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The AI Sovereignty Paradox:

France and the Limits of Digital Autonomy

Neil Bouchard

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About the author

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Executive Summary

France's AI sovereignty strategy under President Emmanuel Macron from 2018 to 2026 rests on a central paradox. Over that period, the country has built genuine influence on the politics of artificial intelligence through international summits, European regulation, investment announcements and the emergence of Mistral AI as a national champion. Yet it remains dependent on other countries for most of the infrastructure on which AI runs. This paper describes the strategy as *performative sovereignty*: a deliberate effort to make sovereignty visible through diplomatic staging, regulatory leadership and industrial signaling before the material capacity behind the claim fully exists.

The performance has produced real gains, since France has shaped the European AI agenda, strengthened its position as a convening power and helped push the debate from rules towards infrastructure. Those gains have not, however, closed the material gap. As of July 2025, European cloud providers held around 15 per cent of the regional market while Amazon, Microsoft and Google together accounted for around 70 per cent. Measured AI supercomputer performance remains overwhelmingly concentrated in the US. France is an instructive test of AI sovereignty because it starts from a comparatively strong technological and political position; the constraints visible in the French case are likely to be sharper elsewhere. The test in the coming years is whether these political gains lead to greater control over critical AI infrastructure.

Introduction

At the Paris AI Action Summit in February 2025, Emmanuel Macron sought to place France at the centre of the global race for artificial intelligence. Co-chaired with India and held at the Grand Palais in Paris, the summit brought together representatives from nearly one hundred countries. Macron used the occasion to announce around €109 billion (A\$177.67 billion) in mostly private investment commitments for AI in the country.¹ The message was deliberate: the government wanted to present the country as a serious site for AI infrastructure, investment and governance alongside its role as a regulator.

By November 2025, Paris was trying to extend this agenda to the European level. France and Germany convened a Summit on European Digital Sovereignty in Berlin, where they announced new commitments to strengthen European technological capacity. At the same time, the gradual implementation of the EU AI Act exposed a persistent tension between regulatory leadership and competitiveness.² The tension raised a question Europe had still not answered: how could it lead AI regulation without falling further behind in a sector dominated by American and Chinese firms?

The Berlin summit built on an agenda Macron had been developing since 2018, when a government-commissioned report led by the mathematician and former parliamentarian Cédric Villani set out a national AI strategy with an explicitly European horizon.³ Since then, French leaders have consistently presented the country, and Europe more broadly, as offering a “third way” between the US and China. In 2026, Jean-Noël Barrot, the Minister for Europe and Foreign Affairs, repeated this argument, stating that Europe could change the geopolitical

equation if it strengthened itself and reduced its dependencies.⁴ This language of AI sovereignty is therefore part of a broader diplomatic claim that Europe should avoid being absorbed into either the American or Chinese technological order.

This paper describes France’s strategy as a form of *performative sovereignty*, an attempt to project authority in a field where much of the underlying infrastructure remains outside French control. The term is not intended as a criticism of the strategy. The country cannot match the scale of American private investment or Chinese state-led industrial mobilisation on its own, so it has concentrated on areas where it does have influence, particularly diplomacy, regulation and industrial policy. These efforts have produced real political gains, although their durability will depend on whether the country can use European cooperation to strengthen the technological and industrial capacity behind them.

The French case is particularly useful because it begins from a relatively strong position. It has diplomatic weight, abundant nuclear energy,⁵ a strong research base and access to the regulatory power of the European Union. If a country with these advantages still struggles to gain greater control over the infrastructure behind advanced AI, the challenge is likely to be even greater for states with fewer resources.

The paper moves from concept to practice. It first defines performative sovereignty and explains why the concept applies to France. It then examines what French AI diplomacy has achieved before turning to the material foundations of AI sovereignty, where the country’s position remains weaker. The final section considers the domestic and European fragilities created by the gap between political influence and material capacity.

¹ Élysée, “Presentation,” Artificial Intelligence Action Summit, updated 17 January 2025, <https://www.elysee.fr/en/sommet-pour-l-action-sur-l-ia/presentation>; Élysée, “Faire de la France une puissance de l’IA,” 11 February 2025, <https://www.elysee.fr/admin/upload/default/0001/17/23058aa82354edfd8a30ff11b57b36f2801504f3.pdf>.

² Élysée, “Summit on European Digital Sovereignty Delivers Landmark Commitments for a More Competitive and Sovereign Europe,” 18 November 2025, <https://www.elysee.fr/en/emmanuel-macron/2025/11/18/summit-on-european-digital-sovereignty-delivers-landmark-commitments-for-a-more-competitive-and-sovereign-europe>; Regulation (EU) 2024/1689 of the European Parliament and of the Council of 13 June 2024 laying down harmonised rules on artificial intelligence, *Official Journal of the European Union*, 12 July 2024, <https://eur-lex.europa.eu/eli/reg/2024/1689/oj>.

³ Cédric Villani, *Donner un sens à l’intelligence artificielle: Pour une stratégie nationale et européenne* (Paris: La Documentation française, 2018), <https://www.vie-publique.fr/files/rapport/pdf/184000159.pdf>; Emmanuel Macron, “Discours du Président de la République sur l’intelligence artificielle,” Collège de France, 29 March 2018, <https://www.elysee.fr/emmanuel-macron/2018/03/29/discours-du-president-de-la-republique-sur-lintelligence-artificielle>.

⁴ Jean-Noël Barrot, “Entretien de Jean-Noël Barrot avec « France Inter », « France Info » et « Le Monde » – Extraits,” France Diplomatie, 22 February 2026, <https://www.diplomatie.gouv.fr/fr/presse-et-ressources/decouvrir-et-informer/actualites/entretien-de-jean-noel-barrot-avec-france-inter-france-info-et-le-monde-extraits>.

⁵ RTE, “Generation,” *Annual Electricity Review 2025*, <https://analysesetdonnees.rte-france.com/en/annual-review-2025/generation>.

Performative Sovereignty in the Age of AI

The concept of *performative sovereignty* is useful because legal authority alone does not capture the kind of power at stake in AI. In the French case, the gap lies between the authority the state can project and the technological conditions it can actually shape. Understood this way, AI sovereignty concerns political authority as well as the capacity to influence the infrastructures, firms and strategic choices through which AI develops.

