Nuaim:** Building on Aramco's digital transformation since 2017, the new entity focuses on four pillars:
Cybersecurity: Essential for OT and manufacturing (owning Sbrani, a Tier 1 firm).
Connectivity: Utilizing the 450MHz spectrum alliance and partnering with Qualcomm to push "mission-critical" AI to the edge.
Digital Platforms: Moving compute to the edge (sensors) to predict asset integrity for thousands of rotating equipment pieces, reducing data center reliance.
Sovereign Cloud: Creating multi-cloud orchestration to ensure data sovereignty for industrial players.

> "We are exploring very seriously of setting up an innovation hub in Sophia Antipolis... we can access talents from all Europe not only France."

No responsible AI without a sustainable infrastructure.

Benoît Coquart, CEO

Legrand is a global specialist in electrical and digital building infrastructures. The company offers the systems that power, connect, and protect buildings in over 90 countries. Artificial intelligence is emerging as a powerful lever to optimize energy consumption, manage complex infrastructures, and develop smart, user-centric environments.

Benoît Coquart has led Legrand as CEO since 2018. He has shaped the Group's transformation by aligning performance with responsibility and innovation with impact.

Legrand is a historic industrial player. How have you pivoted to become a key stakeholder in the AI and Data Center market?

∧ **Benoît Coquart:** While Legrand is a 150-year-old traditional building company, it entered the data center space a decade ago. Today, this segment generates approximately €2.5 billion in sales, representing 25% of total revenue. Legrand provides technology for both the "gray space" (energy feeding infrastructure) and the "white space" (server locations/racks). A recent strategic move includes acquiring a US-based load bank specialist to test electrical installations before data centers go live, ensuring reliability in a sector where 60% of Legrand's data center sales occur in the US.

Energy consumption projections for AI are staggering (up to 2,500 TWh by 2030). How can the industry reconcile this demand with sustainability and social acceptance?

∧ **Benoît Coquart:** The scale is massive; 5,000 data centers consumed ~420 TWh last year, a figure expected to reach 1,000−2,500 TWh by 2030 depending on Nvidia's chip deployment. This creates a dual concern: power supply availability and the ethical dilemma of prioritizing machine power over human needs. To maintain social license to operate, the industry must drastically improve efficiency to ensure growth isn't achieved at the expense of local communities.

With 50% of data centers located in the US, can Europe catch up, particularly regarding sovereignty and infrastructure?

∧ **Benoît Coquart:** European growth is inevitable due to sovereignty requirements—nations want domestic data networks. However, the "energy dilemma" is global. Whether in the US, China, or Europe, the universal KPI is Power Usage Effectiveness (PUE). The industry must collectively reduce energy and water consumption regardless of geography.

Regarding European regulation, is there a risk that aggressive policies might stifle the region's ability to compete in the AI race?

∧ **Benoît Coquart:** Europe must avoid the mistake made in the automotive industry, where regulators mandated specific technologies (EVs) rather than outcomes. The correct approach for data centers is a "code of conduct": set strict targets (e.g., PUE caps, water usage limits per MW) but allow the ecosystem—hyperscalers, contractors, and suppliers like Legrand—to determine the best technological path to achieve them. Innovation should drive compliance, not prescriptive regulation.

"It's I sometimes use the analogy of the the the rush to gold... those who made a successful business model were those actually selling everything that help the gold diggers to to find gold. Well, it's a bit the same for data centers... that are able to provide solutions to help data centers to be more efficient."
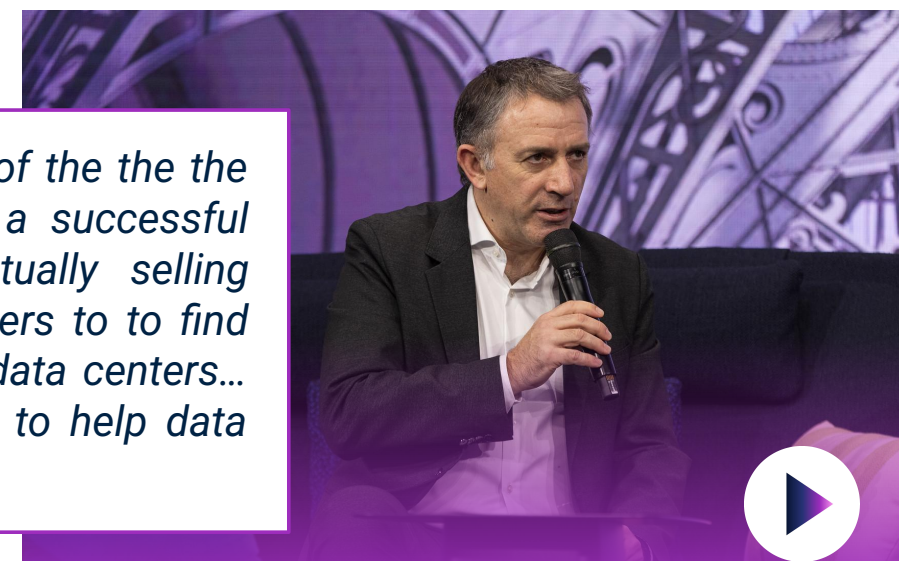
Data Centers: The infrastructure backbone of digital and AI sovereignty.

Anne Le Hénanff, Minister Delegate for AI & Digital Technology

Olivier Micheli, CEO

Data4

About Anne Le Hénanff: Minister Delegate for Artificial Intelligence and Digital Technology (Ministry of Economics & Finance); former MP for Morbihan (Horizons party) with a specialized background in cybersecurity and digital sovereignty.
About The French Gov (Digital): Pursues a strategy of "Digital Sovereignty" through initiatives like "Choose France"; aims to leverage its low-carbon nuclear grid to become the EU's primary AI hub.

About Olivier Micheli: CEO of Data4 since 2014 and President of the trade association France Datacenter; a vocal advocate for the strategic importance of physical infrastructure in the digital economy.
About Data4: A leading European data center operator and investor headquartered in Paris (owned by Brookfield Asset Management); operates major campuses across Europe with over $6B in funding/valuation to support digital growth.

"
> *"For the first time, Germany has embraced the concept of digital sovereignty. It's a turning point... European preference means empowering Europe to have the choice of our technologies."*

What were the key strategic outcomes regarding digital sovereignty from the recent European summit in Berlin?

Λ **Anne Le Hénanff:** Defined the summit as a "historic milestone" where Germany, under Chancellor Merz, officially adopted the concept of digital sovereignty—a significant "philosophical shift" for the country. She clarified that "European preference" is not isolationism, but a necessary strategy to empower Europe to choose its own technologies and protect data. A key operational result was the launch of a working group to create a strict legal definition of a "European digital service."

Despite the "AI Action Summit" announcements, where does France currently stand in the European data center market?

