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TCS Enterprise AI Study – France

Intelligence that matters



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Foreword

A shift in motion: Charting the enterprise AI advantage

We're seeing the evolution of enterprise AI firsthand, both through our client engagements and across several of our large-scale research studies. Once defined by anticipation around its potential, AI has rapidly moved into everyday workflows, decisions, products, and operations. During this time we've seen conversations shift from potential to execution, and from experimentation to value.

Our latest research captures that shift in motion. As organisations have gained more practical experience with AI, respondents see some of its clearest effects in decision-making, changing roles, and responsibilities. At the same time, security, risk, and governance are playing a greater role in shaping AI deployment and investment decisions, while organisations are placing an increased emphasis on maintaining flexibility across the AI stack, including models and platforms.

Truly autonomous action remains the exception rather than the norm. Most organisations are making progress in specific functions, use cases, or business units, yet relatively few have reached a level of enterprise-wide readiness. Business knowledge is often scattered across systems, and many AI initiatives remain tied to individual platforms, environments, or tools.

This is why we believe enterprise AI has reached a decision point. The question now is where and how intelligence can make the greatest difference. That is what we mean by intelligence that is real. Leaders now have to decide where AI should advise, where it should act, and how human judgement will remain part of the system. We also need to protect critical data, intellectual property, and business context while preserving the freedom to choose among a fast-changing ecosystem of models, platforms, and agents.

The opportunity ahead is significant. Organisations that make deliberate choices to lead with connected organisational intelligence will be best positioned to turn today's gains into trusted, resilient, and lasting enterprise advantage.

We hope this report offers a useful perspective as you consider the choices ahead and chart the next stage of your enterprise AI journey.

Executive Summary

This study examines how organisations in France are evolving their enterprise AI priorities across data and AI foundations, scale and deployment, people and work transformation, governance, trust, value-chain, and industry transformation.

Together, the findings point to three interconnected areas where leaders must focus their attention: **redesigning processes around AI-enabled decisions, building adaptable and controlled technology foundations, and aligning the workforce with changing responsibilities.** Progress in one dimension cannot compensate indefinitely for gaps in another.

Among the key findings:

AI is reshaping how decisions get made



Decision-making processes rank as the area experiencing the greatest AI-related change in France, signalling a shift beyond productivity gains towards AI's growing role in how organisations evaluate options, allocate resources, and act on opportunities.

Security will determine the next phase of enterprise AI



Security, risk, and governance considerations rank as the leading factor shaping how and where AI systems are developed and deployed in France, ahead of cost, speed, and ease of deployment.

Practical experience is reshaping expectations for AI's workforce impact



Compared with 2024, uncertainty about AI's workforce impact has increased significantly in France. The share saying it is too early to know how AI will affect job roles rose from 0% to 16%.

Model flexibility and sovereignty are emerging as particularly important priorities in France



Organisations increasingly want the freedom to adapt as AI ecosystems evolve. In France, 94% of respondents consider avoiding dependence on a single AI model or platform important to some degree.

AI economics are coming into focus



As deployments mature, organisations are paying closer attention to the costs of intelligence. In France, 32% assess whether AI initiatives generate sufficient value relative to token and compute costs, while 34% track those costs without consistently evaluating returns.

Note: Percentages are rounded to the nearest whole number. As a result, sums of displayed values may differ by one percentage point from summary figures calculated using unrounded data, and displayed percentages may not total to 100%.

From productivity to enterprise process transformation

Ever since AI burst into the mainstream, there's been no shortage of talk about its value. While the discussions take different forms, they usually boil down to two questions: is AI creating value and where is that value showing up?

In France, the vast majority of organisations identify productivity improvement as the leading source of value realised from AI investments, reflecting the technology's ability to accelerate work, improve efficiency, and augment employee capabilities.

Equally notable is where value has been slower to emerge. Revenue growth ranks lower, putting the onus on the next phase of AI adoption to translate employee productivity gains into top-line enterprise impact.



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But what happens when AI moves beyond productivity? As AI becomes more deeply embedded in the enterprise, it is starting to influence not just how work is performed, but how decisions are made and how systems operate. According to respondents, that next phase is already beginning to take shape.

Respondents ranked decision-making processes as the area experiencing the greatest AI-related change, ahead of many other parts of the business (see Figure 1).



Figure 1 - Q. Please rank the top three areas in your organization that have experienced the greatest change due to AI ?

The importance of this shift aligns with earlier research conducted by TCS on ***Intelligent Choice Architectures (ICAs)***. That work identified decision environments as an emerging source of competitive advantage.

Rather than simply automating processes or generating recommendations, AI systems can help surface new options, reveal hidden trade-offs, and continuously refine the context in which decisions are made.

Industry and region insights

Globally, decision-making processes, job roles and responsibilities, and workforce planning are the three areas seeing the greatest AI-driven change. France shows a distinct pattern: decision-making remains the top-ranked area, but enterprise workflows rises to second place, followed by workforce planning, while job roles and responsibilities ranks only fifth.

Regional priorities also vary, with operating models entering the top three in LATAM and UKI, and talent development and career growth in North America, APAC and ANZ. Among industries, insurance diverges most sharply, ranking operating models first and enterprise workflows third.

AI's path from recommendation to action runs through security

AI may be changing decision processes, but most organisations are not handing over broad authority. Figure 2 shows that nearly two-thirds (62 %) of respondents either do not permit autonomous AI decisions at all or in only a few specific use cases.

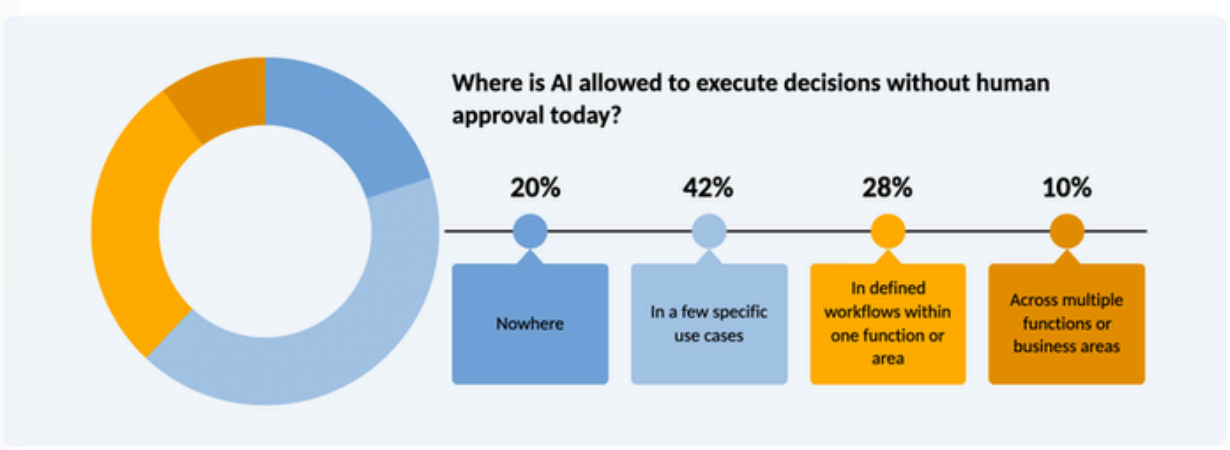


Figure 2 - Q. Where is AI allowed to execute decisions without human approval today?

This distribution separates influence from execution. AI may recommend a course of action, flag conditions, or evaluate possible responses while a person retains final approval. AI's influence on decisions is therefore considerably broader than its authority to execute them. This distinction becomes increasingly important as enterprises move toward more agentic forms of AI, where systems can act within defined boundaries rather than simply generate insights or recommendations.

The same bounded progression appears in physical operations. Nearly half of respondents (46%) use AI to guide or improve operational decisions, while a further 30% use it to increase visibility. By contrast, only 8% use AI to automate specific physical tasks, and just 2% enable dynamic, real-time adjustment (see Figure 3).

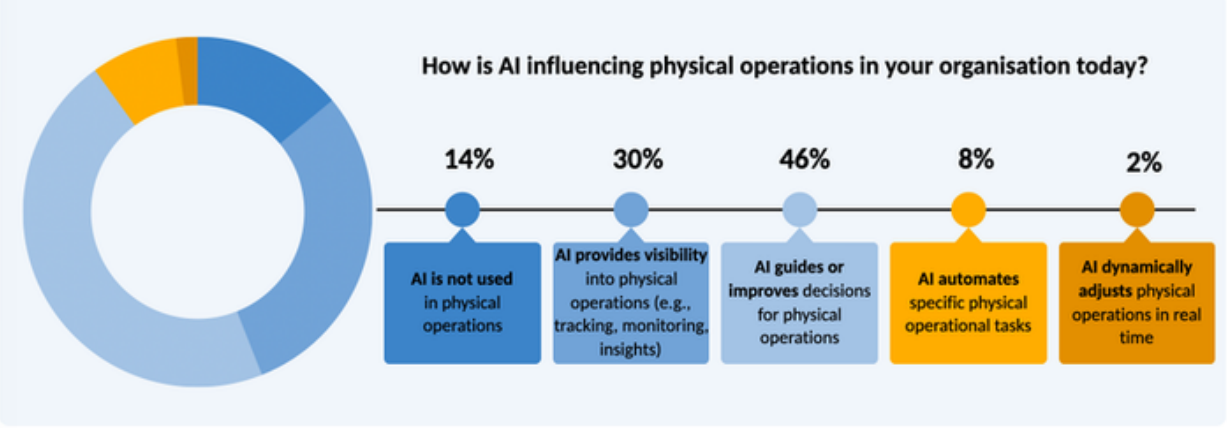


Figure 3 - Q. How is AI influencing physical operations in your organization today?

Industry insights

The use of AI in physical operations varies by sector, yet follows the same general trends across all industries. All the life sciences executives surveyed reported some use of AI, with 96% using it to improve operating technology decisions or to provide visibility into physical operations; however, far fewer (4%) said that AI dynamically adjusts their physical operations in real-time or automates specific tasks.

At the opposite end of the use spectrum, banking, financial services and insurance firms reported the least use of AI overall in physical operations (13% said it was not used), yet among the highest uses (20%) for dynamic, real-time adjustments or automation of specific tasks.

Other industries with the most advanced use of AI for physical operations are retail (20%), manufacturing (18%), and healthcare (16%). Consumer packaged goods is perhaps the most advanced industry of all for operating technology AI, with 12% of executives saying they use AI to adjust physical operations dynamically in real-time, and another 1% using it to automate specific tasks.

The limits on AI autonomy are closely tied to the limits on what AI can securely access and do across the enterprise. As organisations move from AI that informs decisions to AI that can carry them out, secure connectivity, governed permissions, and oversight become increasingly important. AI can generate recommendations with relatively limited access to enterprise systems. But acting reliably on those recommendations requires secure application connections, governed permissions, monitoring, oversight, and a coordinated pathway across tools and processes.

Today, many organisations have established the foundations for secure AI integration, but fully orchestrated agentic workflows remain rare. The most common maturity stage, reported by 44% of respondents, is the use of a standardized integration platform enabling secure access across enterprise AI. A further 28% have integrated several enterprise applications and tools, while only 4% say AI agents securely orchestrate workflows using governed tools and permissions (see Figure 4).