The term “performative” draws on two related strands. The philosopher J. L. Austin’s speech-act theory provides the linguistic starting point: under the right conditions, some utterances do more than describe the world; they act within it.⁶ For sovereignty, the more direct reference is IR scholar Cynthia Weber, whose work examines how sovereign authority is constituted and reproduced through political practices.⁷ France’s AI strategies, summit declarations and investment announcements can be read in this broader performative sense. They do not create technological sovereignty by declaration, but they can mobilise firms, capital and institutions around a particular political project.

Sovereignty has rarely meant complete control. States routinely claim authority where practical autonomy is limited by external dependence. International relations scholar Stephen Krasner described this tension as “organized hypocrisy”: sovereignty is invoked as a principle even when interdependence constrains actual control.⁸ France’s legal sovereignty is not in question. The harder issue is interdependence sovereignty: whether the government can retain meaningful control over the cross-border flows and infrastructures that shape AI power, including data, cloud services, chips, capital and software. Macron’s 2018 Collège de France speech already framed AI in these terms, focusing on compute, data, algorithms,

regulation and the location and control of data processing.⁹

Political economist Susan Strange provides another way to understand France’s position. For Strange, power does not come only from formal political authority; it also comes from control over the structures that shape what other actors are able to do, particularly security, production, finance and knowledge.¹⁰ AI touches each of these areas. It is increasingly important to defence and intelligence. It relies on advanced semiconductors and large-scale computing infrastructure. It requires sustained investment. And it shapes how information and expertise are produced.

Seen from this perspective, the country occupies an uneven position. It has considerable diplomatic and regulatory influence, particularly through the EU, while Mistral AI, the Paris-based company that has become the country’s most visible home-grown AI champion, gives the strategy a more concrete industrial dimension. Yet the national economy still relies heavily on foreign companies for important parts of the cloud, semiconductor and platform infrastructure on which advanced AI depends. The country therefore is trying to shape the politics of AI even though many of the structures that make advanced AI possible remain outside its control.

European regulation complicates this picture because regulation is itself a form of power. Legal scholar Anu Bradford’s “Brussels Effect” describes how firms often adapt their products and compliance systems to EU rules rather than maintain separate regimes.¹¹ The common-charger rules provide a simple example: from December 2024, new mobile phones and other portable devices sold in the EU had to support USB-C, and Apple withdrew its remaining Lightning-based iPhones from several European online stores.¹² The EU AI Act may create a similar effect by influencing how firms design, document and deploy AI systems for the European market. This gives France, through the EU, a real source of

⁶ J. L. Austin, *How to Do Things with Words*, 2nd ed., ed. J. O. Urmson and Marina Sbisa (Oxford: Clarendon Press, 1975), 1–12.

⁷ Cynthia Weber, “Performative States,” *Millennium: Journal of International Studies* 27, no. 1 (1998): 77–95.

⁸ Stephen D. Krasner, *Sovereignty: Organized Hypocrisy* (Princeton: Princeton University Press, 1999), 3–4, 9–13.

⁹ Emmanuel Macron, “Discours du Président de la République sur l’intelligence artificielle,” Collège de France, 29 March 2018, <https://www.elysee.fr/emmanuel-macron/2018/03/29/discours-du-president-de-la-republique-sur-lintelligence-artificielle>.

¹⁰ Susan Strange, *States and Markets*, 2nd ed. (London: Pinter Publishers, 1994), 25, 27.

¹¹ Anu Bradford, *The Brussels Effect: How the European Union Rules the World* (New York: Oxford University Press, 2020), 5–7.

¹² European Commission, “EU Common Charger Rules: Power All Your Devices with a Single Charger,” 28 December 2024, https://commission.europa.eu/news-and-media/news/eu-common-charger-rules-power-all-your-devices-single-charger-2024-12-28_en; Thomas Ricker, “Apple Pulls Remaining Lightning-Based Devices from European Stores,” *The Verge*, 28 December 2024, <https://www.theverge.com/2024/12/28/24330733/apple-pulls-lightning-based-devices-from-european-stores>.

structural influence. Rules alone, however, cannot produce advanced chips, expand computing capacity or close the investment gap. Regulatory power is therefore one part of the country's sovereignty strategy rather than a substitute for technological capacity.

Where Strange emphasises broad structures, political scientists Henry Farrell and Abraham Newman draw attention to specific points of concentration within global networks. Their concept of weaponised interdependence shows how actors controlling strategic chokepoints can use them for surveillance, exclusion or coercion.¹³ Strange explains why control over production and finance matters broadly, while Farrell and Newman show why particular nodes, such as advanced chips, cloud platforms and design tools, carry disproportionate weight. AI depends on precisely these nodes, many of which are concentrated in a small number of firms and jurisdictions, especially the US.

Such dependence creates strategic exposure, and its effects are visible beyond AI. In August 2025, the US sanctioned Nicolas Guillou, a French judge at the ICC, over his role in authorising arrest warrants for Benjamin Netanyahu and Yoav Gallant. Guillou later described the sanctions as severely disrupting his access to banking and major digital services, with European banks closing accounts and US-linked companies cutting off access to their platforms.¹⁴ The episode illustrates a broader problem with dependence: infrastructure that seems routine in normal circumstances can become politically important when control over it lies elsewhere. The same logic matters for France's AI strategy. For a French firm, using an American cloud provider may simply be the best option for cost and performance, yet access ultimately remains subject to foreign companies and foreign law. Dependence does not

automatically produce coercion, but it narrows the room for manoeuvre whenever strategically important infrastructure sits under foreign control.

Material control, however, is only one side of the debate. Digital-governance scholars Julia Pohle and Thorsten Thiel describe digital sovereignty less as a settled legal concept than as a political language through which actors claim control, autonomy and legitimacy in digital space.¹⁵ France fits this interpretation closely. Its national strategies and summit diplomacy do more than describe French power; they are also intended to strengthen it by attracting investment, building partnerships and making technological autonomy politically credible.

A similar perspective appears in the work of geopolitics scholar Frédéric Douzet and the Geopolitics of the Datasphere (GEODE) research community, which examines how political power operates across digital spaces and infrastructures.¹⁶ This helps explain why French debates over digital sovereignty so often connect technology to the wider foreign-policy language of strategic autonomy and state capacity.

