

Editorial Study

Data valorisation

Breakdown of results by country
France / Belgium / Netherlands / UK / US / Canada

Data valorization

CONTENTS

Methodology and objectives of the study	3-4
Respondent profile	5-7
Key findings summary	8-14
Results	15-58
1. Current state of data valorization	16
2. Data usage and exploitation practices	34
3. AI and data exploitation	49
Appendices	59

Context and Objectives

EQUANS, a global leader in multi-technical services, supports public and private organizations in their energy, industrial, and digital transitions, leveraging innovation and data exploitation as core drivers of performance.

In this context of transformation and the growing use of data, EQUANS' Management wanted to deepen the discussion on “**data valorization**” by conducting an editorial study in collaboration with the editorial teams of **Usine Nouvelle / Usine Digitale**. The study aims to provide a comprehensive overview across all sectors in France, Belgium, the UK, the Netherlands, the USA, and Canada.

Study Objectives

To provide a snapshot of organizations' strategies regarding data exploitation...

...by identifying the tools and practices organizations implement to extract value from data

...and to understand how Artificial Intelligence fits into this broader transformation dynamic.

Methodology

Significant differences in this report are identified at the 90% and 95% confidence levels. These differences highlight variations between respondent sub-groups (by country).

Values significantly above the overall results are shown in green, while values below the overall results are shown in orange.

For sample sizes between 30 and 50 respondents, the results are considered indicative and should be interpreted with caution.

For fewer than 30 respondents, the sample is considered very small.



DATA COLLECTION METHOD

Self-administered online questionnaire (CAWI)

STUDY TARGET

Decision-makers from organizations with more than 10 employees, across the following sectors:

- Industry (manufacturing, agri-food, defense, healthcare, transport, etc.)
- Public sector and Services (real estate, trade and distribution, hospitality, catering and tourism, healthcare and social services, financial services, telecommunications, transport, etc.)

FIELDWORK

24 November – 12 December 2025

SAMPLE

Total sample: 980 respondents, distributed by country as follows:

- France: 480 respondents
- Belgium, UK, Netherlands, USA, and Canada: 100 respondents per country

Respondent Profile

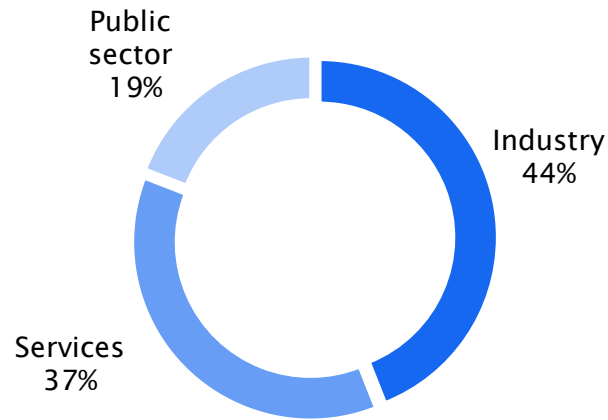
L'USINENOUVELLE **L'USINEDIGITALE**  **EQUANS**

Respondent Profile

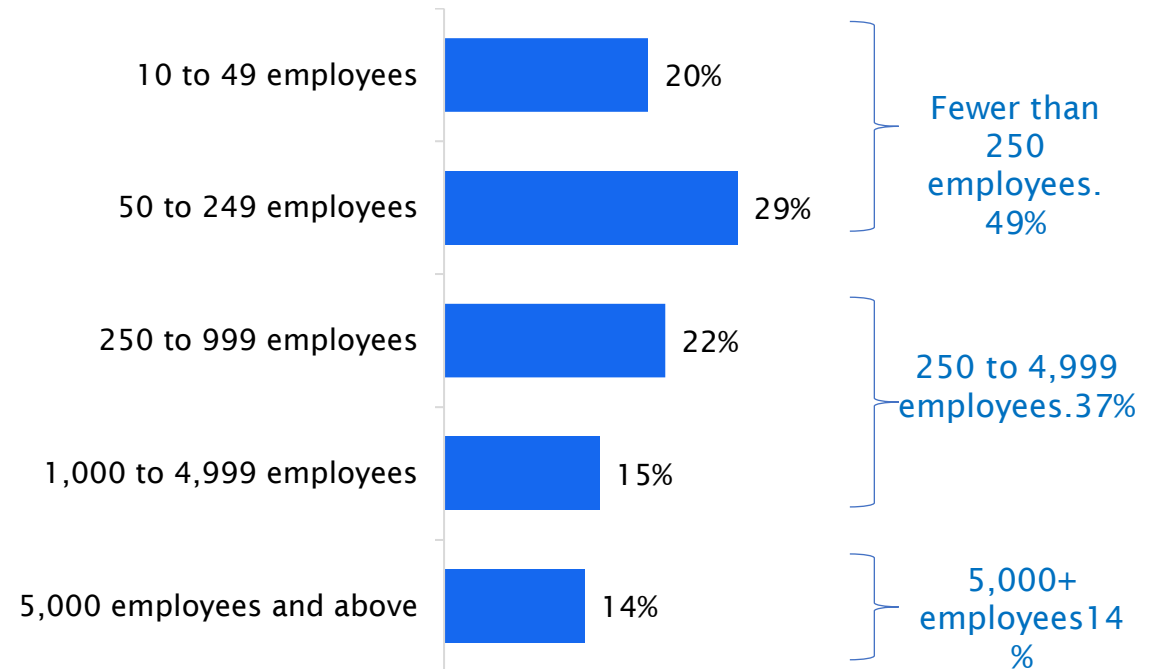
Total sample: 980 respondents

A weighting adjustment was applied to the country samples based on sector and organization size to ensure a homogeneous and comparable composition across countries.

►► Sector of Activity



►► organization Size



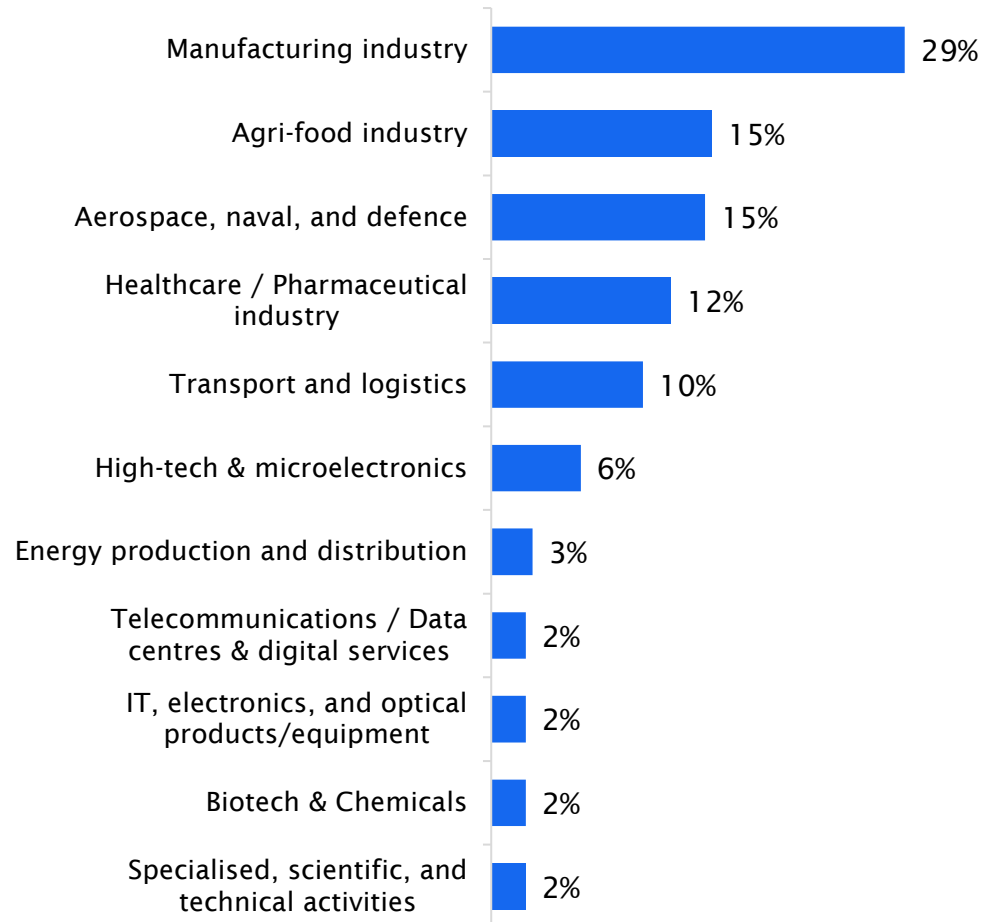
i The breakdown of gross results by department surveyed and turnover can be found in the appendix at the end of the report.

Respondent Profile

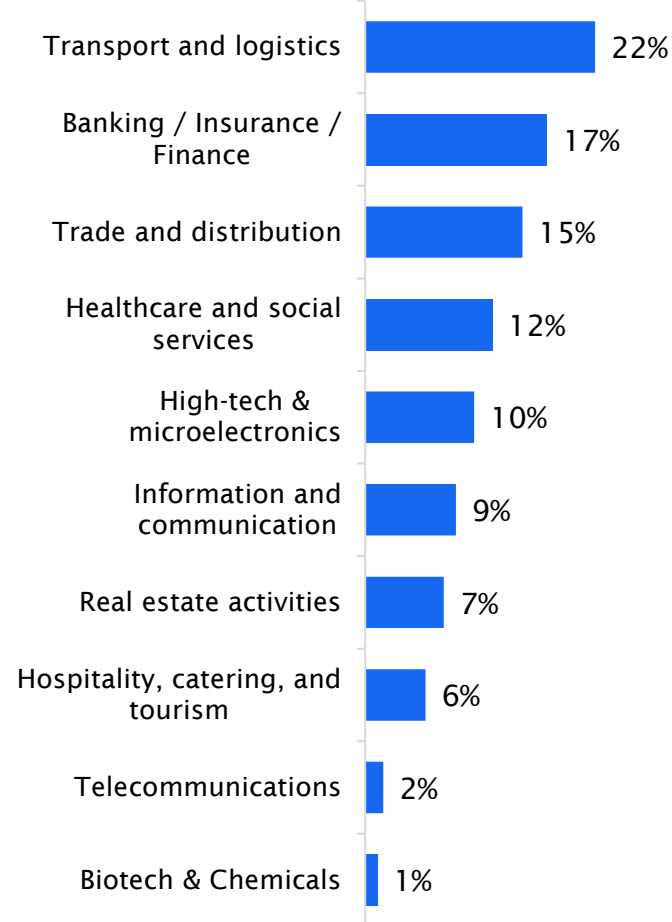
Total base: 980 respondents

Details by area of activity

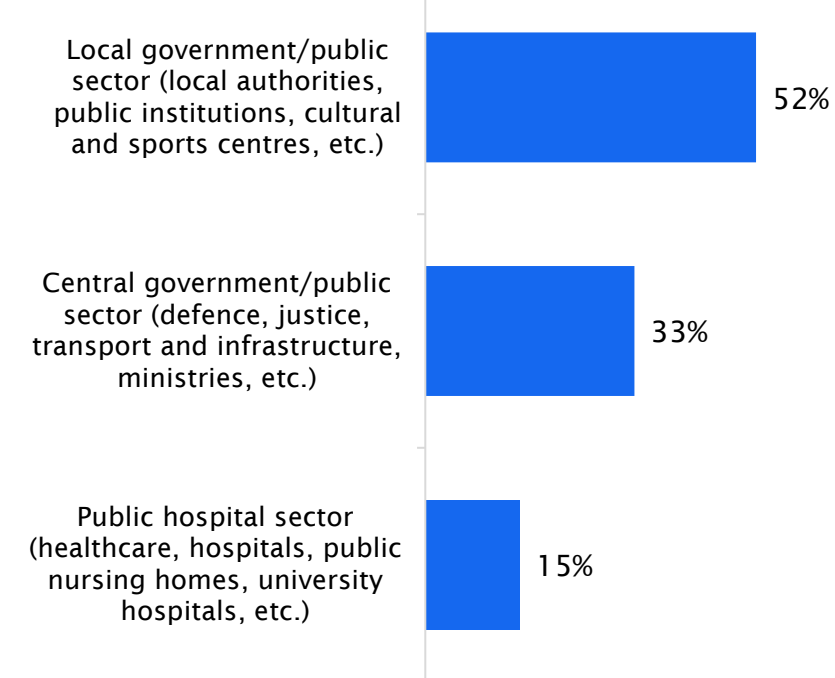
Industry *b=431*



Services *b=363*



Public sector *b=186*



Summary

L'USINE NOUVELLE **L'USINE DIGITALE**  **EQUANS**

Summary

Data Governance and Strategy: Marked Differences Between Countries

A generally structured governance framework, but with varying maturity levels across countries

Most organizations surveyed have a structured governance framework that defines data ownership, responsibilities, and access rules. However, the **USA** (98% of respondents reporting formalized governance), **Canada** (95%), and the **UK** (94%) **stand out as the most advanced** in this area. In contrast, the **Netherlands** (83%) and **France** (90%) show **lower maturity levels**, with 83% and 90% of respondents, respectively, having structured governance and a higher proportion reporting unclear rules.