Λ **Olivier Micheli:** Candidly noted that France currently sits in 3rd place in Europe, a position he finds insufficient given the country's structural advantages. He argued France should be the undisputed leader due to its abundance of competitive, decarbonized (nuclear) electricity and its unique status hosting two top-10 global connectivity hubs (Paris and Marseille). He highlighted that gigawatt-scale projects are now correcting this, with the goal of reaching 2nd place next year and 1st place within two years.

Λ **Anne Le Hénanff:** Reaffirmed the state's vision that there is "no AI without infrastructures." She pointed to concrete progress, such as Data4's recent announcement of nearly €10 billion in investments. To further accelerate this, she announced the immediate publication of a national guide on data centers to streamline procedures and a forthcoming national conference at Bercy to align all project stakeholders.

Moving beyond infrastructure, how can we accelerate concrete AI adoption for SMEs and citizens?

Λ **Olivier Micheli:** Warned against the narrative of "technology vs. workers," framing AI instead as a productivity enabler. He insisted that mass adoption will be driven strictly by use cases that generate tangible ROI. He cited the data center industry's own shift from "reactive" to "predictive maintenance" (analyzing millions of sensor data points) as a prime example of how AI improves service quality and efficiency, a pattern that must be replicated in other verticals like banking and pharma.

"
> *"It's clear now... that AI, generative AI, is a question of hardware. It's basically based on compute which are hosted in data centers... critical assets for AI to work."*

Ahmad O. Al Khowaiter, EVP Technology & Innovation

Pascal Cagni, Chairman of The Board

aramco

Business France

About Pascal Cagni: French Ambassador for International Investment, Chairman of Business France, and Founding Partner at C4 Ventures, actively bridging public policy and private capital.

About Business France: The French national agency supporting the international development of the French economy, fostering export growth and promoting inward investment.

About Ahmad O. Al Khowaiter: Executive Vice President of Technology & Innovation at Aramco, an MIT graduate with over 30 years of experience driving the company's R&D and digital transformation.

About Aramco: The world's largest integrated energy and chemicals company (HQ: Dhahran). Key Figures: ~$495B Revenue (2023), ~70,000+ Employees.

> **"** *"Aramco venture is going to open an office here for a country which is France which has been for six seven years in the row the most attractive country in Europe."*

How does Aramco define its identity beyond being an oil company, specifically regarding data and technology?

Λ **Ahmad O. Al Khowaiter:** Aramco is a unique commercial entity that manages the entire value chain—from wells and midstream pipelines to petrochemicals and retail. Because the industry operates thousands of feet underground where direct measurement is impossible, the company has been data-dependent for 90 years. They possess the lowest carbon intensity and production costs in the industry specifically because they invested early in technology to model indirect data.

Can you detail the scale of your IT and R&D infrastructure (e.g., the $2.5B IT budget)?

Λ **Ahmad O. Al Khowaiter:** Aramco operates a massive proprietary infrastructure, including a 70,000 km fiber optic network. In terms of compute, they have utilized High-Performance Computing (HPC) since the 1970s (installing the first Cray supercomputer in the Middle East) and currently operate ~10,000 GPUs for HPC. They developed "Terra Powers," a trillion-cell reservoir simulation model, because no commercial software could handle the sheer scale of their fields.

Why has Aramco Ventures decided to establish a presence in France/Europe now?

Λ **Ahmad O. Al Khowaiter:** While Aramco has invested in US and Chinese ventures since 2012, they recently observed a dramatic transformation in the French ecosystem, characterized by a renewed "startup spirit" and high-quality talent. Furthermore, geopolitical tensions drive a strategic need for "non-aligned technology access," making Europe a critical neutral ground for diversifying investment and technology sourcing.

With 400 internal use cases, how is Aramco approaching GenAI adoption and workforce training?

Λ **Ahmad O. Al Khowaiter:** He highlights the "Live Earth Model." When drilling, the target "pay zone" (oil location) might be only 10 feet wide. Using AI to analyze indirect inputs (resistivity, temperature) allows them to correct the drill bit's path in real-time. Improving drilling accuracy by just 10% saves millions of dollars, as missing the target wastes significant capital. This proves AI's immense value lies in the physical world, not just the digital one.

> **"** *"It's clear now... that AI, generative AI, is a question of hardware. It's basically based on compute which are hosted in data centers... critical assets for AI to work."*

Visionnary keynote: A banking perspective on AI.

Nicolas Namias, CEO

GROUPE **BPCE**

About Nicolas Namias: Nicolas Namias is the Chief Executive Officer of Groupe BPCE, a position he has held since December 2020. An alumnus of École Nationale d'Administration (ENA) and Sciences Po Paris, his career has spanned high-level roles in the French public service and finance, including budgetary and economic advisory roles to the French President and Prime Minister, before joining BPCE where he previously served as CFO.

About Groupe BPCE: Groupe BPCE is the second-largest banking group in France, born from the merger of the Banques Populaires and Caisses d'Epargne. The group employs approximately 100,000 people worldwide, operates around 6,000 branches, and serves 35 million clients. Its mission, as articulated by the CEO, is to transform itself to remain and be transformative for society. The Group's estimated revenue in 2023 was over €25 billion, with its headquarters in Paris, France.

Λ **Financing the AI Ecosystem:** The bank supports tech companies, including emerging and highly innovative players, through dedicated financing of the AI tech ecosystem.

Λ **Financing Client Transitions:** BPCE commits to financing its 35 million individual and corporate clients in their specific AI adoption journeys and investments, leveraging its position as the largest bank for corporates in France.

Λ F**ocus on AI Infrastructure:** The bank is highly focused on financing AI infrastructure, particularly data centers, leveraging its history through NATIX. The CEO cited a necessary investment of €1,000 billion a year by 2030 across the major transitions, with a significant portion of this dedicated to data centers (part of the €5,200 billion in AI-specific infrastructure financing by 2030, out of a total infrastructure target of €6,700 billion by 2030).

Λ **Internal Transformation (The "How")**: BPCE's internal journey is based on three convictions (Human, Usage, Selection) and two paths: 1) AI for All (spreading AI use to all 100,000 employees through the internal tool 'Maya', with 50,000 employees already using it by 2025, one year ahead of schedule) and 2) Transformative AI (focused on a limited number of high-impact use cases).

Λ All adoption must be grounded in Ethical AI, which aligns with BPCE's cooperative DNA. This means ensuring client data protection and confidentiality, but critically, also remaining sovereign by adopting an agnostic, multi-LLM approach to avoid dependency on any single language model.

Λ **The challenge:** The core objective for the industry is self-transformation through AI adoption, not as an end in itself, but with the overarching goal of remaining a transformative force for society in the face of four major transitions: environmental, technological (AI), demographic, and geopolitical. These transitions, while offering great opportunities, are also perceived by clients as challenging, leading to a sense of loss of control. BPCE is committed to supporting the AI transformation in three strategic ways, underpinned by the recognition that without banks, the required large-scale transitions will not happen.

"
"Age, it's not a resistance to change. Age actually it's the experience of change. We have that experience, and so we want to use that experience today to transform ourselves to be transformative for the society."