Daniel Mügge, a political economist writing on European AI governance, shows that EU AI sovereignty carries several different ambitions at once, ranging from jurisdiction and citizen protection to industrial development and reduced dependence on the United States and China.¹⁷ These goals overlap without being identical. French discourse moves between them according to context. Macron's 2018 speech emphasised autonomy, research and regulation. The 2025 Paris summit focused on inclusive and sustainable AI. The France–Germany summit later shifted attention towards competitiveness and infrastructure.¹⁸ The French case requires both a political and a material reading.

¹³ Henry Farrell and Abraham L. Newman, "Weaponized Interdependence: How Global Economic Networks Shape State Coercion," *International Security* 44, no. 1 (2019): 42–79, https://doi.org/10.1162/isec_a_00351.

¹⁴ United States. Office of Foreign Assets Control, "International Criminal Court-Related Designations; Issuance of International Criminal Court-Related General License," 20 August 2025, <https://ofac.treasury.gov/recent-actions/20250820>; Patrick Wintour, "Into the Void: How Trump Killed International Law," *The Guardian*, 25 December 2025, <https://www.theguardian.com/law/ng-interactive/2025/dec/25/how-donald-trump-killed-international-law>.

¹⁵ Julia Pohle and Thorsten Thiel, "Digital Sovereignty," *Internet Policy Review* 9, no. 4 (2020), <https://policyreview.info/concepts/digital-sovereignty>.

¹⁶ Georg Glasze et al., "Contested Spatialities of Digital Sovereignty," *Geopolitics* 28, no. 2 (2023): 919–958, <https://doi.org/10.1080/14650045.2022.2050070>; Frédéric Douzet, "Cyberspace: The New Frontier of State Power," in Sami Moisio, Natalie Koch, Andrew E. G. Jonas, Christopher Lizotte, and Juho Luukkonen (eds), *Handbook on the Changing Geographies of the State: New Spaces of Geopolitics*, ed. (Cheltenham: Edward Elgar, 2020), 325–338.

¹⁷ Daniel Mügge, "EU AI Sovereignty: For Whom, To What End, and To Whose Benefit?" *Journal of European Public Policy* 31, no. 8 (2024): 2200–2225, <https://doi.org/10.1080/13501763.2024.2318475>.

¹⁸ Macron, "Discours du Président de la République sur l'intelligence artificielle"; Élysée, "Statement on Inclusive and Sustainable Artificial Intelligence for People and the Planet," Artificial Intelligence Action Summit, 11 February 2025,

Performative sovereignty is conditional in this sense: summits, declarations and investment pledges can have real political effects, but their durability depends on whether they help produce the infrastructure and institutional capacity needed to sustain them.

For this paper, AI sovereignty means the capacity of a state, or a political community such as the EU, to retain credible control over the parts of the AI value chain that matter most for political choice and strategic resilience. Regulation is one part of this, alongside the technological infrastructure, firms and state capabilities needed to develop and operate AI. Total autonomy is not a realistic benchmark because no state possesses it. The more useful question is whether enough of these critical layers remain under French or European control to preserve meaningful political choice. Table 1 lists the key layers of AI sovereignty.

This definition also provides a way to judge whether France’s political performance is producing something more durable. Diplomatic success can be seen in agenda-setting and coalition-building, while material progress would appear in more concrete changes. These might include stronger French or European alternatives in cloud infrastructure, greater access to European-controlled computing capacity, secure options for public procurement or firms such as Mistral becoming less dependent on non-European platforms. If political language advances while these conditions remain broadly unchanged, the strategy is not yet reducing the dependencies it claims to address.

This framework avoids two opposite readings of the French case: dismissing sovereignty discourse as mere rhetoric or taking it at face value despite continuing infrastructure dependencies. The next two sections examine the political and material sides of that problem.

Table 1: Conceptual layers of AI sovereignty

Layer	Why it matters for AI sovereignty
Rules and governance	States need legal and institutional capacity to define how AI is developed, deployed and made accountable. This is the layer where France and the EU are strongest.
Compute and data centres	Frontier AI requires large-scale computing power, energy, data-centre capacity and access to advanced accelerators. Without this layer, sovereignty remains mostly declaratory.
Cloud and platform infrastructure	AI systems are trained, hosted and deployed through cloud and platform ecosystems. Dependence here gives external actors influence over access, costs and operational control.
Semiconductors and hardware	Advanced chips, design tools and supply-chain resilience form the hardware base of AI power. Control over this layer is highly concentrated globally.
Firms, capital and talent	A sovereign AI ecosystem needs firms that can scale, capital that can be mobilised over time, and talent able to move between research, industry and the state.
State technological capacity	Public institutions need the expertise and procurement capacity to operate sensitive digital systems without excessive dependence on external providers.

What Can France’s AI Diplomacy Achieve?

French AI diplomacy began with a national strategy, but many of its most important effects have been European. France has helped place AI sovereignty higher on the European agenda, strengthened the EU’s regulatory role and promoted an alternative to an AI order dominated by the United States and China. Its main diplomatic achievement has been to shape the terms on which Europe discusses

technological sovereignty. The 2018 national AI strategy already reached beyond technology. The Villani report treated AI simultaneously as a question of research, ethics, industrial policy and European autonomy.¹⁹ From the beginning, French AI sovereignty had a European horizon, with the national strategy built around a scale larger than the one country alone.

The Paris Call for Trust and Security in Cyberspace, launched in 2018, provides an example of the diplomatic method France later brought to AI

<https://www.elysee.fr/en/emmanuel-macron/2025/02/11/statement-on-inclusive-and-sustainable-artificial-intelligence-for-people-and-the-planet>; Élysée, “Summit on European Digital Sovereignty.”

¹⁹ Villani, *Donner un sens à l’intelligence artificielle*; Macron, “Discours du Président de la République sur l’intelligence artificielle.”

governance.²⁰ Although not an AI initiative, it brought states, companies, civil-society organisations and technical communities together around shared principles. In the AI context, the Paris Call illustrates a broader method: where the government cannot control digital infrastructure directly, it seeks to shape the norms, language and coalitions through which the infrastructure is governed.

For France, the EU AI Act matters because it gives national ambitions regulatory scale. EU legislation reaches firms well beyond French territory, giving Paris leverage that national rules alone could not provide.²¹ It also sought to shape the Act itself. In late 2023, France, Germany and Italy argued for an innovation-friendly approach to general-purpose AI, warning that unnecessary regulatory burdens could weaken Europe's capacity to develop its own AI industry.²² That intervention shows Paris working inside European negotiations rather than simply supporting the final regulation.