Overall, the countries surveyed have implemented solutions to optimize the use of their data. Respondents in the UK (97%) appear the most advanced, reflecting strong structuring in data management and valorization, followed by the USA (91%), France (90%), and Belgium (90%).

Conversely, respondents in the Netherlands lag behind in leveraging data to create value, highlighting a need for harmonization and consolidation of their operational framework

Varying levels of involvement in data exploitation projects

Involvement in data exploitation projects varies across countries. Respondents in the UK (49%), Canada (47%), and the USA (46%) are mostly engaged in strategic data valorization projects (governance, management, advanced analytics). **This is likely linked to trust in established standards in these countries**, as respondents report that their regulations largely ensure data security.

By contrast, continental European countries—**Netherlands** (50%), **Belgium** (42%), and **France** (39%)—**mobilize their teams more on operational projects** (data collection, processing, reporting), reflecting a generally younger maturity level and a focus on execution rather than transformation.

This is likely influenced by the GDPR framework governing data processing in Europe

Summary

Operational Maturity Focused on Security and Quality, Yet Hindered by Data Delivery

Common strengths in data security, accessibility, and quality

Across most countries surveyed, the areas best managed are **data security** (54%), which ranks highest in nearly all countries, followed by **accessibility** (49%) and **data quality and updates** (49%).

Conversely, for all countries, **data delivery** (43%) and **transformation** (46%) are among **the least advanced aspects**. This suggests that while organizations have invested in collecting, securing, and ensuring the quality of their data, they are less proficient in valorizing, visualizing, and disseminating information.

The priorities cited by **respondents are largely operational**. The focus is on **monitoring day-to-day activities** (47%), although this is less prominent among respondents in the Netherlands (39%). **Improving products and services** (46%) is also a key priority, particularly for respondents in the USA (55%), alongside supporting strategic decision-making (42%), reflecting higher maturity in data exploitation. By contrast, using **data for communication or marketing** (34%), as well as **innovation and R&D** (33%), remains a **secondary focus** for most countries.

Data as a performance lever: enthusiasm varies by country

This strategic view of data is stronger in Anglo-Saxon countries. Respondents in the **UK** (95%), **Canada** (94%), and the **USA** (92%) see data as a strategic asset and a genuine driver of organizational performance.

For respondents in **France** (87%) and the **Netherlands** (79%), **this perception is less pronounced**, reflecting a less developed data culture compared to the USA and UK, as well as fewer local actors or solutions, particularly compared with the USA.

Internal data sharing follows the same trend. While **most respondents** (52%) **report that data is shared between departments**, this practice is far **more common** in organizations in the **USA** (71%), **Canada** (59%), and the **UK** (54%).

Summary

Data Collection, Exploitation, and Management Practices: Strong Contrasts Between Countries

Heterogeneous data collection and exploitation practices across countries

The study highlights a **clear divide between continental Europe and Anglo-Saxon countries** in terms of data sources and exploitation methods. **In Europe, surveyed organizations primarily rely on data from user forms** (France: 48%, Belgium: 46%, Netherlands: 44%) **or their internal IT networks** (France: 43%, Belgium: 43%, Netherlands: 34%), reflecting an approach still focused on traditional, easily controlled sources.

By contrast, **respondents in Anglo-Saxon countries make greater use of information from their IT infrastructures** (Canada: 57%, USA: 56%, UK: 52%), as well as **social media and web tools** (USA: 54%, UK: 48%, Canada: 40%), demonstrating a strategy geared towards capturing large-scale, diverse data.

This maturity is also reflected in the ability to leverage collected data. While **most respondents in the USA, Canada, and the UK report using more than half of their data**, European respondents in Belgium (47%), France (41%), and the Netherlands (39%) **extract value from only a limited portion**. Tool usage further reflects these differences: **France remains heavily reliant on basic solutions** such as Excel, whereas

Belgium and the UK favor more advanced monitoring tools. Respondents in the USA and Canada stand out for their extensive use of Business Intelligence tools, enabling more comprehensive data valorization and structured decision-making.

Advanced analytical maturity and strategic management in Anglo-Saxon countries

Beyond collection, organizations' ability to measure the performance of their data strategies varies by country. **Surveyed organizations in the USA (97%), UK (95%), and Canada (90%) rely more heavily on performance indicators, with nearly half of US respondents even reporting a quantified ROI**—a sign of a results-oriented approach and strong integration of performance objectives.

In contrast, several European countries, notably **the Netherlands (77%) and France (80%), show more limited ROI measurement**, reflecting a lag in the implementation of robust performance tracking mechanisms.

Summary

Barriers to Data Exploitation

Key barriers are common across countries

The main obstacles reported by respondents across all countries are the **high cost of data exploitation** (29%), **ensuring data quality** (29%), and **a lack of internal skills** (25%). However, some national specificities emerge. In Belgium, for example, **a lack of equipment for data collection** (27%) is a significant constraint, whereas in the UK, the main issue is the **availability of sources** (26%), despite relatively high overall maturity.

Respondents in **the Netherlands** highlight **rigid internal processes** as a major limitation, making it difficult to leverage data effectively. Regarding data unification efforts, 60% of Dutch respondents are still in the planning stage, considering the implementation of dedicated processes. In contrast, organizations in the USA (85%) and the UK (85%) lead in these initiatives, with the majority already having implemented or deployed advanced processes to centralize and harmonize their data.

Data valorization highlights differences between continental Europe and Anglo-Saxon countries. Whereas the USA, UK, and Canada adopt structured, tool-supported, and performance-oriented approaches, European

countries tend to rely on partial exploitation, traditional tools, and lower analytical maturity.

These differences likely reflect technological gaps, but more importantly, they indicate distinct organizational cultures, where **data** may be seen **both as a central strategic lever** and as **an organizational constraint**, while also **posing regulatory compliance challenges**.

Summary

AI at the Heart of Data Exploitation and Transformation

Highly heterogeneous adoption dynamics across countries

Significant disparities remain in organizations' ability to leverage Artificial Intelligence (AI) to valorize their data. **Surveyed organizations in the USA (82%) clearly lead, showing a notable advantage over all other countries.** By contrast, the Netherlands (45%) lag significantly, reflecting lower maturity in AI adoption, despite a higher proportion developing domestic solutions.

The ways AI is used also vary greatly by country. In **Belgium (50%) and Canada (50%), AI is primarily deployed for predictive purposes.** In the USA, AI is **integrated more broadly into organizational processes**, with diverse and strategic applications such as **human resources (55%), production planning (44%), and marketing (44%).** UK respondents stand out for a stronger **focus on research and information compilation (44%),** reflecting a more analytical and documentation-oriented use.

These differences indicate varying levels of maturity, where some countries are already using AI as a lever for comprehensive transformation, while others remain focused on targeted use cases.

Technology choices and investment strategies reveal AI maturity

Most countries rely on market-available AI solutions. However, Belgium distinguishes itself by developing more internal solutions (36% vs 26% overall). Conversely, the USA makes greater use of consumer AI solutions (63% vs 50% overall). **Open-source AI solutions (40%) are the most widely used, particularly in the Netherlands (55%) and the USA (59%), which also combine them with sovereign solutions (36% vs 26% overall).**

The perceived impact of ChatGPT's launch is another marker of maturity. **Respondents in the USA (87%) and UK (87%) largely consider that the arrival of these new tools has accelerated organizational transformation.** By contrast, respondents in **Belgium (77%), France (73%), and the Netherlands (62%)** are more cautious, reflecting a more gradual adoption.

Finally, investment intentions reinforce these differences. Respondents in the **USA (93%) and UK (87%) place AI at the center of their strategic priorities,** demonstrating a strong commitment to multi-year engagement. **European countries appear more reserved** (France: 73%, Belgium: 72%, Netherlands: 68%). While investments have begun, they remain lower priority for the organizations surveyed.

Summary

Data governance and exploitation frameworks are generally structured, but their maturity varies by country. Anglo-Saxon countries (USA, UK, Canada) have formalized and advanced systems, whereas some European countries (Netherlands, France) show less mature frameworks. Involvement in data projects also differs: organizations in Anglo-Saxon countries participate more in strategic initiatives, while European organizations remain largely operationally focused. This reflects both confidence in regulations and the maturity of local frameworks.

Data security, accessibility, and quality are the best-managed areas across all countries, while data delivery and valorization remain less developed. Operational priorities dominate, with a focus on activity monitoring and improving products or services, whereas innovation, R&D, and marketing remain secondary.

Anglo-Saxon countries view data as a strategic lever, with more widespread internal sharing and more comprehensive exploitation. In continental Europe, data collection relies on traditional sources, tool usage is limited, and data valorization is partial. Analytical maturity is higher in Anglo-Saxon countries, where organizations regularly measure ROI from data

initiatives. Across all countries, the main barriers are cost, data quality, and lack of internal skills, with country-specific constraints.

AI adoption highlights further disparities. The USA and UK integrate AI extensively into strategic processes, whereas the Netherlands and France are more cautious, focusing on targeted use cases. Technology choices reflect this maturity, with varying use of internal and open-source solutions across countries. The impact of new tools such as ChatGPT illustrates these gaps: Anglo-Saxon countries perceive accelerated transformation, while adoption in European Union countries is more gradual.

Investment intentions reinforce these differences, with AI being a strategic priority in the USA and UK, whereas Europe remains more reserved. Overall, differences in data and AI maturity between countries reflect both technological gaps and distinct organizational cultures, with more strategic and structured exploitation in Anglo-Saxon countries and a more operational focus in continental Europe.