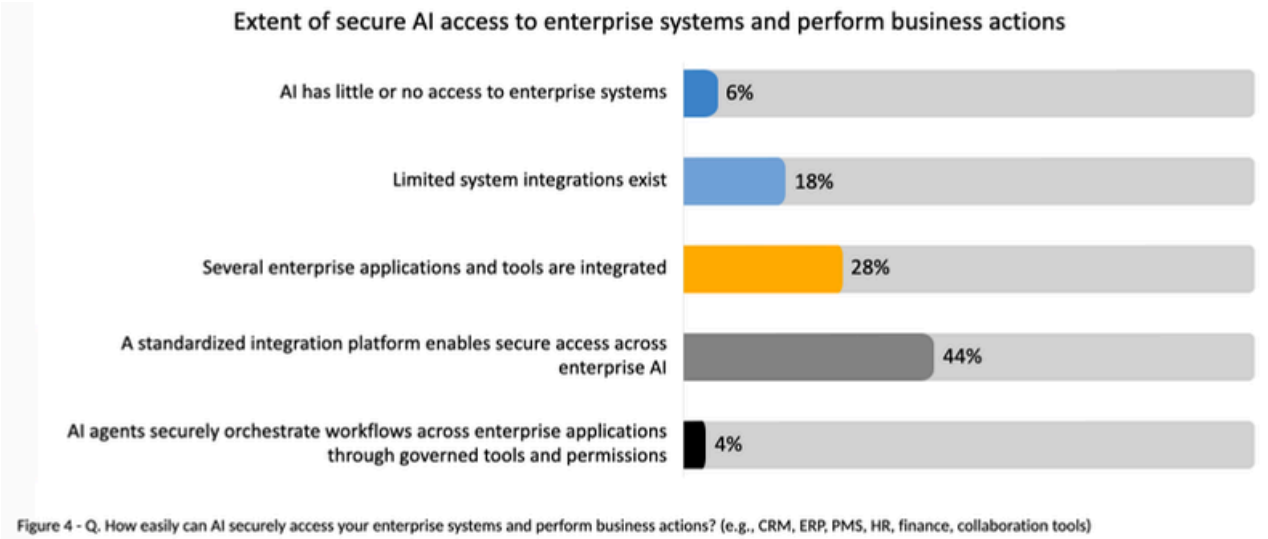


Figure 4 - Q. How easily can AI securely access your enterprise systems and perform business actions? (e.g., CRM, ERP, PMS, HR, finance, collaboration tools)

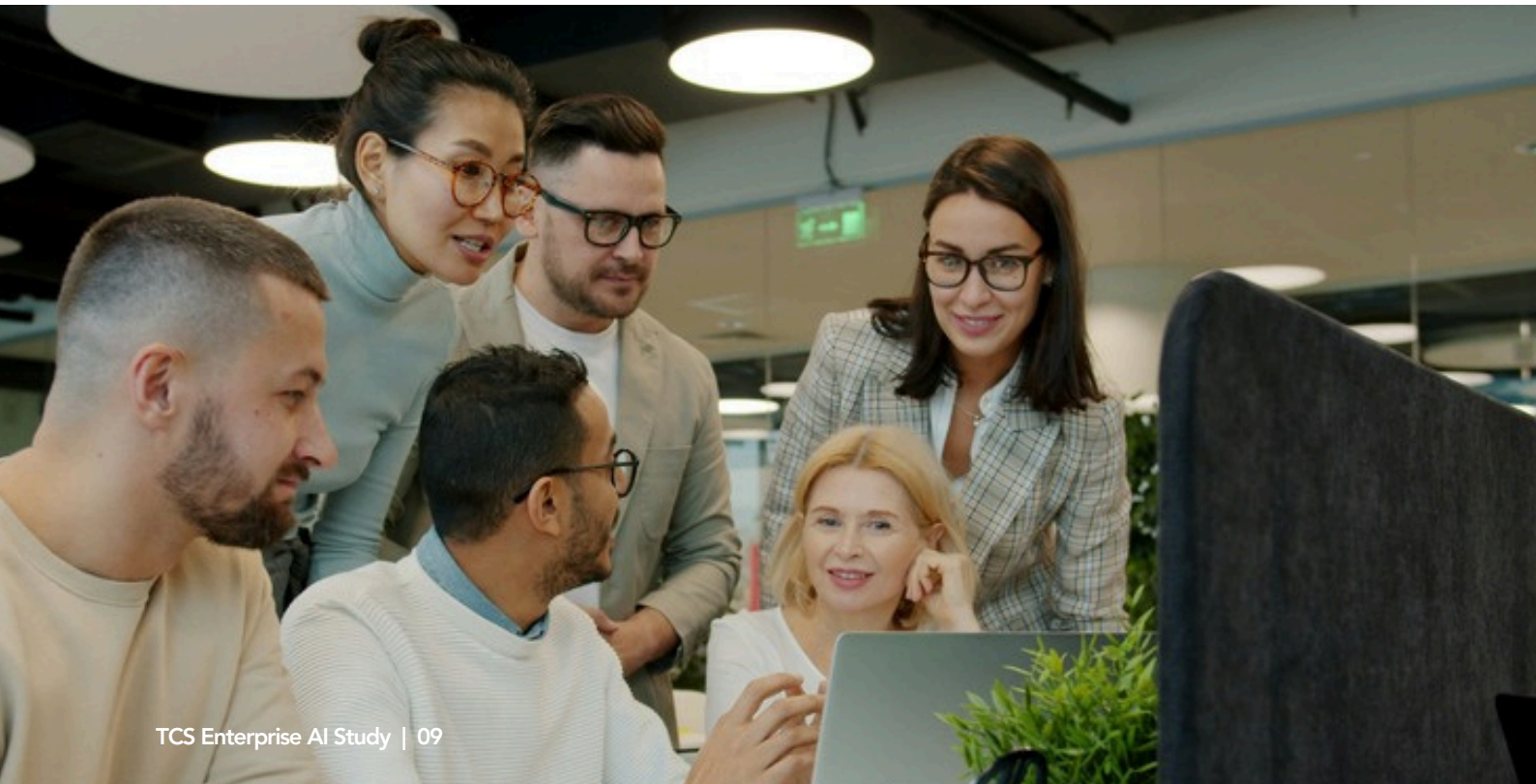
Industry insights

Banking, financial services and insurance has an 11-point advantage in agent orchestration: 20%, compared with 9% globally.

Closing this infrastructure gap will be critical as enterprises move toward more agentic AI. And as AI gets closer to taking action, security and governance are becoming more consequential to deployment decisions. Security, risk, and governance considerations now rank as the leading factor shaping how and where AI systems are developed and deployed, ahead of cost, speed, and ease of deployment.



> As AI gets closer to taking action, security and governance are becoming more consequential to deployment decisions.



Among industries AI's impact has yet to become structural transformation

AI is already influencing how organisations compete, innovate, and engage with customers. How far does AI's impact extend beyond the enterprise itself? When asked where AI is having the greatest impact on their industries, french respondents rank supply chain and ecosystem coordination first, followed by internal enterprise functions andcustomer engagement (see Figure 5.)



Figure 5 - Q. Where is AI creating the greatest impact on business transformation in your industry?

Industry and geo results

Customer engagement, product or service innovation, and internal enterprise functions are the three leading areas of AI impact globally. The composition changes across several countries.

Supply-chain and ecosystem coordination enters the top three in Japan and France, while both supply-chain coordination and industry business models enter Australia's top three. Industry results are similarly varied. Supply-chain coordination enters the top three in manufacturing, retail, consumer packaged goods, life sciences, and healthcare. Industry business models enter the top three in travel, hospitality and logistics, communications and media, consumer packaged goods, and utilities.

These are meaningful areas of change, but they remain concentrated within individual organisations rather than across entire industries. More structural forms of transformation, such as changes to industry business models and revenue streams, rank lower, while shifts in competition and market structure rank even lower. AI is improving how organisations participate in their industries before it fundamentally reshapes industry structures, boundaries, and revenue models.

Deeper industry transformation depends on coordination beyond a single enterprise. In France, respondents identify difficulty coordinating data, workflows, and processes across organisations as the leading barrier to more significant industry change. The second biggest challenge is turning AI insights into concrete business actions or decisions, followed by limited trust in AI outputs across organizational boundaries (see Figure 6). Until organisations can overcome these coordination, execution, and trust barriers, AI's impact is likely to remain more visible within individual enterprises than across their broader ecosystems.

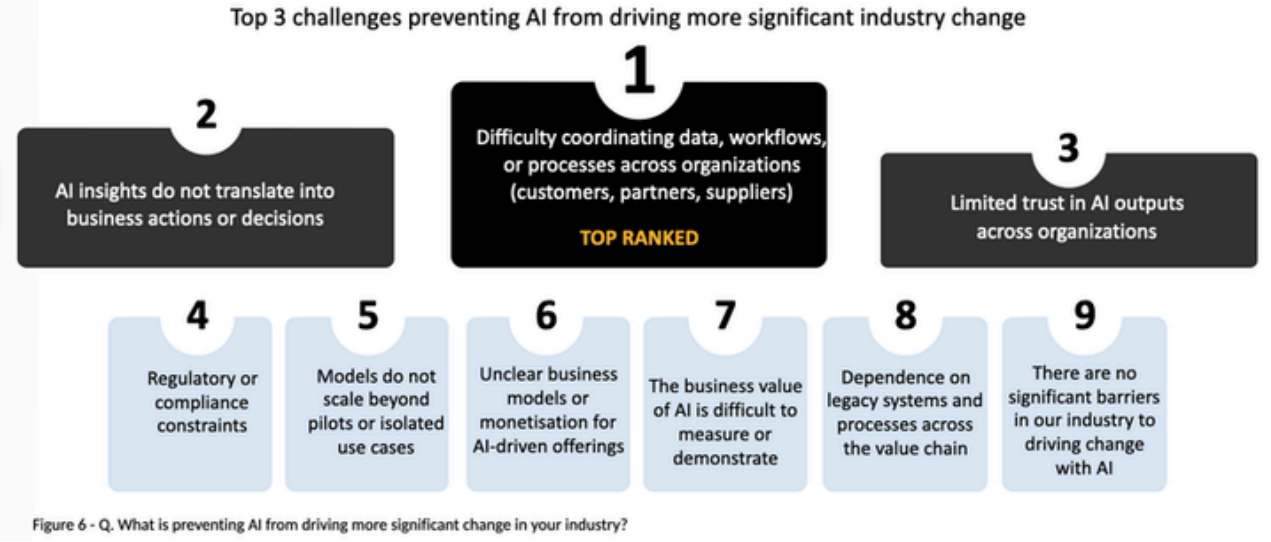


Figure 6 - Q. What is preventing AI from driving more significant change in your industry?

Most AI activities will stop at the enterprise boundary

The maturity of external AI adoption helps explain why broader industry transformation remains limited. Nearly half of respondents in France (48%) report using AI only within internal operations. A further 30% use AI to support interactions with customers, partners, or suppliers, but without integrating AI into their systems or processes. Together, this means that 78% of respondents still use AI either internally or independently of external partner systems.
Only 18% report integrating AI into systems and business processes with partners, suppliers, or customers. More advanced forms of cross-organisational AI remain rare, with just 2% using AI to coordinate activities across multiple external stakeholders and another 2% enabling shared workflows or decision-making across organisations (see Figure 7).