Bernard Fontana, Chairman & CEO

About Bernard Fontana: As Chairman and CEO of Électricité de France (EDF), Mr. Fontana leads Europe's largest nuclear operator and is a prominent figure in the continent's transition toward low-carbon, highly available energy infrastructure.

About EDF: EDF is an integrated electricity provider headquartered in Paris, France, operating with a mission to build a net zero energy future; the group reports annual sales of approximately €118.7 Billion and employs over 119,444 people worldwide

Can France effectively position itself as a prime location for data centers, given the global energy demands of the AI revolution?

Bernard Fontana: France is optimally positioned due to its reliable, competitive, and low-carbon electricity supply, which are the 4 key requirements for data center and AI customers. The national grid guarantees reliability at a factor of 99.9995%, backed by close to 100 terawatts of available power. The energy is highly competitive, currently priced €8/MWh lower than in Spain, €36/MWh less than in Germany, and half the price of Italy (a €51/MWh differential). Critically, it is low-carbon, at only 22 grams of CO2 per kilowatt for continental France—eight times less than Germany.

How significant is the reliability of the French grid in attracting large-scale data center investment?

Bernard Fontana: The grid's reliability is a key argument, as France benefits from both excellent generation and a high-performing distribution network. EDF's guaranteed reliability figure (**99.9995%**) stands in stark contrast to the US, where the average outage duration exceeds **10h/year**, which is more than 10 times higher than in France.

Beyond energy provision, what turnkey solutions is EDF offering to accelerate site deployment for data center operators?

Bernard Fontana: EDF is leveraging its position as one of France's largest landowners to offer turnkey, "ready-to-plug-in" industrial sites, significantly accelerating deployment speed. For example, OpCore announced a **€4 billion** investment for a data center on a former coal generation site in Montereau, close to Paris; this represents a very successful site transformation. Similarly, Eclairion announced investment in two sites in Moselle (La Maxe and Richemont) following the same industrial approach. The full package also includes optimizing environmental factors, such as heat recovery from data centers via the subsidiary Dalia.

What is the regulatory landscape in France regarding speed of deployment, given concerns about long permitting times in Europe?

Bernard Fontana : EDF is proactively working to anticipate regulatory hurdles by conducting environmental studies ahead of time so sites are pre-approved and ready. Furthermore, the French President recently announced a fast-track approach for key strategic projects in regions, clearly signaling a supportive mindset toward the rapid deployment of data centers across France.

How is EDF integrating AI into its core business, specifically in nuclear engineering and operational efficiency?

Bernard Fontana: AI is integrated not only as a service utility but also for internal efficiency, extending far beyond the electricity supply chain. EDF is using AI in conjunction with digital twins of its plants, where simulations help optimize engineering processes and control command systems, which are inherently complex. The application of machine learning has allowed EDF to reduce unplanned outages by 30% through improved learning and anticipation.

> "It's low carbon. 22 grams per kilowatt for France... it's four time less than Spain and nine eight time less than Germany."

Trusted AI : Now you can accelerate.

Hélène Bringer, President S3NS

Anthony Cirot, VP EMEA South Google Cloud

About Hélène Bringer: Chairman of S3NS (a joint venture between Google Cloud and Thales), specializing in the fusion of cyber defense and hyperscaler data/AI capabilities.
About S3NS: A joint venture majority-owned and controlled by Thales dedicated to ensuring digital sovereignty. The company combines Thales's leading expertise in cyber defense and security with the technological power of Google Cloud.

About Anthony Cirot: Vice President, South CEMEA at Google Cloud, driving the adoption of Google's AI and cloud offerings across Southern Europe, the Middle East, and Africa.
About Google Cloud: A leading global provider of cloud computing services, Google Cloud reported $33.1 billion in revenue in 2023 and is part of Alphabet Inc., which has over 180,000 employees.

> "*For too long, European organization have refused to move their critical workloads to the cloud for many reasons: data sovereignty risks, compliance, and certainty and trust. All these spheres have acted as a gravitational pool keeping critical organization from achieving true AI velocity.*"

∧ **S3NS - Trusted Sovereign Cloud:** The solution is the **Premium** trusted cloud by S3NS, built as a dedicated and isolated Google Cloud Platform. The infrastructure is exclusively operated and owned by S3NS, a French company fully controlled by Thales, ensuring full control and sovereignty while leveraging Google's technology. The solution is designed for SecNumCloud qualification, **guaranteeing protection against extraterritorial laws**. The offering integrates Google's full enterprise AI stack, featuring Vertex AI and BigQuery.

∧ **Sovereignty Unlocks AI Opportunity:** Anthony Cirot positions digital sovereignty as a lever for innovation, not a constraint, unlocking a massive €400 billion AI market opportunity in Europe over the next decade. To realize this, the sovereign platform must ensure three things: **access to the latest AI tools and models, a data lake, and, crucially, technological freedom of choice**. Premium is already adopted by 50 customers across critical sectors like EDF for nuclear energy projects and Thales for its Security Operation Center (SOC).

∧ **Conclusion:** The collaboration between Thales and Google Cloud, executed through S3NS, fundamentally redefines the European cloud landscape by proving that compliance with the most stringent sovereignty requirements (SecNumCloud) can be achieved without sacrificing access to hyper-scale innovation and best-in-class AI technology. The Premium offering is an industrialized solution that enables European enterprises to move sensitive data to the cloud with absolute confidence, ensuring their entire AI value chain—from data grounding in BigQuery to agent orchestration with Gemini Enterprise—is operated within a trusted, secure, and state-of-the-art ecosystem, thereby setting the new standard for accelerated digital transformation in the region.

∧ **AI Sovereignty Challenge:** The key challenge for European organizations is the lack of complete end-to-end AI sovereignty, forcing them to balance the need for state-of-the-art AI stacks against sovereign compliance. Hélène Bringer argues that for too long, fears surrounding data sovereignty risks, compliance uncertainty, and trust have acted as a "gravitational pool," preventing critical organizations from moving their workloads to the cloud and achieving true AI velocity.
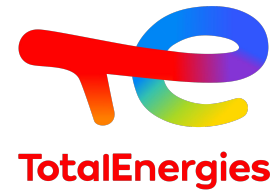
> "*The latest achievement was Gemini 3.0 that we launched last week. It is already ranked the best LLM in the market on LMArena.*"

Visionary Keynote.

Patrick Pouyanné, CEO

TotalEnergies

About Patrick Pouyanné: Rising through leadership positions, he became CEO in 2014 and Chairman in 2015, guiding the company through global energy transitions and strategic growth. He holds degrees from École Polytechnique and École des Mines de Paris.

About TotalEnergies: TotalEnergies is a global multi-energy company that produces and markets energies on a worldwide scale: oil and biofuels, natural gas and green gases, renewables, and electricity. Under Patrick's leadership, TotalEnergies has made significant strides in leveraging digital technologies and artificial intelligence to enhance industrial performance and accelerate its transformation.

Patrick Pouyanné
Chairman & CEO

Grand Palais, Paris.

