
AI
Adopt AI

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EDITORIAL

Damien Gromier, CEO & Founder of Adopt AI

Adopt AI was created from a simple conviction: artificial intelligence will only change our economies if it is truly adopted. Not tested. Not admired from a distance. Adopted, scaled, and governed in the real world.

AI is now everywhere in conversations, yet still too rare in daily operations. Many organizations are caught in the same loop: ambition, pilots, proofs of concept, then inertia. Adopt AI exists to break that loop. It was designed as a place where AI moves from promise to execution, and where decisions are made, not postponed.

This is what sets Adopt AI apart. It is not a technology fair and not a hype-driven conference. It is a meeting point for those who carry responsibility: CEOs, public leaders, industrial players, researchers, and entrepreneurs. AI is addressed here as a strategic and economic subject, one that reshapes competitiveness, productivity, sovereignty, and public action.

Adoption is the red thread. Scaling AI is rarely a technical problem alone. It requires leadership, investment, and courage. It means redesigning end-to-end processes, building strong data and infrastructure foundations, training entire workforces, and putting governance and accountability at the core. These choices are complex, sometimes uncomfortable, and always structural. Adopt AI creates the conditions for honest, high-level conversations about this reality.

Adopt AI also carries a clear ambition: to become the Davos of artificial intelligence. A neutral, trusted, international platform where economic leaders, governments, and experts meet to align on the direction of AI adoption, beyond slogans and short-term narratives.

From Europe, this ambition takes on a specific meaning. Europe brings talent, industrial depth, reliable and low-carbon energy, and demanding standards for trust and responsibility. Adopt AI aims to turn these assets into a collective advantage.

At its core, Adopt AI remains deeply human. The most impactful AI transformations are not about replacing people, but about empowering them. Adoption succeeds when people are trained, involved, and trusted.

Adopt AI is not about predicting the future of AI. It is about shaping it. Together.



A MANIFESTO AND CALL FROM EUROPE'S LEADERS FOR THE ADOPTION OF AI

Our priority is to give Europe back its full place in international competition. AI is no longer merely a technological challenge, but an issue of adoption for our organisations. Early adopters will benefit from greater growth, resilience and innovation.

This manifesto calls for collective mobilisation to accompany the extraordinary transformations that AI is causing within our companies, our administrations and society. This race for adoption must not be pursued at any cost: we commit to making AI a lever for enhancing our employees and creating long-term value.

We call on the European public authorities to increase their efforts and to coordinate an ambitious strategy to encourage the massive and responsible adoption of AI within our organisations and administrations.

Our commitments:

- **To deploy a policy of increasing human capabilities through AI** alongside the automation of tasks, in order to strengthen collective performance.
- **To provide massive training for all our teams in the new professions augmented by AI**, paying particularattention to the transmission of knowledge to young people and the inclusion of seniors who are most excluded from technology.
- **To adapt our organisational models to this technological transformation** in order to enable its large-scale dissemination, while ensuring that humans remain at the centre of decision-making processes.
- **To ensure the full mastery of our AI systems**, relying on strong internal technological knowledge, mechanisms for portability and hybridisation of AIs with European systems, protection of the most sensitive data, deployment of supervision and control policies, and internalisation of key technological components.
- **To implement a trustworthy AI policy**, respectful of privacy, protective of data and energy efficient.

To go further, we call on the European public authorities to:

- **Rethink the education system for AI** by establishing long-term skills planning exercises to anticipate the evolution of professions. Training for young graduates must be adapted to prepare the "AI native" generation, and vocational training must be redesigned.
- **Make the labour market more fluid and secure** in order to facilitate career guidance, transition and professional training in an uncertain context marked by the automation of tasks.
- **Lead the way in the adoption of AI**, with administrations setting an example in the useful application of AI in the implementation of public policies, for the benefit of public servants and citizens.
- **Simplify the adoption of AI in Europe** by harmonising European regulation and avoiding market fragmentation caused by heterogeneous national rules.
- **Establish targeted programmes to support SMEs and mid-sized companies** (traditional partners of large enterprises) in their AI transformation, and to support and finance start-ups and the technological champions of tomorrow.
- **Engage in a societal debate** on the transformation of the value of work and the new forms of professional transition in the age of AI.

Together, let us give Europe the means for its technological leadership.

A MANIFESTO AND CALL FROM EUROPE'S LEADERS FOR THE ADOPTION OF AI

Signatories :

Vincent Luciani — Cofounder & Executive Chairman, ARTEFACT
Alexandre Bompard — CEO & Chairman, CARREFOUR
Christophe Perillat — CEO, VALEO
Bernard Fontana — CEO, EDF
Guillaume Texier — CEO, REXEL
Nicolas Dufourcq — CEO, BPI FRANCE
Anne Bouverot — Special Envoy for AI to the FRENCH PRESIDENCY
Olivier Lenel — Chairman of the Board of Directors, FORVIS MAZARS FRANCE
Julie Huguet — Director, MISSION FRENCH TECH
Gabriel Hubert — Cofounder & CEO, DUST
Eleonore Crespo — co-CEO PIGMENT
Gautier Cloix — CEO, H COMPANY
Sophie Yannicopoulos — CEO, ADOBE FRANCE
Soham Saha — President & CEO, MEDINSIGHTS
Grégoire Pigné — President, PULSELIFE
Geneviève Marais — President, AQUATECH INNOVATION
Michael Brehm — General Partner & Founder, REDSTONE
Fabien Versavau — ex-CEO Rakuten France — VICARAU AI ADVISORY
Vincent Aurez — CEO, FIGEN AI
Aditi Joshi — CEO, ARDEXIA
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Laurent Benarousse — CEO France, ROLAND BERGER
Gunnar Graef — CEO, DEUTSCHE VENTURES
Adrien Aliev — CEO, ARKANGE
Clément Dietschy — CEO, ASK FOR THE MOON
Pierre Touton — President, BOW MEDICAL
Jim Jansen — CEO, BROWNSTONE
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Edouard Guillaud — Former CDS French Armed Forces, HIPPOCAMPE AGENCY
Julien Delpech — Founder, INVIVOX
Benoît Serre — Co-President, CERCLE HUMANIA
Omid Hajishirmohammadi — Representative, 4 Earth 2 Mars Holding
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Marguerite Brac de la Perrière — Tech & Data Lawyer, FIELDFISHER
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Hicham Temsamani — Principal, HBT GROUP FRANCE
Stéphan Cohen-Bacrie — MD & Expert in semantic interoperability, USE-AND-SHARE
Jean-Patrick Orsi — Data Scientist, BNP PARIBAS CIB

HIGHLIGHTS





Adopt AI - Grand Palais 2025, held in Paris, was a high-level convergence of global CEOs, C-level executives, and government leaders. The event signaled a critical shift in the AI dialogue, moving from theoretical debates about AI safety risks to the practical challenges of deployment and governance, focusing on the tangible business value of AI adoption.

+ 20,000 Attendees

+ 600 Speakers

+ 300 Sessions

+ 250 Exhibitors

+ 7 Stages









EMMANUEL MACRON
PRESIDENT OF THE FRENCH REPUBLIC



President Emmanuel Macron visited the Grand Palais to close the first day of the Adopt AI International Summit.

After meeting with AI professionals at the Summit, the President spoke to close the first day. He notably reaffirmed France's direction on this matter: ***« after the massive expansion of our talent pool, the acceleration of installed computing power, and the emergence of French and European champions, we must put artificial intelligence to work for our public services, businesses, and local governments »***. He emphasized the importance of adopting this technology where it is useful, with European and sovereign solutions.



Adopt AI

THE MAIN DEBATES



THE MAIN DEBATES

At the **Adopt AI Summit 2025**, CEOs, experts, technology leaders and institutional decision-makers converged around a few core questions: how AI is reshaping the economy, what it means for Europe's sovereignty, how to move from pilots to real transformation, and how to build trusted, sovereign AI infrastructure. The themes below capture the main debates that structured the conversations throughout the summit.

AI adoption as the new economic imperative

AI adoption is now recognised by business leaders as a strategic economic imperative that fundamentally reshapes operations and competitiveness. It is seen as a true game changer, enabling more efficient R&D and manufacturing, and acting as a lever for operational performance and the energy transition. In finance, AI is viewed as a powerful performance tool, with targets such as reducing time spent on administrative tasks by 20% by 2028 and achieving efficiency gains of up to 50% in compliance. These productivity gains are considered essential to facing macroeconomic headwinds, particularly decarbonisation and demographic slowdown.

The geopolitical and macroeconomic stakes of AI

AI sits at the heart of global competition, forcing Europe to define its own strategy in the face of rapid advances in the United States and China. Leaders increasingly see AI as a pillar of national competitiveness and sovereignty. A key challenge lies in the lack of regulatory simplification and coherence within Europe, which prevents companies from fully leveraging the advantage of a 450-million-consumer market. Europe is urged to "rebalance" its approach by accepting more risk in order to seize opportunities and avoid losing the race. Sovereign AI is also seen as a way to secure strategic autonomy and avoid dependence on foreign technologies, especially in sensitive sectors.

From experimentation to transformation: a model for AI adoption

To succeed, companies must move beyond isolated pilots (95% of which fail to generate measurable value) and focus instead on deep transformation of business processes. Scaling up is identified as the central challenge. The emerging adoption model relies on agentic AI, capable of autonomously executing complex workflows. In industry, this enables, for example, maintenance planning cycles to shrink from days to hours thanks to multi-agent industrial AI.

Such change requires end-to-end redesign of processes rather than simply bolting AI features onto legacy systems. A strong, unified data foundation is a prerequisite, as the speed of scale-up is ultimately constrained by data quality and accessibility.

Governance, regulation and the human factor

Trust is the non-negotiable condition for AI adoption. Governance frameworks must be explicit and robust, ensuring security, ethics, transparency, explainability and traceability of AI-driven decisions. Lack of explainability is cited as the main barrier to AI adoption in financial services. Organisations must ensure that humans remain accountable for AI by design, through guardrails and "human-in-the-loop" mechanisms. On the human side, AI is widely seen as an augmentation tool that frees employees from repetitive "bullshit tasks" so they can focus on higher-value work, creativity and empathy. Large-scale training and upskilling of 100% of employees is considered essential to adoption and to ensure that AI does not replace humans, but rather "replaces humans who do not use AI".

Building a sovereign, trusted and growth-driving AI ecosystem

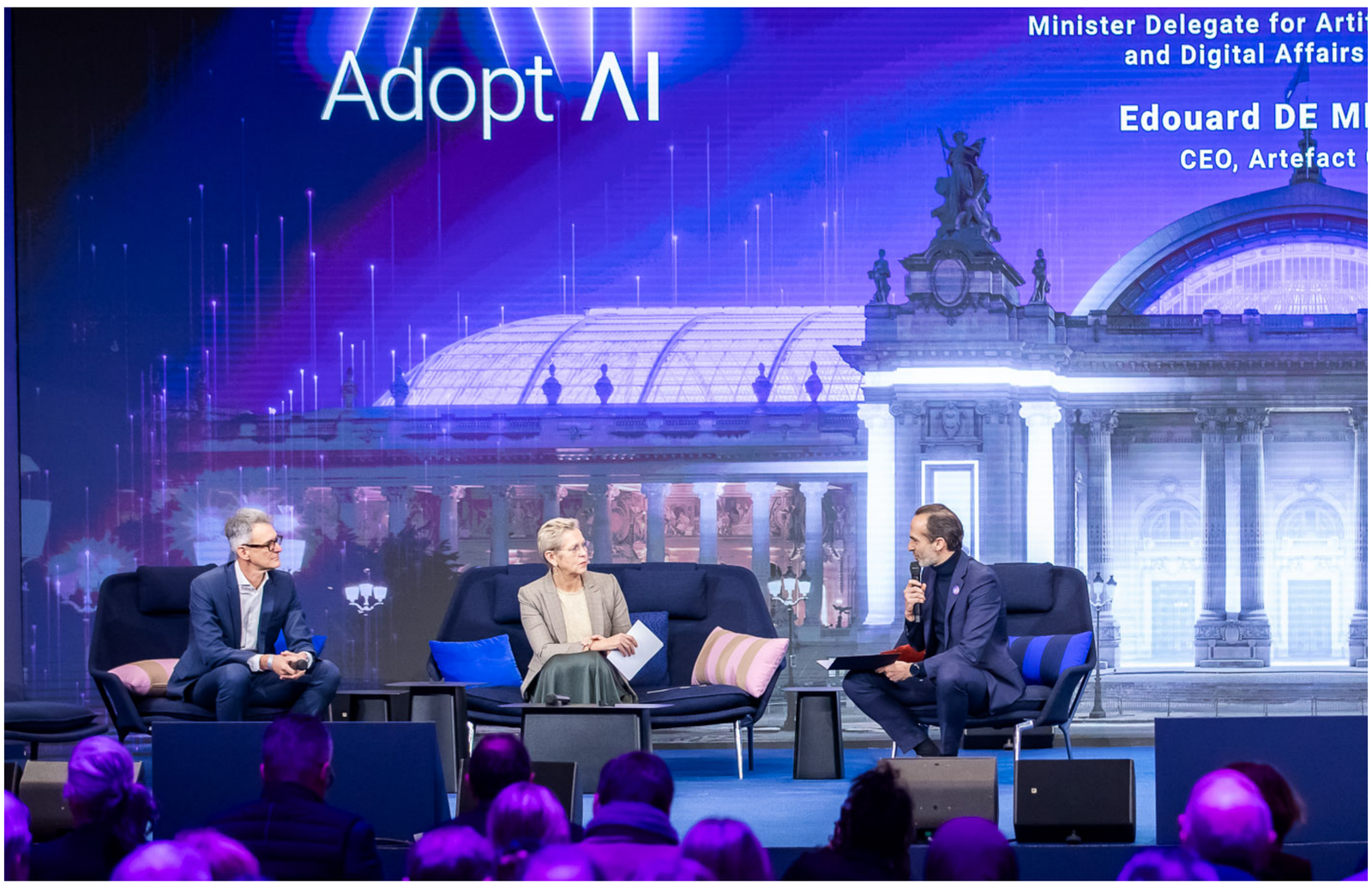
AI sovereignty is a strategic imperative aimed at securing control, ownership and freedom of choice over core technologies. It is made concrete through infrastructure decisions such as deploying on-premise solutions or using sovereign cloud environments so that sensitive data never leaves the organisation's perimeter. Some financial institutions, for example, have built internal infrastructure requiring substantial investment in hardware and skills to guarantee data confidentiality. Actors are working to build a resilient European ecosystem by backing local champions such as Mistral AI and adopting a "European preference" when selecting competitive solutions. Sovereignty is also linked to ensuring AI integrity, including protecting models from corruption and securely storing military or strategic data, as illustrated by sovereign supercomputers such as Asgard. Collaboration and openness, including open source, are seen as key levers for Europe to accelerate and close the gap with global tech giants.