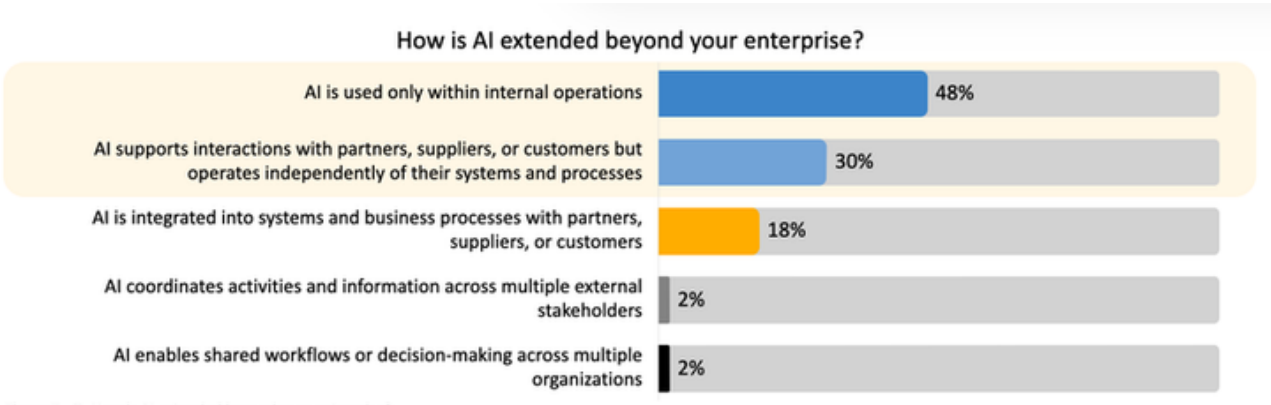


Figure 7 - Q. How is AI extended beyond your enterprise?

Taken together, the findings in this section show that AI is already influencing decisions, workflows, and operations, but broader authority and ecosystem coordination remain limited. The next section examines the context, integration, controls, and architecture needed for organisations to move from AI influence to greater autonomy and action.

Building for context, control, and adaptability

Organisations are steadily advancing the value they generate from data and AI. The long-term ambition is even greater as enterprises mature toward agentic systems that can continuously interpret changing business conditions, draw on enterprise context, and take appropriate action.

However, AI's growing influence on decisions has not yet translated into broad authority to act. Reliable action depends on business context, connected data, secure access to enterprise systems, governed permissions, and controls that operate consistently across models and platforms. In France, 30% of respondents use AI to uncover previously difficult-to-access or disconnected insights, while 24% use it to generate predictions and recommendations. A further 20% provide contextual intelligence in the flow of work, slightly above the global figure of 16%. However, only 6% continuously interpret enterprise-wide data to anticipate needs and adapt actions in real time, compared with 8% globally (see Figure 8).

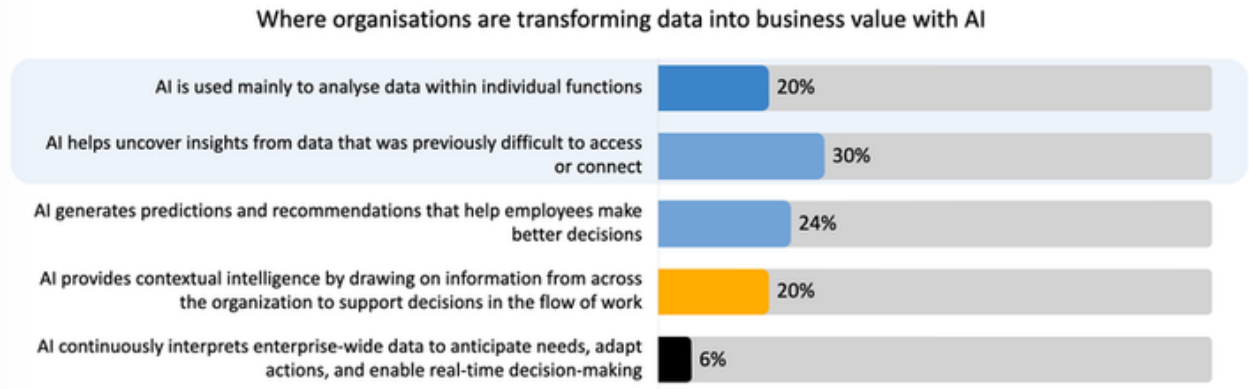


Figure 8 - Q. Which statement best describes the value your organization is creating from data through AI?

Industry and region insighs

Industry results reveal different paths forward. Prediction and recommendation generation soars for a number of industries: energy and resources (48%); utilities (44%); consumer packaged goods (38%) and manufacturing (35%). Insurance stands out for continuous enterprise-wide interpretation at 36%, compared with 8% globally.



Many organisations are encountering the practical limits of fragmented business context. In France, 42% of respondents still rely primarily on employee knowledge that is difficult for AI to access (14%) or on documentation that remains fragmented across functions and systems (28%). At the same time, 28% have consistently documented and managed major business processes, entities, and definitions in key areas, while 22% have digitised and standardised business context across much of the enterprise. Only 8% have established an enterprise business context layer that provides AI with a structured and consistent understanding across systems (see Figure 9).

Similar to the coordination challenge at the industry level, this fragmentation is also visible within the enterprise. Accessible business context is the connective layer that allows AI to produce consistent intelligence across functions and, eventually, across ecosystems. Agentic AI turns this already important layer into a critical one. As AI systems gain the ability to take actions within defined boundaries, organisations must determine how much authority to delegate and where human approval remains necessary.

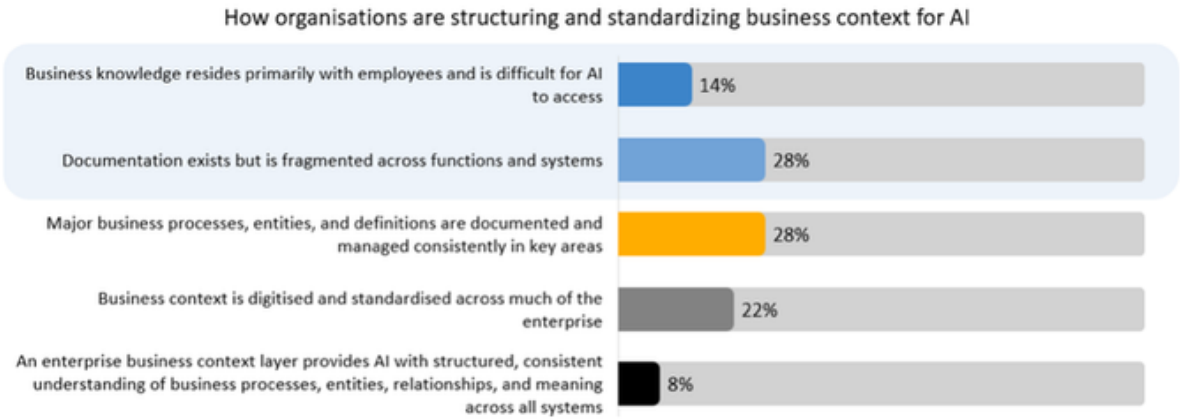


Figure 9 - Q. Which statement best describes how well your organization structures and standardises business context so AI can consistently operate across business functions? (e.g., finance, procurement, HR, marketing, revenue management, customer operations)

The consequences become visible when organisations attempt to scale beyond initial use cases. In France, rising costs emerge as the leading challenge to broader AI deployment, followed by difficulties among business teams in adopting, trusting, or operationalising AI. Data that is insufficiently integrated, accessible, or trusted ranks third (see Figure 10).

This differs from the global picture, where data integration, accessibility, and trust rank as the leading challenge, while cost increases rank third. The French results suggest that, while data foundations remain an important barrier, the economics of scaling AI are a more immediate concern for organisations in France.

Many organisations are encoutering the practical limits of fragmented business context.

Top challenges scaling AI beyond initial use cases

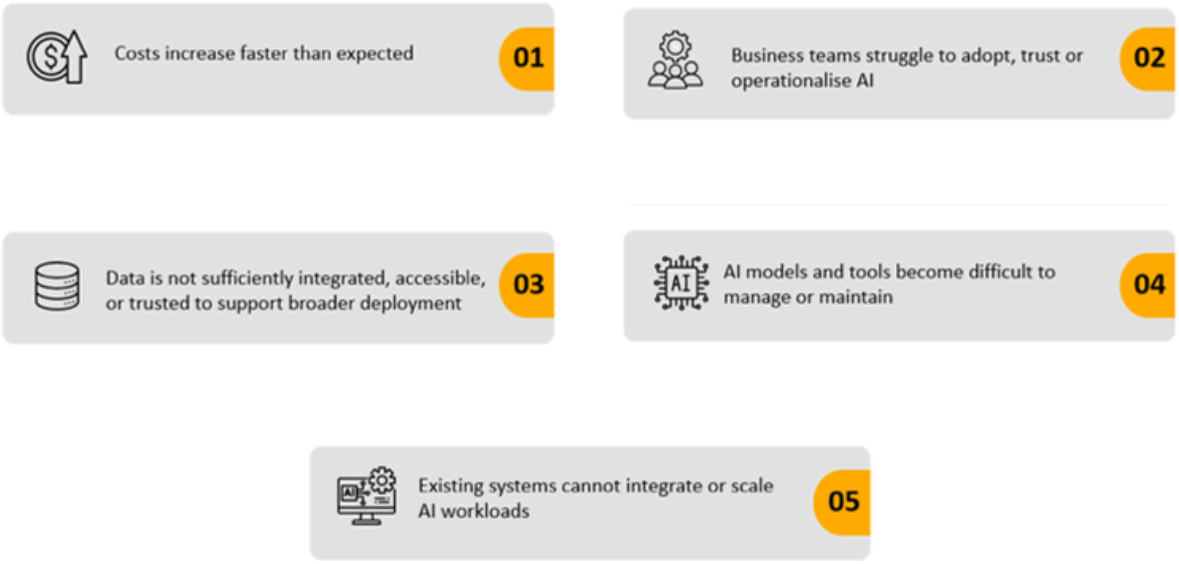


Figure 10 - Q. What are the top 3 challenges that occur when you try to scale AI beyond initial use cases?



