

VivaTech 2026 Confidence Barometer: A paradox revealing tensions between technology adoption, sovereignty, and cybersecurity in a fragmented geopolitical context

Third edition of VivaTech's Confidence Barometer conducted by OpinionWay among tech executives in Europe (France, Germany, United Kingdom, Spain, Italy, Netherlands) and North America (United States)

- The executives express strong confidence in new technologies with a confidence score of 89/100 (vs. 87/100 for 2025)
- 92% of the executives favor a future partner of the same nationality when adopting a new technological tool
- 88% of the executives believe that their perception of the role of new technologies in their company's competitiveness has improved over the last 12 months
- 89% of executives trust AI to guide their company's decisions
- 39% of executives have already shared information about their company with an AI tool they did not fully trust
- Artificial intelligence and cybersecurity stand out in terms of the intensity of future investment: 87% plan to increase their investment (including 53% significantly) and 77% (including 42% significantly) respectively.

Paris, 3 February 2026 – VivaTech unveils the third edition of its Tech Confidence Barometer, conducted by OpinionWay*. Covering sovereignty issues, AI adoption, and investments, executives from seven countries express their strong confidence in new technologies and share their insights.

François Bitouzet, CEO of VivaTech, explains: "This 2026 barometer paints a new picture of technological confidence: American and British executives consider the nationality of their tech supplier to be essential, while most Europeans consider it a 'plus'. This divergence is not anecdotal; it reveals two visions of sovereignty, one "de facto" and the other "contradictory." In response to this, we are seeing a real acceleration in Europe on tech issues, with investments in AI and cybersecurity becoming a priority. But we must be wary of a new paradox that we are observing: while 9 out of 10 executives trust AI, 4 out of 10 admit to having shared confidential data with tools they did not fully trust."

Technological sovereignty: The emergence of an Atlantic divide

When adopting a new technological tool, 92% of executives would favor a future partner who shares their nationality, and nearly half of them (47%) would make this commonality a decisive factor.

This essential aspect is particularly emphasized by the English-speaking countries surveyed (57% in the United States and the United Kingdom), while the majority of EU members consider it a "plus" rather than an obligation, with the exception of the Netherlands, which places equal importance on both concepts.

Furthermore, **63% of executives say they are concerned about the loss of sovereignty that may accompany technological progress.**

The geography of trust: New blocs are Forming

The geographical origin of tech solutions has a significant influence on the level of trust placed in them (86%). Nearly one in two executives (47%) cite their own country as one of the regions they trust the most, but the boundaries of trust extend far beyond that:

- The United States: Confident in their own country (51%), Americans value the North American continent as a whole even more (62%).
- Continental Europe stands united: 43% of European executives favor solutions from their own continent. In France, 63% place the most trust in European solutions.
- The United Kingdom, between two worlds: Particularly confident (56%) in the capabilities of the UK, those surveyed place Europe on an equal footing (53%) – revealing the duality of the UK as both anglophone and European.

For executives, trust is primarily linked to security issues (57%). It is then associated with qualitative innovation issues (50%) alongside more positive performance issues (49%).

The AI paradox: Maximum confidence, risky practices

Artificial intelligence has convinced executives of its reliability, with **89% trusting AI to guide their company's decisions**, regardless of their sector of activity. AI inspires confidence in them in terms of technology and decision-making, as well as job security over the next 12 months, despite its sometimes uncontrolled use.

83% of executives are confident in the sustainable and controlled development of financial investments in artificial intelligence.

Only 17% fear a speculative bubble. It should be noted that the French are more pessimistic than other countries surveyed, with 30% expressing concern.

The integration of **AI is not intended to lead to layoffs in the short term**, as **92% are confident** (including 48% who are very confident) in their ability to maintain employment levels over the next 12 months.

Four out of ten executives have already shared information about their company with an AI tool they did not fully trust.

This proportion remains consistent regardless of country, payroll size, or industry. AI has been widely adopted in companies, but the framework for its use and raising awareness among teams is taking more time: AI could potentially **generate data security and confidentiality issues**.

Investments: Record levels driven by AI and cybersecurity

When it comes to tech investment, cybersecurity leads the way, with 82% of executives saying they have already invested in this area. This is followed by investments in **artificial intelligence** (76%), 5G (73%), **cloud computing** (72%) and, after a second drop, **the Internet of Things** (54%).

The ranking remains broadly similar in France, with 81% of executives having invested in cybersecurity and 71% in 5G, while investment levels appear to be lower for artificial intelligence (65%), cloud computing (49%) and the Internet of Things (40%).

Among these technologies, artificial intelligence and cybersecurity also stand out in terms of the intensity of future investment: 87% say they will increase their investment (including 53% significantly) and 77% (including 42% significantly) over the next 12 months. In France, this trend is clearly evident, with 82% of executives planning to increase their investments in AI and 74% in cybersecurity.

Two other technologies are particularly popular with current investors: **robotic process automation** (80%, including 36% strongly) and **quantum computing** (76%, including 45% strongly) to support AI ambitions.

Competitiveness: Europe is accelerating, anglophone countries dominate

87% of executives consider that companies in their country are internationally competitive in tech (and the figure rises to 94% among medium-sized companies). While the **United States** remains the most enthusiastic (92%, including 61% who are "very enthusiastic," up 19 points vs. 2024), the **European countries** in the survey are experiencing a marked acceleration in confidence, thereby reducing the gap with the leader:

- With a score of 90% in **the United Kingdom**, the country is holding its own against the United States
- 81% in **France** (up 12 points in 2024) and **Spain** (up 11 points vs. 2025)
- 75% in **Italy** (up 11 points vs. 2025)
- Only **Germany** holds to its previous level, just below the average (79%)

Societal challenges: Technology as a solution, but to which problems?

The tech executives surveyed believe in the ability of major technological innovations to solve the great challenges of our time: 94% confirm this, and 50% of them do so without a moment's hesitation.

Diversity, inclusion, and the environment remain values strongly upheld by leaders in the national tech ecosystem (85%). However, they show a certain pragmatism, since paradoxically, the revision of priorities by certain tech giants in early 2025 is welcomed by nearly half of them (48%), while a quarter are disappointed. It should be noted that in **Spain**, the "business first" vision is more clearly evident, with fewer people indifferent and 60% satisfied.

* OpinionWay methodology

This survey was conducted between November 2025 and December 2025 among 1,524 executives representing private companies with more than 50 employees or startups, unicorns, or scaleups whose companies offer tech solutions or have an interest in tech topics. The geographical distribution of the sample was as follows: 301 respondents in France, 204 in Germany, 204 in Spain, 200 in Italy, 208 in the United Kingdom, 205 in the United States, and 202 in the Netherlands. The representative sample was constructed using the quota and weighting method, based on criteria such as salary size, sector of activity, and geographical location.

About VivaTech

VivaTech is an innovation accelerator that connects startups, technology leaders, large companies, and investors to address the world's greatest challenges.

Every year, VivaTech organizes Europe's largest startup and tech event. For four days, we bring together all the excitement of tech in Paris, focusing on the most disruptive topics in the ecosystem and innovations presented in a world premiere, making it a unique place where business and innovation meet. The tenth edition of VivaTech will take place 17-20 June 2026. More information is available at <https://vivatech.com/media> and @VivaTech.

Contacts

VivaTech – press@vivatechnology.com