∧ **Context:** TotalEnergies is executing an integrated multi-energy strategy built on two pillars: producing low-cost, low-emission oil and gas, and aggressively developing an integrated power and electricity business. Data and AI are identified as a strategic lever to support both operational performance and the overall energy transition, allowing the company to deliver more affordable energy to customers while providing a huge opportunity to grow their business.

∧ **Industrializing AI:** The company established a Digital Factory in Paris five years ago, staffed with 300 data scientists and AI engineers, resulting in the development of over 100 applications and the deployment of over 10,000 AI models to production, demonstrating a rapid scaling of AI delivery capabilities.

∧ **Data Platform Strategy:** Recognizing the criticality of reliable data, TotalEnergies is launching major data platform development programs in 2024 (focusing on the power value chain with Amazon) and 2025 (industrial assets with Aspentech and Cognite) to maximize the value of AI solutions.

∧ **Operational Excellence & Emissions Reduction:** AI's primary objective is to increase revenues rather than merely lowering costs. Examples include connecting 3,000 equipment for predictive failure anticipation and monitoring methane emissions using 3,000 sensors combined with cameras, satellites, and drones to quickly analyze and correct leaks, directly supporting the "less emissions" objective.

∧ **Integrated Power Modeling & R&D:** The 2025 strategic research and technology program includes four platforms centered on AI to optimize integrated power modeling, improve design and integration of renewable assets into grids, enhance weather/price forecasting, and accelerate project development.

∧ **Ecosystem Development (Mistral AI):** TotalEnergies is collaborating with Mistral AI, setting up an innovation lab to explore generative and agentic AI for operational performance and R&D assistance, while also examining the use of Mistral AI infrastructure in Europe to ensure digital sovereignty.

∧ **Conclusion:** AI creates a huge new demand for energy, with data centers potentially growing from 4% to 8%-12% of global electricity demand. TotalEnergies sees a major business opportunity in supplying clean and firm power to tech companies (e.g., Amazon, Microsoft, Google), positioning itself as a leader in this booming segment by leveraging gas-to-power assets, such as through the recent joint venture with EP in Europe.

"
"Artificial intelligence is a strategic lever for total energies which on one side will support our operational performance but on the other sides as well energy transition of the company."

Unlocking AI-powered experiences and creativity.

Luc Dammann, President EMEA — Adobe

About Patrick Poyanné: Luc Dammann joined Adobe in 2016. Today, he leads the company's business in Europe, the Middle East, and Africa. Luc previously served as Adobe's Vice President and Managing Director in Western Europe, covering France, Iberia, Italy, Benelux, and the Nordics.

About Adobe: Adobe is changing the world through personalized digital experiences. Adobe empowers everyone, everywhere to imagine, create and bring any digital experience to life. From creators and students to small businesses, and global enterprises — customers choose Adobe products to ideate, collaborate, be more productive, drive business growth and build remarkable customer experiences.

∧ **Context:** The debate on AI's impact is over; the focus is now on the speed, responsibility, and value creation of the transition. The core challenge is adapting to three profound shifts: how people discover brands, how companies operate, and how teams create value, all while consumer behavior has already changed, moving decisions to AI agents before human interaction occurs.

∧ **The Rewriting of Discovery:** 80% of people rely on AI-written summaries for nearly half of their online searches, indicating a massive behavioral change where AI agents now act on consumers' behalf, necessitating that brands be discoverable by these agents.

∧ **From Experimentation to Outcomes:** Businesses are moving past pilots, demanding real productivity gains, measurable cost takeout, faster go-to-market, and topline impact through ultra-personalized experiences at scale, all secured by enterprise-grade governance and brand safety.

∧ **The Content Velocity Engine:** A single global campaign can now require over 500,000 assets. AI is the only way to scale this demand, transforming the content supply chain from a bottleneck into a velocity engine that cuts production cycles from months to days and enables personalization at reach.

∧ **Real-World ROI and Impact:** Coca-Cola used Adobe Firefly to generate on-brand content 10x faster, boosting revenue by 35% and checkout conversion by 24% without increasing content spend. L'Oréal increased content production by 30% using custom Firefly models.

∧ **The Agentic AI Foundation:** 85% of AI projects fail due to poor data quality. Operationalizing AI requires a strong agentic foundation built on high-quality, unified data, connecting content to that data, and integrating workflows into the customer journey. General-purpose AI is not sufficient; purpose-built, enterprise-ready agents are required.

∧ **Conclusion:** Organizations that embrace AI now are not just improving efficiency; they are defining the next era of customer experience. When AI is built around a brand's gravity and workflows, it moves beyond being a tool and becomes a powerful force multiplier that builds the future customers expect.

> "The customer experience rulebook is being rewritten in real time. Right now the question is not whether conversational AI is the future. Your customers have already decided that for you."

CEO Spotlight: Insuring the Future with AI.

Hans De Cuyper, CEO — ageas

About Hans De Cuyper: Hans has served as the Group CEO of Ageas for five years, previously leading its Belgian entity, and has extensive experience in digitization and data strategies within the insurance sector.

Ageas is an international insurance group, headquartered and listed in Belgium, with a heritage spanning 200 years. Artificial intelligence is a cornerstone of the Group's strategic plan Elevate27. Ageas is leveraging technology to transform customer experience, improve insurance excellence and operational efficiency and drive innovation across its markets.

At Adopt AI, he will explore how innovation and artificial intelligence are transforming the insurance industry. AI empowers insurers to offer more personalised and sustainable protection based on deeper customer insights.

Grand Palais, Paris.

- The core challenge lies in how the insurance industry, traditionally reliant on historical data and legacy systems, must evolve with the integration of AI and data to unlock business intelligence and enhance customer experiences.
- **Ageas has been on a journey to digitize data infrastructure,** migrating from outdated mainframe systems to cloud solutions, facilitating a more agile data management environment.

- **AI is positioned as a transformative tool** that will shift customer journeys from a data output perspective to a data input one, enabling personalized insurance products and streamlined claims processes.
- New insurance models, such as usage-based and contextual insurance, reflect a growing trend towards creating tailored offerings that accommodate customer behaviors and needs.
- **The potential risks associated with AI include greater exclusion of high-risk populations due to data-driven segmentation**, which poses ethical and regulatory challenges for the industry.
- **By implementing AI ethically,** Ageas aims to increase inclusion, particularly in underinsured populations, using innovative approaches to risk assessment, such as leveraging satellite data for agricultural insurance.
- **Hans emphasizes that the deployment of AI within insurance should prioritize societal responsibility** by aiming for inclusion rather than exclusion, recognizing the vital role insurance plays in communities.
- **The insurance industry must evolve by embracing AI** and modernizing data infrastructure to unlock business intelligence and better serve customer needs.
- **Potential risks surrounding AI deployment necessitate a structured yet ethical** approach to mitigate exclusion and support regulatory frameworks.
- **Emphasizing societal responsibility** can lead to greater financial inclusion for underserved populations through innovative insurance solutions that leverage advanced analytics.

"

"AI needs to be at the core of our business to drive inclusion and not exclusion."