Production readiness is selective rather than enterprise-wide

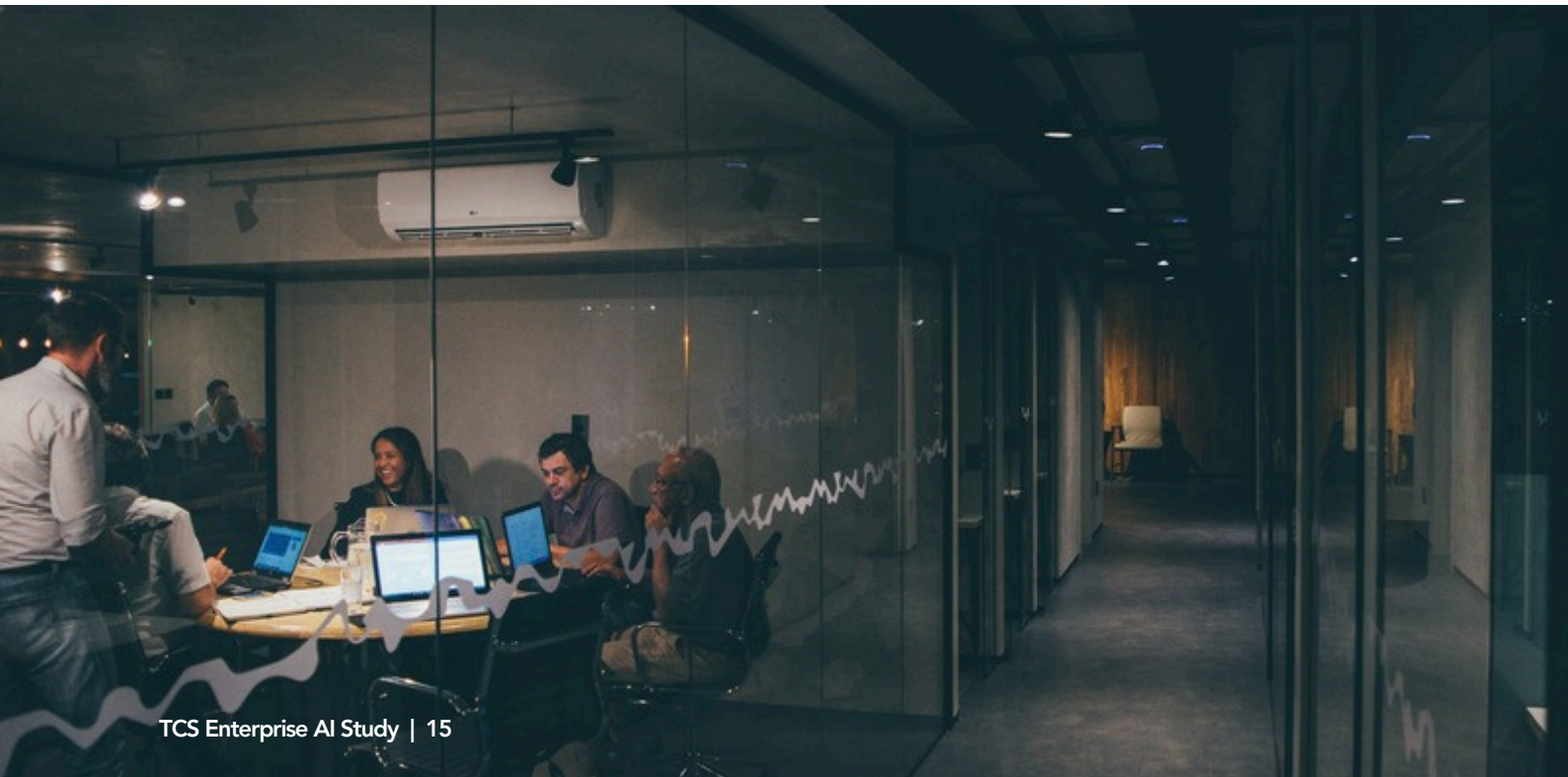
Organisations have made meaningful progress in building the technology foundations required for enterprise AI. In France, most organisations have moved beyond experimentation across the technology stack, with selected production use now the most common level of readiness for platforms, models, applications, and APIs and integration. Governance and controls show somewhat greater maturity, with 32% reporting readiness for widespread production use.

However, enterprise-wide maturity remains limited. Across platforms, models, applications, APIs and integration, and governance and controls, only 4% to 8% of respondents describe their environments as fully scaled across the enterprise (see Figure 11). Targeted production readiness is becoming established, but enterprise-wide maturity remains rare.

How well can your environment support scaling AI?

Capability	Not supported	Ready for limited pilots and experimentation	Ready for select production use	Ready for widespread production use	Fully scaled across the enterprise
Platforms Using AI capabilities across business functions	0%	34%	38%	20%	8%
Models Deploying, managing and updating AI models and tools	2%	26%	58%	8%	6%
Applications Embedding AI into day-to-day business processes	6%	24%	48%	18%	4%
APIs/integration Connecting systems, data and workflows across the organisation	4%	34%	36%	20%	6%
Governance and controls Ensuring oversight, compliance and responsible use of AI systems	4%	18%	42%	32%	4%

Figure 11 - Q. How well can your technology environment support scaling AI in the following areas?



Governance is present, but fragmented controls weaker consistency and trust

As AI becomes more deeply integrated into business processes and decision-making, trust becomes a prerequisite for scale. In an agentic environment, organisations need to govern not only what AI generates, but what it is permitted to do, under what conditions, and who remains accountable for the outcome. Organisations may invest in context layers, secure integrations, and production-ready environments, but those capabilities create value only if people are willing to rely on the outputs they produce.

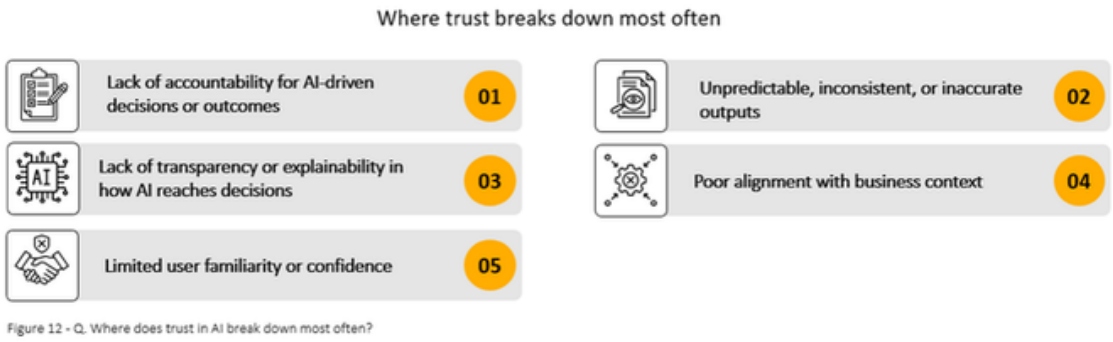
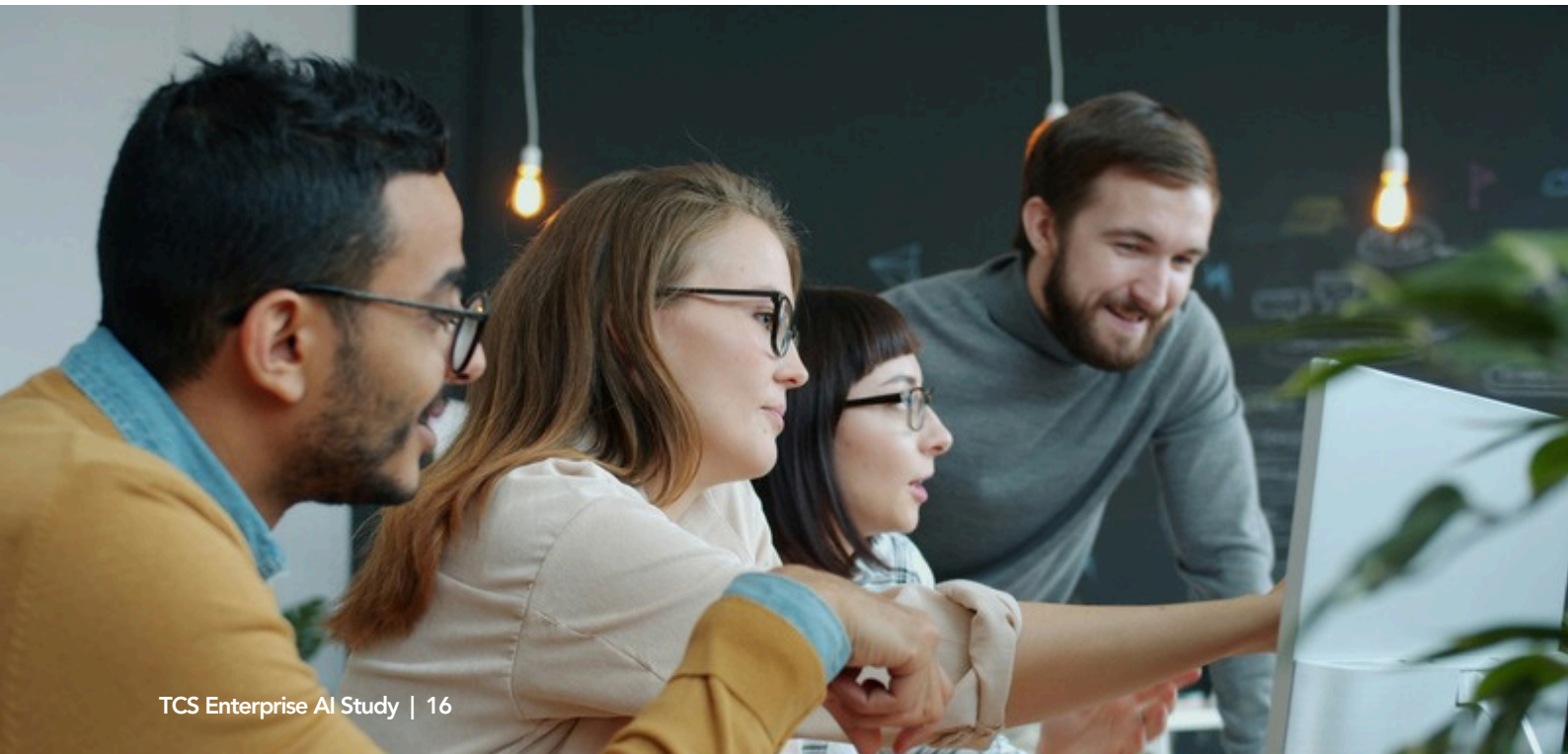


Figure 12 - Q. Where does trust in AI break down most often?

> In an agentic environment, organisations need to govern not only what AI generates, but what it is permitted to do, under what conditions, and who remains accountable for the outcome.



Organisations are not starting from an absence of controls, but their effectiveness remains uneven. In France, controls are most often rated as moderately effective across several areas, including real-time monitoring, risk management, transparency and explainability.

Confidence is highest in managing exceptions, escalation, and human intervention, and in defining accountability, with 30% rating each as highly and consistently effective. By contrast, only 4% say the same for real-time monitoring of AI performance (see Figure 13). This gap matters: effective intervention mechanisms depend on an organisation's ability to detect when intervention is needed.

How effectively is your AI environment controlled?

Capability	Not effective	Limited effectiveness	Moderately effective	Highly and consistently effective	Don't know
Monitoring AI performance in real time	4%	44%	48%	4%	0%
Identifying and managing risk	0%	24%	48%	28%	0%
Enforcing policies and compliance requirements	2%	26%	44%	28%	0%
Managing exceptions, escalation, and human intervention	6%	32%	32%	30%	0%
Ensuring transparency and explainability for AI outputs	2%	28%	48%	20%	2%
Defining and maintaining accountability for AI-driven decisions and outcomes	10%	22%	38%	30%	0%

Figure 13 - Q. How effectively are the following controlled in your AI environment?

Multi-platform governance remains a work in progress

Governance becomes more difficult as AI expands across multiple models, platforms, applications, and vendors. Consistency depends not only on the quality of individual controls, but also on the ability to coordinate them across the broader AI environment. In France, this coordination remains a challenge. More than one-third of respondents (34%) rely primarily on governance capabilities provided by individual vendors, with limited coordination across platforms.