Results

L'USINE NOUVELLE **L'USINE DIGITALE**  **EQUANS**

1. Current State of Data Valorization

1 Data Strategy and Governance

2 Maturity Level of Data Exploitation

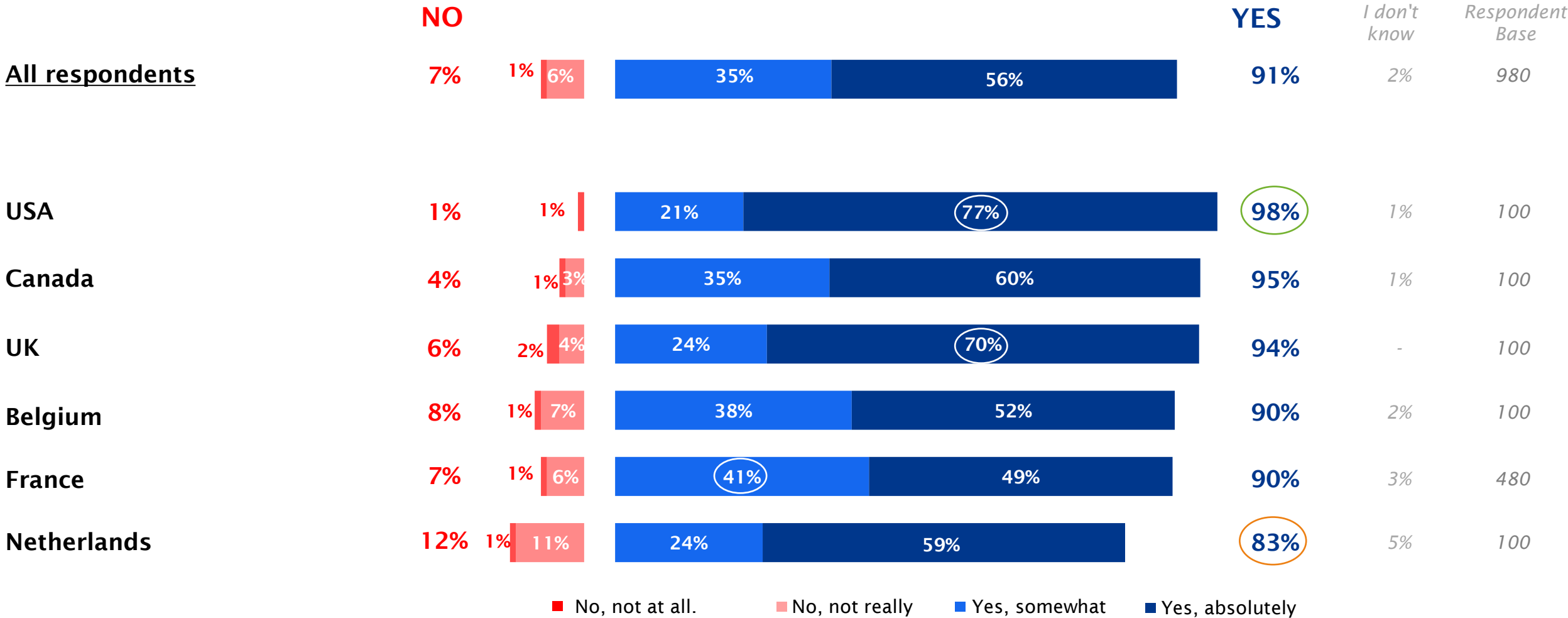
3 Key Challenges in Data Exploitation

Data Strategy and Governance

L'USINENOUVELLE **L'USINEDIGITALE**  **EQUANS**

In general, the countries surveyed have a structured governance framework with clear rules. However, the USA, Canada, and the UK are the most advanced.

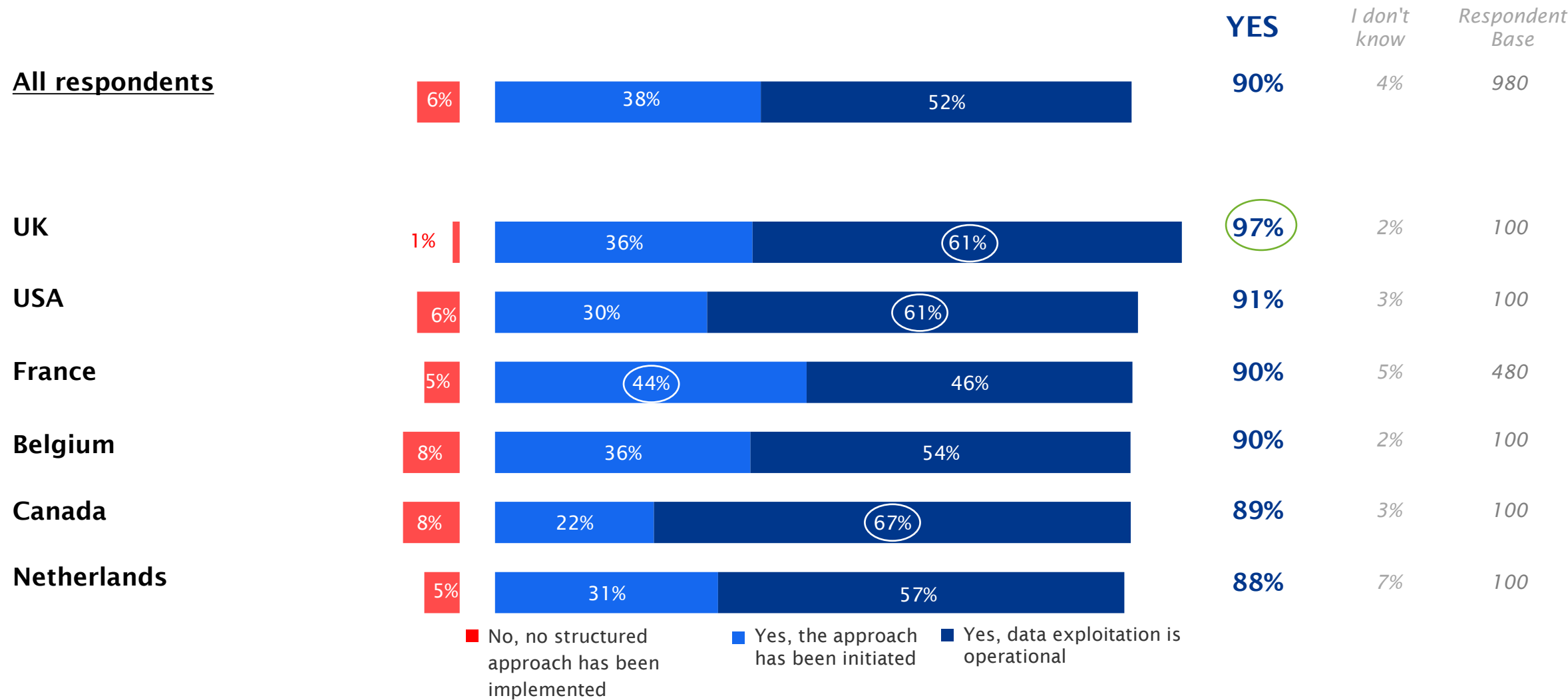
Does your organization have governance rules defining data ownership, responsibilities, as well as access and security protocols?



Base : All respondents (980 respondents) / Only one possible answer

In general, the countries surveyed have a framework designed to optimize the use of their data. However, respondents in the UK stand out as the most advanced, alongside the USA and Canada. In contrast, respondents in France are still in the process of rolling out their initiatives.

Has your executive management implemented measures to exploit data and extract value from it?



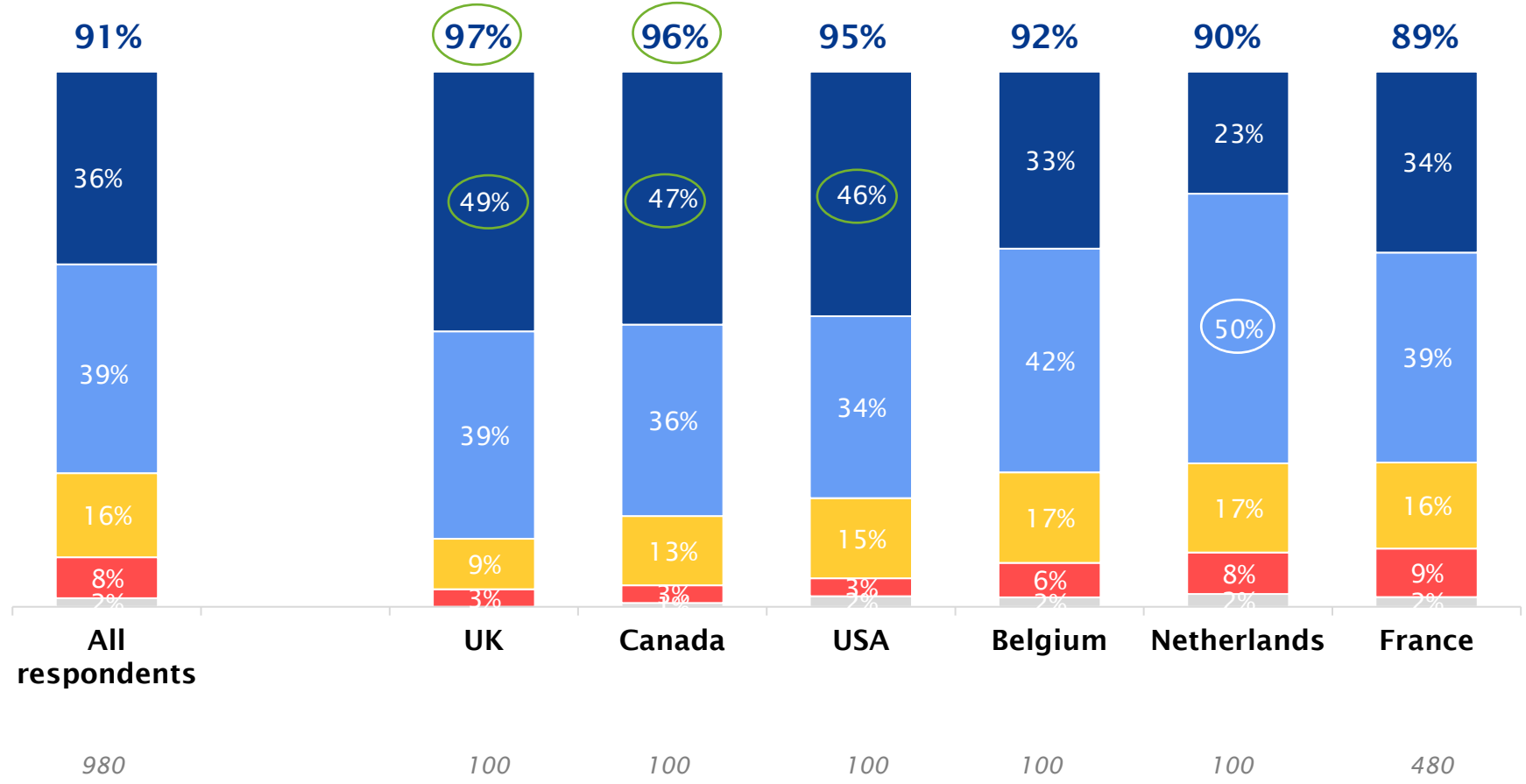
Base : All respondents (980 respondents) / Only one possible answer

Most respondents in the UK, Canada, and the USA are more involved in strategic data exploitation projects, whereas respondents in the European countries surveyed are more engaged in operational projects.

Have you personally been involved in projects that leverage data?