More broadly, the OECD.AI Policy Navigator records thousands of AI policy initiatives across more than 80 jurisdictions and organisations, showing how quickly AI governance has become an area of state activity.²³ The French position therefore sits within a wider international contest over who sets the rules and develops the industrial capacity behind them. France's strategy works across several levels. National policy sets the direction, the EU gives French preferences greater regulatory weight, and international summits allow Paris to build wider political support. The Paris AI Action Summit in February 2025 brought these elements together.²⁴ Co-chaired with India, it brought together

governments, international organisations, firms, researchers and civil-society actors around the language of inclusive, sustainable and trustworthy AI. Hosting the summit gave Paris a prominent role in the international debate over AI governance.

The summit also tied this political message to investment, most visibly through Macron's €109 billion announcement.²⁵ The figure should be treated cautiously: announced investment is not completed infrastructure, and much of the capital, hardware and cloud capacity may still come from foreign actors. Even so, the announcement helped present France as a serious destination for AI infrastructure and investment, rather than only as a rule-maker.

At the same summit, the European Commission reinforced the move from rules towards infrastructure by presenting InvestAI, a plan to mobilise €200 billion for investment in Europe, including support for AI gigafactories.²⁶ For France, the significance was clear: regulation alone would not be enough if the computing infrastructure and investment continued to come from elsewhere. Table 2 summarises key milestones.

The Summit on European Digital Sovereignty in Berlin in November 2025 carried this logic into a bilateral European setting. France and Germany presented digital sovereignty as a question of competitiveness and infrastructure, not only law and ethics.²⁷ France's national strategy gains credibility when Berlin and Brussels reinforce it, because the scale of the challenge requires European industrial, financial and regulatory coordination.

²⁰ Paris Peace Forum, "Paris Call for Trust and Security in Cyberspace," launched 12 November 2018, <https://parispeaceforum.org/initiatives/paris-call-for-trust-and-security-in-cyberspace/>.

²¹ Regulation (EU) 2024/1689.

²² France. Ministry of the Economy. "L'Italie, l'Allemagne et la France décident de renforcer leur coopération dans le domaine de l'intelligence artificielle," joint press release, 30 October 2023, <https://presse.economie.gouv.fr/30102023-litalie-lallemagne-et-la-france-decident-de-renforcer-leur-cooperation-dans-le-domaine-de-lintelligence-artificielle/>.

²³ OECD.AI, *OECD.AI Policy Navigator*, <https://oecd.ai/en/dashboards/policy-initiatives>.

²⁴ Élysée, "Presentation"; Élysée, "Statement on Inclusive and Sustainable Artificial Intelligence for People and the Planet."

²⁵ Élysée, "Faire de la France une puissance de l'IA".

²⁶ European Commission, "EU Launches InvestAI Initiative to Mobilise €200 Billion of Investment in Artificial Intelligence," 11 February 2025, <https://digital-strategy.ec.europa.eu/en/news/eu-launches-investai-initiative-mobilise-eu200-billion-investment-artificial-intelligence>.

²⁷ Élysée, "Summit on European Digital Sovereignty".

Table 2: France's AI sovereignty agenda 2018–2026: key moments

Year	Instrument or event	Role in the agenda
2018	Villani report and Macron's national AI strategy	National strategic framing
2018	Paris Call for Trust and Security in Cyberspace	Multistakeholder norm-building
2024	EU AI Act	Regulatory power
2025	Paris AI Action Summit	Convening power
2025	French and European AI investment announcements	Infrastructure signaling
2025	France–Germany Summit on European Digital Sovereignty	European-scale coordination
2026	AI Omnibus (Regulation (EU) 2026/1744)	Competitiveness pressure on the regulatory model

By 2026, France had succeeded in keeping AI sovereignty high on the European agenda and in bringing infrastructure much closer to the centre of that debate. The next question is harder: whether it has enough control over the technologies behind AI to give this diplomatic influence lasting weight.

Compute provides the place to begin, because it is the layer where the gap between French ambition and French capacity is widest.

The Material Conditions of AI Sovereignty

France's diplomatic influence looks less impressive once the focus moves from rules and summits to the infrastructure needed to build advanced AI. One of the most important resources is computing power, usually shortened to compute. Training frontier models requires large clusters of specialised processors, particularly GPUs, together with data centres and cloud infrastructure. Access to this computing power helps determine which firms and countries can train and deploy the most capable systems. France cannot provide this infrastructure at anything close to American scale. A 2025 analysis by Pilz et al. placed the United States at about 75 per cent of measured AI-supercomputer performance in January 2025, compared with around 15 per cent for China and about 5 per cent for the EU.²⁸ Although private clusters are difficult to observe, the figures still indicate the scale of the gap the country is trying to overcome.

This dependence places a real limit on what France can achieve at the national level because even a French AI model may have to be trained or deployed on infrastructure controlled abroad. The country does, however, have one important advantage: electricity. Its large nuclear power system provides a substantial low-carbon energy base for data-centre expansion,²⁹ but electricity alone says little about who owns a facility, whose chips it uses or whose software runs on it. France can therefore host more AI infrastructure without necessarily gaining equivalent control over it.

European programs have become an important part of France's attempt to close the computing gap. The European High Performance Computing Joint Undertaking (EuroHPC JU) pools resources for high-performance computing across participating states, while its AI Factories and proposed AI gigafactories are intended to expand access to AI-ready compute.³⁰ These programs offer something a purely national strategy cannot: access to infrastructure at a much larger scale. Their value will ultimately depend on whether they give French and European actors reliable alternatives to non-European providers.

Cloud platforms store data and models, provide deployment environments and supply many of the services through which firms and governments use AI. Dependence on this layer is an everyday operating condition as well as a strategic concern. This is a particularly difficult layer for France because the European cloud market is dominated by American

²⁸ Konstantin F. Pilz, Robi Rahman, James Sanders, Luke Emberson, and Lennart Heim, "The US Hosts the Majority of GPU Cluster Performance, Followed by China," *Epoch AI*, 5 June 2025, <https://epoch.ai/data-insights/ai-supercomputers-performance-share-by-country>.

²⁹ RTE, "Generation," *Annual Electricity Review 2025*; Élysée, "Faire de la France une puissance de l'IA."