A further 18% manage AI governance separately within individual platforms or teams. While 22% have integrated governance across enterprise AI platforms, models, and applications, only 4% operate a federated governance model with enterprise-wide visibility, automated controls, and coordinated oversight across vendor and internally developed AI ecosystems (see Figure 14).

This compares with 8% globally at the most advanced level, suggesting that fully coordinated, enterprise-wide AI governance remains particularly limited in France.

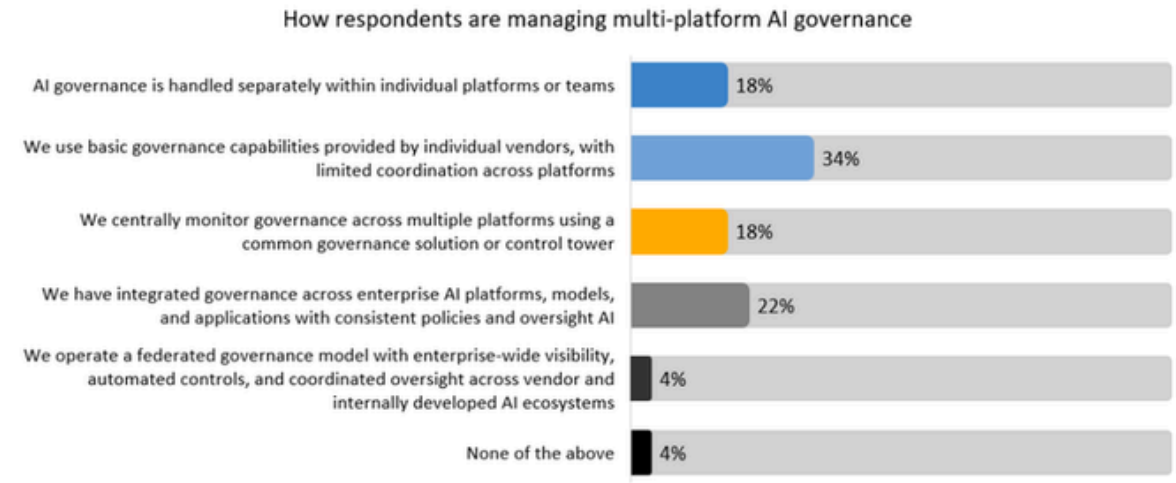


Figure 14 - Q. Which best describes how your organization manages AI governance across multiple AI platforms, models, and applications?

Architecture choices now extend from deployment to resilience and return

Multi-platform governance is only one dimension of managing AI at scale. As organisations deploy AI across multiple models, providers, and environments, attention is also shifting to the architectural decisions that determine how much control, flexibility, resilience, and value those environments deliver over time.

In France, security, risk, and governance considerations rank as the leading factor shaping how and where AI systems are developed and deployed. Flexibility to avoid dependence on a single AI provider and access to advanced models and capabilities rank jointly second (see Figure 15). This suggests that French organisations are balancing the need for secure and governed AI environments with the flexibility to access different technologies and avoid excessive dependence on a single provider.

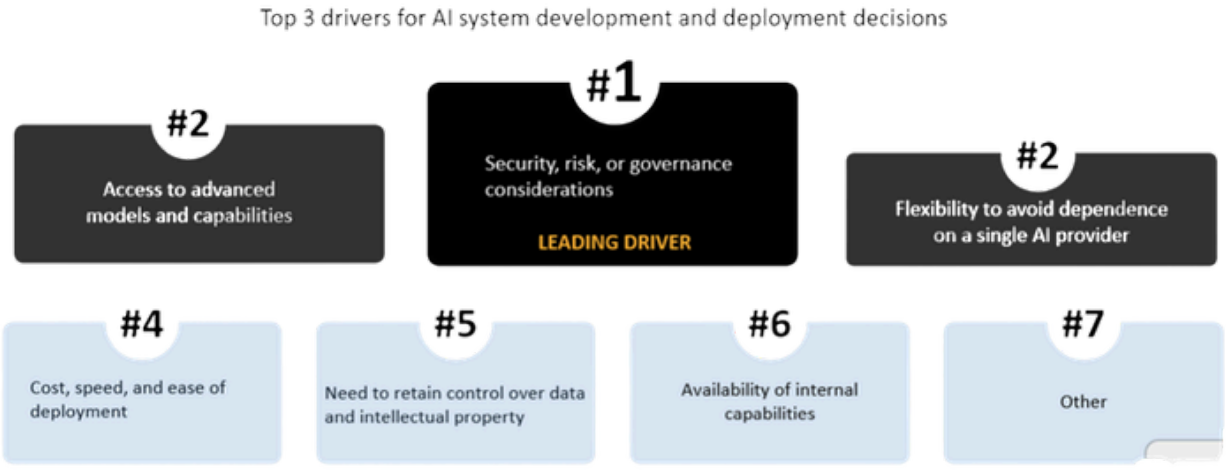


Figure 15 - Q. What is driving decisions about where and how AI systems are developed and deployed?

Model independence is one reflection of that shift. In France, 94% of respondents consider avoiding dependence on a single AI model or platform important to some degree, compared with 90% globally. More than half (56%) say model independence is important across most AI initiatives, while 22% view it as a strategic requirement guiding AI architecture and investment decisions (see Figure 16). Notably, no respondents in France consider model independence unimportant. Concerns about control therefore extend beyond individual vendors and platforms.

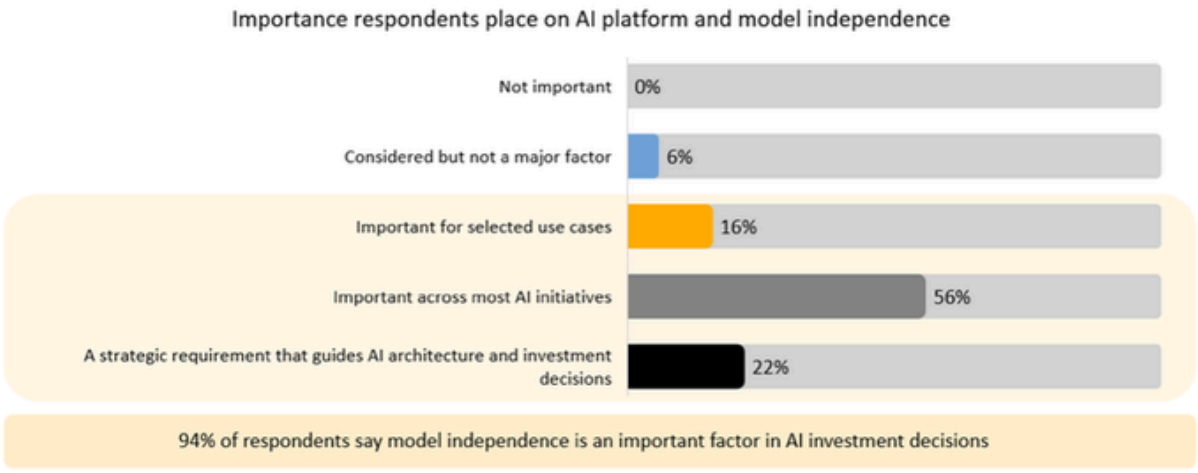


Figure 16 - Q. How important is maintaining independence from any single AI platform or model when making AI investment decisions?

Industry and regions insights

France places greater emphasis on model independence across most AI initiatives, at 56% vs 39% for the global respondents. Aerospace gives independence greater strategic weight, with 39% identifying it as an architectural and investment requirement vs 27% globally.



Sovereign AI requirements are also emerging as a significant enterprise risk consideration. In France, more than half of respondents (54%) describe requirements for control over AI data location, model choice, and regulatory or data-residency compliance as a high or very high organisational risk, compared with 34% globally. (see Figure 17) This 20-point gap suggests that AI sovereignty is a particularly prominent consideration for organisations in France as they make decisions about AI architecture, deployment, and governance.

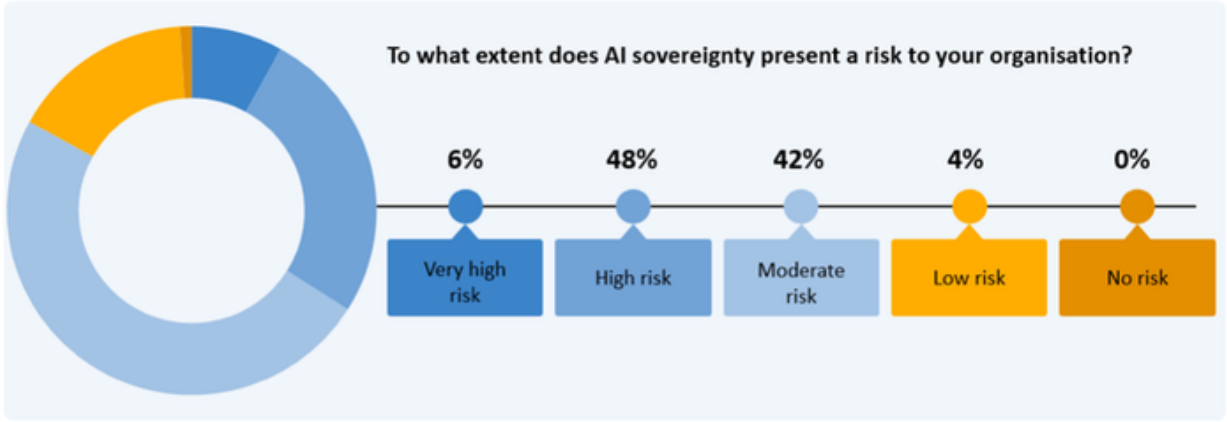
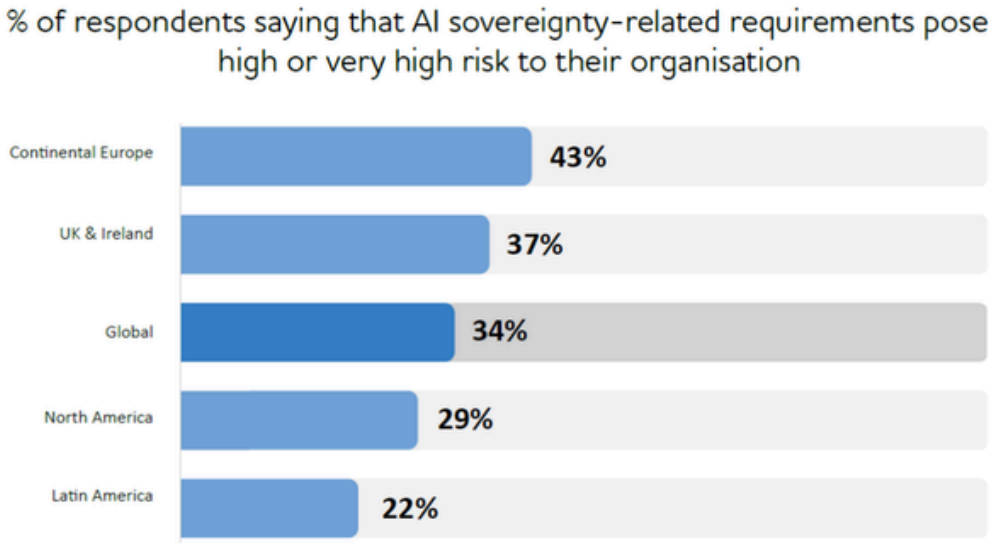


Figure 17 - Q. To what extent does AI sovereignty — your organization's control over AI data location, model choice, and regulatory/data-residency compliance — present a risk to your organization?