INSTITUTIONAL LEADERS



« Digital transformation isn't just about technology; it's about people. Our priority is massive training and upskilling programs to ensure every public servant, from the executive level to the frontline, can utilize AI effectively and securely. »

David Amiel, Minister Delegate for the Civil Service & State Reform of France



« There is no AI without infrastructure. AI requires data centers, and France aims to become a leading destination for data centers. We have unique advantages: stable, competitive, and largely decarbonized electricity, as well as available land. This ambition is becoming a reality now. »

Anne Le Hénanff, Minister Delegate for Artificial Intelligence and Digital Affairs of France



« European digital sovereignty can be a competitive advantage, enabling us to enhance productivity, invest in the future, and produce global champions. Crucially, this strategy keeps us aligned with our values while protecting progressive democracy. »

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

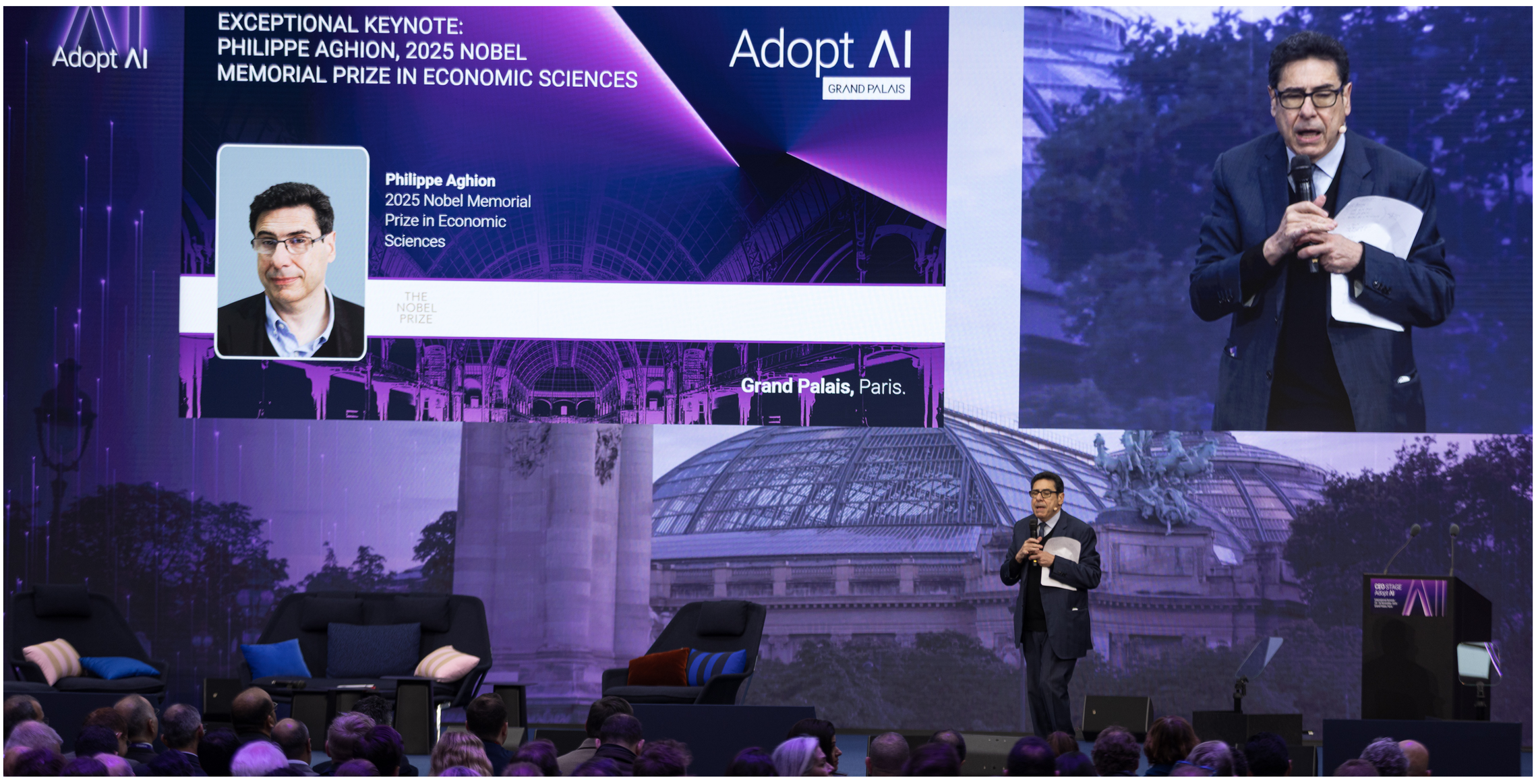
PHILIPPE AGHION, NOBEL PRIZE IN ECONOMICS



The keynote by Philippe Aghion, the 2025 Nobel Memorial Prize in Economic Sciences co-winner, centered on analyzing the implications of AI through the lens of Schumpeterian economics, emphasizing the need for strategic policy decisions to maximize AI's transformative potential.

« AI represents a major wave of creative destruction, reminiscent of the fears of mass unemployment seen during past industrial revolutions. AI's unique growth potential lies not only in automating tasks related to the production of goods and services but also in automating tasks essential to the 'production of ideas.' AI accelerates the selection and recombination of possibilities, leading to the rapid discovery of new activities. »

« The primary barrier to capitalizing on AI's potential is the 'lack of competition,' following the pattern set by previous technological waves where superstar firms emerged and discouraged new entry and innovation. While caution is necessary, I warn against the risks of over-regulation, which could 'barrage the revolution.' To steer the technology in the right direction, we need the 'right policies and institutions. »



CEO SPEAKERS



« We need scale, and when Europe comes together, we achieve the scale and can compete and be efficient. When we fail to cooperate, to play as one block, we are slower than the others. »

Guillaume Faury, CEO, Airbus



« My sole obsession is clear: How can AI deliver the tools needed to transform my company? The good news is that with the right investment and expertise, AI proves effective in achieving this transformation within our industry. »

Alexandre Bompard, Chairman & CEO, Carrefour



« Ethical AI means remaining sovereign. You remain sovereign by being agnostic. We are agnostic regarding all language models on the market, and we are using a multi-LLM approach. »

Nicolas Namias, CEO, Groupe BPCE



« The real promise of AI will require companies to tackle process transformation, a step which inherently means organizational transformation. »

Christel Heydemannn, CEO, Orange



« Our digital strategy is built on three pillars: infrastructure, data, and talent. Talent is mission-critical. We hire exceptional scientists and engineers, but we also train all employees across the organization. »

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



« The key assets to maximize the value of AI will be data and people. Data is a real differentiator for us, so we need to secure this data. Furthermore, we need to train and develop our people. »

Patrick Pouyanné, CEO, TotalEnergies

CEO SPEAKERS



« I want the 215,000 employees of Veolia to understand and to use AI in their daily work, and we are well on our way. I also want AI to make a significant difference in reducing the environmental footprint of the economy around us. »

Estelle Brachlianoff, CEO, Veolia



« What you have to do as the CEO is to lead from the front, incubate projects, encourage people, and allow them to fail, but ensure that we are looking for a return on investment, not just a use case. »

Paul Hudson, CEO, Sanofi



« AI is a powerful tool to improve our performance and our ability to deliver results. Our ambition is to divide by two our time-to-market by combining AI and organizational transformation. »

Olivier Gavalda, CEO, Crédit Agricole



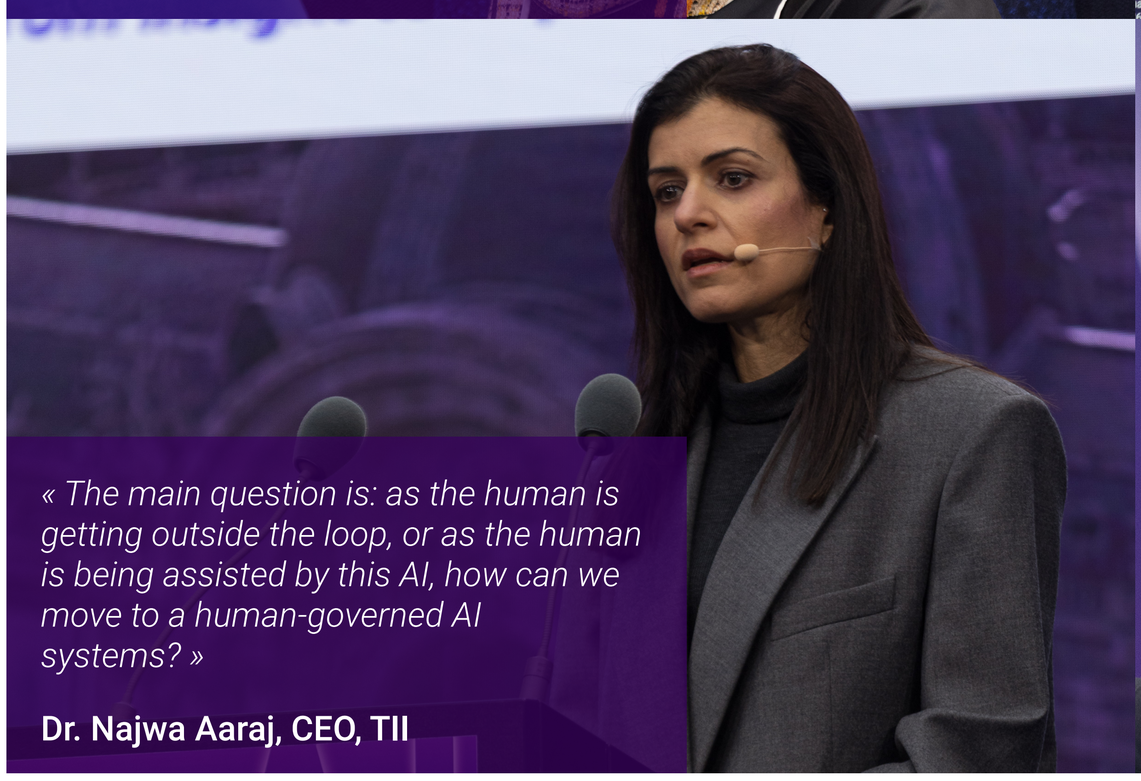
« The biggest challenge is more about organizational transformation: how do you train people, how do you convince them that it's the right thing to do, and how do you change their way of working »

Sophie Bellon, Chairwoman of Sodexo's Board of Directors, Sodexo



« In this highly competitive automotive industry, AI is a true game changer, which is supporting more efficient R&D and more efficient manufacturing. »

Christophe Périllat, CEO, Valeo



« The main question is: as the human is getting outside the loop, or as the human is being assisted by this AI, how can we move to a human-governed AI systems? »

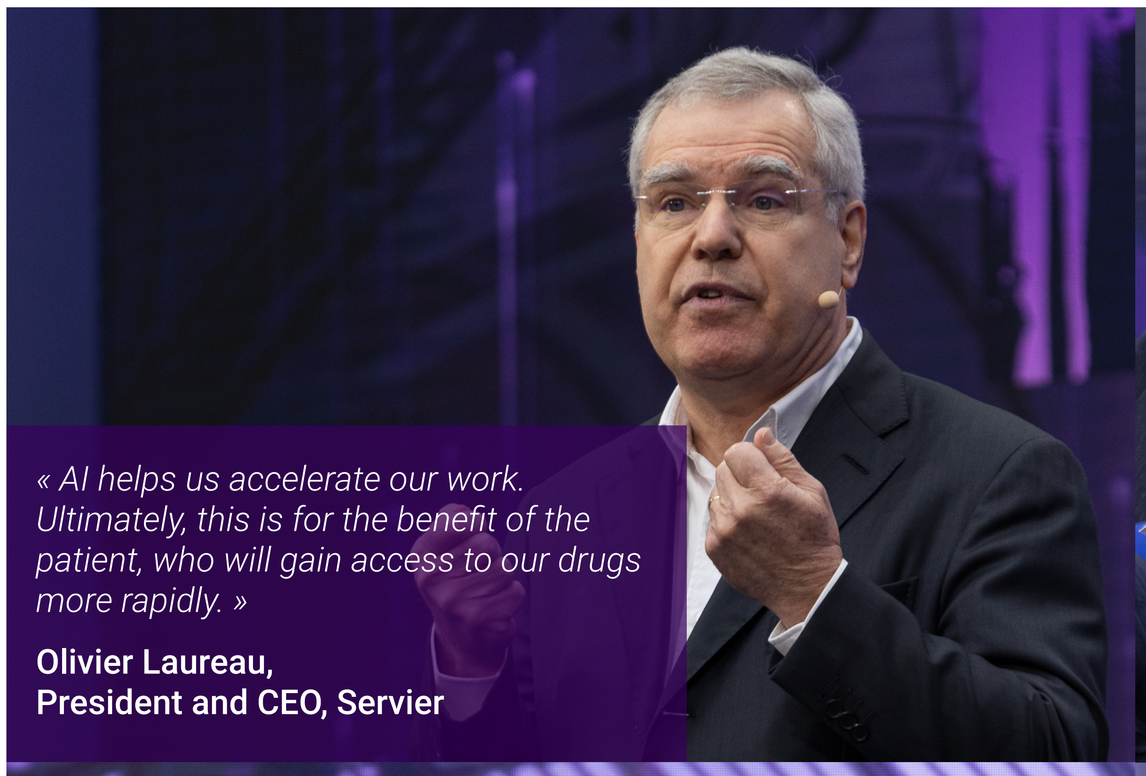
Dr. Najwa Aaraj, CEO, TII



« Europe, and specifically France, bring a very important AI ecosystem. Europe possesses unique regulatory frameworks, and is always ahead in terms of creating the right policies and regulations when it comes to AI. »