³⁰ European High Performance Computing Joint Undertaking, "AI Factories," https://www.eurohpc-ju.europa.eu/ai-factories_en; European Commission, "EU Launches InvestAI Initiative."

companies. In July 2025, Synergy Research Group estimated that European providers held around 15 per cent of the regional market, while Amazon, Microsoft and Google together held about 70 per cent.³¹

France has responded partly through its *cloud de confiance*, or “trusted cloud,” model. Rather than trying to replace American cloud technology immediately, the model seeks to place it inside stronger domestic legal and security arrangements. The two main projects are S3NS, which combines Thales with Google Cloud, and Bleu, a partnership involving Orange and Capgemini with Microsoft.³² These arrangements may give customers greater control over jurisdiction and procurement without creating a fully domestic technology stack. Their sovereign value lies mainly in governance rather than ownership of the underlying technology.

The limits of this model became more concrete in debates over sensitive public data. Concerns about foreign jurisdiction were already visible in 2021, when *The Guardian* reported that the US National Security Agency had used Danish intelligence infrastructure to monitor senior European officials, including Angela Merkel.³³ Cloud providers are not intelligence agencies, but the episode helps explain why jurisdiction and political trust matter when sensitive infrastructure is controlled abroad. The issue became more directly relevant to cloud services during a June 2025 Senate inquiry. Anton Carniaux of Microsoft France acknowledged under oath that a lawful US government order could require Microsoft to transfer French citizens’ data without the explicit agreement of French authorities. In April 2026, the national Health

Data Hub (Plateforme des données de santé) selected Scaleway, a French cloud provider, for its planned migration from Microsoft Azure to a sovereign cloud.³⁴

Cloud hosting is only one part of the problem. Sensitive French institutions have also relied on foreign software for analysis and decision support. In December 2025, the Direction générale de la sécurité intérieure (DGSI) renewed a three-year contract with Palantir, whose software had been used by the service for years.³⁵ The position changed six months later. In June 2026, the French government announced that ChapsVision, a French data-intelligence company, had been selected to replace Palantir as part of a wider effort to reduce strategic digital dependencies. ChapsVision said its Argonos platform had won the second lot of the DGSI’s sovereign data-processing program, after securing the first lot in 2024.³⁶ The sequence shows how difficult technological substitution can be in sensitive government systems. France renewed a foreign system while a domestic alternative was still being developed, then began moving away from it once that alternative became credible. In this case, sovereignty is starting to become a procurement decision rather than remaining only a political claim.

France’s dependence on advanced chips is a tougher problem to address nationally because semiconductor production is spread across a highly specialised transnational industry. Europe does possess one crucial asset in ASML, the Dutch company whose extreme-ultraviolet lithography systems are used in leading-edge chip production.³⁷ This places a decisive capability within Europe,

³¹ Synergy Research Group, “European Cloud Providers’ Local Market Share Now Holds Steady at 15%,” 24 July 2025, <https://www.srgresearch.com/articles/european-cloud-providers-local-market-share-now-holds-steady-at-15>.

³² S3NS, “Thales x Google Cloud Trusted Cloud,” <https://www.s3ns.io/en/>; Bleu, “Un cloud au service des acteurs publics et privés français,” <https://www.bleucloud.fr/qui-sommes-nous/>; Capgemini and Orange, “Capgemini and Orange Are Pleased to Announce the Launch of Commercial Activities of Bleu, Their Future ‘Cloud de Confiance’ Platform,” 15 January 2024, <https://www.capgemini.com/news/press-releases/capgemini-and-orange-are-pleased-to-announce-the-launch-of-commercial-activities-of-bleu-their-future-cloud-de-confiance-platform/>.

³³ Jon Henley, “Denmark Helped US Spy on Angela Merkel and European Allies – Report,” *The Guardian*, 31 May 2021, <https://www.theguardian.com/world/2021/may/31/denmark-helped-us-spy-on-angela-merkel-and-european-allies-report>.

³⁴ Plateforme des données de santé, “La Plateforme des données de santé engage sa migration vers un cloud souverain avec Scaleway,” 23 April 2026, <https://health-data-hub.fr/actualites/la-plateforme-des-donnees-de-sante-engage-sa-migration-vers-un-cloud-souverain-avec>; Sénat, “CE Commande publique : compte rendu de la semaine du 9 juin 2025,” 10 June 2025, https://www.senat.fr/compte-rendu-commissions/20250609/ce_commande_publique.html.

³⁵ Palantir Technologies, “Palantir Announces Renewal of Multi-Year Contract with the DGSI,” 15 December 2025, <https://investors.palantir.com/news-details/2025/Palantir-Announces-Renewal-of-Multi-Year-Contract-with-the-DGSI/>.

³⁶ Gouvernement français, “Accélérer l’IA dans l’État et au service des Français,” 18 June 2026, <https://www.info.gouv.fr/actualite/accelerer-l-ia-dans-l-etat-et-au-service-des-francais>; ChapsVision, “ChapsVision choisi par la France pour déployer Argonos pour OTDH,” 16 June 2026, <https://www.chapsvision.com/fr/press-release/chapsvision-choisi-par-la-france-pour-deployer-argonos-pour-otdh/>.

³⁷ ASML, “EUV Lithography Systems,” <https://www.asml.com/en/products/euv-lithography-systems>.

although not under French control, and lithography is only one part of the chain. Chip design, fabrication, packaging and deployment remain distributed across companies and countries outside French control. The European Chips Act seeks to strengthen Europe's semiconductor capacity and reduce strategic dependence.³⁸

The distinction between European capability and French capability is further complicated by ASML's direct involvement in Mistral. In September 2025, ASML led Mistral's €1.7 billion Series C with a €1.3 billion investment, giving the Dutch company an approximately 11 per cent stake on a fully diluted basis.³⁹ The round strengthened Mistral's European capital base, although it also included investors such as Nvidia, Andreessen Horowitz, Bpifrance and DST Global. This illustrates the mixed character of Mistral's financing: European industrial and public capital has become more important, but the company remains embedded in a wider international investment ecosystem.

Mistral brings many of these dependencies together in one French company. It gives France a credible presence in a field still led by American and Chinese firms, but the company itself operates within an infrastructure environment that remains largely outside French control. Its founding team came from Google DeepMind and Meta, reflecting the cross-border talent base of Europe's AI sector.⁴⁰ The company's reliance on the wider international ecosystem became more concrete in February 2024, when Microsoft and Mistral announced that Mistral Large would be distributed through Azure AI Models-as-a-Service.⁴¹ The partnership made commercial

sense because it gave Mistral access to Microsoft's cloud infrastructure and enterprise customers. At the same time, it exposed the difficulty at the heart of the strategy: a French AI champion may still need an American platform in order to scale.