Fireside Chat.

Marie-Aude Thépaut, CEO

Marie-Aude Thépaut, an actuary by training, has spent her entire career at CNP Assurances. She has held leadership positions in actuarial services, risk, performance management, and international business development, before being appointed CEO in January 2024.

CNP Assurances is a leading player in personal insurance in France, Europe, and Brazil, protecting 36 million personal risk and protection policyholders worldwide and 13 million savings and pension policyholders. CNP Assurances is committed to anticipating societal changes and reinventing protection solutions at every stage of life.

Could you provide an overview of CNP Assurances' market position and distribution model?

∧ **CNP Assurances operates as a leading international player primarily in Europe and Latin America,** holding the position of the second-largest term creditor insurer in France and the third-largest insurer in Brazil. The company functions on a robust B2B2C model, maintaining long-term agreements with major banking partners like La Banque Postale and Caixa Econômica Federal, while also utilizing open models with retailers and brokers. Financially, the group generates a net result of €1.5 billion and is recognized for its commitment to ESG, ranked among the top 9% of sustainable companies globally.

CNP has been working with AI for over a decade. What were the initial sparks that ignited this transformation?

∧ **The transformation was driven by two distinct engines:** necessary innovation under pressure and deep technical expertise. In Argentina, amidst a severe economic crisis with 200% inflation, the local subsidiary moved away from top-down directives to build a decentralized "agentic platform" to survive. This resulted in responding to customers 30% faster and dividing call supervision costs by a factor of 30.

How do you successfully scale AI across a large, regulated organization?

∧ **Scaling requires a clear "Why," focus, and operational evolution.** The "Why" is driven by the pressure between customer demands for immediacy and strict regulatory constraints. The long-term vision is to become the "Netflix of insurance," offering personalized suggestions and single-click service execution.

∧ **Strategically, CNP focuses on 4 core domains:** Customer Relationship, Augmented Marketing, Compliance/Fraud, and AI for IT. Successfully executing this requires a dual operating model: maintaining a fixed long-term "North Star" vision while building with flexibility in daily execution to leverage AI for creating bandwidth in legacy systems.

What are your key learnings on leading the cultural and people aspect of this transformation?

∧ **Deep organizational transformation rarely stems from comfort;** it requires a sense of threat or urgency, such as economic instability in Argentina or regulatory pressure in Europe. To move a large organization, leadership must combine a top-down strategic vision with a bottom-up "AI for All" approach. The goal is to demystify the technology by allowing employees to manipulate it directly. When teams personally experience how AI simplifies their daily tasks and increases their impact, resistance fades and is replaced by desire and engagement.

> *"In the long term, we are inevitably moving towards the 'Netflix of insurance' with personalized suggestions and customer journeys that deliver the service in a single click."*

Tanuja Randery, Managing Director & Vice President EMEA

aws

About Tanuja Randery: Tanuja Randery is the Managing Director and Vice President for Amazon Web Services (AWS) across Europe, the Middle East, and Africa, drawing on extensive experience in roles such as Chief of Staff, Head of Transformation, Head of Strategy, and CEO. Her background focuses on driving large-scale organizational change and transformation in the tech sector.

About Amazon Web Services: AWS is a subsidiary of Amazon (NASDAQ: AMZN), specializing in on-demand cloud computing platforms and APIs to individuals, companies, and governments. AWS is the world's most comprehensive and broadly adopted cloud, enabling customers to build anything they can imagine.

∧ Context: The primary challenge for organizational leaders is overcoming the "tyranny of 'or'," which forces a choice between two mutually exclusive options, such as innovation or efficiency, and cost improvement or growth. AI, and specifically "agentic AI," requires adopting the "genius of 'and'" to unlock the technology's full potential, capitalizing on both innovation and efficiency simultaneously.

∧ The AI Adoption Pace: AI adoption has seen a nearly 30% increase in the past year, with five businesses adopting AI every minute. This accelerated adoption is projected to generate €600 billion in economic value impact for Europe by 2030, a figure that the speaker believes is likely underestimated. Notably, 90% of businesses using AI are reporting not just efficiency, but revenue growth, with some seeing a 30% boost.

∧ Agentic AI Use Cases (Needle-Moving Impact): High-impact deployment areas include transforming software development (agents are pioneers/collaborators, not just automation; Amazon saved $260 million and 4,500 developer years using Q developer), reshaping customer experience (moving beyond basic chatbots to compliant, tone-of-voice-aware assistants that train call center agents), and knowledge work productivity (using AI for meeting summarization, saving up to two to three hours per day for strategic decision-making).

∧ Leadership in the Agentic Era (Scaling with Clarity, Not Control): The shift requires moving from functional silos to a unified, interconnected operating model, like nature's immune system, where agents and humans collaborate. This includes concepts like the "Single-Threaded Owner" at Amazon, or adopting AI governance frameworks like the one at Schaeffler, which uses an AI inferencing gateway on Bedrock to ensure data security while enabling innovation at the edge.

∧ Culture of Innovation and Risk Management: Organizational transformation failures (estimated at 75-90%) are due to a lack of mindset and culture, not technology. Leaders must instill a learning culture that allows for "two-way door" decisions (reversible experiments) at the edge. Risk management must move from slow "factory floor" control to rapid "trading floor" speed, embedding predictive monitoring and guardrails to react to disruption at the speed of algorithms, rather than waiting for a human kill switch.

∧ Conclusion: Successful navigation of the agentic AI era requires leaders to adopt the "Y quotient"—a commitment to starting with the customer problem and relentlessly asking the difficult "why" questions (e.g., Why does this take 10 days?). Speed is a leadership decision, and the time is now to unleash AI responsibly, not timidly.

> "We are now in the era of agentic AI. We're moving from reactive to predictive. We're moving from assisted to autonomous to truly intelligent systems. And this is going to go by far faster than we've ever seen."

CEOs Vision on AI Adoption. (1)

Olivier Gavalda, Deputy CEO

Olivier Sichel, Deputy CEO

Emilie Sidiqian, CEO

Olivier Gavalda has held key responsibilities across the Group since 1988. His long-standing career includes leadership roles within regional banks and central functions. Today, under his leadership, **Crédit Agricole** is accelerating its transformation into an innovation-driven universal bank, integrating AI at every level of its operations.

Olivier Sichel: Director of the Banque des Territoires and Deputy CEO of Caisse des Dépôts, focused on digital infrastructure and public interest investment.
Caisse des Dépôts (CDC): A French public sector financial institution (Assets: ~€1.3T, HQ: Paris) supporting public policy, housing, and regional development.

Salesforce is the world's leading customer relationship management technology, helping companies and organizations build stronger, smarter customer relationships.
Emilie Sidiqian drives the digital transformation of French businesses with a visionary approach: she enables companies and organizations to unlock the full potential of agentic enterprises with trusted AI, data, and apps, helping them innovate and thrive in a rapidly evolving landscape.

How do you integrate AI into your company's vision and ambition?