There are considerable regional differences when it comes to perceived risk related to AI sovereignty requirements.



But could organisations act on that desire for independence if a critical provider or model became unavailable? In France, 52% are prepared to switch providers for a few critical use cases and 32% for most business-critical use cases. However, only 4% are prepared to switch critical AI workloads across the organisation, while 12% are not prepared at all (see Figure 18). Among organisations with a business continuity plan, nearly one-third (32%) have not actively tested it.

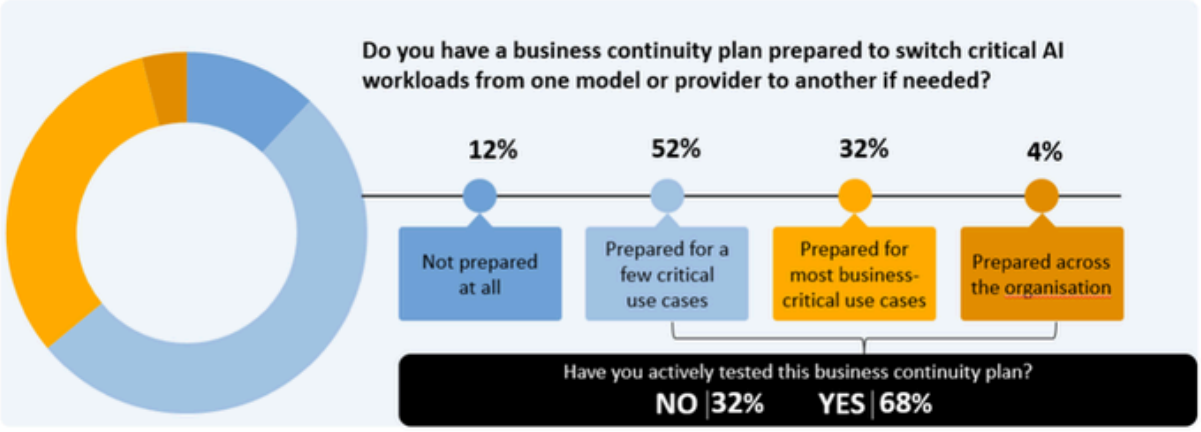


Figure 18 - Q. Do you have a business continuity plan prepared to switch critical AI workloads from one model or provider to another if needed?; Have you actively tested this business continuity plan of redirecting to another model

Open-source adoption is similarly selective, favouring workload fit over broad standardisation. In France, more than half of respondents (54%) report targeted deployment of open-source AI models for selected use cases, compared with 46% globally. By contrast, only 10% report broad deployment across multiple functions, while just 6% describe open source as a strategic priority involving significant customisation or deployment (see Figure 19).
This suggests that French organisations are primarily adopting open-source AI where it addresses specific needs, rather than as a broadly standardised enterprise approach.

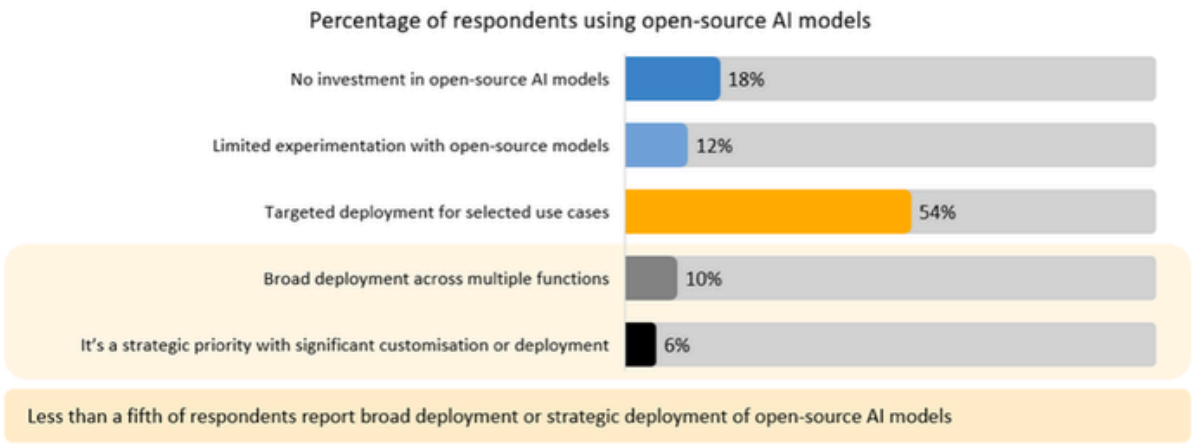


Figure 19 - Q. To what extent has your organization invested in developing, customising, or deploying open-source AI models (including small language models) instead of relying exclusively on frontier AI models?

Industry and region insighs

Banking, financial service, and insurance reached 17% for strategic priority, compared with 7% globally. Technology 19% for broad deployment and CMI 12% for strategic priority.

Economic discipline is developing alongside architectural flexibility. In France, 32% of respondents assess whether AI initiatives generate sufficient value relative to token and compute costs, while 34% track those costs without consistently evaluating whether the value delivered justifies the consumption. A further 18% actively optimise prompts, architectures, and models to reduce consumption while preserving outcomes, but only 10% continuously improve the value generated per token or unit of compute to increase returns over time (see Figure 20).

The result is a broader definition of AI architecture. Beyond governance, success increasingly depends on maintaining the ability to choose, switch, control, recover, and continuously improve the economics of AI over time.

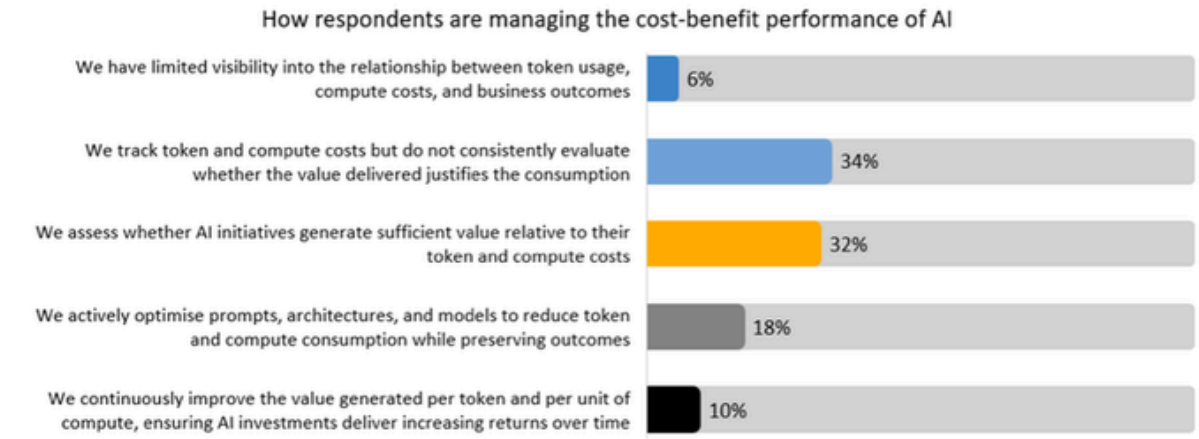
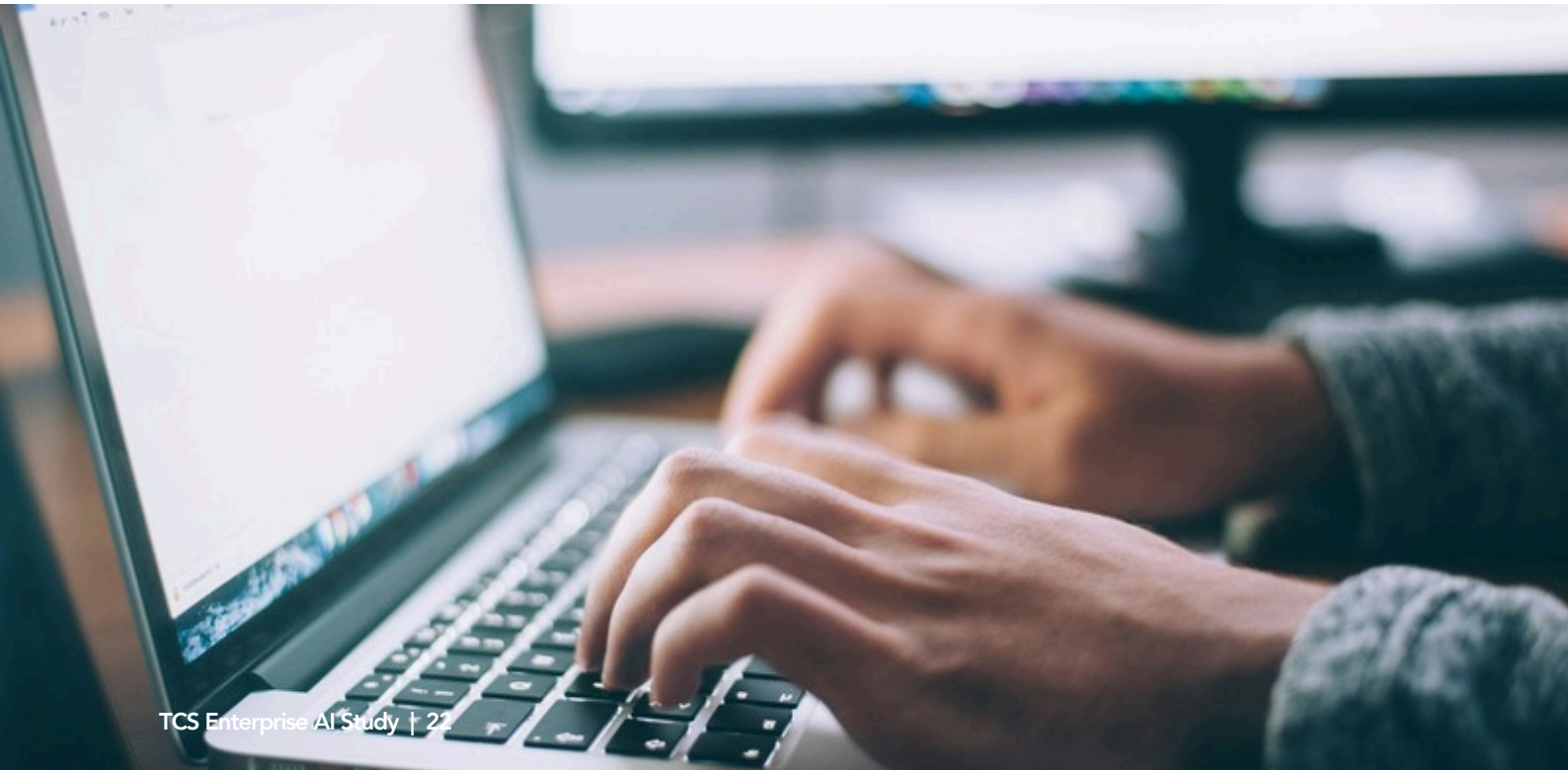


Figure 20 - Q. Which statement best describes your organization's ability to improve the cost-benefit performance of AI over time?



Aligning leadership, skills, and workforce systems for the AI era

The findings throughout this study point to a common conclusion. Enterprise AI has definitively moved past technical capability. Organisations are redesigning workflows, introducing new forms of decision support, establishing governance models, and building increasingly complex AI portfolios.