Mistral has also begun securing more computing capacity of its own. In March 2026, it raised just over €700 million (US\$830 million) in debt to finance 13,800 Nvidia GB300 GPUs and 44 MW of capacity at a data centre in Bruyères-le-Châtel, south of Paris.⁴² A June 2026 agreement added an initial 96 MW at the Campus AI project, with provision to scale to 200 MW.⁴³ These arrangements put considerably more compute under the company's direct control, though the accelerators are still Nvidia's, and Nvidia is itself a partner in the Campus AI joint venture alongside MGX and Bpifrance.

Mistral shows that the country can build a company close to the technological frontier, while control of the surrounding ecosystem remains much weaker. The Stanford AI Index 2025 puts this achievement in perspective: US-based institutions produced 40 notable AI models in 2024, compared with 15 in China and three in Europe.⁴⁴

Competing at the frontier also requires sustained financing. The Stanford AI Index estimated US private AI investment at US\$109.1 billion in 2024.⁴⁵ France's €109 billion package was strikingly similar in headline size, but the comparison is imperfect: the French figure aggregates investment commitments, while the US figure measures one year of private spending.⁴⁶ The more revealing question is where that capital comes from. At the

³⁸ European Commission, "European Chips Act," <https://digital-strategy.ec.europa.eu/en/policies/european-chips-act>.

³⁹ ASML, "ASML, Mistral AI Enter Strategic Partnership," 9 September 2025, <https://www.asml.com/en/news/press-releases/2025/asml-mistral-ai-enter-strategic-partnership>; Mistral AI, "Mistral AI Raises €1.7B to Accelerate Technological Progress with AI," 9 September 2025, <https://mistral.ai/news/mistral-ai-raises-1-7-b-to-accelerate-technological-progress-with-ai/>.

⁴⁰ McKinsey & Company, "Creating a European AI Unicorn: Interview with Arthur Mensch, CEO of Mistral AI," 2 May 2024, <https://www.mckinsey.com/featured-insights/insights-on-europe/videos-and-podcasts/creating-a-european-ai-unicorn-interview-with-arthur-mensch-ceo-of-mistral-ai>.

⁴¹ Eric Boyd, "Microsoft and Mistral AI Announce New Partnership to Accelerate AI Innovation and Introduce Mistral Large First on Azure," Microsoft Azure, 26 February 2024, <https://azure.microsoft.com/en-us/blog/microsoft-and-mistral-ai-announce-new-partnership-to-accelerate-ai-innovation-and-introduce-mistral-large-first-on-azure/>; Mistral AI, "Au Large," 26 February 2024, <https://mistral.ai/news/mistral-large/>.

⁴² Matthew Gooding, "Mistral AI Raises \$830m in Debt Financing for Data Center in Paris, France," *Data Center Dynamics*, 30 March 2026, <https://www.datacenterdynamics.com/en/news/mistral-ai-raises-830m-in-debt-financing-for-data-center-in-paris-france/>.

⁴³ Bpifrance, "Mistral sécurise jusqu'à 200 MW de capacité de calcul avec Campus AI en France," 1 June 2026, <https://presse.bpifrance.fr/mistral-securise-jusqua-200-mw-de-capacite-de-calcul-avec-campus-ai-en-france/>.

⁴⁴ Stanford Institute for Human-Centered Artificial Intelligence, "Research and Development," *The 2025 AI Index Report*, 2025, <https://hai.stanford.edu/ai-index/2025-ai-index-report/research-and-development>.

⁴⁵ Stanford Institute for Human-Centered Artificial Intelligence, "Economy," *The 2025 AI Index Report*, 2025, <https://hai.stanford.edu/ai-index/2025-ai-index-report/economy>. This amount in USD approximates €101 billion at 2024 average exchange rates.

⁴⁶ Élysée, "Faire de la France une puissance de l'IA".

Choose France summit on 1 June 2026, several of the largest pledges again came from foreign sources. SoftBank committed €45 billion to three AI data centres in Hauts-de-France by 2031, with a further €30 billion conditional on that first phase. Brookfield raised its total French AI infrastructure commitment to €30 billion, an increase of €10 billion on the €20 billion it had announced at the Paris AI Action Summit in February 2025. MGX, an Abu Dhabi-based investor, and Bpifrance announced plans for a second Campus AI site of

around €7.5 billion, extending a joint venture they had formed with Mistral and Nvidia at Choose France in May 2025.⁴⁷ Foreign investment can expand capacity in France without transferring equivalent control to French actors, because ownership, financing, hardware and operating decisions still matter. A data centre inside the country may add domestic computing capacity while leaving important dependencies intact. Table 3 summarises key aspects of France's AI sovereignty gap.

Table 3: Selected indicators of the AI sovereignty gap

Material condition	Indicator or evidence
Compute	AI supercomputer datasets place the US far ahead of Europe in visible frontier compute capacity, with about 75 per cent of measured performance in the US, around 15 per cent in China and about 5 per cent in the EU
Cloud infrastructure	As of July 2025, European cloud providers held around 15 per cent of the European cloud market, while Amazon, Microsoft and Google together accounted for around 70 per cent.
Semiconductors and GPUs	Europe has strategic assets such as ASML but does not control the full AI accelerator chain from design and fabrication to packaging, cloud integration and deployment.
Model production	Stanford AI Index reports 40 notable AI models from US-based institutions in 2024, 15 from China, and three from Europe.
Capital and data centres	France announced around €109 billion in AI investment commitments in 2025. At Choose France in June 2026, the largest AI-infrastructure pledges again came from foreign capital: €45 billion committed by SoftBank, Brookfield's French total raised to €30 billion, and a second site for the MGX-Bpifrance-Mistral-Nvidia Campus AI venture.
State technological capacity	France's Health Data Hub planned migration from Microsoft Azure to Scaleway, the S3NS/Bleu trusted-cloud model and the DGSi's transition from Palantir to ChapsVision show uneven but tangible progress in reducing foreign dependence in sensitive public functions.

France retains important national assets and considerable influence through the EU, yet many of the technologies required for advanced AI remain concentrated in a small number of foreign companies and countries outside the EU. A long French tradition of state intervention in strategic sectors has limited reach here, because the decisive assets are owned and operated outside French jurisdiction. Greater sovereignty will also depend on capabilities that receive much less political attention than summits or investment announcements: technical expertise inside government, procurement teams able to assess technological dependencies and institutions capable of maintaining strategic systems over time.