Λ **Olivier Gavalda (Crédit Agricole):** Defines AI not just as a tool, but as a strategic pillar for the bank's future. He outlines three core areas: 1) **Speed:** Combating digital-native competitors (like Revolut) by dividing time-to-market by two. 2) **Performance:** Reducing administrative costs and gaining efficiency, targeting a 20% time saving on admin tasks and 50% efficiency gain in compliance by 2028. 3) **Client Relationship:** enhancing the human advisor's capabilities rather than replacing them, ensuring high personalization.

Λ **Olivier Sichel (Caisse des Dépôts):** Adopts a "double approach": Internal AI for operational efficiency, and External AI for the country. He details the "Digital Horizon 2030" roadmap, which includes a €500M investment to scale startups to IPO. He emphasizes the role of BPI France in helping 10,000 SMEs adopt AI and supporting French territories (mayors and regions) to implement AI infrastructure, leveraging France's high fiber (FTTH) coverage.

What is the "next best move" for clients, and is AI just a tool or a revolution?

Λ **Emilie Sidiqian (Salesforce):** Argues that AI is a revolution because it impacts everyone simultaneously—employees, customers, and citizens can now challenge institutions. She advocates for an "Agentic World" designed for people, not just on people. She introduces the "Accordion Model" for adoption: Think Big (analyze business models), Focus (define scope), Go Live Fast (don't wait years), and Invest (secure the savings/growth). She cites Adecco UK, where 66% of candidate qualification is now handled 24/7 by AI agents.

> "Nobody wants to discover one day that Pronote has been hacked and that the data of all our kids are somewhere in the cloud not secured... We want to provide this trusted environment."

CEOs Vision on AI Adoption. (2)

How do you execute this transformation successfully?

∧ **Emilie Sidiqian (Salesforce):** Citing a BCG study, she notes 67% of employees view AI as a "virtual colleague." Execution requires defining the "job description" for the AI agent and redesigning workflows. She shares the example of Bouygues Telecom: they augmented 6,000 staff with AI, resulting in doubled adoption rates, a customer satisfaction score of 4.5/5, and the automation of 25% of customer care cases since September.

What are the top priorities regarding risks, security, and sovereignty?

∧ **Olivier Sichel (Caisse des Dépôts):** Sovereignty and data safety are paramount. He uses the example of Pronote (subsidiary of La Poste/CDC group), which holds sensitive data (student grades). He argues that just as parents trust them with student data, the public must trust them with health and insurance data in the AI era. The priority is providing a trusted cloud and AI environment to prevent data leakage.

∧ **Emilie Sidiqian (Salesforce):** Reinforces that with a cyberattack occurring every 11 seconds in France, companies cannot play "sorcerer's apprentice." Security must be by design, avoiding "Dark AI" and shadow IT. Companies must select platforms that guarantee security and value alignment.

Sovereignty & Trust as a USP: For European institutions, data sovereignty (keeping data safe/local) is not just compliance, but a core value proposition (like the banking secrecy of the past) to build trust in sensitive sectors like health and education.

> "*Don't think that you copy paste the way you work... you need to redesign the process... It's not a tool, it's a virtual colleague.*"

> "*I don't want to be a Revolut... we want to be at the best level... but to make the difference with the human touch.*"

How do you manage the human and cultural aspect of this transformation?

∧ **Olivier Gavalda (Crédit Agricole):** The priority is enabling 160,000 staff via training. He announces the creation of a group-wide Data Marketplace to break silos and an AI Factory to distribute assets to business units. However, he stresses the "Human Touch" as a differentiator; while they will match neobanks in tech, they will beat them on human advisory. He draws a parallel to healthcare: AI improves diagnosis, but the doctor provides the reassurance.

∧ **Emilie Sidiqian (Salesforce):** Emphasizes the "4 Rs": Redesign processes, Reskill people (Salesforce mandates 2 days of training/month), Redeploy workforce, and Rebalance. She asserts this is a CEO and Chief People Officer topic, not just IT, as the pace of innovation currently outstrips the pace of adoption.

The Human-AI Hybrid Model: Traditional players (banks, telcos) should not aim to be purely digital. Their competitive advantage lies in using AI for backend efficiency (admin/compliance) while elevating the human advisor for high-value interactions.

Building the AI-Powered Supply Chains.

Marie-Christine Lombard, CEO

Thomas Larrieu, CEO

About Marie-Christine Lombard: She joined GEODIS in October 2012, eventually being named Chairman of the Executive Board.
About GEODIS: A global leader in transport and logistics, committed to ensuring the efficient, sustainable, and reliable flow of goods across every link of the supply chain.

About Thomas Larrieu: An independent global pharmaceutical group governed by a non-profit foundation, HQ in Suresnes, France, with ~€5.3B in revenue and 22,000 employees.
About Upply: A technology company dedicated to creating efficient and resilient supply chains using intelligent software and agents, significantly backed by GEODIS.

> "I see AI as an enabler to constantly improve the synchronization of flows on behalf of customers and make our operations more efficient and optimized, be it a truck, an aircraft, or a vessel."

∧ **Context:** The supply chain is complex, global, and multimodal, requiring perfectly seamless management where real-time data has always been key to resilience. AI is seen as an augmentation of GEODIS's existing digital efforts to synchronize worldwide flows. The logistics market is worth 10 trillion, with 5 trillion outsourced, indicating a vast potential for optimization. GEODIS made a strict decision in 2018 to invest heavily in data management, building a modular Data Lake to clean and unleash data from disparate systems. GEODIS spends 4% of revenue on IT, digital, and AI expenses, underscoring its vital role in business management.

∧ **Logistics digital platform revolution:** The investment, starting around 2018-2019, was driven by the rise of digital freight forwarders and startups. GEODIS decided to launch a new venture, UPPLY, with a different setup and governance, intending for it to become the "booking.com of logistics". The core goal is to optimize the greatly unoptimized supply chain, where assets like trucks are often not fully utilized because operators don't communicate. UPPLY was created to be a platform that collects the offer and the demand to create an ecosystem, leading to greater efficiency and positive environmental impact by reducing waste.

∧ **AI expands logistics market:** AI can increase the addressable market by attracting and touching new markets and potential clients. He cites UPPLY's new market intelligence agent, trained on proprietary and client data, designed to give freight forwarders and users better insights to make more intelligent decisions.

∧ **Platform neutrality, open capital:** UPPLY is at a crossroads, currently a platform open to shippers and transport companies, but its 100% ownership by GEODIS (a competitor to other transport companies) creates uneasiness. The next chapter is to open the capital of UPPLY to other players, with GEODIS remaining a core shareholder, to achieve the ultimate goal of optimizing the supply chain and reducing negative environmental impact. This involves having competitors join the platform, which is deemed acceptable for the sake of sector-wide optimization.

∧ **Supply chain digitization opportunity:** The transport and supply chain industry is huge, strategic, and critical for sovereignty and resilience. It is a field where AI can have a very strong impact by solving specific operational and strategic problems. Despite a large amount of available data and investment, the supply chain industry has not yet completed its digital revolution and remains "under digitized," which creates a huge opportunity for AI in the forthcoming years.