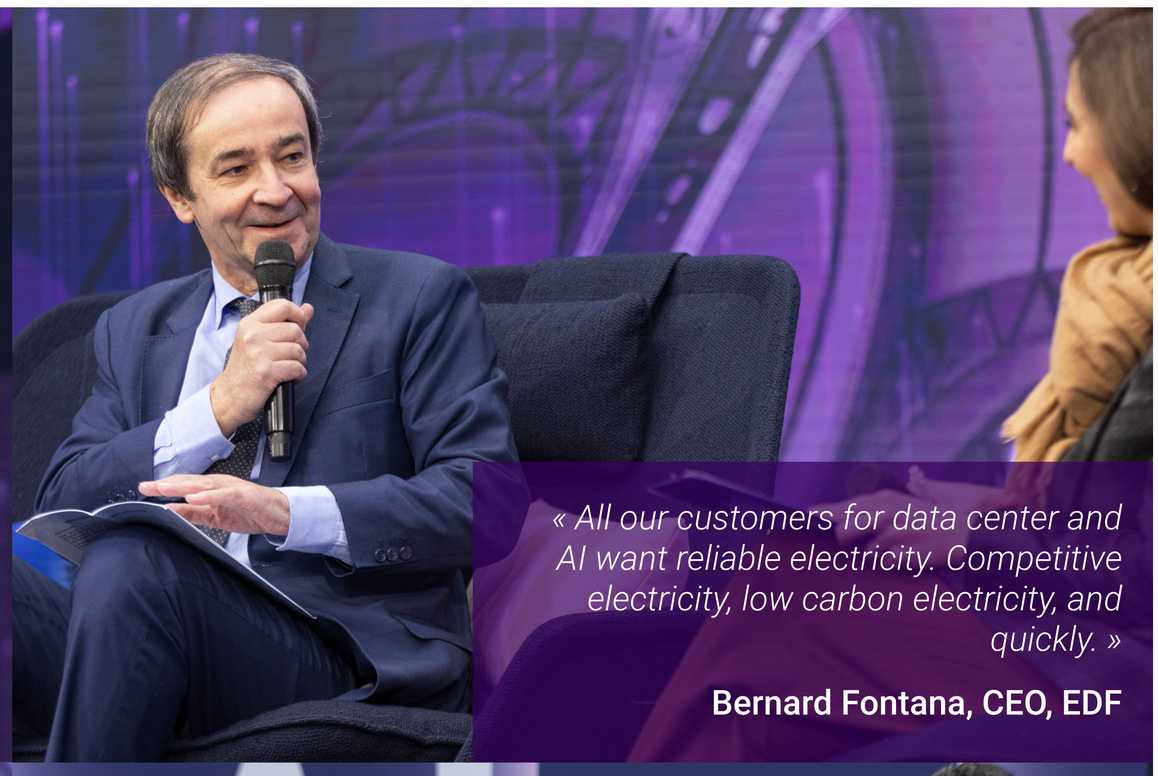
Nabil Al Nuaim, CEO, Aramco Digital

CEO SPEAKERS



« AI helps us accelerate our work. Ultimately, this is for the benefit of the patient, who will gain access to our drugs more rapidly. »

Olivier Laureau,
President and CEO, Servier



« All our customers for data center and AI want reliable electricity. Competitive electricity, low carbon electricity, and quickly. »

Bernard Fontana, CEO, EDF



« From 420 TWh last year to a potential 2500 TWh by 2030, AI's booming data center energy demand presents a critical challenge: we must deliver both power supply and community acceptance by driving efficiency. »

Benoît Coquart, CEO, Legrand



« Our project is a project for women and men, and not of women and men. And for it to succeed, on a large scale, technology is necessary. Therefore, AI is there to aid this service and support project. »

Éric Petitgand, CEO,
Crédit Mutuel Alliance Fédérale



« AI is not just a piece of technology, it's a change to fundamentally rethink our ways of working and become far more agile. »

Marie-Aude Thépaut, CEO,
CNP Assurances



« The top priority is to provide an environment of sovereignty. When you're talking about AI, you're talking about data. And the question, when you are operating in a public environment, is: Is our data safe? »

Olivier Sichel, CEO, Caisse des Dépôts



« AI is a little bit the missing piece in the jigsaw puzzle to really use the intelligence that is in the data. »

Hans de Cuyper, CEO, Ageas

CEO SPEAKERS



« AI makes that much more efficient than in the past. We can now analyze the data from many thousand sensors in real time, and with that, we can also react in real time. »

Dirk Hoke, CEO, Voith



« Confidentiality is very important. We are treating proprietary information, and we need a confidential environment to do that, one that is still open, but simultaneously safeguards our proprietary data. »

Guillaume Texier, CEO, Rexel



« From day one, we have embedded security, transparency, and responsibility into every AI initiative. We have established an AI acceptance board that assesses value and risk. »

Stéphane Pallez, CEO, FDJ United



« If you want to scale AI, data is king. As simple as that sounds, it is equally difficult to execute. »

Alexander Vollert,
CEO AXA Group Operations, AXA



« AI, for me, is just an augmentation of what we already did in the digital arena. AI is an enabler to constantly improve on the synchronization of flows and make our operations more efficient. »

Marie-Christine Lombard, CEO, Geodis



« What creates value is taking over operational processes, transforming them, and making them better. The technology is currently ready to take over and automate this entire end-to-end process. »

Bruno Vaffier, CEO, Cegid



« AI not just automates routine tasks, but also offers the room for more complex services with human talent. »

Thomas Mackenbrock,
Group Deputy CEO, TP

ARAMCO

Aramco is a Premium Partner with 13 sessions on stage.

Main Speakers:
Ahmad O. Al Khowaiter
Sami Al Ajmi
Mahdi Aladel
Nabil Al Nuaim

Aramco's conference program drew a single red thread: how to turn AI from hype into hard industrial value. The debates moved between geopolitics (why Europe, why France, why now), internal transformation (data, infrastructure, talent, culture), and very concrete use cases in finance, infrastructure, drilling, capital projects and space analytics. Underneath, speakers converged on one idea: AI is no longer experimental, it is becoming invisible infrastructure, provided that organisations tackle adoption, governance and security with the same rigour as the technology itself.

Europe as a strategic AI anchor for industrial players

Europe, and especially France, stands out as a neutral AI hub, combining deep maths/ engineering talent, a rich startup ecosystem and robust regulation, making it a prime base for long-term, non-aligned industrial AI investment.

AI as core infrastructure: data, compute, and agentic platforms

AI is treated as a foundational layer built on decades of proprietary data, massive compute and connectivity, enabling agentic platforms, industrial LLMs and predictive systems that function like an operating system for the whole organisation.

From failing pilots to billions in verified value

In a context where most AI pilots fail to scale, the real advantage lies in targeting precise AI "sweet spots" with clear business cases and KPIs, converting experimentation into several billions of third-party-verified value.

Operational and geospatial AI: "real physical AI" in the field

The most impactful AI is deployed directly in operations: steering drilling in real time, monitoring ecosystems and infrastructure from space, optimising networks such as fuel stations, and reinforcing asset integrity and OT cybersecurity.

Reasoning, transparency and human-centric adoption

Multi-hop reasoning and agentic assistants are designed for traceability and trust, recognising that most AI failures come from people and processes; culture, governance and explainability become more critical than the algorithms themselves.

Security and sovereignty: defending AI by defending data

Industrial AI at scale depends on strong sovereignty and multilayer security—protecting data against new attacks, securing the AI supply chain, and keeping compute and control close to industrial assets to avoid dependency and vendor lock-in.









TECHNOLOGY INNOVATION INSTITUTE (TII)

TII is a Worldwide Partner with 3 sessions on stage.

Main Speakers:
Dr. Najwa Aaraj
Dr. Hakim Hacid
Dr. Dario Albani

Pushing the frontier of knowledge by TII

The TII debates converged around one big shift: AI is no longer just analysing data, it is acting in the world. Speakers explored how agentic and embodied systems are reshaping, energy, earth observation, and aerial robotics, while raising hard questions about trust, security, governance, and how humans and machines will actually work together on the ground.

From insight to action

Across missions, drones, earth observation and construction, AI is moving from pattern recognition to full task execution: agents set goals, plan, act and re-plan in real time, increasingly orchestrating complex operations rather than just supporting them.

Cognitive autonomy to manage complexity at scale

For drone swarms and sensor-rich environments, the bottleneck is human cognitive overload. Cognitive, agentic and neurosymbolic AI turn high-level “mission intent” into safe, grounded execution, enabling one operator to manage large fleets and dense data streams without losing control.



Trust, safety and machine identity as the new “infrastructure”

As humanoids and autonomous systems enter physical space, the core challenge becomes establishing predictable, explainable, governable behaviour – including machine IAM (identity and access management) so agents and robots can be authenticated and controlled like human users.

Pragmatic adoption: platforms, legacy systems and leadership

Successful deployment hinges on middle-layer agentic platforms that plug into legacy infrastructure, clear value-driven use cases with KPIs, top-down accountability, and broad AI literacy. The target horizon is not “AI vs humans” but machines, agents and people working together in new operating models.

TII and Edge are both part of the Abu Dhabi Government’s Advanced Technology Research Council (ATRC), which oversees technology research in the emirate.

Main Edge Speaker:
Dr. Chaouki Kasmi

Combat proven AI by Edge & TII

The debates focused on how Agentic AI is transforming Earth Observation and security, shifting from manual monitoring to automated orchestration that leverages legacy systems and speeds up data-to-decision.

Architectural Orchestration via the “Mission Factory"

Modern security frameworks should integrate without disruption, using AI as an orchestration layer rather than replacing existing systems. This automates multi-source data retrieval and analysis, turning raw streams into actionable intelligence. By handling complex workflows, AI frees operators to focus on high-level decisions instead of manual processing.

Generative AI as a double-edged cyber weapon

GenAI powers real-time detection, vulnerability hunting and automated defence (e.g. specialised LLMs in binaries), but it also industrialises malware creation and social engineering, pushing the field toward autonomous defence, predictive intelligence and hyper-personalised security.





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ADOPTING AI: KEY CHALLENGES



WHAT BLOCKS AI ROLLOUT

The pursuit of massive Artificial Intelligence (AI) adoption, actively promoted at the **Adopt AI - Grand Palais**, encounters severe difficulties once organizations attempt enterprise-wide deployment. CEOs and business leaders consistently report struggling to scale projects beyond initial testing, citing studies that show only 5% of AI and Generative AI initiatives successfully capture anticipated business value. These failures often stem from neglecting the required profound organizational changes, specifically the difficult and complex task of reinventing core business processes to leverage the technology effectively. This transformation is further complicated by foundational deficits related to data quality, inadequate technological infrastructure, cultural resistance, complex regulatory environments, and the critical need to maintain digital trust and explainability

Foundational data issues: quality, fragmentation and siloed access

The adoption and deployment of Artificial Intelligence (AI) across large organizations are fundamentally hindered by challenges related to data quality, centralization, and the resulting fragmentation that prevents meaningful scale. Senior leaders consistently highlight that building AI systems requires trusted, integrated, and aligned data; without this foundation, companies inevitably struggle. A significant constraint is that 90% to 95% of data in certain complex industries, such as insurance, exists in unstructured formats (e.g., documents), which remains largely untapped. Compounding this, many organizations maintain data in silos -finance data separate from HR data, for instance-, which slows down operations, reduces the ability to analyze cause and effect across the business, and leads to internal conflicts regarding data reliability. This inability to properly manage data is financially costly, as two-thirds of a typical knowledge worker's time can be spent merely "chasing data" (finding, importing, exporting, and cleansing it).

Scaling crisis: failure to transition from pilots to enterprise-wide process transformation

A persistent problem documented across various sectors is the struggle to move beyond initial testing and achieve measurable business impact at scale. Industry studies indicate that the vast majority of AI and Generative AI (Gen AI) projects fail to generate the expected value, with figures showing that only 5% of projects successfully capture anticipated value. Similarly, almost 90% of AI pilots never transition successfully into full production deployments. This failure rate often stems from trying to implement AI without first undertaking necessary foundational changes.