These constraints explain why France repeatedly turns to Europe, and why the gap between political influence and material capacity has become a domestic political problem.

The Fragilities Created by the Gap

The National Assembly's commission of inquiry into structural dependencies and systemic vulnerabilities in the digital sector, created in February 2026, heard in May from industry representatives (Mistral AI, data-centre operators, representatives of Microsoft, Google Cloud and AWS), and from former digital-affairs secretary Cédric O.⁴⁸ It held forty-five hearings

⁴⁷ Élysée, "Entretien de travail avec Masayoshi Son, Directeur général de SoftBank," 1 June 2026, <https://www.elysee.fr/emmanuel-macron/2026/06/01/entretien-de-travail-avec-masayoshi-son-directeur-general-de-softbank>; Direction générale des Entreprises, "Choose France 2026 : un nouveau record d'investissements en faveur de l'industrie, de l'innovation et des territoires," 4 June 2026, <https://www.entreprises.gouv.fr/la-dge/actualites/choose-france-2026-un-nouveau-record-dinvestissements-en-faveur-de-lindustrie-de>; Bpifrance, "Choose France 2026 : 93 milliards d'euros d'investissements et 15 600 emplois annoncés," <https://bigme-dia.bpifrance.fr/nos-actualites/choose-france-2026-93-milliards-deuros-dinvestissements-et-15-600-emplois-annonces>; Bpifrance, "Mistral sécurise jusqu'à 200 MW."

⁴⁸ Assemblée nationale, "Vulnérabilités du secteur du numérique en France : auditions de Mistral AI, de représentants des Gafam en

and questioned 113 witnesses before adopting its report on 8 July 2026. The inquiry showed that the gap between sovereignty claims and dependence on foreign AI firms, cloud providers and infrastructure had become a recognised domestic political issue.

The hearings highlight the central problem of this section. France's diplomatic and regulatory tools can create visible influence, yet incomplete control over infrastructure can still restrict political choice. Three vulnerabilities are particularly important: domestic credibility, dependence on European coordination and the viability of France's proposed European "third way".

The first vulnerability is domestic credibility, which depends on more than how the strategy is presented. The national sovereignty discourse draws strength from a long political tradition in which the state protects strategic sectors, organises industrial capacity and defends autonomy from external dependence. AI exposes the limits of that tradition. The state can announce strategies and investments, but it cannot easily command the cloud platforms, chips, compute clusters and software ecosystems on which frontier AI depends. When policy is framed in terms of sovereignty while operational infrastructure remains partly foreign, the claim becomes easier to challenge.

French policy has supported research, backed Mistral, promoted European regulation and attracted large investment commitments. The problem is partly one of timing. Political strategies and announcements can change quickly, whereas computing infrastructure, semiconductor capacity and stronger public-sector expertise take years to build.

The durability of France's strategy will also depend on what happens after Macron. Much of the current agenda has been driven by presidential diplomacy, summit politics and highly visible investment announcements, which raises the question of how firmly it is embedded in French institutions. A future

government could place less emphasis on AI sovereignty, but the opposite is also possible. The country could decide in favour of more investment in data-centres, EuroHPC, AI factories, or sovereign-cloud procurement. Firms such as Mistral could become more deeply integrated into French and European industrial policy, producing a more selective form of sovereignty in which the government seeks greater control over the areas it considers most sensitive.

The second vulnerability is that France cannot pursue this strategy alone. Advanced AI requires a scale of finance, infrastructure and industrial cooperation that exceeds the capacity of any single EU member state. France therefore depends on Germany, the European Commission, other governments and private investors moving broadly in the same direction.

Pressure for greater European coordination no longer comes only from governments. In March 2025, Airbus, Dassault Systèmes and a broad coalition of European firms and organisations called for a sovereign infrastructure fund and stronger European preference in digital procurement.⁴⁹ Their appeal treated infrastructure dependence as a strategic issue in its own right. France can help define the problem, but procurement, finance and market demand will determine whether European alternatives scale.

At the Berlin Summit on European Digital Sovereignty, France and Germany presented cloud, AI, data and infrastructure as parts of a more competitive and sovereign European agenda. Yet the wider EU debate also showed that sovereignty and competitiveness can pull in different directions. The AI Omnibus, agreed provisionally in May 2026 and in force since 27 July 2026, postponed most high-risk obligations under the AI Act. Stand-alone systems listed in Annex III move to 2 December 2027, and systems embedded in regulated products under Annex I move to 2 August 2028.⁵⁰ The debate exposed a difficult

France et de Cédric O," 12–13 May 2026, <https://www.assemblee-nationale.fr/dyn/actualites-accueil-hub/vulnerabilites-du-secteur-du-numerique-en-france-auditions-de-mistral-ai-de-representants-des-gafam-en-france-et-de-cedric-o/>; Assemblée nationale, Rapport fait au nom de la commission d'enquête sur les dépendances structurelles et les vulnérabilités systémiques dans le secteur du numérique et les risques pour l'indépendance de la France, Rapport n° 3054, Tome I, rapporteure Cyrielle Chatelain, adopted 8 July 2026, https://www.assemblee-nationale.fr/dyn/17/comptes-rendus/cenum/l17cenum2526042_compte-rendu.

⁴⁹ EuroStack, *Open Letter: European Industry Calls for Strong Commitment to Sovereign Digital Infrastructure*, 14 March 2025, <https://eurostack.eu/wp-content/uploads/2025/07/eurostack-letter-with-logos-25-7-25.pdf>.

⁵⁰ Élysée, "Summit on European Digital Sovereignty"; Council of the European Union, "Artificial Intelligence: Council and Parliament Agree to Simplify and Streamline Rules," 7 May 2026, <https://www.consilium.europa.eu/en/press/press-releases/2026/05/07/artificial-intelligence-council-and-parliament-agree-to-simplify-and-streamline-rules/>; Regulation (EU) 2026/1744 of the European

trade-off for France. Looser rules may support competitiveness in the short term but weaken the regulatory model that gives Europe much of its international influence. Keeping demanding rules without developing stronger industrial capacity creates the opposite problem: France and Europe may remain powerful regulators of technologies largely developed elsewhere. French strategy therefore depends on preserving regulatory influence while expanding the industrial base behind it.