TOTAL YES

- Yes, in strategic projects (management, governance, advanced operations)
- Yes, in operational projects (collection, processing, quality, reporting)
- Yes, but only occasionally.
- No, not at all.
- I don't know



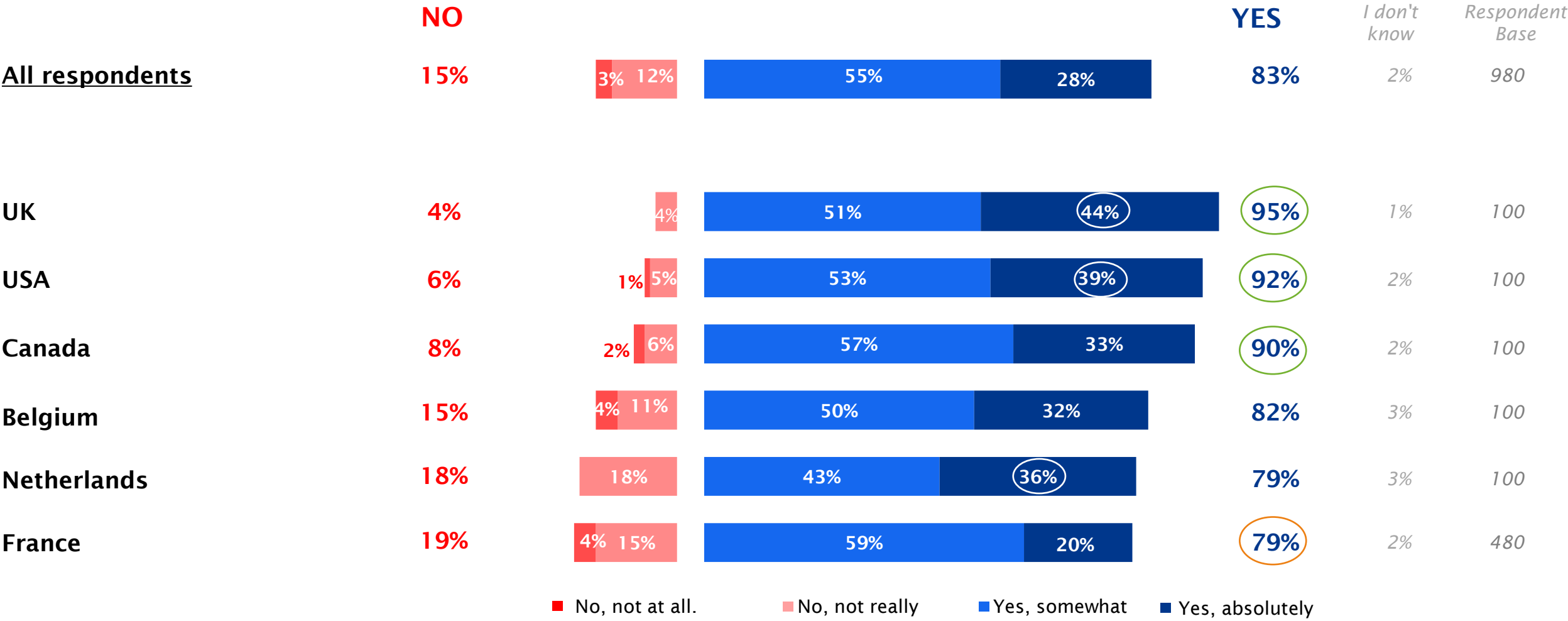
Respondent Base

980 100 100 100 100 100 480

Base : All respondents (980 respondents) / Only one possible answer

Majority of respondents in the UK, USA, and Canada believe that current standards and regulations fully ensure data security. In contrast, respondents in Belgium, the Netherlands, and France are more cautious on this point.

Do you think that current standards and regulations sufficiently guarantee data security?



Maturity Level of Data Exploitation

Overall, respondents believe that data primarily belongs to their organization. This perception is particularly strong in the USA and Canada, where a higher proportion of respondents share this view. In contrast, respondents in France are more likely than in other countries to attribute ownership of data to external partners.

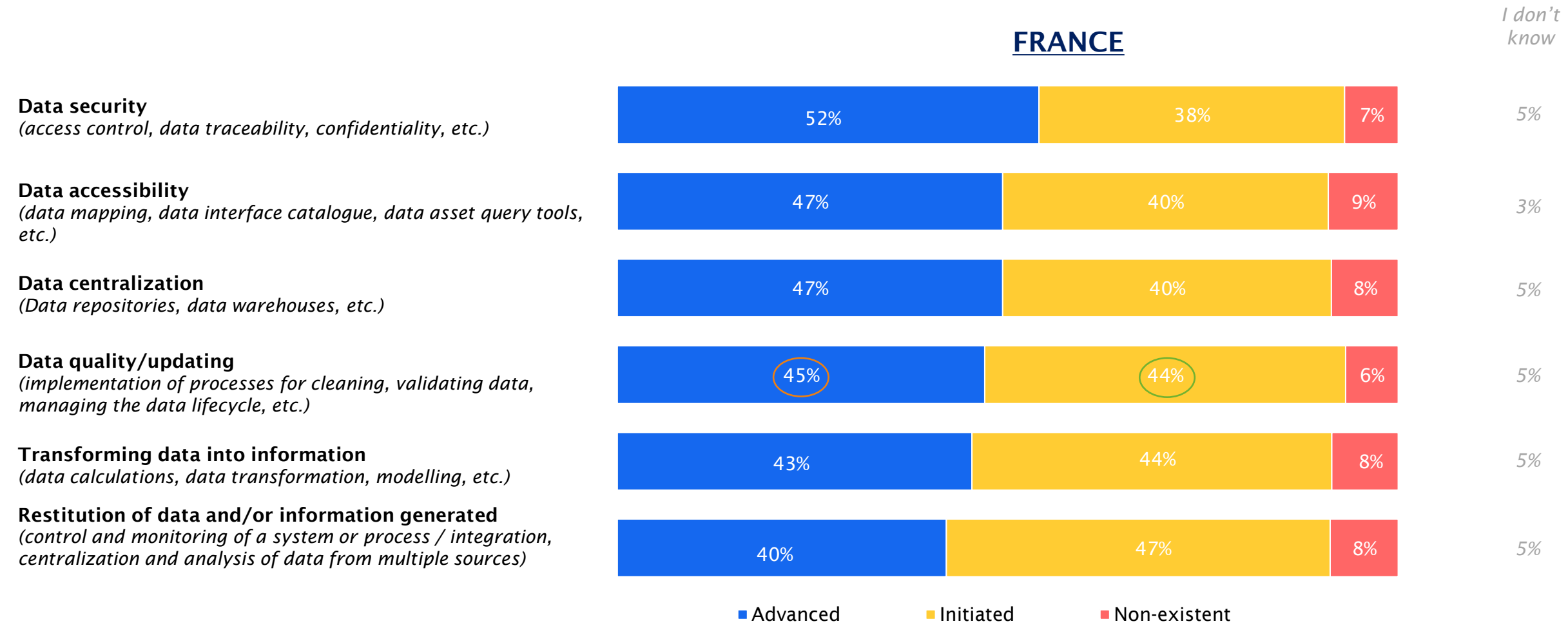
In your opinion, who owns the data produced or collected by your organization?

	All respondents	France	Belgium	UK	Netherlands	USA	Canada
<i>Respondent Base</i>	980	480	100	100	100	100	100
To your organization	65%	59%	60%	70%	61%	76%	87%
To your customers / your users / citizens	38%	41%	39%	37%	19%	47%	34%
To external partners (service providers, suppliers, etc.)	32%	37%	30%	28%	31%	24%	22%
I don't know	3%	3%	3%	-	4%	2%	2%

Base : All respondents (980 respondents) / Multiple responses possible

Data security, accessibility, quality, and updates are the aspects of data exploitation that are best managed. In contrast, data delivery remains an area still being structured.

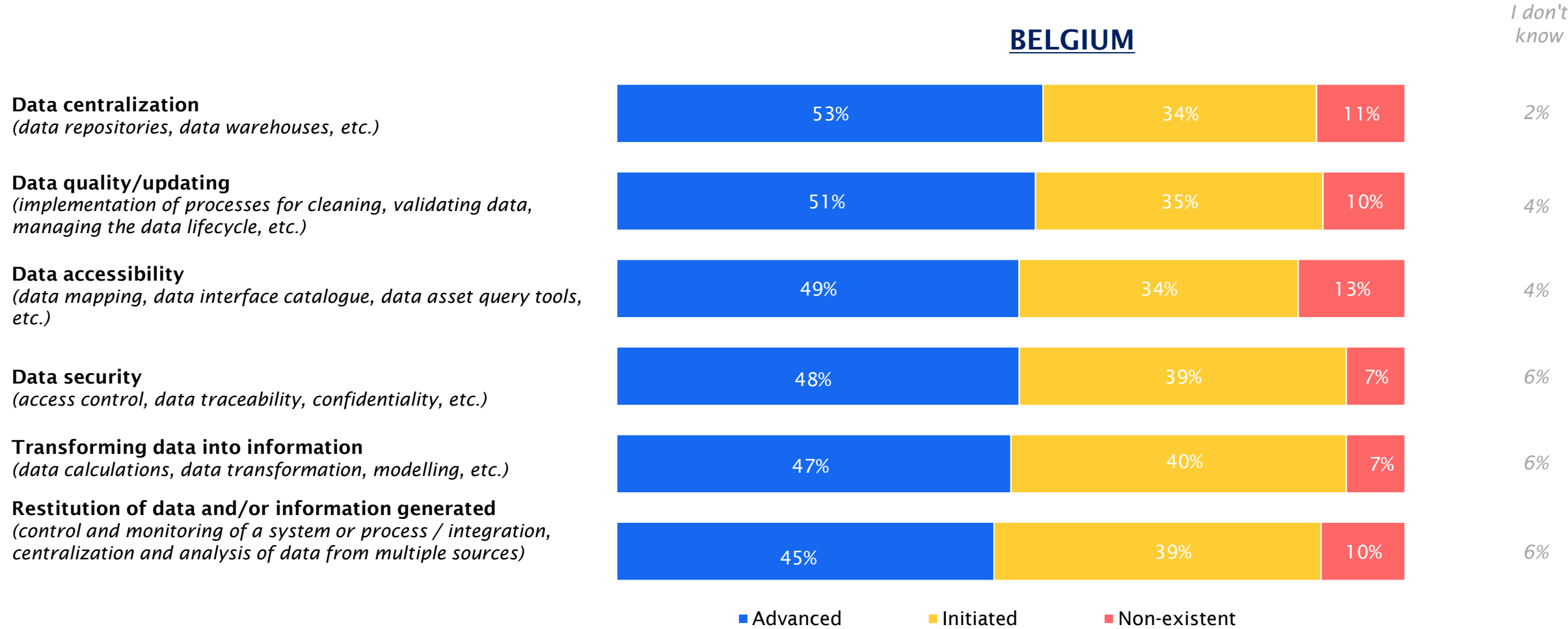
At what stage is your organization regarding the following aspects?



Base : All respondents (480 respondents) / Only one possible answer

For Belgium, data centralization and data quality and updates are the most advanced aspects of data exploitation. Similarly, data delivery remains an area still being structured.