Deploying AI requires a complete reinvention or end-to-end redesign of core business processes. Merely injecting an AI model into a broken process is akin to "putting lipstick on a pig" and will not solve the underlying inefficiencies. This critical need for radical simplification and process restructuring, however, is often characterized as difficult, complex, and overwhelming for large enterprises, leaving many leaders unsure of where to even begin the transformation.

Human and cultural resistance: managing fear, skill gaps, and organizational silos

The human and cultural elements represent arguably the hardest challenge in scaling AI adoption. The pace of technological advancement is drastically faster than the human capacity to adopt change, leading to widespread fear and apprehension among employees who worry AI will steal their jobs. Leaders must actively manage this shift by fostering a culture of psychological safety and communicating that AI primarily serves to augment human capabilities, replacing only those tasks that are mundane, repetitive, or performed by employees who fail to utilize AI tools. Furthermore, organizations must overcome functional silos, a behavioral tendency where employees often hoard data to maintain their departmental control or hide underperformance. This requires building hybrid skill sets—individuals possessing both deep domain expertise and AI knowledge—and ensuring continuous upskilling across the entire workforce, as traditional learning methods cannot keep pace with the evolving technology.

Infrastructure and financial hurdles: high costs and inadequate computing capacity

High costs and inadequate technological infrastructure pose significant deployment constraints. The sheer financial investment required for deploying AI infrastructure securely and reliably can be immense; for instance, running a single medium-sized model in a resilient, high-availability environment can cost approximately one million euros just for the necessary hardware (GPUs). Crucially, the cost of the actual AI model is often less than 10% of the total expenditure for achieving a robust, scaled-up industrial solution; the overwhelming majority of the budget is absorbed by the foundational components, including security, data management, observability, and orchestration. Moreover, existing IT architectures are frequently unfit for AI demands. Data centers designed for conventional computing often lack the necessary density (e.g., 20kW rack density required for AI versus the typical 4kW) to host advanced AI workloads effectively.

WHAT BLOCKS AI ROLLOUT

Erosion of digital trust: the critical challenge of explainability and security Risks

Building and maintaining digital trust is identified as a non-negotiable cornerstone for successful AI deployment. A massive barrier to adoption is the widespread lack of explainability, which many financial executives cite as the greatest hurdle. AI systems, particularly complex deep learning models, risk opacity, making it difficult to understand the rationale behind automated decisions, undermining accountability, and raising the risk of bias and unintended discrimination. Furthermore, new security risks unique to AI, such as prompt injection (manipulating the model's behavior) and hallucinations (AI inventing plausible but false information), must be actively defended against. Companies address these by implementing sophisticated technical and business guardrails, rigorous monitoring, and specialized AI Red Teaming units dedicated to stress-testing models for vulnerabilities before deployment

Regulatory friction and geopolitical concerns: sovereignty, compliance, and vendor lock-in

Finally, the need to navigate fragmented regulation and avoid technological dependence slows down the speed of AI deployment, particularly in Europe. Regulatory complexity, exacerbated by rules like the AI Act, Dora, and varied GDPR interpretations across member states, creates legal hurdles that leaders find difficult to reconcile with the pace of innovation.

This environment encourages what many describe as the "too much care kills the cat" syndrome, leading to excessive delays. Simultaneously, leaders are keenly concerned about excessive technological dependency on a few dominant global providers, creating a risk of vendor lock-in, which affects resilience and sovereignty. This concern drives many European firms to seek solutions that allow agnosticism across multiple models and infrastructure types, while demanding sovereign cloud options to ensure their critical data and intellectual property remain protected within their chosen jurisdictions

In the face of the common obstacles organisations encounter when deploying AI at scale, Europe is turning its cultural and regulatory constraints into strategic assets. Strict requirements on transparency and explainability are becoming a global differentiator, backed by massive investment in skills and sovereign infrastructure. By leveraging low-carbon, reliable energy to host AI data centers, France positions itself as a key infrastructure hub for scalable, resilient cloud. Combined with executive-driven, end-to-end process reinvention, these foundations show that Europe is not “late”, but actively shaping the next phase of the AI economy.



ADOPTING AI: THE TOP 20 KEY CHALLENGES

The 20 critical challenges that must be addressed to unlock sustainable value from AI by 2026 : A roadmap for executives

The rapid adoption of Artificial Intelligence (AI) and Generative AI (GenAI) is reshaping the competitive landscape, creating unprecedented opportunities for financial gain and operational efficiency. However, success hinges on overcoming deep-seated organizational, technological, and cultural hurdles.

Studies indicate that between 80% and 95% of AI pilots fail to deliver measurable business value, demonstrating a significant gap between ambition and industrialized reality. For corporate leaders, 2026 will be defined by the ability to transition from fragmented experimentation to confident, scalable execution.



STRATEGY, VALUE REALIZATION, AND SCALING

1 **Escaping the pilot purgatory and achieving industrialization:** The majority of AI projects stall in the Proof of Concept (POC) phase, failing to transition into robust production systems. The central challenge is establishing a clear pathway to **industrialize AI adoption at the core of critical business processes** rather than treating AI as a side project.

2 **The return on AI (ROAI) mandate:** Executives must shift focus from simply experimenting with new tools to demonstrating a measurable Return on AI (ROAI) that impacts the P&L (profit and loss). The value must be tracked beyond minor productivity gains (e.g., drafting emails) toward **maximizing large-scale growth or achieving substantial cost reduction** across the enterprise.

3 **Mandatory end-to-end business process re-engineering (BPR):** True transformative value cannot be achieved by merely adding AI tools to existing, legacy workflows ("putting lipstick on a pig"). Success requires **radically rethinking and redesigning complex processes end-to-end** to be AI-first, leveraging AI for orchestration and decision-making across functional boundaries.

4 **Accelerating speed to market:** The rate of technological capability doubles approximately every seven months, demanding an **organizational culture obsessed with speed and agility**. Failing to commit quickly to deployment risks being surpassed by competitors who achieve a lower cost base or faster product development cycles.

5 **Establishing an agentic operating model:** Moving beyond human-assisted GenAI means adopting autonomous **multi-agent systems capable of executing complex, multi-step workflows across the organization**. This requires defining new interaction models where agents coordinate actions and communicate across integrated systems.

ADOPTING AI: THE TOP 20 KEY CHALLENGES



DATA AND FOUNDATIONAL ARCHITECTURE

6 **Resolving the data quality and AI-readiness crisis:** AI systems are only as strong as the data they consume, following the "Garbage In, Garbage Out (GIGO)" principle. Investing heavily in **cleansing, structuring, and maintaining "AI-ready" data quality** is non-negotiable and represents the majority of implementation effort.

7 **Unifying fragmented data silos:** Data trapped in functional silos (e.g., Finance, HR, R&D) prevents AI agents from accessing the holistic context needed for informed decisions. The challenge is to **build shared semantic layers and knowledge graphs** to transform dispersed data (including hidden, implicit knowledge) into a single, unified source of truth.

8 **Securing data and model sovereignty:** Highly regulated industries require **full control over data residency and Intellectual Property (IP)**, often necessitating deployment on on-premise, secure, or sovereign cloud infrastructure. This addresses vendor lock-in risks and ensures control over proprietary algorithms and model weights.

9 **Addressing computational frugality and digital sobriety:** The high energy and financial costs associated with running massive LLMs must be mitigated. Organizations must strategically pursue **smaller, specialized language models (SLMs) and efficient hardware** to drive down power consumption and maintain financial predictability at scale.

10 **Modernizing legacy IT infrastructure:** Existing IT systems, sometimes decades old, lack the agility and standardized APIs necessary to support large-scale AI deployment. The difficulty lies in "AI-hardening" essential IT elements (networking, security, access management) **without forcing a complete, immediate overhaul** of the legacy environment.

ADOPTING AI: THE TOP 20 KEY CHALLENGES

TALENT, CULTURE, AND ORGANIZATIONAL CHANGE

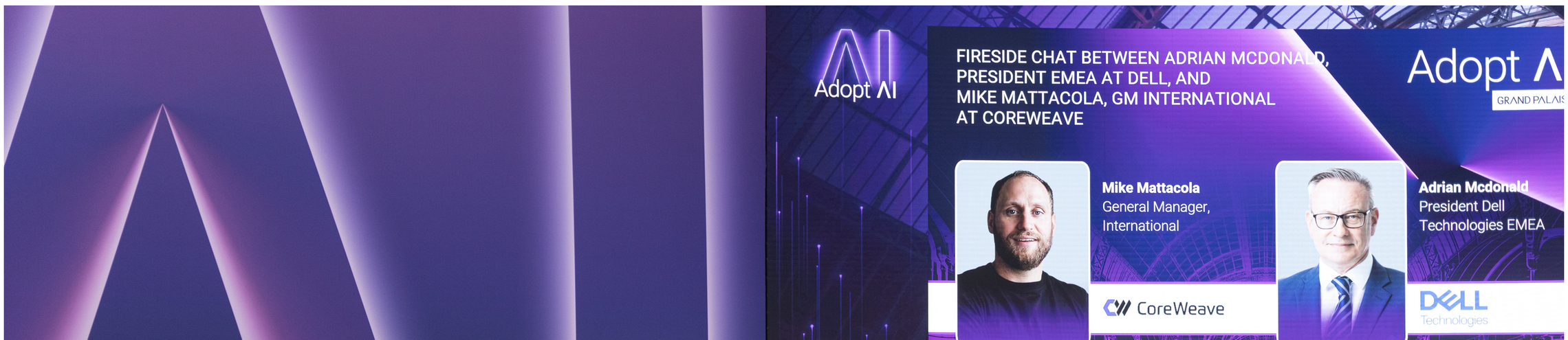
11 **CEO-led organizational transformation:** Successful scaling is a **CEO-driven journey**, not a delegated IT project. The CEO must provide the top-down vision, financial commitment, and cultural mandate necessary to sustain rapid transformation, often against organizational resistance.

12 **Bridging the hybrid skills gap:** There is a critical shortage of individuals possessing both deep domain knowledge (e.g., in finance or engineering) and AI expertise. The focus must be on **creating hybrid talent pools** and cultivating "AI catalysts" or "process designers" who bridge the technical and business gap.

13 **Massive upskilling and adoption (AI for all):** To leverage AI's full potential, **100% of employees need basic AI literacy and training**. Adoption must be driven at the grassroots level, turning employees into champions who can identify high-value use cases and integrate AI into their daily routines.

14 **Managing employee anxiety and redefining roles:** Employees fear job displacement. Leaders must articulate a vision where AI serves to **augment human capability, eliminating repetitive tasks** and refocusing talent on strategic thinking, complex problem-solving, and critical human-centric activities like empathy.

15 **Institutionalizing agile execution and learning:** Organizations must embrace **an iterative development approach characterized by rapid prototyping, continuous user feedback, and fast deployment cycles**, rather than lengthy planning. This discipline helps overcome the slowness often inherent in large enterprise feature development.



ADOPTING AI: THE TOP 20 KEY CHALLENGES



TRUST, RISK, AND COMPLIANCE

16 **Guaranteeing explainability and transparency by design:** In regulated and safety-critical domains, AI must provide **traceable reasoning and justification for its decisions (Explainable AI, or XAI)**, moving beyond opaque "black box" outcomes. This is essential for building trust with customers, regulators, and employees.

17 **Implementing autonomous risk governance:** Traditional human-in-the-loop controls cannot keep pace with autonomous agents. Organizations must develop **automated "guardrails" and monitoring systems** to detect and mitigate AI-specific risks, such as prompt injection or policy violation, in real time.

18 **Protecting against AI-specific cyber threats:** AI enables attackers to generate sophisticated malware, launch automated attacks, and perform advanced social engineering. Enterprises must invest in **AI-powered defense systems** and embed security controls across the entire AI supply chain, from design to runtime.

19 **Navigating regulatory fragmentation and headwinds:** The proliferation of diverse and evolving regulations across different jurisdictions (e.g., EU AI Act, FIDA, defense standards) creates significant **compliance barriers and slows the adoption rate** in Europe compared to the US and China.

20 **Establishing clear accountability and data lineage:** As autonomous agents make real-world decisions, **clarifying who is responsible when systems fail** is paramount. This requires meticulously documenting and tracking the full data lineage used for training and deployment to ensure auditable, traceable accountability throughout the lifecycle.

Adopt AI

AI TRENDS BY SECTORS



AI FOR HEALTH

The healthcare and life sciences sectors are leveraging AI to drive a profound transition from reactive to proactive and personalized care. A major trend is the accelerated pace of drug discovery and R&D using generative AI and advanced simulation to identify therapeutic targets and improve the success rates of early-stage drug candidates. Key debates surround balancing innovation with stringent data protection and governance (e.g., GDPR, EHDS) necessary for reusing sensitive health data for research and AI training.

Technologically, the focus is on integrating complex multi-omics data (genomics, metabolomics, imaging) to create holistic patient profiles ("patient twins") and developing foundation models trained on specialized biosignals like EEG for augmented diagnostics and monitoring.

Success requires adopting strict ethical guidelines, ensuring explainability of AI outputs for clinical confidence, and promoting upskilling among clinical professionals.

« AI is accelerating science. First, using causal AI and digital twins, we have already identified three new breakthrough targets in our survey. We hope these will lead to new drugs. Second, AI streamlines multi-center trials by rapidly identifying the best hospital sites globally. Third, AI enables us to recruit patients from all over the world. »

Olivier Laureau, President and CEO, Servier.



« AI is advancing rapidly and its potential to strengthen health systems is significant but even with powerful tools the duty of care in medicine remains with health providers. That means all countries must invest now in clinician training, digital literacy and supervisory competence. We must also ensure that these innovations reach the populations who need them most and that they serve to narrow inequalities rather than widen them. »

Dr. Tedros Adhanom Ghebreyesus, Director General, World Health Organization.