The third vulnerability concerns the European “third way.” France presents this model as more democratic, open, human-centred and protective of rights than either American platform capitalism or Chinese state-led mobilisation. The EU AI Act, the Paris summit and France’s digital diplomacy show that Europe can influence the vocabulary of AI governance. For Paris, the credibility of this “third way” depends on more than Europe’s ability to write rules. France also needs credible European alternatives in the infrastructure used to host, train and deploy AI; otherwise the values it promotes internationally remain tied to technologies controlled elsewhere.

France is not unique in facing this problem. Many states can shape rules and public debate without controlling the infrastructure beneath advanced AI, which is precisely why performative sovereignty may have wider relevance. Political mobilisation can attract investment and build coalitions even before material autonomy exists. The French case also shows the limit of the strategy: political influence becomes difficult to sustain if it does not eventually reduce important dependencies.

Conclusion: Conditional Performance

France’s experience under Macron shows AI sovereignty as a matter of degree rather than a settled condition. Presidential diplomacy, European regulation, international summits and Mistral AI have given the country real influence over how the issue is framed and pursued in Europe. The diplomatic gains examined in this paper have widened the agenda to include compute, cloud, investment and infrastructure.

The material evidence sets clear limits on that influence. France still relies heavily on foreign cloud providers, advanced chips, platforms and capital, and national scale remains insufficient to control the full AI stack. Yet the picture is no longer static. By mid-2026, the Health Data Hub had selected Scaleway for its planned migration from Microsoft Azure, the DGSi had begun moving from Palantir to ChapsVision, and Mistral was investing in computing infrastructure of its own. These shifts remain partial, but they show that sovereignty is beginning to shape procurement and infrastructure choices.

European scale is therefore central to the strategy. EU regulation gives France leverage it could not generate alone, while shared investment and infrastructure offer a route to greater capacity. The same dependence on Europe also creates fragility. Progress requires coordination among governments, EU institutions and private firms. The balance between regulation and competitiveness remains unsettled and the viability of the French-backed “third way” depends on Europe developing credible alternatives as well as rules. The strategy’s durability will finally depend on whether these choices become firmly embedded in French and European institutions beyond Macron.

This is what makes the strategy a form of conditional performance. Political authority can precede material control and, under the right conditions, help create it. France has begun to turn parts of its sovereignty agenda into material choices. The decisive question is whether those early gains can scale far enough to reduce dependence in the layers that matter most for strategic choice. If they do, performance will have helped build capacity. If they stall, AI sovereignty will remain more political ambition than technological condition.

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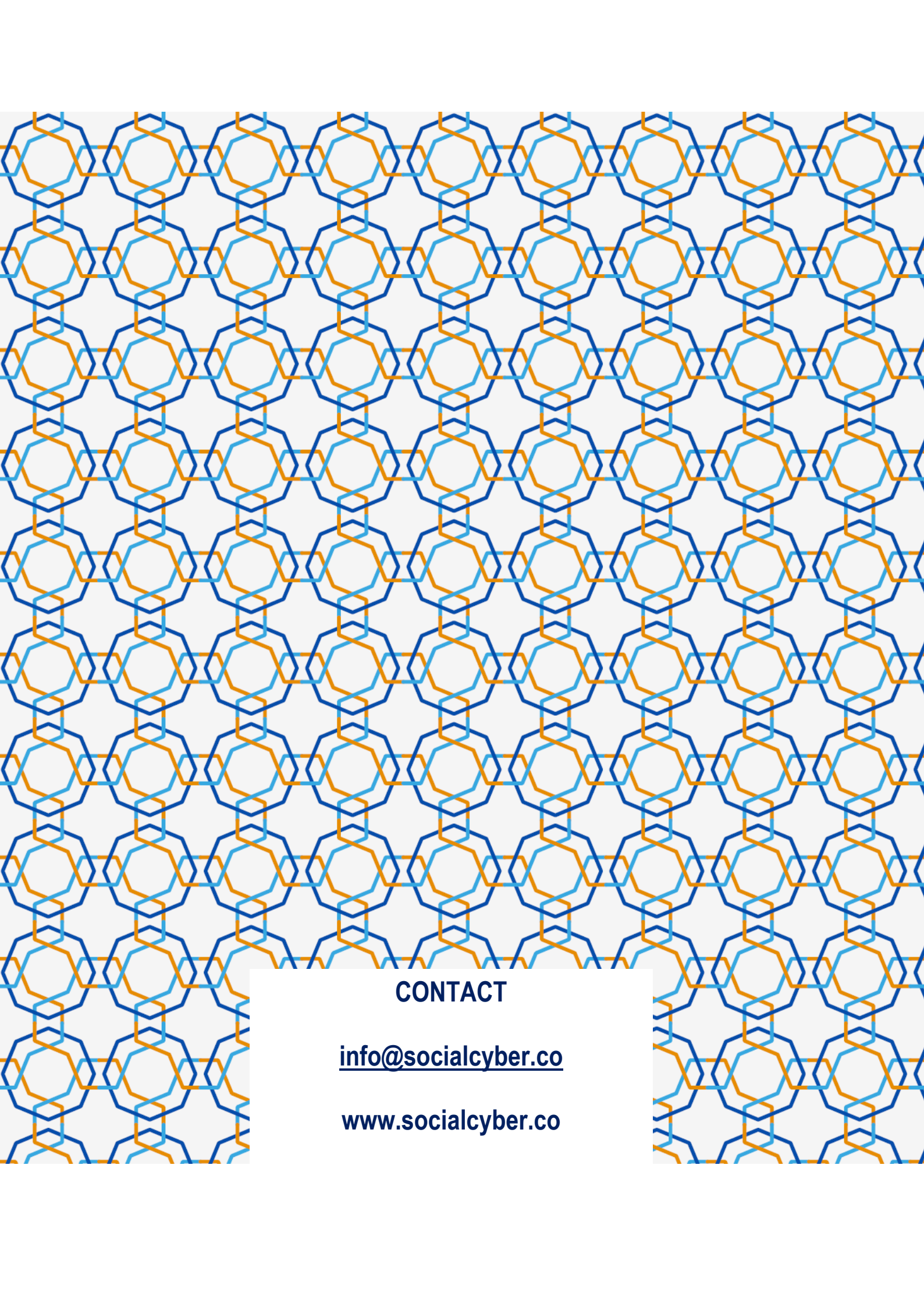
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