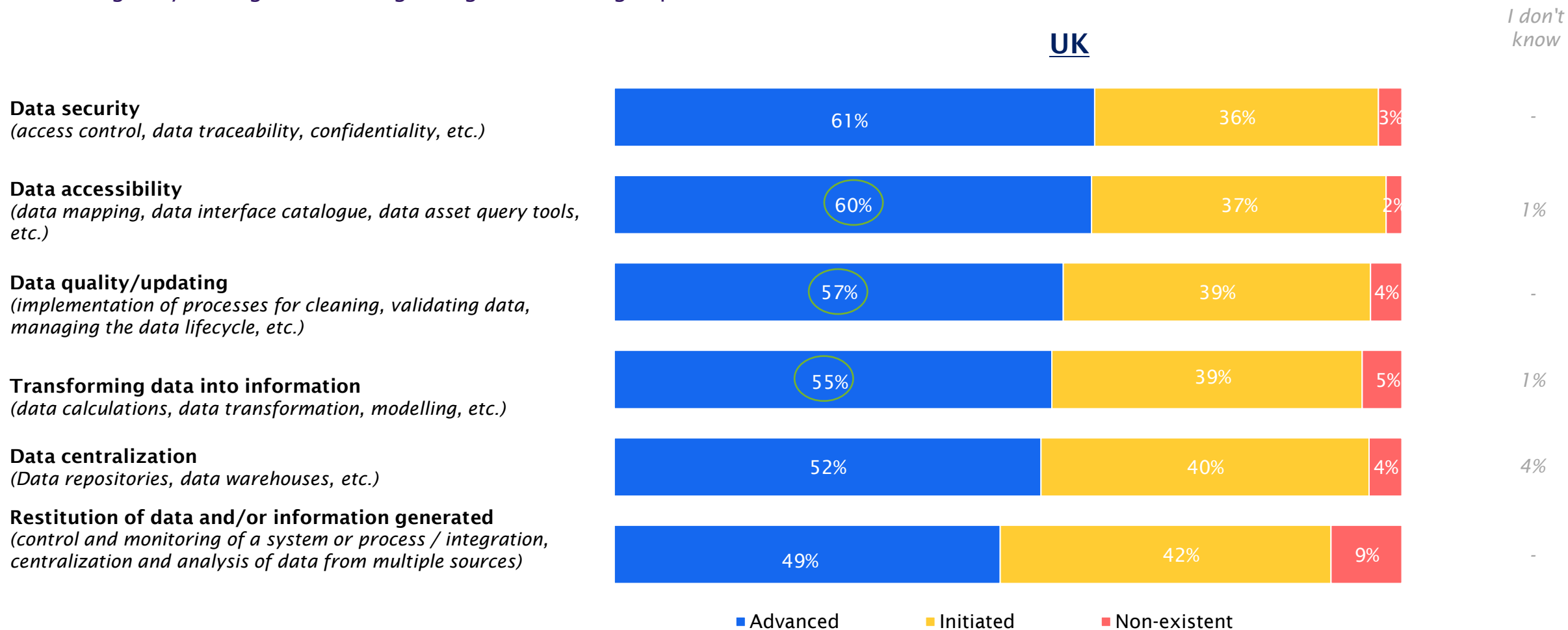
At what stage is your organization regarding the following aspects?



Base : All respondents (100 respondents) / Only one possible answer

Like France, the UK stands out for strong management of data exploitation aspects, particularly in terms of security, accessibility, quality, and updates, as well as data transformation. In contrast, data delivery remains the least mature element, reflecting a stage of development that still has room for improvement.

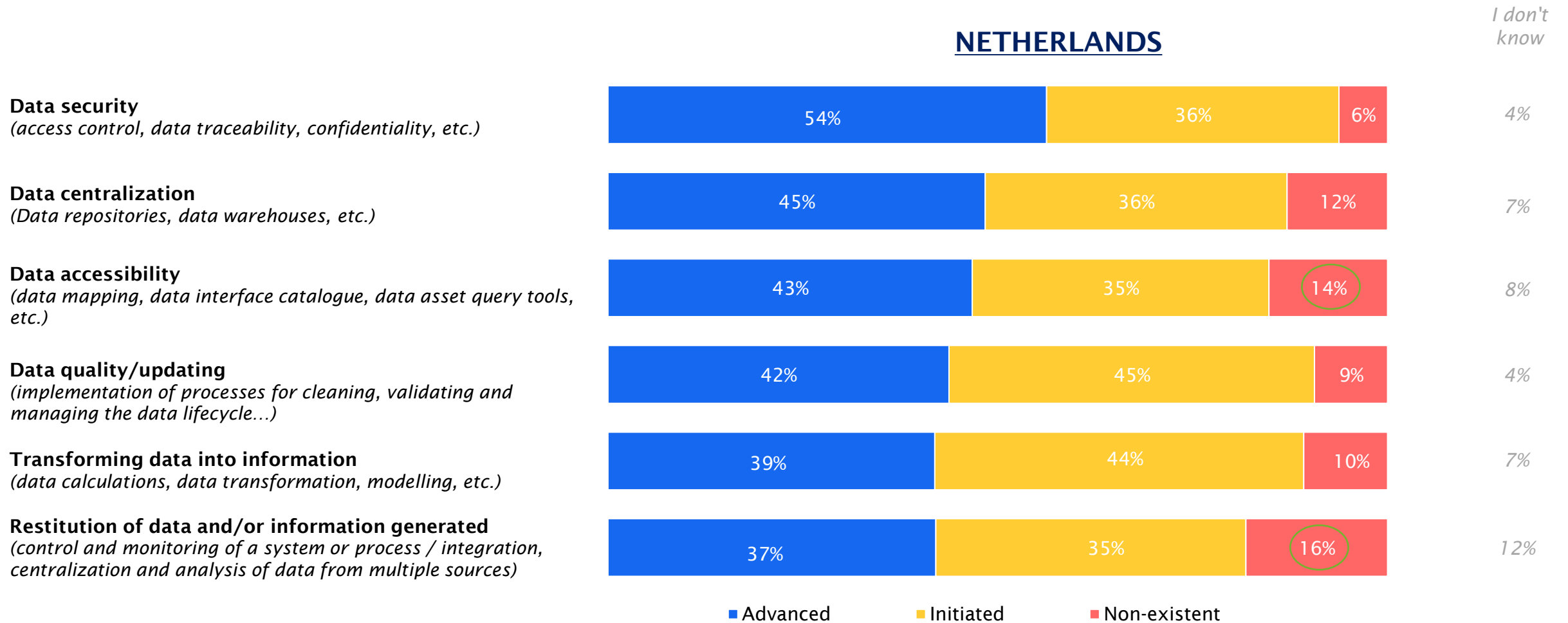
At what stage is your organization regarding the following aspects?



Base : All respondents (100 respondents) / Only one possible answer

For respondents in the Netherlands, data security is the best-managed aspect. However, in terms of data delivery, they rank last compared to the other countries.

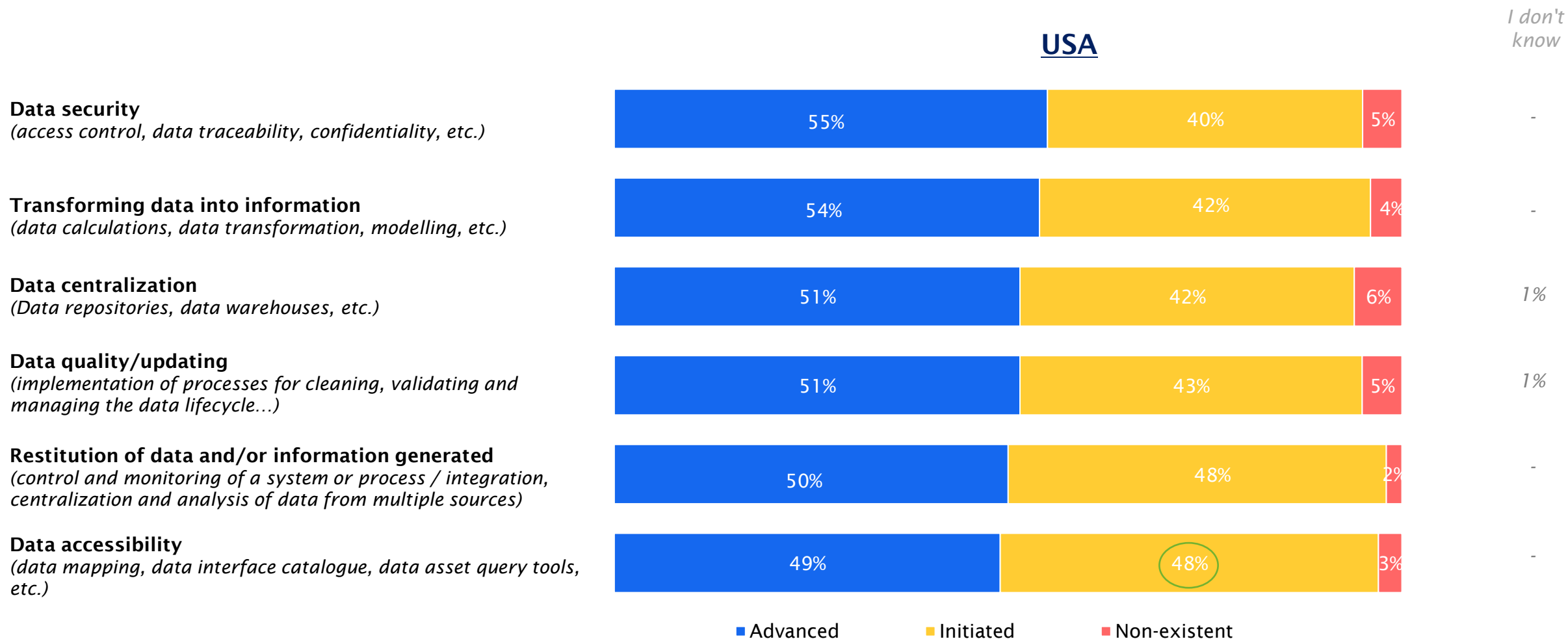
At what stage is your organization regarding the following aspects?



Base : All respondents (100 respondents) / Only one possible answer

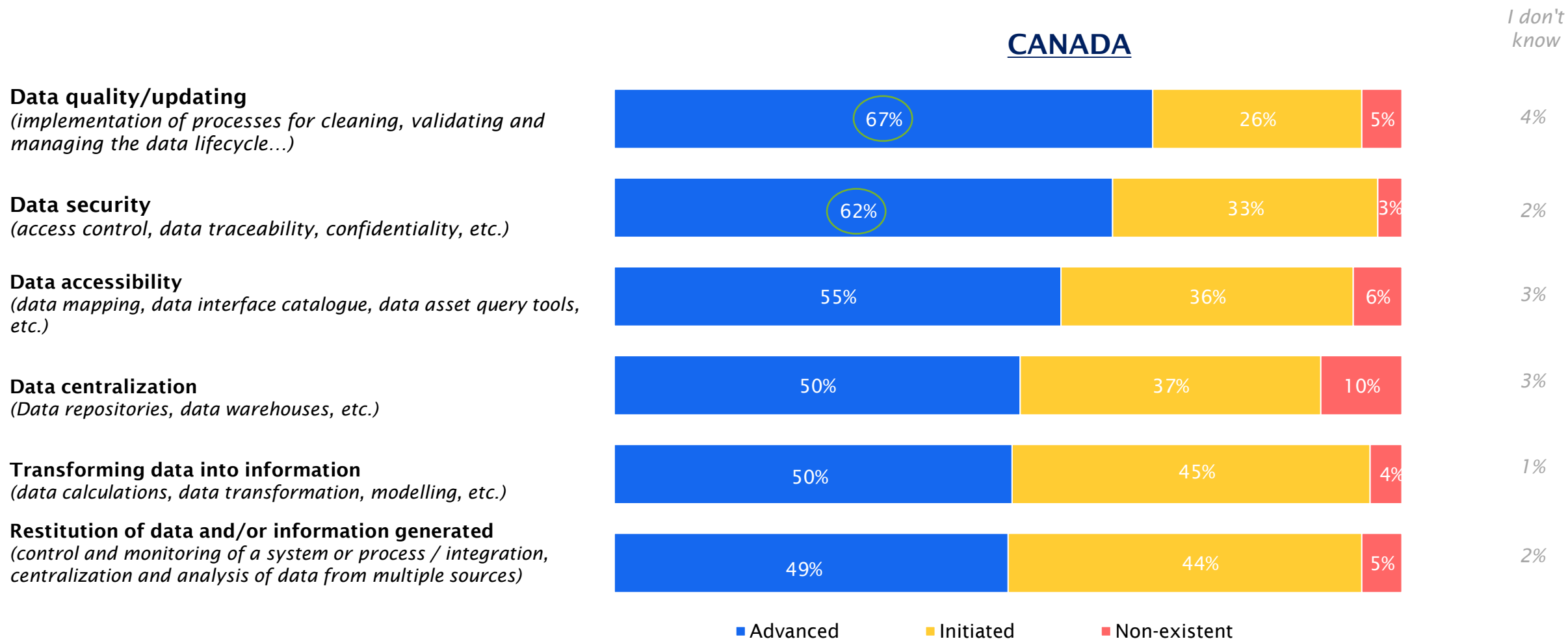
According to respondents in the USA, all aspects of data exploitation are better managed compared to other countries. However, data delivery and accessibility remain the main areas for improvement.