AI FOR HEALTH

Accelerated drug discovery	Generative AI and advanced simulation are drastically accelerating R&D by identifying new therapeutic targets, running molecular simulations (sometimes thousands per second), and improving the success probability of early-stage drug candidates.
Proactive and predictive care	The industry is transitioning from reactive medicine (treating symptoms) to proactive care, using predictive algorithms and quantification of biological aging (geroscience) to identify individuals at high risk for chronic diseases and guide personalized prevention plans.
Multi-omics for personalized patient twins	Holistic patient profiles, or digital twins, are created by integrating complex multi-omics data (genomics, proteomics, metabolomics, imaging) to determine precise disease signatures, monitor treatment response, and inform highly personalized treatment protocols.
Foundation models for biosignals	Foundation models, similar to those used for LLMs, are being trained on complex biological and neurological signals (e.g., EEG/brainwaves) to transform them into accessible, continuous vital signs, helping to bridge the global shortage of human specialists.
Secure health data market	European policy is driving the creation of a regulated market for health data reuse (European Health Data Space), requiring the establishment of secure processing environments (SPEs) to accelerate research and innovation while ensuring stringent privacy and governance.
AI-augmented diagnostics and screening	AI algorithms are used as powerful screening tools, analyzing data from EKG readings, eye imagery (oculomics), and wearable devices to detect conditions like heart failure, sleep apnea, Parkinson's, and Alzheimer's earlier and more efficiently.
Explainable AI for clinical confidence	LLMs and AI are employed to generate understandable post-hoc reports and explanations for complex diagnoses (e.g., radiomics features), enhancing clinician confidence in AI predictions and improving communication of prognostic data.
Continuous knowledge transfer	AI is streamlining operational workflows and documentation processes, freeing up R&D and clinical staff from mundane tasks (e.g., document summarization, safety stock management) to focus on scientific expertise and patient contact.

AI FOR FINANCE

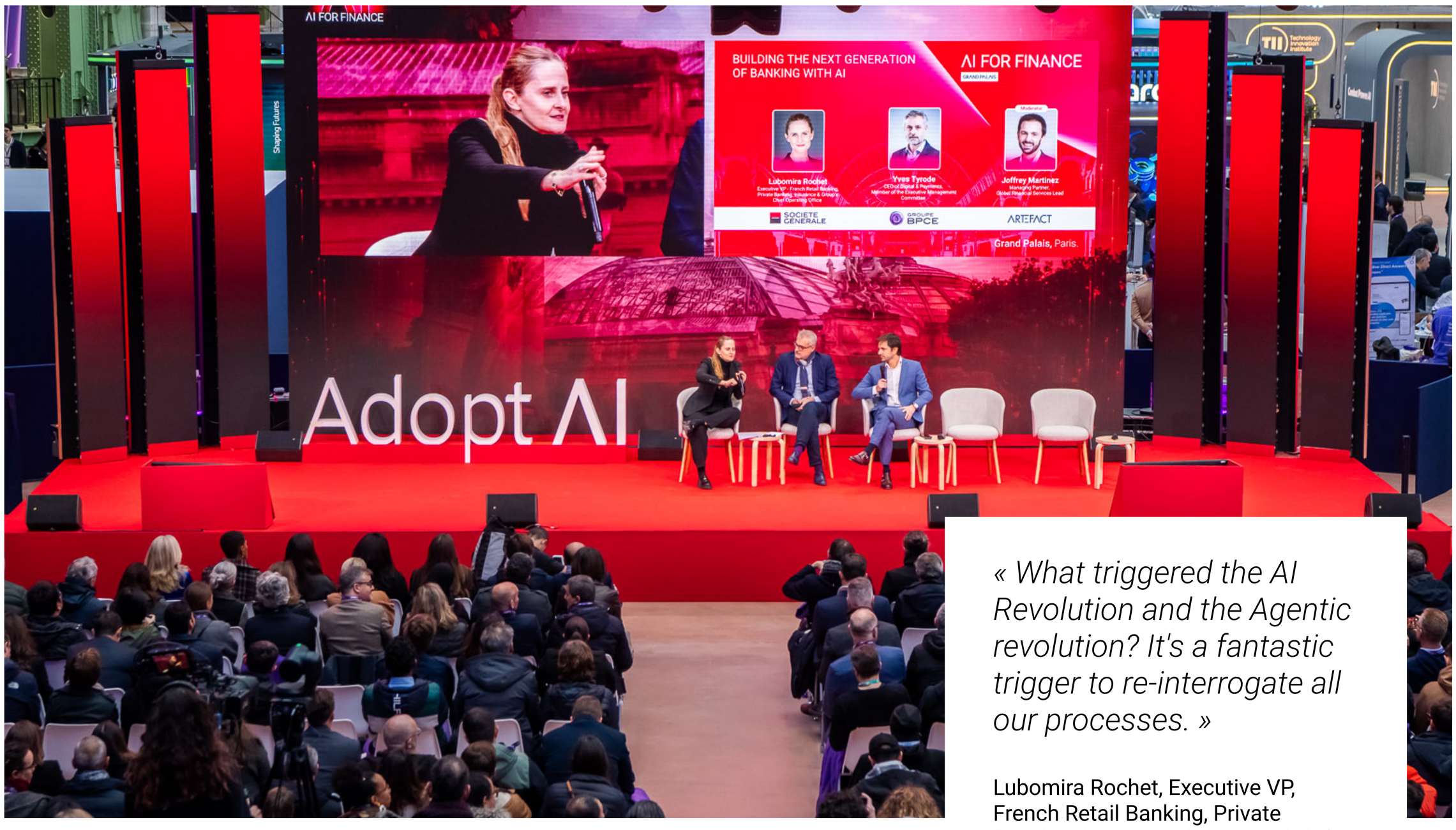
The financial sector's AI adoption journey is mature, moving beyond basic machine learning (ML) used for scoring and predictive analytics to implementing transformative Agentic AI. The central debate revolves around achieving operational efficiency and productivity gains by redesigning core, end-to-end processes like credit approval, fraud detection, and regulatory compliance, while simultaneously maintaining unwavering trust.

Institutions are tackling this by adopting multi-LLM and sovereign cloud strategies to ensure control over sensitive data and remain compliant with regulations like the AI Act and Dora. Key trends include the shift to AI-driven process re-engineering, the creation of highly personalized conversational interfaces, and intensive investment in data quality and governance to support complex AI applications and mitigate financial risk.

The underlying challenge is navigating the complexity of legacy, fragmented systems and the high cost of training and operating large-scale, enterprise-ready AI infrastructure.

« Trust is the ultimate currency we have received for free from our customers. And despite all the hype, we will not give up on trust... Now the new agents are as well monitoring and controlling these agents, and that is kind of the trust we need. »

Bernd Leukert, Chief Technology, Data and Innovation Officer Member of the Management Board, Deutsche Bank.



« What triggered the AI Revolution and the Agentic revolution? It's a fantastic trigger to re-interrogate all our processes. »

Lubomira Rochet, Executive VP, French Retail Banking, Private Banking, Insurance & Group's Chief Operating Office, Société Générale.

AI FOR FINANCE

Agent-driven core process transformation	AI agents are increasingly moving beyond simple automation to re-engineer core banking processes end-to-end, including complex workflows like credit approval, loan processing, and managing large volumes of unstructured documentation for efficiency and compliance.
Hybrid risk control systems	Financial institutions are deploying sophisticated oversight frameworks where primary AI agents execute operational tasks, while secondary, often independent, agents monitor and control those automated decisions to ensure regulatory compliance and transparency.
The rise of the financial AI butler	The customer interface is shifting towards advanced conversational AI, with models expected to act as a "financial butler" that can autonomously handle complex queries, execute transactions, and provide immediate advice through video and speech interfaces.
Unlocking enterprise knowledge	Investment is pouring into knowledge management platforms and AI systems, like Retrieval Augmented Generation (RAG), necessary to contextualize and utilize massive amounts of internal, unstructured data (e.g., code, legal documents) for lineage and insights.
Sovereign, hybrid cloud architecture	Strict regulatory mandates, such as those related to data security and operational resilience, are driving the adoption of sovereign, on-premise, and multi-cloud platforms to maintain full control over sensitive financial data and computing resources.
Hyper-personalization and customer nurturing	AI is continuously enhancing customer relationships by delivering highly personalized content, improving advice quality for human advisors, and automating nurturing processes (e.g., identifying cross-selling opportunities and customizing digital interactions).
Data quality and governance as a value driver	Scalable AI adoption is reliant on robust data governance and quality assurance frameworks, requiring standardization of core data definitions to ensure information is traceable, auditable, and reliable enough for mission-critical applications.
Cyber defense for financial assets	AI tools are paramount for protecting financial operations, driving real-time fraud detection, anti-money laundering compliance, and acting as a cybersecurity defense layer against sophisticated, automated threats.

AI FOR INDUSTRY

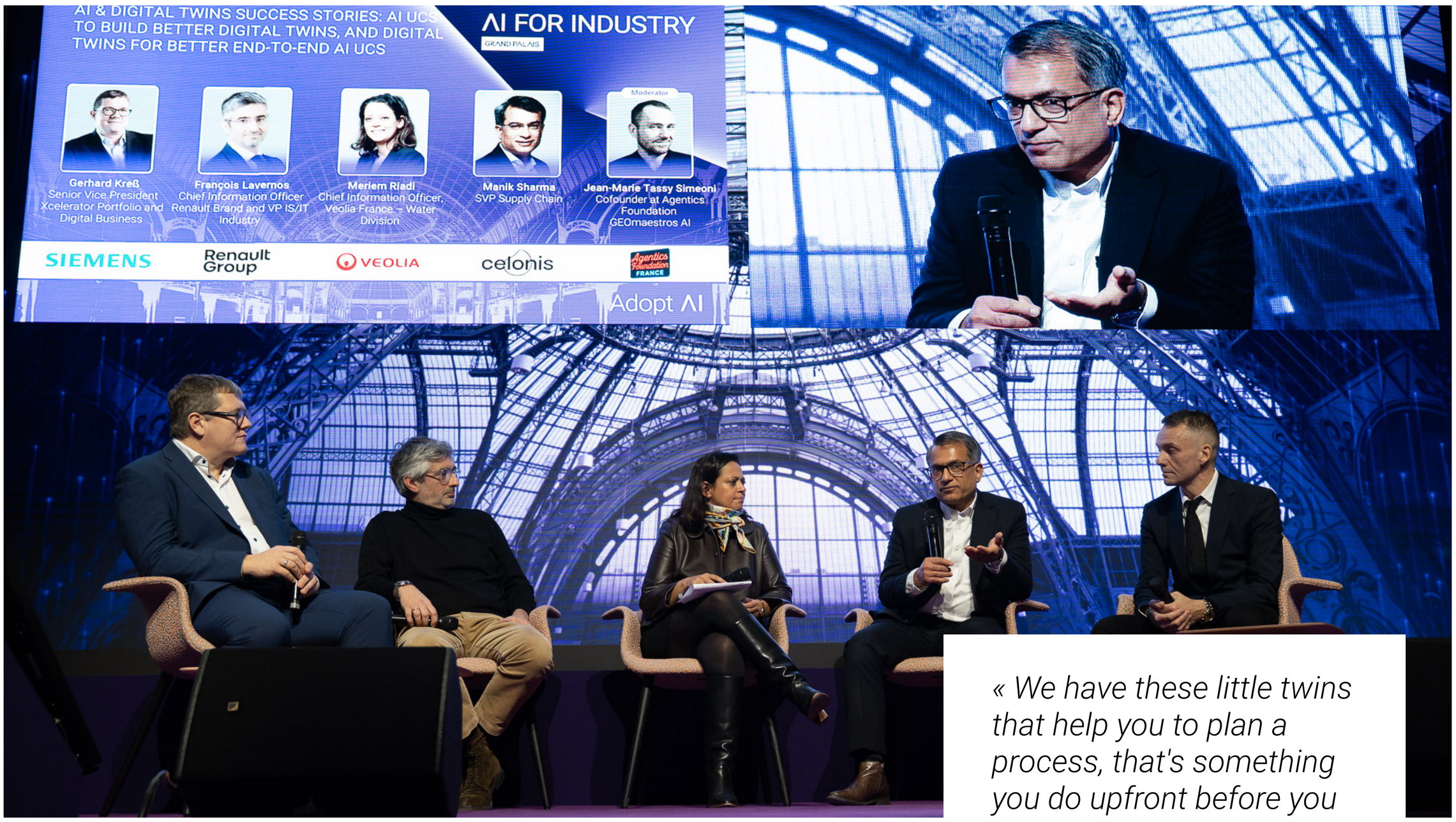
AI is poised to fundamentally redefine industrial operations, likened to the transformative impact of electricity centuries ago. The core trends focus on achieving breakthrough productivity gains (up to 20% in data-driven contexts) through Digital Twins and end-to-end operational optimization.

Debates center on the rapid development and deployment of Physical AI and robotics (humanoids, UGVs) that learn in virtual environments and operate autonomously on the shop floor. A major paradox is the reliance on internal, often unstructured or siloed, industrial data for AI deployment, requiring massive efforts in data governance, standardization, and lineage tracking.

Furthermore, there is a strategic pivot toward Edge AI for low-latency decision-making (e.g., visual quality control) and optimizing energy consumption, alongside a continuous organizational challenge of training the existing blue and white-collar workforce for AI-augmented tasks.