> "Supply chain hasn't done its digital revolution yet. It's a market with a lot of digital aspects, but it's under-digitized. I think this is something where AI will have an impact in the forthcoming months and years."

Special interview.

Guillaume Faury, CEO

AIRBUS

About Guillaume Faury: As CEO of Airbus, his expertise is central to navigating the aerospace giant's technological transformation, which includes the integration of Artificial Intelligence and a cohesive global market strategy.

About Airbus: A global leader in aerospace, defense, and space, its 2023 figures include €65.4 billion in revenue, approximately 148,000 employees, and its corporate headquarters are located in Toulouse, France. Airbus is leveraging AI as a critical enabler of its future, from automated flight systems and unmanned traffic management, to AI-powered making assistants, computer vision, machine-learning technologies and even AI in space.

Grand Palais, Paris.

How is AI accelerating the commercial plane manufacturing process, especially with a 10-year backlog?

Λ AI is used across three core fields—development, production, and services—with production being a current main challenge. AI is already deployed for quality checks and process efficiency, powering automation and robotics. The full transformative impact will be on the next generation of planes, where AI will be deeply integrated with robotics and engineering simulation to ensure faster, more efficient production with an "even higher degree of quality first time". In services, predictive maintenance uses massive onboard data to identify failure patterns, allowing Airbus to prevent deficiencies rather than fixing them afterwards.

Will AI lead to autonomous commercial planes or single-pilot cockpits?

Λ No, not in the near term for commercial aviation, as AI today is "not considered predictable enough" for core, safety-critical functions. While military systems use AI extensively, such as for automatic refueling, commercial aircraft use AI primarily in non-safety-critical ground systems (engineering, quality, support). Onboard commercial planes, AI is only used to enhance safety; for instance, using image recognition in automatic landing systems to detect ground objects that might be missed by the pilot, thus increasing the safety layer. This cautious approach is due to the high risks involved when carrying passengers.

What is your view on the risk of over-regulation in Europe compared to the US/China approach to AI innovation?

Λ Europe faces a complex dual mandate: the need to protect against risks and the need to unleash the full potential of new technologies and opportunities. This creates a fundamental challenge because Europe's current philosophy is to regulate upfront to try and prevent risks, which stands in stark contrast to the US approach of unleashing full potential and managing risks later. The result of the European approach is that it is limiting opportunities and significantly reducing the speed and field of action for innovation. This risks Europe lagging behind global competitors like the US and China, who are focused on speed. Therefore, the debate on regulatory "simplification" needs to be reframed as a necessity for Europe to "accept more risk" to capitalize on opportunities, recognizing that in the current technological environment, speed matters most. The goal should be to rebalance the framework to foster innovation without losing the competitive race.

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"We're deploying AI in military systems to digest a huge volume of data and bring consolidated information or help for decision to human beings. But we keep human beings at the center when it comes to decision making."

With AI, putting the human back at the center of the game.

Stéphane Pallez, Chairwoman & CEO

FDJ UNITED

About Stéphane Pallez: Stéphane is CEO and Chairwoman of FDJ Group (La Française des Jeux) and has a distinguished background in the French public and private sectors, previously serving as CEO of the Centre Monétique Interbancaire and as a key advisor to the French Ministry of Economy and Finance, focusing her expertise on financial services and large-scale organizational leadership.

About FDJ UNITED (La Française des Jeux): A European leader in betting and gaming in Europe, operating across a wide portfolio of iconic brands and digital platforms. Its mission is to be a leader in responsible gaming and to use its profits to serve public interest initiatives, maintaining the trust of its 33 million players across Europe, including 9 million digital users.

∧ **Context:** The challenge is to navigate the profound transformation brought by AI, which is likened to the advent of electricity and the internet, while countering the narrative that machines will simply replace people. FDJ's core conviction is that AI should instead be the force that frees humans to be more creative and strategic, putting the human back at the center of the game.

∧ **Empowering the Workforce:** FDJ's vision is that AI is about empowering, not replacing, people, shifting teams from repetitive, low-value tasks to strategic, creative, and ultimately, more human work.

∧ **Massive Training Commitment:** FDJ is committed to training 100% of its employees in AI, partnering with the Albert School to form a Data and AI academy, recognizing that building employee confidence and competence is essential for a successful transformation.

∧ **Pilot Program Success:** An internal experiment with Microsoft Co-pilot showed significant engagement, with 90% of equipped employees engaging monthly and 80% engaging weekly, demonstrating a serious adoption of AI tools by the workforce.

∧ **Focus on Creativity & Efficiency:** AI is actively leveraged to boost creativity, particularly in visual production, enabling teams to design and personalize communication materials and in-store advertising faster, significantly cutting down production time.

∧ **Ecosystem Building & Partnerships:** FDJ is contributing to a French and European AI ecosystem by announcing a strategic partnership with the French agentic AI champion, h company, to identify high-value use cases for productivity and player experience improvement.

∧ **Responsible Gaming Implementation (FDJ Protect):** The core use case for customer-facing AI is Responsible Gaming. FDJ developed an in-house AI powerhouse algorithm, 'FDJ Protect,' to identify and monitor at-risk players, ensuring a unique and safe experience while maintaining the fun and emotion of the game.

∧ **Conclusion:** This transformation must be paired with strong governance and ethics, embodied by an internal AI acceptance board and a public Responsible AI Charter. Ultimately, the future of both work and play will be more human than ever, provided organizations choose to put their people at the center of every step in the transformation.

> "AI is not about replacing people. It's about empowering them. It's about giving our teams the tools to move from repetitive low value task to work to what is more strategic, more creative and at the end of the day more human."

In French: Investing in Intelligence, The Next Wave.

Éric Petitgand, CEO

Crédit Mutuel Alliance Fédérale

An expert in cooperative banking, **Éric Petitgand has built his career within Crédit Mutuel**, where he has driven both regional and international development.

Crédit Mutuel Alliance Fédérale is one of the leading banking and insurance groups in France, serving millions of customers with a cooperative model rooted in solidarity, responsibility, and long-term commitment.

How has a decade of "Cognitive Factory" strategy prepared the group for the current GenAI wave?

∧ **The group's strategy is rooted in a decentralized, mutualist model that prioritizes IT sovereignty and internal control.** Unlike peers who outsourced, Crédit Mutuel maintained internal mastery of its processes and infrastructure. They identified AI early as a tool for operational excellence, not just a trend. This 10-year head start allowed them to seamlessly pivot to Generative AI in late 2022 because the foundational infrastructure and team mindsets were already in place. They are currently leveraging partnerships with European leaders like Mistral AI to maintain this sovereign optimism.

What differentiates the current GenAI era from the "Traditional AI" of the last decade?

∧ **The primary differentiator is natural adoption.** While traditional AI required change management, GenAI is being adopted intuitively by the general public.

How does the bank address the "Trust Equation" (Trust = Adoption = ROI) in the age of Black Box AI?