At what stage is your organization regarding the following aspects?



Canada stands out from the other countries in terms of data quality and security. However, data transformation and delivery remain areas still being structured.

At what stage is your organization regarding the following aspects?



Base : All respondents (100 respondents) / Only one possible answer

Data security is the most mature aspect of data exploitation, followed by accessibility, quality, and centralization, particularly for respondents in the USA, UK, and Canada. However, data delivery remains an area still being consolidated for most of the countries surveyed.

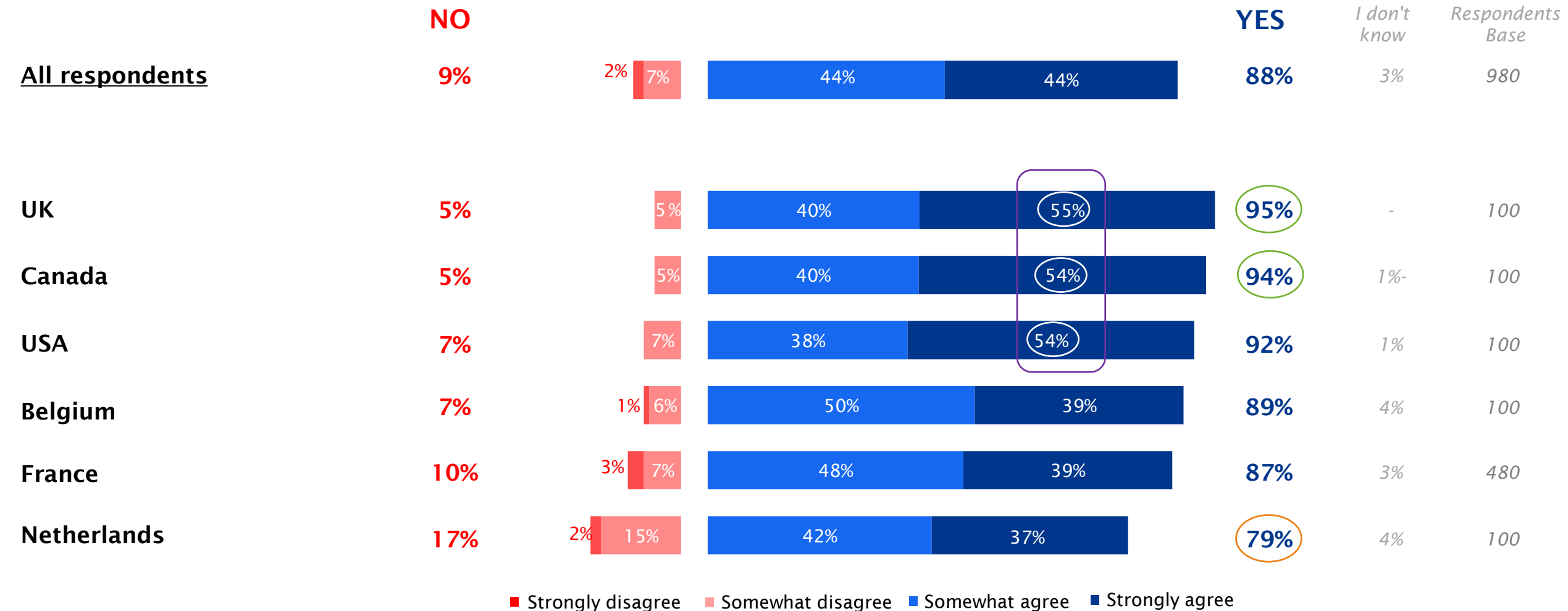
At what stage is your organization regarding the following aspects?

% Advanced	All respondents	France	Belgium	UK	Netherlands	USA	Canada
<i>Respondents Base</i>	980	480	100	100	100	100	100
Data security <i>(access control, data traceability, confidentiality, etc.)</i>	54%	52%	48%	61%	54%	55%	62%
Data accessibility <i>(data mapping, data interface catalogue, data asset query tools, etc.)</i>	49%	47%	49%	60%	43%	49%	55%
Data quality/updating <i>(implementation of processes for cleaning, validating and managing the data lifecycle...)</i>	49%	45%	51%	57%	42%	51%	67%
Data centralization <i>(Data repositories, data warehouses, etc.)</i>	49%	47%	53%	52%	45%	51%	50%
Transforming data into information <i>(data calculations, data transformation, modelling, etc.)</i>	46%	43%	47%	55%	39%	54%	50%
Restitution of data and/or information generated <i>(control and monitoring of a system or process / integration, centralization and analysis of data from multiple sources)</i>	43%	40%	45%	49%	37%	50%	49%

Key Challenges in Data Exploitation

Respondents in the UK and Canada largely view data as a genuine performance driver within their organization. In contrast, this perception is less pronounced among respondents in France and the Netherlands.

Do you consider data to be a performance driver within your organization?



The main priorities related to data concern operational monitoring in most countries surveyed, followed by optimization of products and services, and support for strategic decision-making.

Which priorities does your organization address when using data (collected or generated)?

	All respondents	France	Belgium	UK	Netherlands	USA	Canada
<i>Respondents Base</i>	980	480	100	100	100	100	100
Operational monitoring of your activities <i>(inventory management, file tracking, dashboards, task automation, maintenance optimization, etc.)</i>	47%	47%	48%	45%	39%	48%	50%
Improving your services or products <i>(customization, process optimization, quality improvement)</i>	46%	45%	40%	50%	35%	55%	53%
Strategic decision-making <i>(predictive analysis, planning, simulation)</i>	42%	41%	37%	44%	45%	50%	45%
Business development <i>(tender analysis, analysis of requirements in specifications, targeting, etc.)</i>	38%	35%	41%	45%	37%	37%	41%
To meet regulatory obligations	37%	34%	36%	47%	38%	36%	37%
Communication or marketing <i>(audience segmentation, campaign evaluation, message adaptation)</i>	34%	37%	26%	32%	24%	36%	35%
Innovation or R&D <i>(creation of new services or products, internal data exploitation)</i>	33%	32%	34%	28%	28%	39%	33%
I don't know	2%	2%	4%	1%	5%	1%	2%

2- Data usage practices

1 The means and practices implemented by organizations

2 Data management and performance

3 Barriers to data exploitation

Usage by sector of activity

In general, data exploitation in the industry is primarily used for monitoring and controlling production, tracking products and raw materials, and industrial planning. Priorities, however, vary by country: in the UK, the focus is on managing production lines, while in the USA, it is on strengthening cybersecurity.

For which purposes does your organization use its data?

<u>INDUSTRY</u>	All respondents	France	Belgium	UK	Netherlands	USA	Canada
<i>Respondents Base</i>	312	162	26	35	26	31	32
Monitoring and control of production lines	36%	31%	41%	53%	31%	31%	47%
Traceability of products and raw materials	36%	39%	24%	33%	22%	33%	37%
Production planning and resource optimization	35%	35%	43%	36%	25%	28%	34%
Inventory and supply management	33%	36%	18%	30%	34%	19%	31%
Industrial process optimization	32%	34%	40%	28%	29%	37%	24%
Compliance with industry standards and regulations	32%	38%	28%	14%	18%	39%	15%
Process automation	31%	30%	17%	36%	32%	37%	35%
Detection of anomalies or production defects	31%	33%	23%	33%	31%	17%	34%
Automation and control of machines/automated systems	30%	26%	41%	36%	25%	30%	30%
Predictive maintenance of industrial tools/equipment	30%	32%	26%	25%	19%	23%	37%
Innovation and R&D (testing and experimentation)	29%	29%	38%	33%	14%	26%	27%
Strengthening cybersecurity	28%	28%	12%	25%	19%	41%	29%
Risk anticipation / Incident management	27%	28%	22%	13%	18%	32%	40%
Measuring and reducing environmental impact	27%	27%	30%	20%	21%	28%	26%
Improving the energy performance of buildings	23%	22%	25%	46%	7%	20%	33%
Building security	20%	15%	24%	42%	26%	25%	25%
I don't know	4%	5%	-	-	7%	-	-

Base: respondents from the industrial sector, excluding the health and transport sectors (312 respondents) / Multiple responses possible

In the public sector, data exploitation is primarily aimed at improving administrative management, particularly in Canada, and at strengthening territorial security, mainly in the USA, where energy efficiency is also a focus. It also helps optimize services for users, especially for respondents in the UK.

For which purposes does your organization use its data?