« When data is collected, cleaned, and shared through trusted industrial systems, it can unlock productivity gains of up to 20%. This is the raw material of industrial transformation. »

Sébastien Martin, Minister Delegate for Industry, French Ministry of Economy, Finance and Industrial, Energy and Digital Sovereignty.



« We have these little twins that help you to plan a process, that's something you do upfront before you build a building. We see huge effects from that. We did it in our own factories, we're seeing 30% less space utilization, 20% less energy, and still 10% more output. »

Gerhard Kress, Senior Vice President Siemens Xcelerator Portfolio and Digital Business, Siemens.

AI FOR INDUSTRY

Digital twins for end-to-end optimization	Digital twins of complex physical assets (e.g., plants, production lines, vehicles) are used to run virtual stress tests, accelerate design, predict maintenance needs, and optimize energy/cost efficiency in near real-time before physical action is taken.
Physical AI and industrial robotics	Investments in physical AI are leading to the deployment of intelligent robots and autonomous systems (humanoids, UGVs) that learn in simulated digital twin environments, driving end-to-end automation of factory and maintenance operations.
Edge AI for low-latency decisions	Processing is shifting to the Edge (shop floor, machines) using small, optimized AI models to achieve ultra-low latency, save energy, ensure local data privacy, and enable real-time operational decisions such as visual quality control and asset monitoring.
AI-native process reinvention	Enterprises are redefining core business processes—such as procurement, quality control, and order fulfillment—to embed AI at the core, moving beyond simple task augmentation to achieve large-scale, transformative operational efficiency gains.
AI-driven sustainability and frugality	A critical focus is placed on leveraging AI to optimize energy consumption (e.g., in data centers or manufacturing), reduce waste, improve yield problems, and manage complex power/water utility systems for environmental compliance and cost reduction.
Generative engineering and materials design	AI accelerates R&D cycles by using generative models to create synthetic data, design new materials (e.g., for batteries or chemicals), and reduce the number of physical experiments needed to find optimal solutions.
Intellectual property lifecycle management	Sophisticated systems are being deployed to track the IP ownership and data lineage used to train AI models, ensuring compliance in regulated environments and protecting the company's unique, implicit knowledge.
Hybrid organizational models	Successful scaling of AI relies on combining centralized expert teams (for governance and foundational development) with decentralized, agile teams or "squads" embedded in business units to localize expertise and ensure asset-proximity deployment.

AI FOR DEFENSE

AI adoption in the defense sector is critical and characterized by an urgent need for speed and sovereignty in the face of evolving geopolitical threats. The fundamental objective is to use AI to digest the vast "data deluge" from modern digital battlefields and provide consolidated intelligence and decision support to human operators.

While AI is essential for accelerating mission planning, situational awareness, and optimizing fire plans for systems like drones and unmanned combat air systems (UCAS), human judgment remains central to lethal and strategic decision-making. Debates center on developing trustworthy and explainable AI (XAI), often through neurosymbolic systems, to ensure predictable and auditable autonomous actions in mission-critical environments.

The push for digital sovereignty mandates maintaining national control over the entire AI stack, from localized infrastructure (supercomputers like Asgard) and models to the secure handling of classified data, driving strong partnerships between defense contractors and AI champions

« We are not replacing the Legacy platform. We are coming with our Agentic platform that we plug directly to the data streams. And we create this enablement through AI orchestration. Without having to impose any critical change to their operations. »

Dr. Chaouki Kasmi, President - Technology & Innovation, EDGE Group.



« The French military Combat Aircraft roadmap is driven by nuclear deterrence, and in nuclear deterrence, achieving sovereign AI is crucial for this roadmap. »

Pierre Renvoisé, Defense Systems Architect, Dassault Aviation.

AI FOR DEFENSE

Cognitive autonomy for mission planning	AI agents are providing enhanced cognitive autonomy for military applications, generating strategic mission plans and operational execution sequences for unmanned combat systems, aerial platforms, and drone swarms.
AI-Powered situational awareness	Systems use AI to ingest and process massive, heterogeneous data inputs (the "data deluge") from sensors, satellites, and open sources to provide military command centers with rapid, consolidated situational awareness and intelligence.
Human-machine collaborative combat	AI augmentation is centered on assisting human pilots and operators in high-pressure, complex scenarios (e.g., optimizing fire plans or managing sensor orientation) while ensuring human judgment remains central to lethal or strategic decisions.
Sovereign control of the AI stack	Digital sovereignty is achieved by maintaining French/European control and ownership over the entire AI development and deployment lifecycle, relying on internal infrastructure, localized development, and audited open-source models.
Accelerated cyber-deterrence	AI is deployed for both offensive and defensive cybersecurity, including building sophisticated cyber reasoning systems capable of real-time vulnerability detection, malware analysis, and automated patching.
Digital twins for classified systems	Highly secure supercomputers are utilized to run computationally intensive simulations and develop digital twins of classified defense assets, aiding in training, stress-testing, and operational scenario planning.
Trustworthy AI via neurosymbolic systems	The development of trustworthy and explainable AI systems, often utilizing Neurosymbolic AI, is prioritized to ground model outputs in reality, making autonomous decisions auditable and predictable for mission-critical use cases.
Continuous operational learning	AI models are designed for continuous refinement and adaptation based on real-world operational data collected on the battlefield, moving toward more open and flexible architectures that support rapid development cycles.

AI FOR RETAIL & CONSUMERS

The retail and consumer sector is undergoing rapid change driven by two main trends: Agentic Commerce and the need for extreme content velocity. The central debate is how established brands can maintain relevance and direct customer relationships when generative AI models act as personal shopping assistants, intervening in the product discovery and purchase funnel.

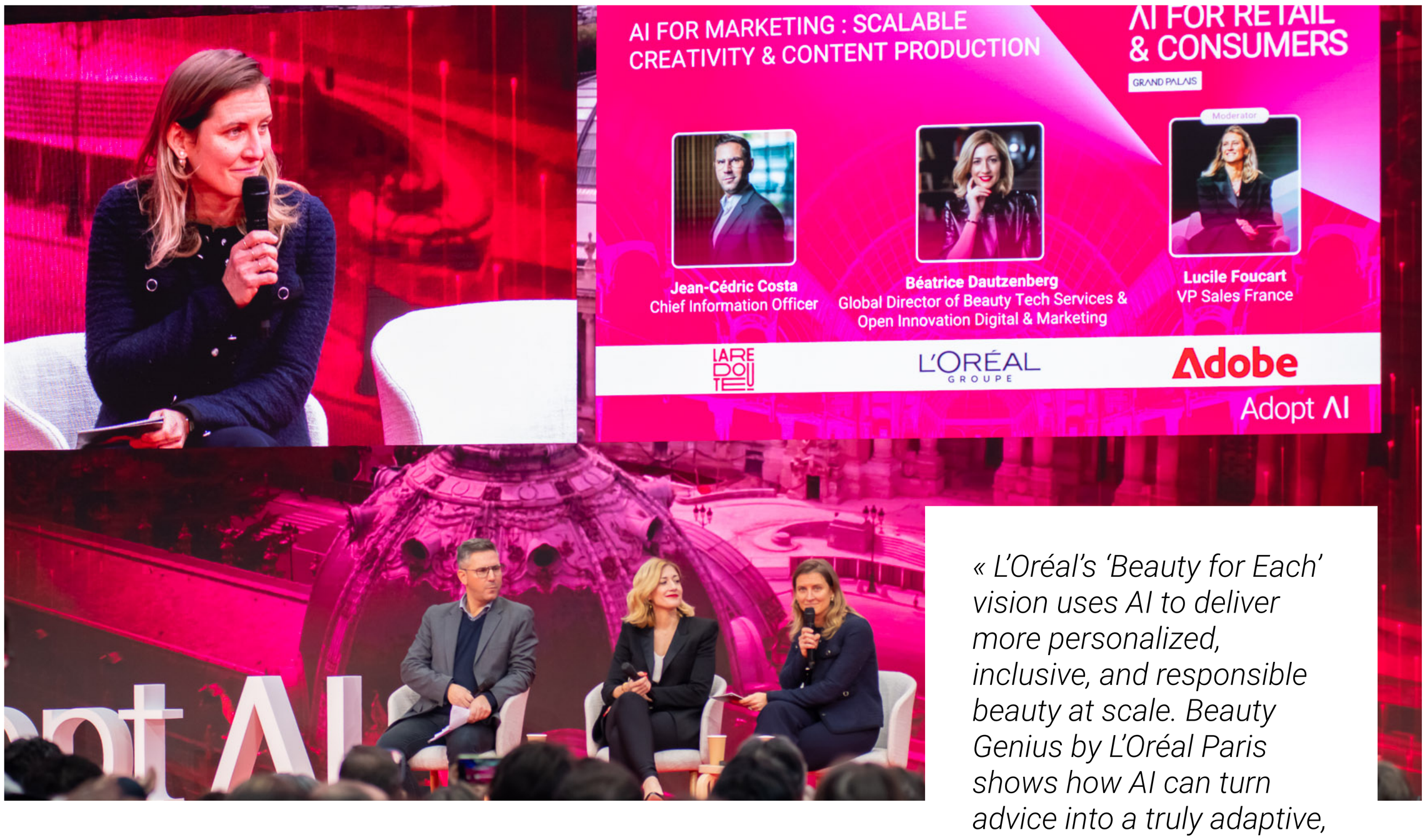
Key application areas include using AI for hyper-personalization in marketing (e.g., dynamically generating thousands of on-brand assets in minutes) and enhancing in-store operations through computer vision for real-time asset monitoring and loss prevention.

Challenges include leveraging fragmented data across various channels, ensuring brand integrity when producing AI-generated content at scale, and adapting business models to new distribution channels where autonomous agents manage transactions on behalf of the customer.

Success relies on building an "agentic layer" to optimize product catalogs for machine readability and enable seamless transactions across external AI interfaces.

« Your brand is no longer discovered only by people, but also by the agents acting on their behalf. »

Luc Dammann, President of EMEA, Adobe.



« L'Oréal's 'Beauty for Each' vision uses AI to deliver more personalized, inclusive, and responsible beauty at scale. Beauty Genius by L'Oréal Paris shows how AI can turn advice into a truly adaptive, personal companion, beyond efficiency, it boosts relevance and creativity. »

Béatrice Dautzennberg, Global Director of Beauty Tech Services & Open Innovation Digital & Marketing, L'Oréal Groupe.

AI FOR RETAIL & CONSUMERS

Agentic commerce and personal shopping	Consumer interaction is being reshaped by AI shopping agents that act as personal consultants, aggregating user preferences, providing instant product recommendations, and potentially handling entire purchasing workflows autonomously.
Content velocity and on-brand scaling	Generative AI is essential for mass production of marketing content, enabling hyper-personalized campaigns across multiple channels (e.g., social media) and accelerating production cycles from months to minutes while adhering strictly to brand guidelines.
Computer vision for store intelligence	In physical retail, advanced computer vision systems analyze video streams to monitor customer behavior, manage store efficiency (e.g., staffing, queue management), detect internal fraud (loss prevention), and track product stock levels in real time.
Dynamic revenue optimization	AI enhances dynamic pricing models and sales strategies by analyzing market demands and product inventory in real-time, optimizing profitability and enabling personalized negotiations outside of standard public rates.
AI for fraud prevention	AI agents are specifically designed to analyze complex logistical and conversational patterns (e.g., refund requests, message templates) to detect and prevent sophisticated fraud schemes, driving measurable financial impact for e-commerce platforms.
Agent-driven customer service deflection	AI chatbots and agents handle a high volume of routine customer service requests (e.g., subscription issues, FAQs) with high satisfaction, reserving human agents for complex, escalated, or emotionally sensitive customer interactions.
Rethinking digital distribution	As AI drives customer discovery toward large language models, retail brands must develop an "agentic layer" to expose their product catalogs and transaction capabilities to new external AI channels, moving away from sole reliance on owned websites.
Operational efficiency on the shop floor	AI is integrated into site operations to forecast consumer demand (reducing food waste/ inventory issues) and optimize workforce scheduling, directly improving efficiency and cost management for site managers.

AI FOR TRAVEL

AI is fundamentally transforming the traveler experience by aiming for autonomous trip orchestration and extreme personalization across the entire journey. The most pressing debate concerns the impact of autonomous AI agents on the industry's business model, particularly how brands will remain visible and transact when agents become the primary interface for planning and booking, leading to a need for brands to expose product catalogs via an "agentic layer".

Key trends focus on facilitating data collaboration across the historically fragmented ecosystem (airlines, hotels, airports) to enable seamless handoffs and disruption management. Applications include enhancing airport operations through forecasting and automated turnaround efficiency, deploying real-time voice and translation agents for customer service, and using AI for dynamic revenue and distribution optimization.

The greatest structural challenge is overcoming the legacy and fragmented IT systems within the industry to support the rapid adoption and scaling of AI, which often relies on establishing secure data governance frameworks (e.g., data spaces) to build trust among partners.

« 80% of the challenges that we are facing are not coming from the limitation of AI. They are coming from legacy, fragmented system and the underlying technology below it. »

Sylvain Roy, Chief Technology Officer, Amadeus.



« AI is the next step in the airport journey: using it to tailor processes on the fly to each passenger's characteristics and preferences. Ultimately, we need to stop thinking like a company and start thinking like the client, using AI to orchestrate services around their journey. Agentic AI is the obvious tool to enable that, even if we're not there yet. »

David Krieff, CIO, Groupe ADP.