∧ **Banking is impossible without trust.** GenAI introduces anxiety regarding the "place of the human." To counter this, the group established a "GenAI Trust Charter". This framework defines strict rules, processes, and transparency protocols to ensure AI is explainable and fair. They aim to make these ethical standards opposable to third parties, ensuring that technology remains a "proof of trust" rather than a source of opacity.

As a Benefit Corporation, how does this status influence AI deployment?

∧ **Being a mutualist group protects them from the "dictatorship of short-term profitability".** Their mission obliges them to act for society.

What is the future "Social Contract" between the Bank, AI, and the Human workforce?

∧ **The human element must not be the "adjustment variable" for AI economics.** There must be Intentionality: the organization must actively decide that AI serves the human, otherwise, external forces will dictate that outcome. The strategy is "Augmentation" regarding competence and soft skills, allowing staff to shift from low-value tasks to high-value advisory roles. The ultimate mantra remains: "A project for people, by people".

> "
> *"The human is not the adjustment variable for AI. If it becomes so, believe me, we have a rather dark future."*

Building trusted intelligence: From AI experiments to mission-critical systems.

Florian Douetteau, CEO & Co-founder dataiku

About Florian Douetteau: Florian co-founded Dataiku out of a passion for data, people, and the transformative potential of AI. A graduate of the École Normale Supérieure, he entered the tech world in 2000 at Exalead, a French search engine startup, and went on to hold key positions in product, engineering, and analytics. Since 2013, he has led Dataiku's growth into one of the most recognized AI platforms in the world.

About Dataiku: Dataiku is The Universal AI Platform™, giving organizations control over their AI talent, processes, and technologies to unleash the creation of analytics, models, and agents. Agnostic by design, it integrates with all clouds, data platforms, AI services, and legacy systems to ensure full technology optionality, empowering customers to future-proof their AI initiatives. Providing no-, low-, and full-code capabilities, Dataiku meets teams where they are today, allowing them to build with AI using their skills and knowledge.

The Flaw of "Magical Thinking": A significant barrier to trust is the prevalent "magical thinking" that model evolution alone will automatically solve complex organizational challenges like messy data, change management, and process definition. This denies the complexity and necessary human-driven risk management of an enterprise.

Need for "Ambition and Fearlessness": True enterprise trust will only be built when AI tackles "big heavy processes" that are mostly information-driven. These processes, costing companies of millions, require a fundamental, ambitious re-thinking and re-mapping of the workflow, deciding what is an agent, a human, or a scoring system.

Formalizing a "Reasoning Layer": To achieve trusted, scalable AI, enterprises must move beyond standardizing computation and data (lakes, warehouses). The next necessary step is to put the enterprise's "decision-making and problem-solving" logic—currently locked in people's brains—into a formal, managed layer of reasoning.

The Structure of Trusted Intelligence: This formal reasoning layer involves: continuously assembling diverse building blocks (human-in-the-loop, business rules, predictive systems, generative AI); and explicitly managing, adapting, and observing these systems. This creates an accountable system that can be judged on whether it is working, which is the only path to adopting mission-critical AI.

The Role of IT must Evolve: The IT function must evolve its role from managing apps, data, and compute to abstractly organizing and owning this decision-making and reasoning layer. This shift is necessary to align business, IT, compliance, and risk teams for the transformation of mission-critical processes within the next 2 or 3 years.

Conclusion: The path to trusting and successfully adopting AI at an enterprise scale is not about relying on increasingly powerful black-box models, but by building a concrete, accountable Reasoning Layer that formally institutionalizes the company's decision-making logic. This layer will transform the role of IT and unlock the ability to tackle high-value, mission-critical business processes.

Context: The current state of enterprise AI in 2025 is marked by "naiveté," comparing it to building a website in 1995—valuable, but lacking the core conceptual frameworks (like e-commerce) for mass-scale, profitable application. The speaker identifies a profound Trust Deficit because current AI applications range too widely in value (from near-worthless to agents generating $20 million in ROI for finance automation), suggesting the industry lacks the right terminology and standardized approach to assess utility.

> "Trust is built on accountability, necessitating a new, formal Reasoning Layer that captures the company's decision logic and shifts the role of IT toward organizing this abstract intelligence."

Special interview.

Estelle Brachlianoff, CEO

About Estelle Brachlianoff: Estelle Brachlianoff, who is a graduate of the École Polytechnique and the Ponts et Chaussées engineering school, took over as CEO of Veolia on July 1, 2022, following a successful tenure as Deputy CEO and Zone Director for the UK and Ireland. Estelle is leading the global reference in ecological transformation and pioneering solutions for water, waste, and energy management.

About VEOLIA: With nearly 215,000 employees worldwide, Veolia is a global leader in ecological transformation, providing game-changing solutions in water, waste, and energy management.

How is GenAI enabling Veolia's ecological mission and achieving broad adoption across its 215,000 employees?

∧ Veolia uses GenAI to directly enhance its core mission—reducing water footprint, increasing green energy, and cutting pollution. A key deployment, "Talk to my Plant," demonstrates this by using a Natural Language Model (NLM) to democratize technical expertise, allowing any technician to query plant issues (using live data and digital twins) via their cell phone for immediate, efficient maintenance guidance. This approach supports employee adoption by building trust "milestone after milestone." Instead of a top-down mandate, Veolia trained 13,000 AI ambassadors across all levels to manage the transition, leveraging the inherent democratization of GenAI to empower non-specialists and place employees at the center of the revolution.

How does Veolia reconcile the high resource and energy consumption of AI and data centers with its ecological mission?

∧ This was at the forefront of our choices, including provider selection. The rule is that the environmental costs of the data center must be lower than the environmental benefit of the AI application. Veolia has developed an offer to make data centers more sustainable by recouping wasted heat, recycling cooling water, and treating electronic waste.

Will the use of AI lead to job replacement within Veolia?

∧ AI does not replace human beings; it enhances them by saving time from repetitive tasks, and allowing them to focus on what creates value. For example, AI can detect leaks in water networks to improve efficiency, but a person is still required to perform the physical replacement of the pipe section. We need the same 215,000 employees, but with enhanced resources, placing human beings at the center of the revolution.

What are the biggest current challenges in adopting AI?

∧ The biggest challenge is scaling up and industrialization, not job loss or environmental footprint. Many companies have great proof-of-concepts, but the difficulty lies in moving beyond an example to deploying the tool across thousands of sites. It requires rationalization and industrialization to move past the initial excitement phase.

Considering your global role, where does Europe currently stand in its AI journey?

∧ Based on an external study, Veolia is positioned in the best-in-class group among industrial companies. However, this is not a time to "rest on our laurels," as the landscape evolves rapidly. Success depends on maintaining clear views on conditions: ethical use, geopolitics, and environmental footprint, with the intent of using AI for good.

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> *"The biggest challenge for me is scaling up. There are many companies which have lots of PoCs and great ideas, but the question is how do you make sure that it doesn't stay an idea."*

Adopt AI