PUBLIC SECTOR

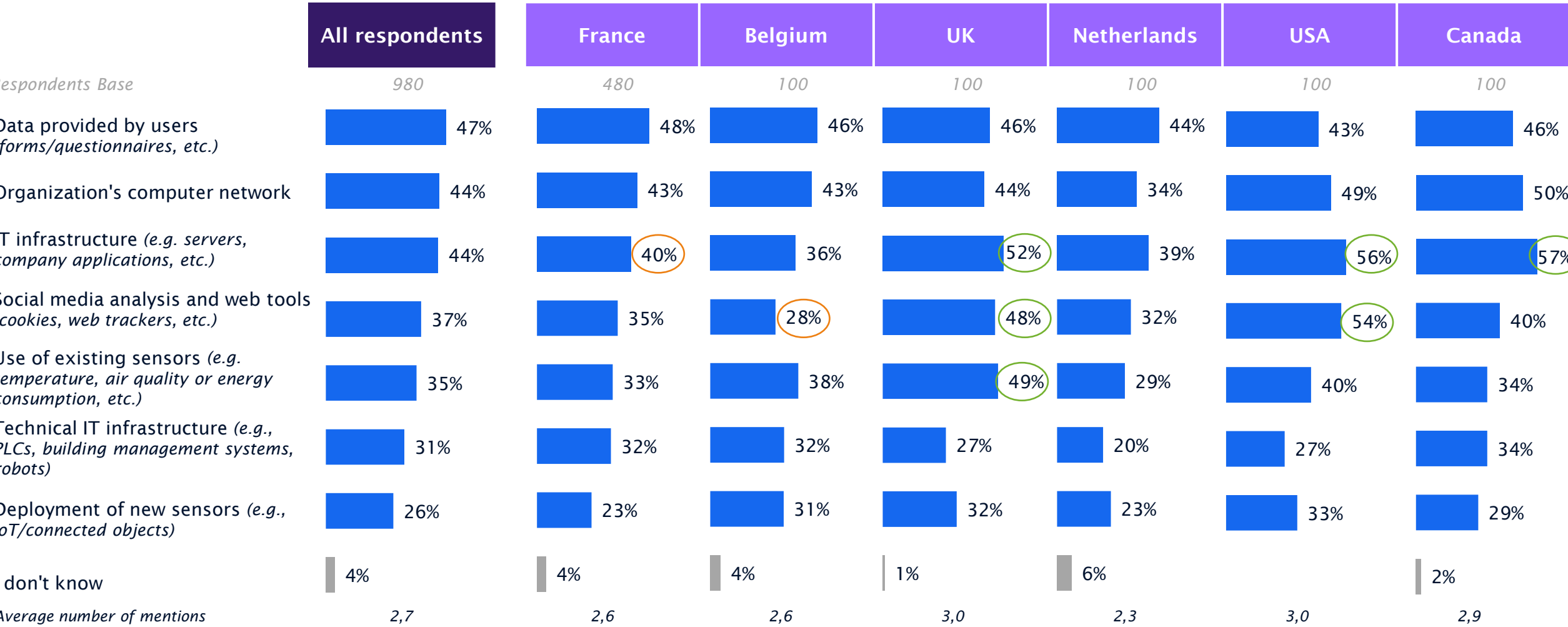
Respondents Base

	All respondents	France	Belgium	UK	Netherlands	USA	Canada
	229	80	32	22	31	32	32
Administrative management (archives, forms, internal requests, etc.)	35%	32%	30%	18%	34%	41%	54%
Securing territories (risk prevention)	33%	26%	19%	37%	34%	56%	44%
Optimization and adaptation of services for users/citizens	33%	28%	31%	58%	22%	35%	37%
Use of data for studies, experiments or pilot projects	26%	20%	22%	27%	36%	32%	31%
Evaluation of the effectiveness of public policies or programs	25%	21%	12%	35%	35%	29%	31%
Development of new methods or services	24%	18%	22%	28%	31%	36%	23%
Strengthening cybersecurity for public infrastructure	24%	16%	28%	32%	25%	32%	23%
System monitoring and incident management	23%	23%	16%	18%	36%	19%	25%
Energy efficiency for local areas (lighting management, etc.)	23%	13%	22%	19%	23%	42%	35%
Management and maintenance of public facilities (transport network, etc.)	20%	17%	22%	19%	25%	23%	20%
Mobility management (traffic flow control, parking, etc.)	17%	19%	3%	12%	26%	25%	16%
I don't know	3%	5%	-	-	3%	-	10%

Measures Implemented by organizations

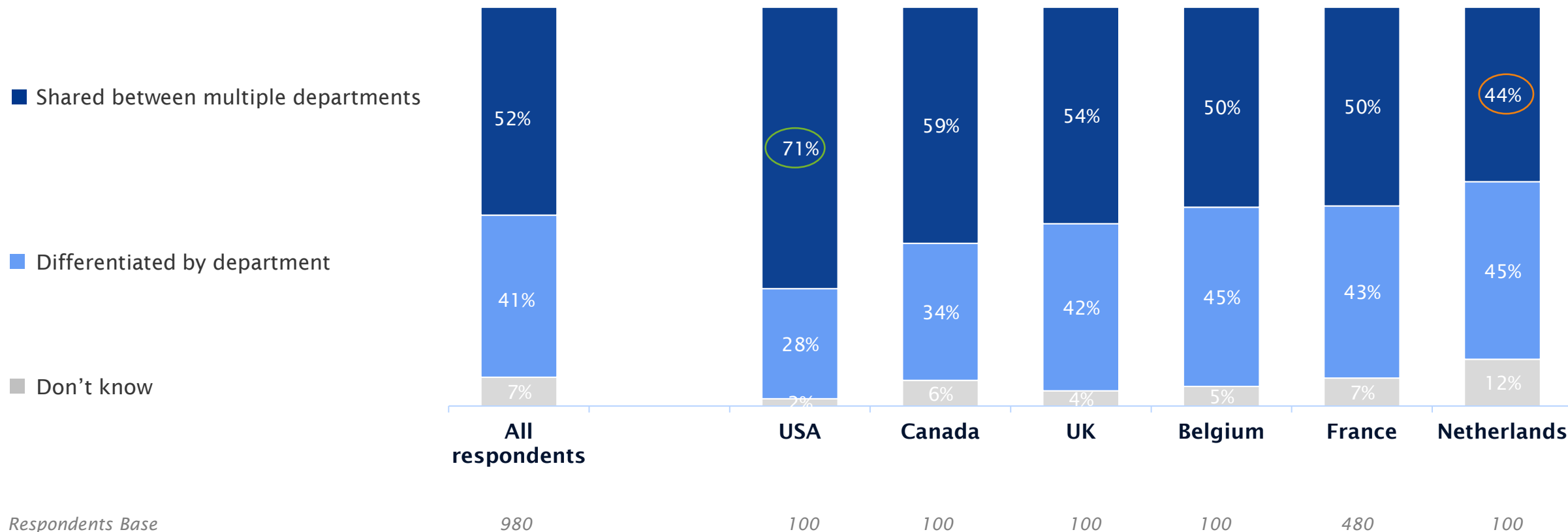
European respondents primarily rely on user-reported data or data from their internal IT networks. However, respondents from the USA and the UK report making greater use of information collected through their IT infrastructures, social media, or web-based tools.

How do you collect data in your organization?



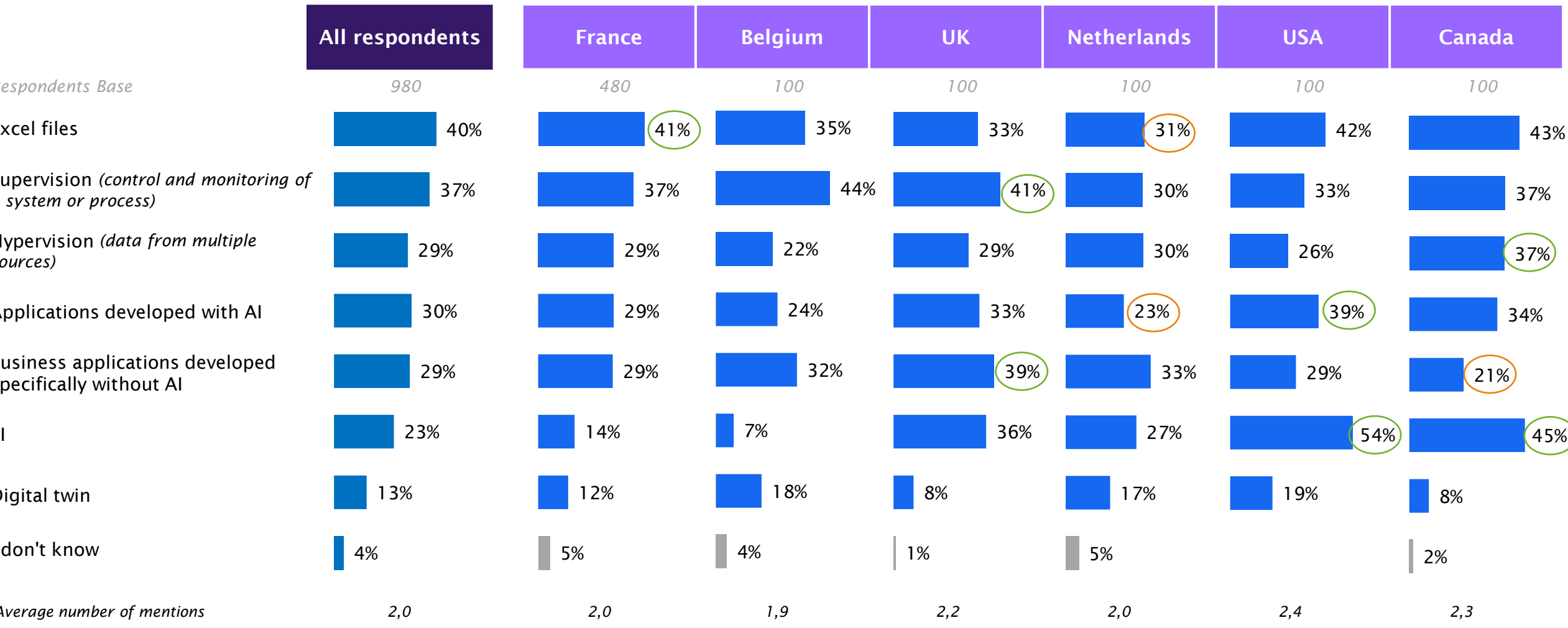
Most respondents indicate that data is shared across different departments within their organization, a practice more common among respondents in the USA, Canada, and the UK.

Are these data collection methods:



Data exploitation methods remain basic, particularly among French respondents, who primarily use Excel files, while Belgium and the UK rely more on system or process monitoring solutions. In contrast, respondents in the USA and Canada make greater use of Business Intelligence tools to extract value from their data.

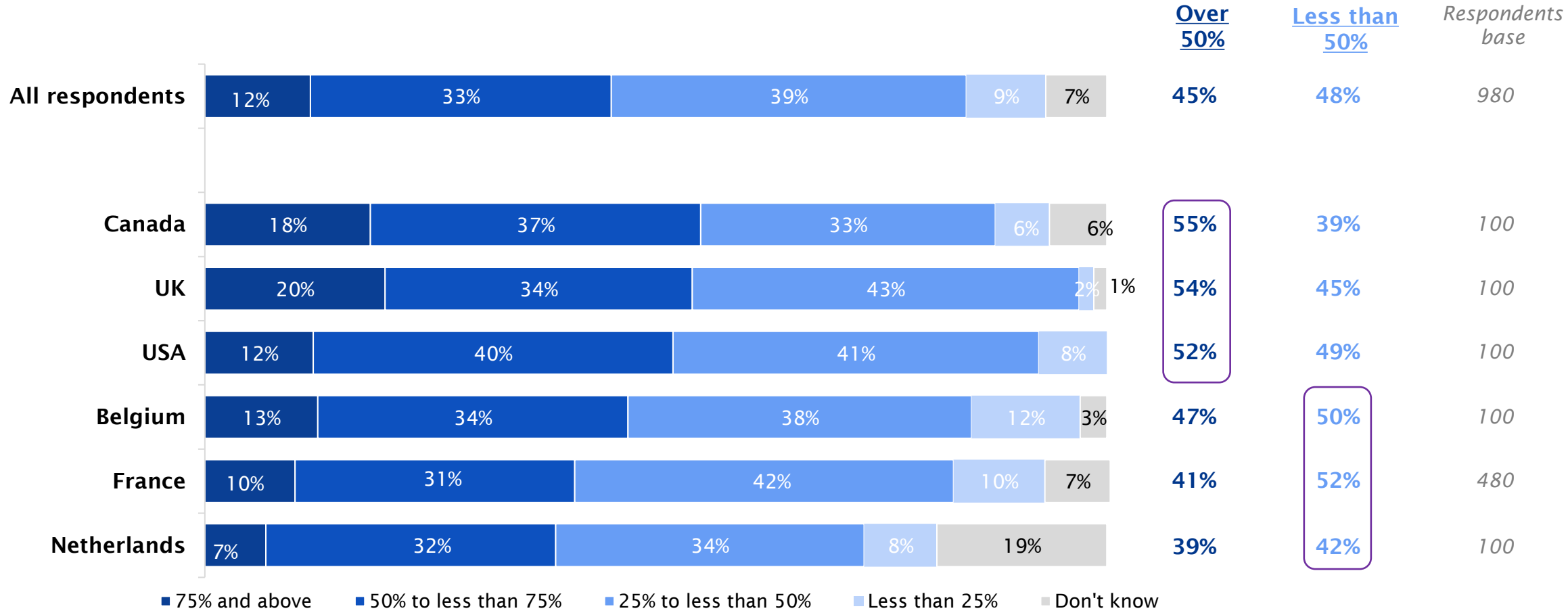
How does your organization primarily use its data?