AI FOR TRAVEL

Autonomous trip orchestration	Agentic AI is moving toward managing the entire travel journey autonomously, including re-booking due to flight disruption, coordinating connections, and automatically arranging ancillary services (e.g., trains, hotels).
Data collaboration across the ecosystem	End-to-end personalization requires establishing data collaboration frameworks and "data spaces" between traditionally separate actors (airlines, airports, hotels, OTAs) to achieve a seamless, fluid traveler experience.
Adapting to AI-driven discovery	Travel brands must fundamentally rethink their visibility and booking funnels to remain relevant, as generative AI models become the primary source for trip planning and decision-making, shifting control from brands to consumer-facing agents.
Hyper-personalization and tailor-made experiences	AI is enabling ultra-personalization, going beyond generic offerings to anticipate individual traveler needs, adapt communication based on real-time context, and design unique, tailor-made trip experiences.
Real-time voice and translation agents	AI is deploying voice-to-voice agents that handle customer interactions, including real-time translation for diverse global clientele, which accelerates service delivery and improves the emotional quality of complex support handoffs.
Optimizing core airport operations	AI is deeply embedded in managing travel infrastructure operations, using computer vision and forecasting models for tasks such as predicting passenger flow, optimizing security lane allocation, and managing aircraft turnaround efficiency.
AI for revenue and distribution management	AI enhances revenue streams by supporting dynamic pricing, recommending personalized upsells, and allowing complex content (e.g., pricing multiple flight segments) to be served efficiently to travelers.
Data quality and governance for scale	Scaling AI relies on establishing robust data governance and common data language across fragmented organizational systems to ensure data reliability and trustworthiness, which is a significant challenge given the industry's legacy complexity.

AI FOR SPORT

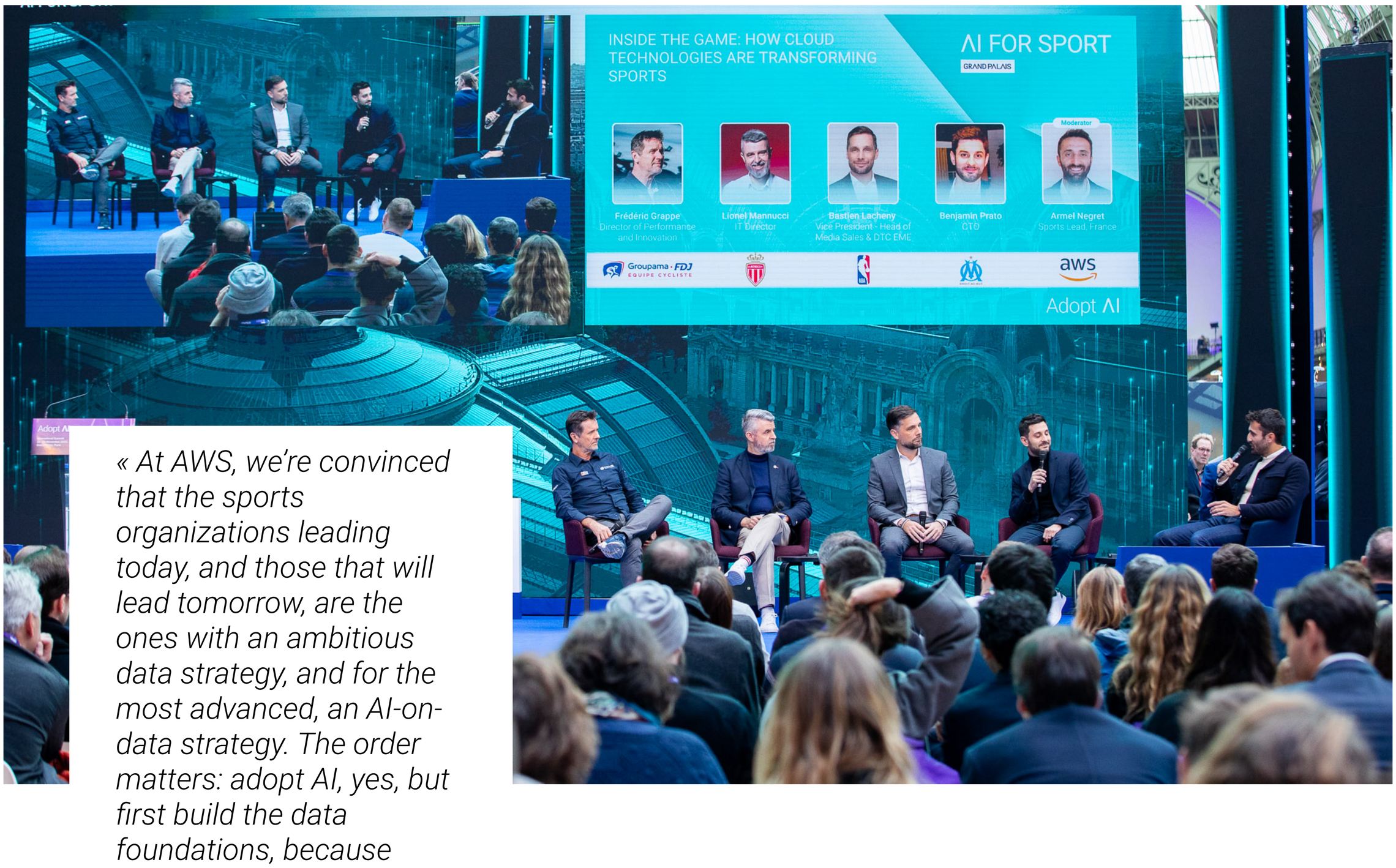
AI is driving both the real-time fan experience and the operational efficiency required to manage large-scale sporting events and venues. The primary commercial trend involves deploying AI to personalize engagement for large fan bases, using tools like customized emails, targeted campaigns, and unique digital merchandising (e.g., personalized scratch cards) to maximize loyalty and revenue.

Operationally, AI is applied internally for high-stakes performance analysis and managing the complex logistics of venues, including predictive crowd analytics and optimizing staffing and autonomous store experiences to reduce consumer wait times.

Future trends point towards the integration of sophisticated generative AI for augmented media and commentary, enhancing the consumption experience, and the importance of cross-ecosystem collaboration to aggregate the diverse data required (e.g., ticket sales, mobility) for large-scale event management.

« Generative AI will shift sports from one-size-fits-all to truly individualized experiences. It will also reshape athlete preparation, injury prediction, and officiating, changing how leagues operate and how sports content reaches mainstream audiences. »

Bastien Lacheny, Vice President - Head of Media Sales & DTC EME, National Basketball Association (NBA).



« At AWS, we're convinced that the sports organizations leading today, and those that will lead tomorrow, are the ones with an ambitious data strategy, and for the most advanced, an AI-on-data strategy. The order matters: adopt AI, yes, but first build the data foundations, because clean AI starts with clean data. »

Armel Negret, AWS, Sports Lead, France.

AI FOR SPORT

Real-time fan experience personalization	AI revolutionizes fan engagement by accelerating content creation and targeting customized emails and campaigns to millions of supporters in real time, leveraging digital platforms to drive record engagement.
Predictive stadium and event analytics	AI is applied to manage complex logistics in large venues, monitoring crowd dynamics, optimizing operational flow, and providing predictive analytics to address post-event traffic congestion and resource allocation.
Operational efficiency in large venues	AI supports the management of large sports venues (stadiums), optimizing resource allocation and streamlining service delivery, including implementing autonomous stores to reduce consumer wait times.
Augmented commentary and media	Future applications include the use of generative AI to create dynamic, real-time commentary and media artifacts, enhancing the immersive experience of sports consumption.
Data-driven performance analysis	AI is utilized internally for deep performance analysis, although the specific applications are often protected intellectual property, the tools support data-driven decision-making in highly competitive environments.
Customized advertising and merchandising	AI enables personalized digital signage and promotional displays within retail environments, potentially extending to sports merchandising based on individual customer history when they enter a venue.
Compliance and governance support	AI supports the complex governance required for large-scale events, aiding in compliance checks, security monitoring, and management of various operational risks to maintain safety and stability.
Ecosystem collaboration for data	Partnerships are formed to aggregate and share diverse data sets (e.g., ticket sales, mobility data, purchasing) necessary for developing comprehensive fan engagement strategies and managing event logistics.

AI FOR THE PLANET

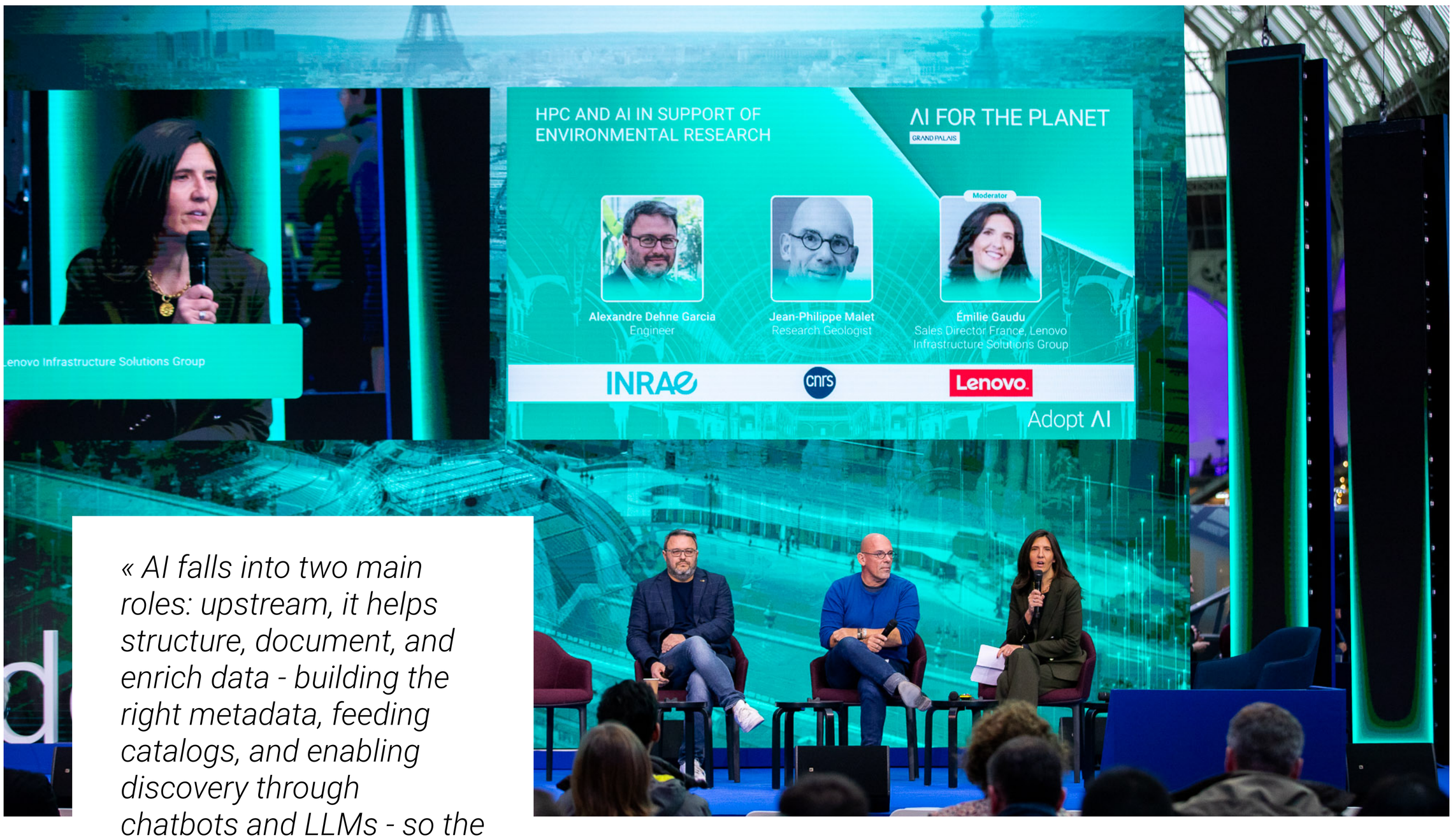
AI adoption presents an energy paradox, characterized by the immense power consumption of data centers, which risks conflicting with global sustainability goals. This tension drives a fundamental push toward digital sobriety, requiring organizations to invest in energy-efficient infrastructure such as liquid cooling and optimized small language models (SMLs) to significantly reduce power usage per computation.

Beyond minimizing its own footprint, AI acts as a crucial tool for proactive environmental management by enabling real-time optimization of energy use, reducing industrial waste, and conserving resources across utilities and manufacturing processes.

Furthermore, AI is vital for climate resilience, enhancing weather forecasting accuracy, and providing earlier warnings for severe events like storms. Success in this area relies on leveraging digital twins and generative AI to simulate, accelerate the discovery of sustainable materials, and optimize complex operational assets.

« AI can indeed serve the full scope of environmental research, but we must support that research with infrastructures that are also aligned with sustainable development. »

Jean-Philippe Malet, Research Geologist, School and Observatory of Earth Sciences, CNRS.



« AI falls into two main roles: upstream, it helps structure, document, and enrich data - building the right metadata, feeding catalogs, and enabling discovery through chatbots and LLMs - so the data becomes truly findable, reusable, and archivable; downstream, it helps us exploit that data to extract concrete information for scientific and operational questions. »

Alexandre Dehne Garcia, Project Director, INRAE.