As AI becomes embedded in decisions and operations, organisational alignment becomes the next limiting factor. Scaling requires leadership structures that coordinate initiatives across the business, operating models that connect accountability with execution, and workforce systems that adapt as roles, responsibilities, and skills evolve.

AI requires a defined enerprise operating model

How organisations structure AI initiatives provides an indication of their maturity and readiness to scale. In France, Centres of Excellence and shared governance are the two most common operating models, each cited by 34% of respondents (see Figure 21). A further 14% have established enterprise platforms and reusable assets to support scalable AI delivery.

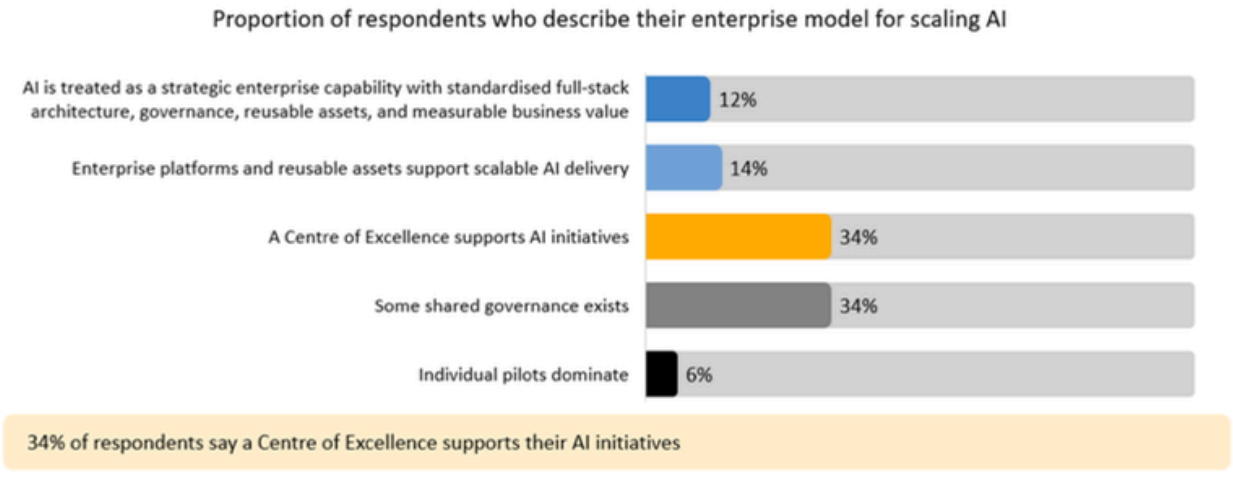


Figure 21 - Q, Which statement best describes your enterprise operating model for scaling AI?

These findings suggest that organisations are developing different layers of coordination as they scale AI. A Centre of Excellence concentrates expertise and accelerates experimentation. Shared governance distributes responsibility while maintaining oversight. Enterprise platforms create the foundations for repeatable delivery across functions. Reaching enterprise scale requires these capabilities to operate as a connected system rather than as isolated initiatives.

Where CAIO exist, they lead scaling

As enterprises formalise AI leadership, the Chief AI Officer (CAIO) is emerging as a focal point for scaling, consolidating responsibility that otherwise remains distributed across executive roles. In France, 50% of respondents report having a Chief AI Officer in their organisation, compared with 37% globally and 37% across Continental Europe (see Figure 22).

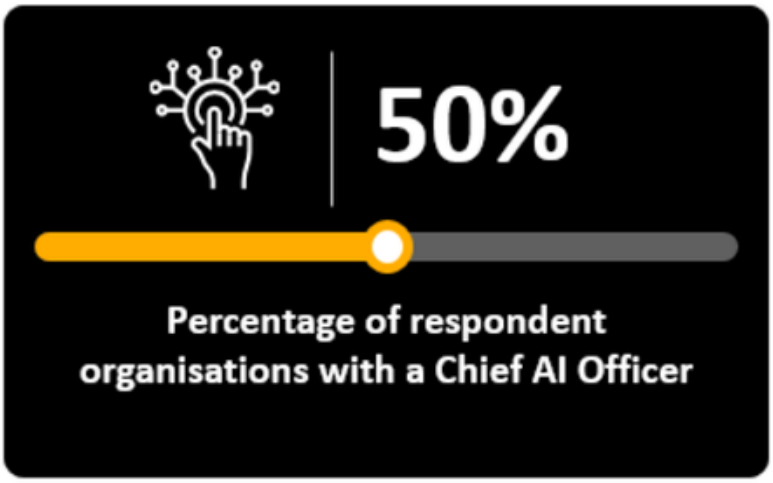


Figure 22 - Q: Do you have a Chief AI Officer?

This suggests that French organisations are moving more decisively towards dedicated executive leadership for AI as they seek to scale initiatives across the enterprise.



As organisations gain practical experience with AI, expectations around its workforce impact are evolving. In France, respondents express far less uncertainty about the impact of AI on job roles than the global sample: 16% say it is too early to know, compared with 19% globally.

At the same time, expectations in France have shifted significantly since 2024. The share expecting AI to eliminate more roles than it creates has fallen from 65% to 44%, while 28% now expect more roles to be created than eliminated, up from 25%. A further 12% expect the overall impact on job creation and elimination to be roughly balanced (see Figure 23).

This differs notably from the global picture, where uncertainty has increased, with 19% now saying it is too early to assess AI's impact on job roles. In France, by contrast, respondents appear more decisive about the direction of workforce change, even as expectations of net job elimination have moderated considerably since 2024.

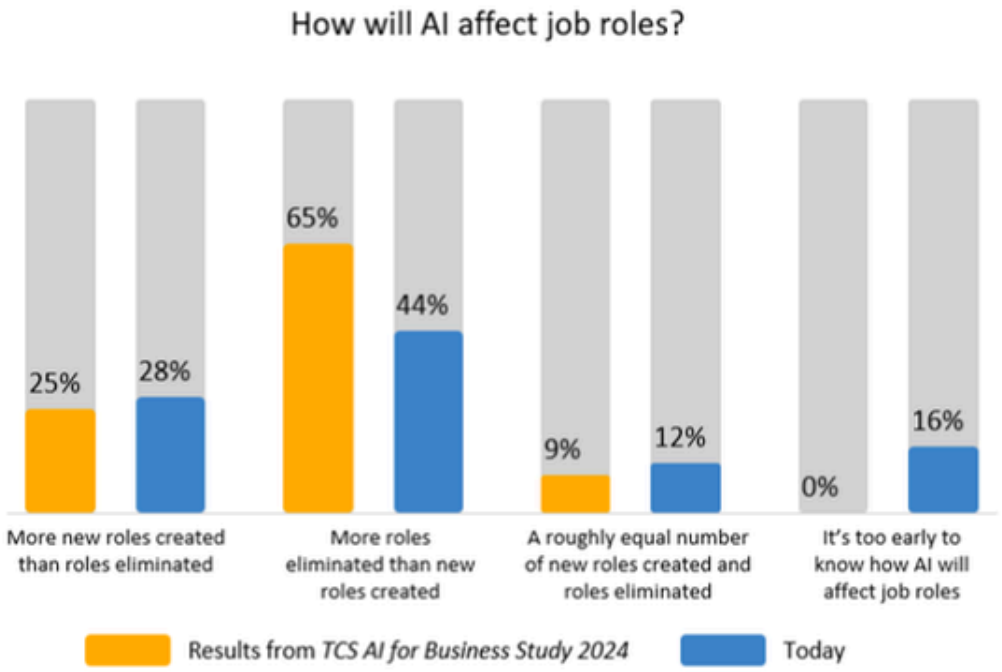


Figure 23 - Q. How do you foresee the balance between roles created and roles eliminated as a result of AI's use at your company?

Still, this comparison should not be interpreted as a simple shift toward either optimism or pessimism. Instead, practical experience appears to be introducing greater uncertainty about AI's long-term workforce impact. In France, 16% of respondents now say it is too early to know how AI will affect job roles, compared with none in 2024, a shift that closely mirrors the global trend.

Organisations can see that AI is altering tasks, decisions, and responsibilities, but the longer-term workforce implications remain tied to where new forms of work emerge and how processes are redesigned. As agents take on bounded activities within those processes, organisations will increasingly have to define which responsibilities sit with people, which can be delegated to AI, and where human judgement or intervention remains essential.

The workforce systems lag changes in roles and responsibilities

That challenge becomes more apparent when examining how organisations define the skills needed in an AI-enabled workforce. In France, progress is visible, but enterprise-wide integration remains limited.

More than a third of respondents (34%) have identified key AI-related skills but have not yet organised them into a formal framework, while 40% have documented technical and business capabilities for selected roles. Only 22% have reached an enterprise-wide approach: 18% maintain an enterprise skills framework across the workforce, and just 4% continuously evolve a comprehensive skills taxonomy connecting capabilities with roles, career paths, learning, and workforce planning (see Figure 24).

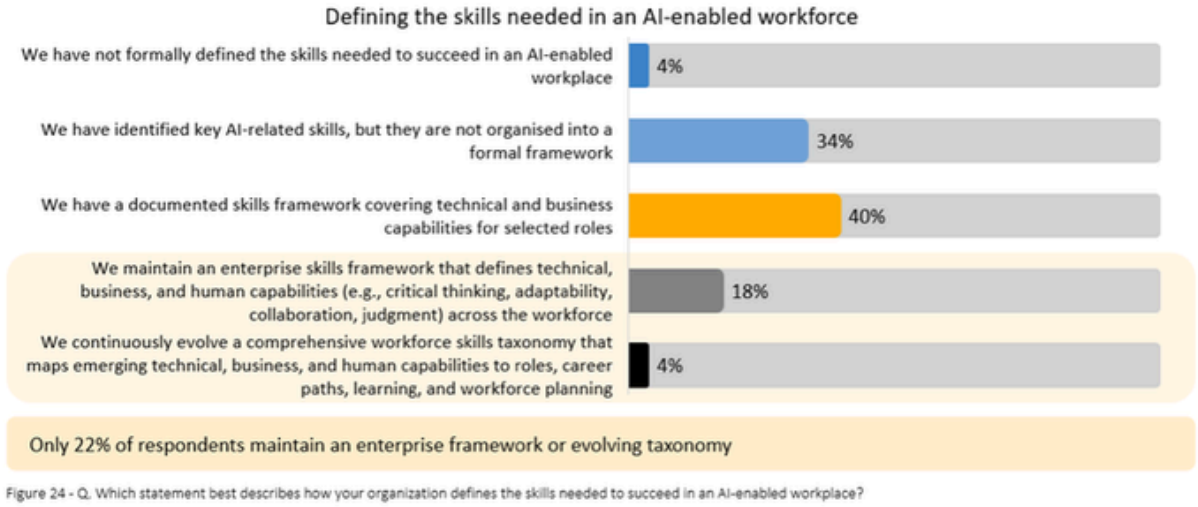


Figure 24 - Q. Which statement best describes how your organization defines the skills needed to succeed in an AI-enabled workplace?

As AI reshapes workflows and decision-making, there will be greater impetus for skills to evolve beyond stand-alone learning initiatives. Enterprise-wide skills taxonomies become part of a broader system for continuously adapting skills, roles, learning, and career paths as technology and work evolve.