AI FOR THE PLANET

AI-driven frugality in data centers	Addressing the massive energy demands of AI by prioritizing the development and deployment of specialized, optimized models (SMLs) and investing in infrastructure improvements, such as liquid cooling and highly efficient data storage, to drastically reduce power consumption per computation unit.
Optimizing industrial energy usage	AI systems are deployed to manage complex utility systems, improving energy efficiency in production processes, reducing water and detergent use (for consumer appliances), and preventing energy waste from the point of production to final consumption.
AI for climate prediction and resilience	Machine learning and foundation models are utilized to accelerate and enhance environmental predictions, improving weather forecasting accuracy and enabling earlier warnings (by up to 12 hours) for severe events like storms, cyclones, and potential flooding.
Sustainable material design and R&D	AI drives operational efficiency by predicting demand and monitoring assets to minimize waste, including optimizing food production to reduce waste on site and improving industrial yield to conserve materials and reduce defective products.
Digital twins for resource optimization	Virtual replicas of industrial facilities, power grids, and infrastructure are leveraged with AI to run real-time simulations and continuous optimization algorithms, identifying inefficient processes to reduce power and water consumption.
Measuring and minimizing industrial emissions	AI systems, including multi-sensor arrays and autonomous aerial monitoring (drones/ satellites), are deployed to precisely locate, analyze, and minimize methane and carbon dioxide emissions across large operational assets and facilities.
Greening logistics through AI optimization	AI optimizes complex supply chain and transportation networks by performing calculations for ideal routing and maximizing truck/asset capacity utilization, thereby reducing overall carbon emissions and energy consumption associated with logistics.
Digital twins for resource optimization	Virtual replicas of industrial facilities, power grids, and infrastructure are leveraged with AI to run real-time simulations and continuous optimization algorithms, identifying inefficient processes to reduce power and water consumption.

AI FOR SOCIETY

The societal discourse around AI in Europe is dominated by the strategic imperative of sovereignty—defined as maintaining national or regional control and ownership over data, infrastructure, and models—to ensure ethical alignment and competitive resilience.

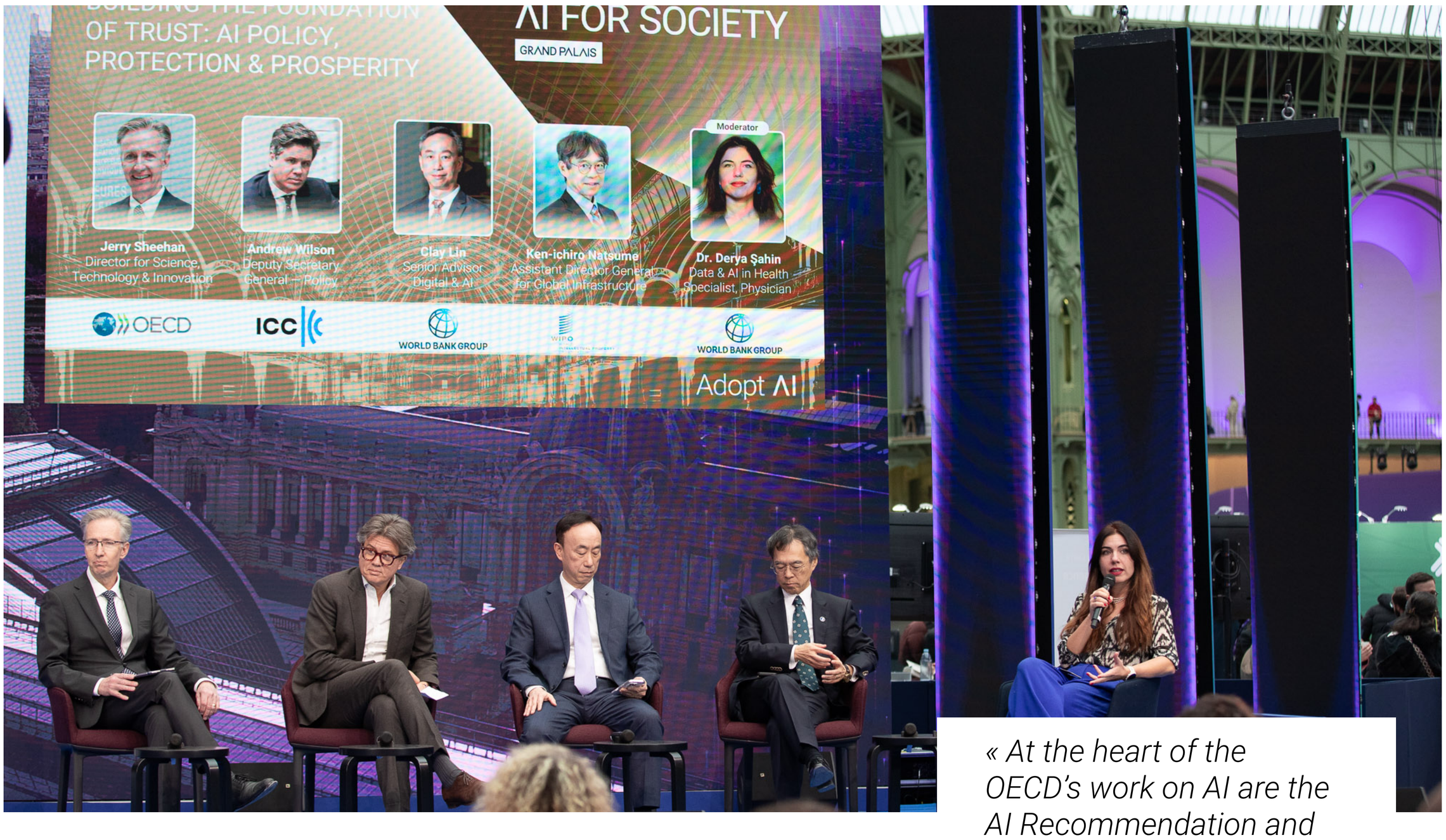
A major trend is the large-scale investment in foundational infrastructure, such as AI factories and supercomputers, coupled with a focus on digital sobriety to manage the immense energy demands of AI models and data centers.

Debates emphasize the need to accelerate AI adoption in the public sector (e.g., health, legal services) by integrating private sector solutions and fostering widespread AI literacy among civil servants.

Key policy discussions center on implementing flexible yet robust governance frameworks (like the AI Act) to instill ethical values, mitigate risks like misinformation, and leverage open source strategies to democratize technology and undercut the market dominance of a few large non-European players.

« AI solutions offer a unique opportunity to deliver immediate, localized impact, bypass many traditional development barriers, and foster homegrown innovation and adoption. »

Clay Lin, Senior Advisor Digital & AI, World Bank Group.



« At the heart of the OECD's work on AI are the AI Recommendation and the OECD AI Principles, which promote a human-centric, rights-based approach to AI development, helping move us toward trustworthy AI. »

Jerry Sheehan, Director for Science, Technology & Innovation, OECD.

AI FOR SOCIETY

Sovereignty as a trust standard	European organizations leverage initiatives like the AI Act and regional collaborations to establish sovereignty—defined as control, choice, and ownership over data and models—as a core principle and competitive advantage for trustworthy AI globally.
AI-powered cybersecurity defense	AI is crucial for both public and private sector cybersecurity, enabling autonomous security operations, real-time vulnerability detection, and the development of sophisticated tools to counter ever-accelerating cyber threats and phishing attacks.
Sustainable AI & green computing	The immense energy demand of AI is driving a strategic focus on digital sobriety, emphasizing investments in energy-efficient infrastructure (e.g., liquid cooling, high-density storage) and optimizing model efficiency (SLMs) to reduce environmental impact.
Governance through guardrails and values	Governance models are shifting away from rigid, centralized control toward flexible "guardrails" and value-based frameworks (constitutional AI) that instill ethical principles in agents while allowing for rapid, decentralized innovation and experimentation.
Open source as a strategy for resilience	Open source platforms are viewed as a vital strategic asset for national and corporate resiliency, facilitating the horizontal distribution of technology, undercutting market dominance, and ensuring technological choice and auditability.
Accelerating public sector adoption	Governments are prioritizing the large-scale deployment of AI in public administration (e.g., health, education, legal services) through fast-track initiatives, ambassador networks, and procurement of proven private-sector solutions.
Human-AI symbiosis and machine identity	The increasing autonomy and embodiment of AI systems (robots, agents) necessitate the development of machine identity (IAM systems for machines) and clear accountability frameworks to ensure safe coexistence and human governance.
Strategic investment in foundational science	Europe's comparative advantage in basic sciences (mathematics, physics, chemistry) provides a crucial foundation for high-impact, disruptive AI research, particularly when leveraged to solve complex challenges like material science and energy transition.

AI FOR HR

The primary focus of AI in HR is enabling a massive, accelerated transformation of the enterprise workforce by shifting human efforts toward high-value, strategic work. This is driven by the immediate potential of Generative AI agents to automate routine administrative tasks, such as internal Q&A, drafting job descriptions, and managing complex internal workflows.

A critical challenge is scaling up AI literacy and specialized skills training (prompting, data literacy) across all employee levels to ensure wide adoption and ease the fears associated with job displacement, often by emphasizing that AI augments, rather than replaces, human work.

Debates emphasize the need for human-centric governance to manage ethical risks, control bias, and clearly define new, AI-enabled roles like "Workflow Managers" responsible for supervising increasingly autonomous agentic processes.

Successful adoption is often measured through employee satisfaction and adoption metrics, viewing human capital and cultural alignment as the central priority for achieving organizational change.

> *« In Safran, 'substitution AI' is already real: in 2025, genAI supported about 12% of our 2,000 pieces of content. But the real question is where we set the delegation line. That's why I prefer 'confrontation AI', an AI that doesn't empty your mind, but trains it by challenging what you truly understand. »*
>
> Jean-Roch Houllier, Head of Operations, Learning & Digital, Safran.



> *« AI is an aggregator, a super assistant for our people. Skills are evolving extremely fast today. So strategic workforce planning, which we used to do every five years, now needs to be done every one to two years. The important thing is to be sure that we are not letting anyone aside. »*
>
> Sofia Merlo, Head of Human Resources, BNP Paribas.

AI FOR HR

Mandatory AI upskilling and training	Companies are implementing mandatory, structured training programs for all employees, often through internal academies and champions, to rapidly improve AI literacy and ensure the workforce is equipped for AI-augmented roles.
AI-augmented daily tasks	AI agents and digital assistants handle numerous routine administrative tasks, such as internal Q&A, drafting communications, document summarization, and generating job descriptions, thereby freeing up employee time for high-value strategic work.
Focus on soft skills and judgment	With AI automating repetitive tasks, the focus of human work shifts towards strategic planning, creativity, empathy, and critical thinking; training programs are adapting to augment these distinctly human skills.
Human-centric ethical governance	HR teams are key stakeholders in defining ethical charters, managing social dialogue, and setting organizational guardrails to ensure AI adoption is transparent, minimizes bias, and upholds the principle of "human responsibility" over autonomous outcomes.
Defining new AI-enabled roles	The transformation is creating new specialist roles, such as "Workflow Managers" and "Process Designers," responsible for mapping, implementing, and supervising the increasingly autonomous agentic workflows within the enterprise.
AI for workforce planning and optimization	AI is utilized for sophisticated workforce management, including predicting staffing requirements (e.g., seasonal allocation) and optimizing resource deployment based on complex factors like site activity and regional movement.
Cultivating adoption through gamification	Organizations use community building, gamification (like digital badges and internal competitions), and strong leadership support to cultivate a proactive culture of experimentation and drive widespread employee adoption of AI tools.
Managerial augmentation and oversight	AI provides middle and senior management with direct decision support, such as drafting team objectives or providing real-time data insights, shifting their focus from operational execution to strategic oversight and cultural leadership.

PARTNERS

The Adopt AI initiative extends its formal recognition and appreciation to all contributing partners whose support is integral to the advancement of our collective mission. The commitment and specialized contributions from each tier of partnership are foundational to the ecosystem's success and its ability to facilitate AI adoption across diverse sectors.

Thank you to Seedext for supporting the summary and transcription of our event replays.

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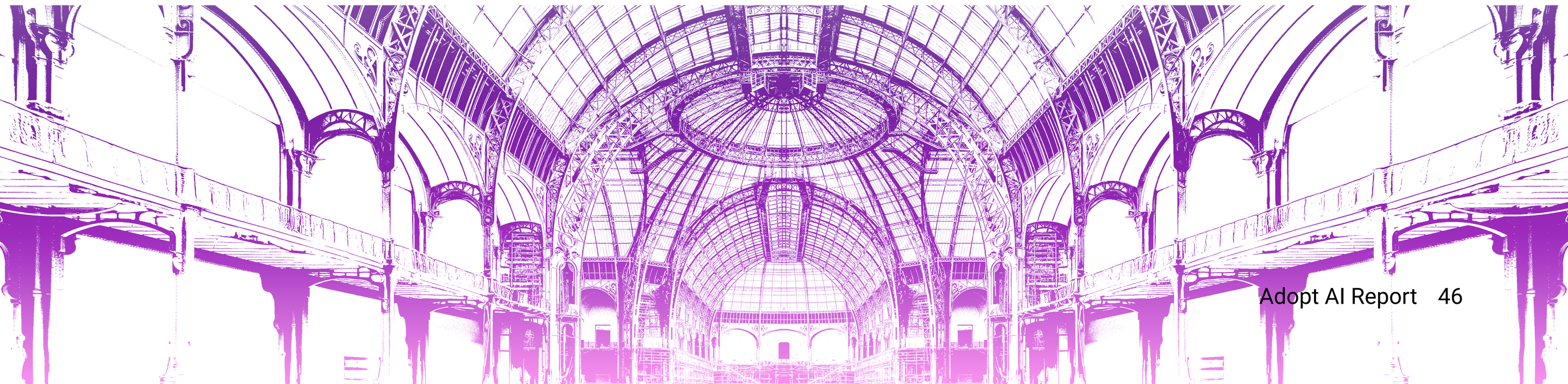


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