As AI reshapes workflows and decision-making, there will be greater impetus for skills to evolve beyond stand-alone learning initiatives.

Conclusion

Organisations have moved beyond proving that AI can improve productivity. Across the study, respondents in France describe AI reshaping decisions, workflows, operating models, and enterprise technology strategies. The challenge now is how organisations can scale that value in ways that are trusted, resilient, and sustainable.

The findings point to a common reality: progress depends on the alignment of process transformation, technology foundations, governance, and workforce adaptation. AI is already influencing decisions and operations, but broader authority remains limited. Only 4% of respondents report AI agents securely orchestrating workflows through governed tools and permissions, while enterprise-wide technology maturity remains rare. At the same time, organisations are strengthening the structures needed to scale, from governance and skills frameworks to dedicated AI leadership.

The French findings also highlight the growing importance of control and resilience. More than half of respondents (54%) consider sovereign AI requirements a high or very high organisational risk, compared with 34% globally, while 94% consider avoiding dependence on a single AI model or platform important to some degree. Yet only 4% are prepared to switch critical AI workloads across the organisation if a provider or model becomes unavailable. Together, these findings highlight a gap between the desire for greater control and the ability to operationalise it at enterprise scale.

Perhaps the study's most important finding is that enterprise AI is becoming less about individual technologies and more about the systems that connect them. Competitive advantage will not come from access to models, platforms, agents, or data alone. It will come from an organisation's ability to connect these capabilities to how decisions are made, how work is organised, and how trust is maintained at scale. In France, the fact that 50% of respondents report having a Chief AI Officer, compared with 37% globally, suggests that many organisations are already putting dedicated leadership in place to address this challenge.

Enterprise AI has reached a decision point. Realising its full potential will depend on organisations' ability to redesign work, strengthen the foundations of trust and control, and prepare for new forms of intelligence embedded across the business. The choices being made today will determine whether AI remains a collection of targeted improvements or becomes a connected, resilient, and sustainable enterprise capability.

Next Steps: Priorities for scaling enterprise AI

Build AI-ready data and security-first foundations

The study shows that trust, data readiness, governance, and operationalisation remain critical to scaling AI. Organisations should prioritise investments that improve data accessibility, quality, context, and interoperability, while strengthening built-in controls and monitoring. This is particularly important in France, where only 4% of respondents rate real-time monitoring of AI performance as highly and consistently effective. As AI takes on greater responsibility for recommendations and actions, governance must evolve from project oversight to continuous operational control, with clear accountability and effective human intervention.

Architect for flexibility, security, and choice

AI strategy is increasingly becoming architecture strategy. Leaders should evaluate how architecture decisions affect long-term flexibility, continuity, sovereignty, and risk exposure. In France, 94% of respondents consider avoiding dependence on a single AI model or platform important to some degree, while 54% view sovereign AI requirements as a high or very high organisational risk. Yet only 4% are prepared to switch critical AI workloads across the organisation. Closing this gap requires stronger continuity planning, greater model and platform portability, and architectures designed to adapt as technologies, regulations, and business requirements evolve.

Establish enterprise accountability and business value measurement for AI transformation<

Scaling AI goes beyond technical ownership. Organisations need clear executive accountability and operating models connecting technology decisions with process transformation, governance, workforce planning, and business value realisation. France already shows signs of more formalised AI leadership, with 50% of respondents reporting a Chief AI Officer, compared with 37% globally. Centres of Excellence and shared governance can provide foundations for coordination, but enterprise scale requires business, technology, operations, risk, and HR to operate as part of a connected model with shared accountability and measurable outcomes.

Connect workforce strategy to new ways of working

AI is already reshaping decisions, responsibilities, and ways of working, while uncertainty about its longer-term workforce impact is growing. Organisations should move beyond isolated skills initiatives and develop workforce systems that connect emerging capabilities with learning, career progression, workforce planning, and mobility. In France, only 22% of respondents currently maintain either an enterprise-wide skills framework or an evolving workforce skills taxonomy. The objective is not to predict exactly how AI will affect every role, but to build mechanisms that allow skills, roles, and workforce models to continuously adapt as work evolves.

Study methodology

50
French leaders

12
industries

25
quantitative questions

Conducted between 10 August and 18 September 2026, the survey explored:

Data & AI foundations
Building the data, intelligence, and decision environments that power AI

AI at scale
Readying platforms, architectures, and operating models for enterprise-wide AI

People & work transformations
Reshaping roles, skills, incentives, and change management for the AI era

Governance & trust
Establishing oversight, accountability, security, and responsible AI frameworks

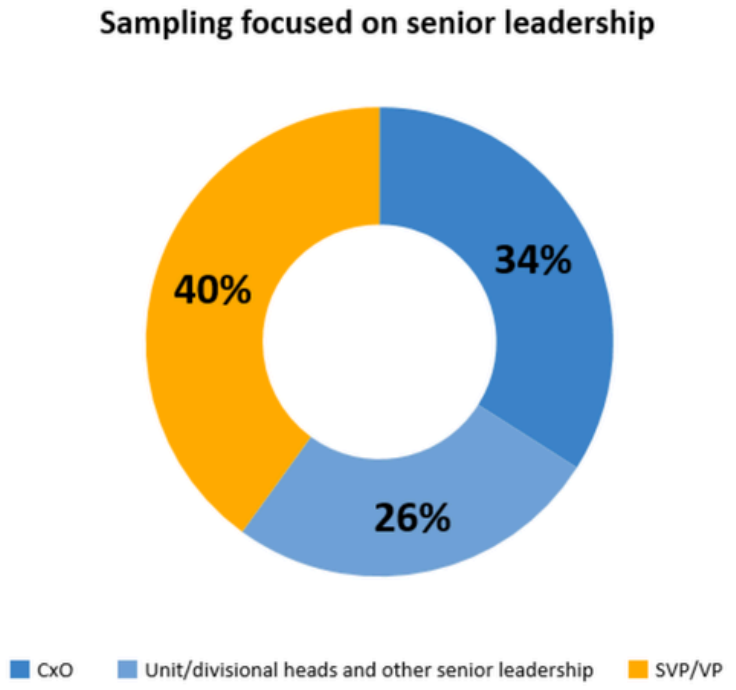
Value chain & industry transformations
Extending AI across ecosystems, industries, and value networks

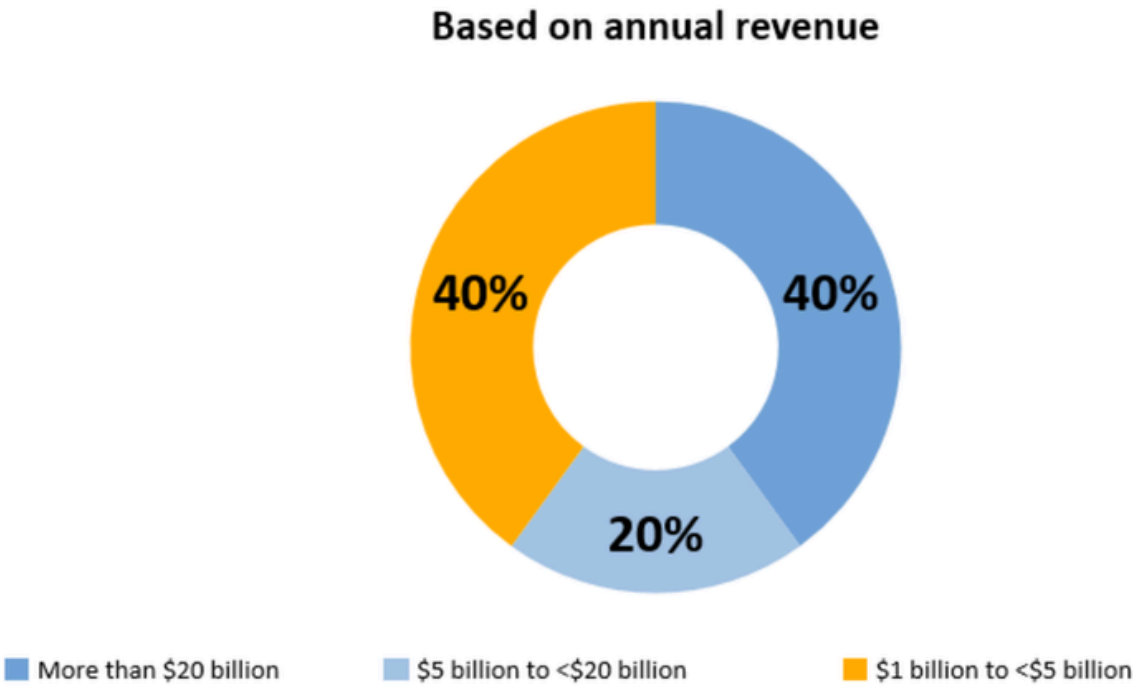
Note: Chart percentages are rounded to the nearest whole number. As a result, sums of displayed values may differ by one percentage point from summary figures calculated using unrounded data, and displayed percentages may not total to 100%.

Industries surveyed

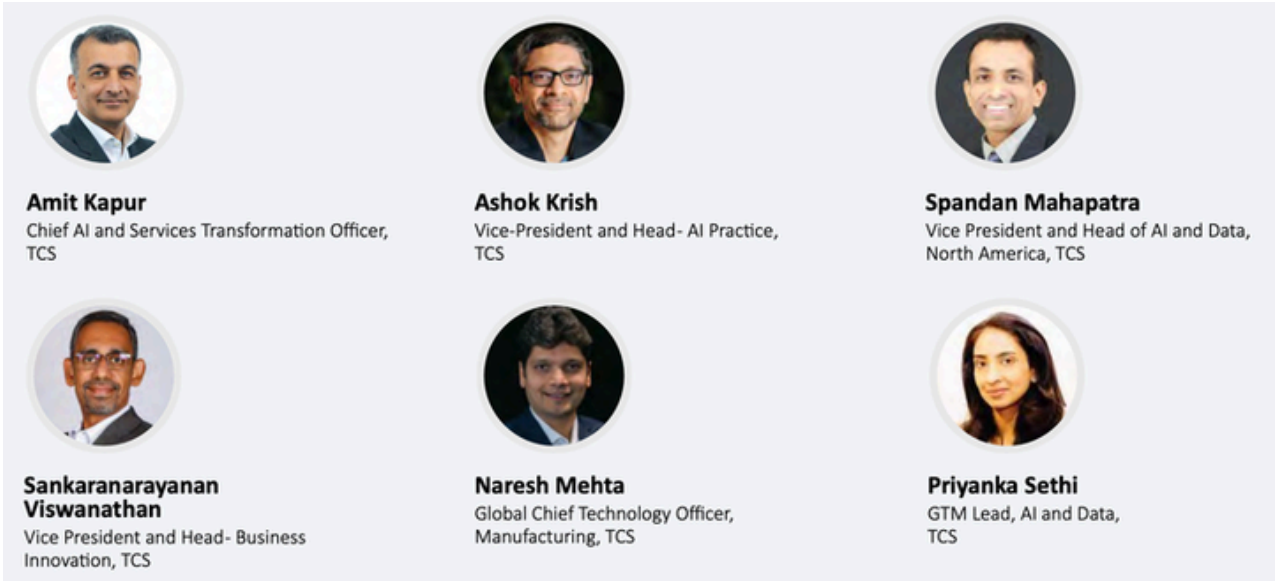


Study methodology continued





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