Management and Performance in Data Utilization

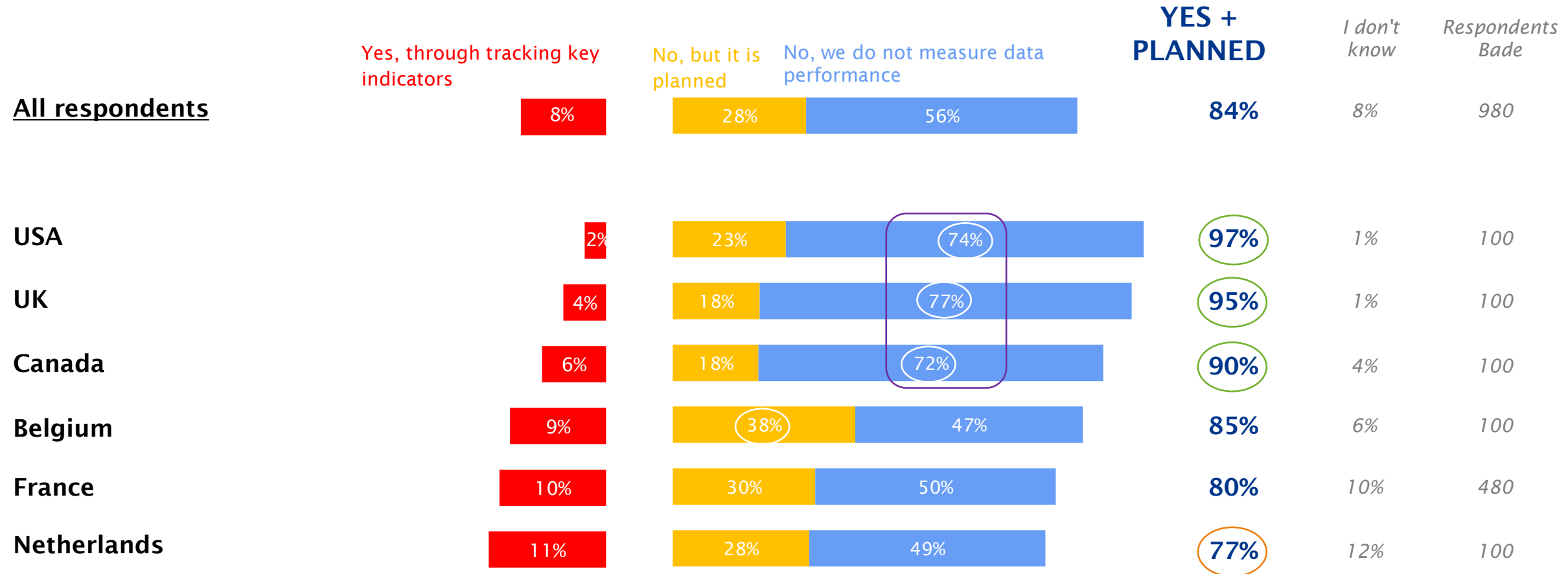
While most respondents in Canada, the UK, and the USA report using more than half of their collected data, European respondents indicate that only a small portion is exploited.

In your opinion, what proportion of your collected data is utilized?



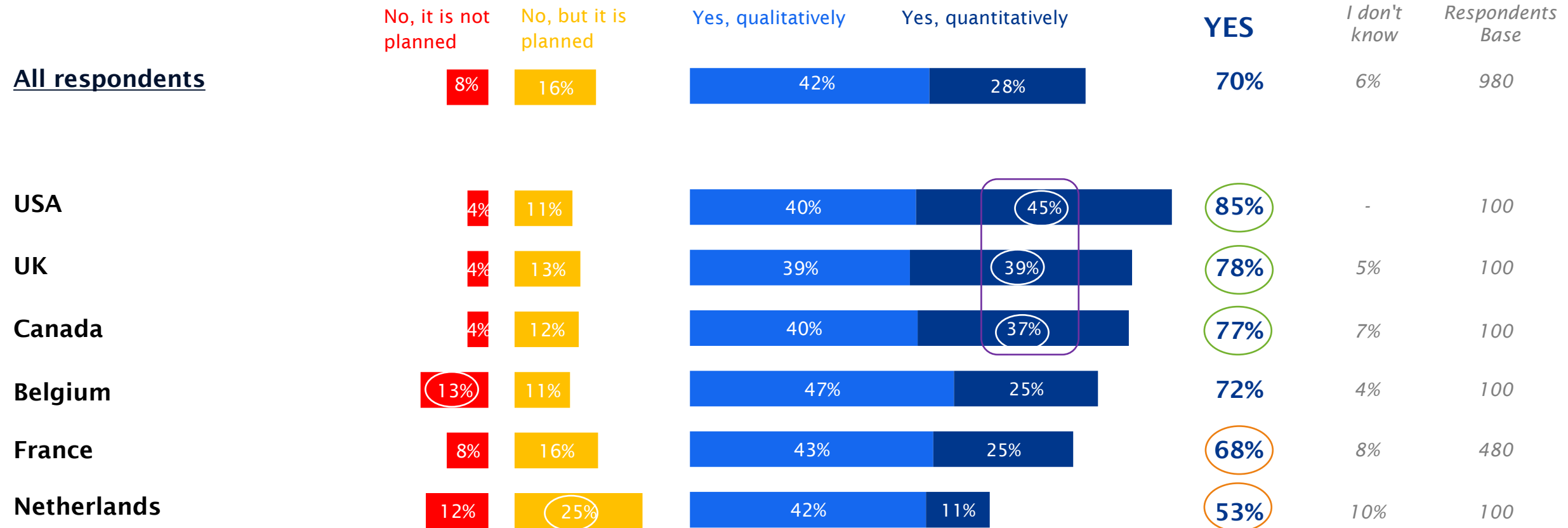
Respondents in the USA, UK, and Canada stand out from other European countries, as their organizations rely more on indicators to monitor the performance of their data strategy.

Does your organization have a process in place to measure the performance of its data strategy?



However, only around half of respondents in the USA report having measured a quantified return on investment (ROI), followed by respondents in the UK and Canada. Additionally, European respondents, particularly those in the Netherlands and France, show less advanced ROI measurement.

Have you been able to measure a return on investment (ROI) since launching your initiatives?



Barriers to Data Exploitation

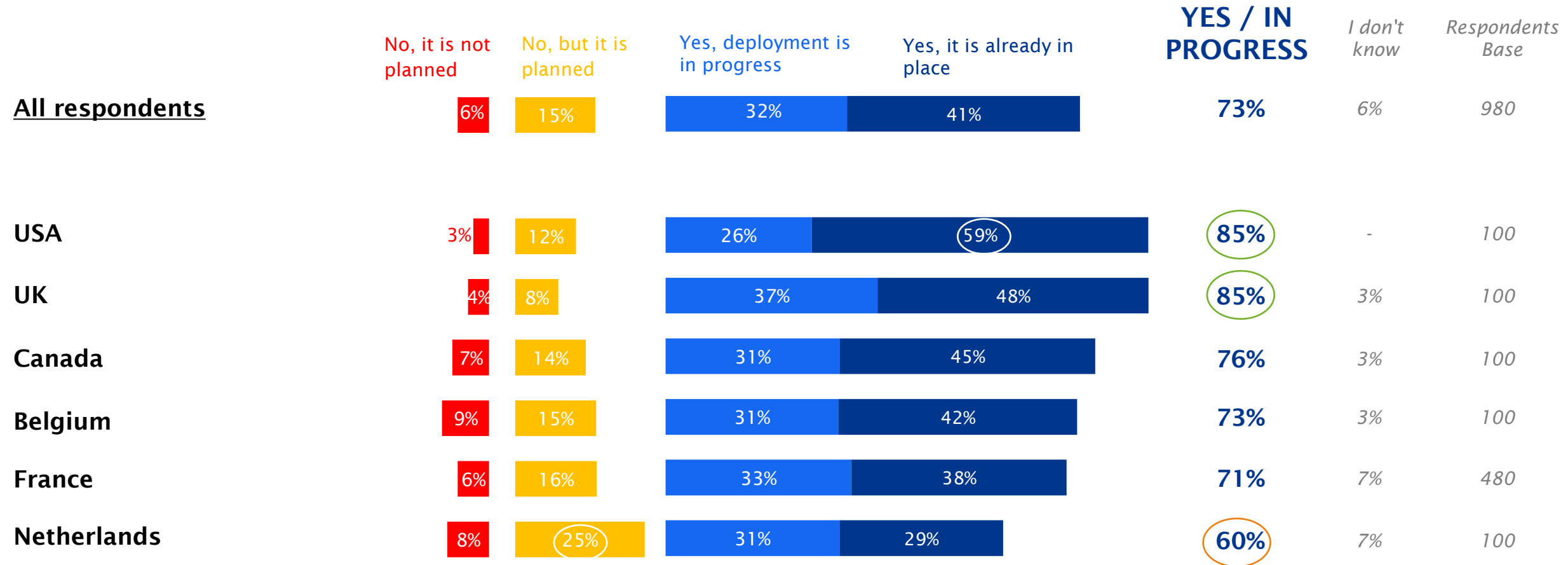
While the high cost of data exploitation is the main barrier for respondents in France, Belgium, and the UK, ensuring data quality is cited more frequently by respondents in the USA and Canada.

What are the main barriers your organization faces in exploiting its data?

	All respondents	France	Belgium	UK	Netherlands	USA	Canada
<i>Respondents Base</i>	980	480	100	100	100	100	100
High cost of operating or centralizing data	29%	28%	26%	37%	22%	41%	29%
Ensuring data quality	29%	26%	28%	31%	22%	42%	40%
Lack of internal skills	25%	26%	22%	23%	16%	41%	21%
Difficulty accessing data	23%	23%	18%	29%	21%	25%	24%
Lack of automation for collecting or processing data	22%	20%	27%	26%	13%	34%	25%
Lack of suitable tools or software	21%	22%	24%	12%	13%	24%	25%
Difficulty securing data	21%	19%	27%	26%	12%	25%	27%
Overly strict regulations	20%	20%	18%	21%	21%	20%	16%
Rigid internal processes that are not very flexible in terms of leveraging data	18%	16%	19%	21%	26%	20%	21%
Lack of equipment to collect data	18%	18%	27%	16%	11%	26%	18%
Lack of data sources	17%	16%	19%	26%	12%	19%	15%
Lack of insight into return on investment / uncertain ROI	16%	15%	18%	18%	9%	23%	20%
Others	1%	1%	1%	-	2%	-	2%
I don't know	5%	5%	4%	2%	11%	-	6%
<i>Average number of mentions</i>	2,7	2,5	2,8	2,9	2,1	3,4	2,9

Respondents in the USA and UK stand out from the other countries surveyed. The majority have either initiated or are at an advanced stage of implementing a data unification process to optimize exploitation and improve operational performance, whereas respondents in the Netherlands are more likely to be considering putting such a process in place.

Have you implemented or initiated a process to unify data within a single platform for better exploitation?



3. AI at the heart of data and transformation

1 The adoption of AI in data exploitation and valorization

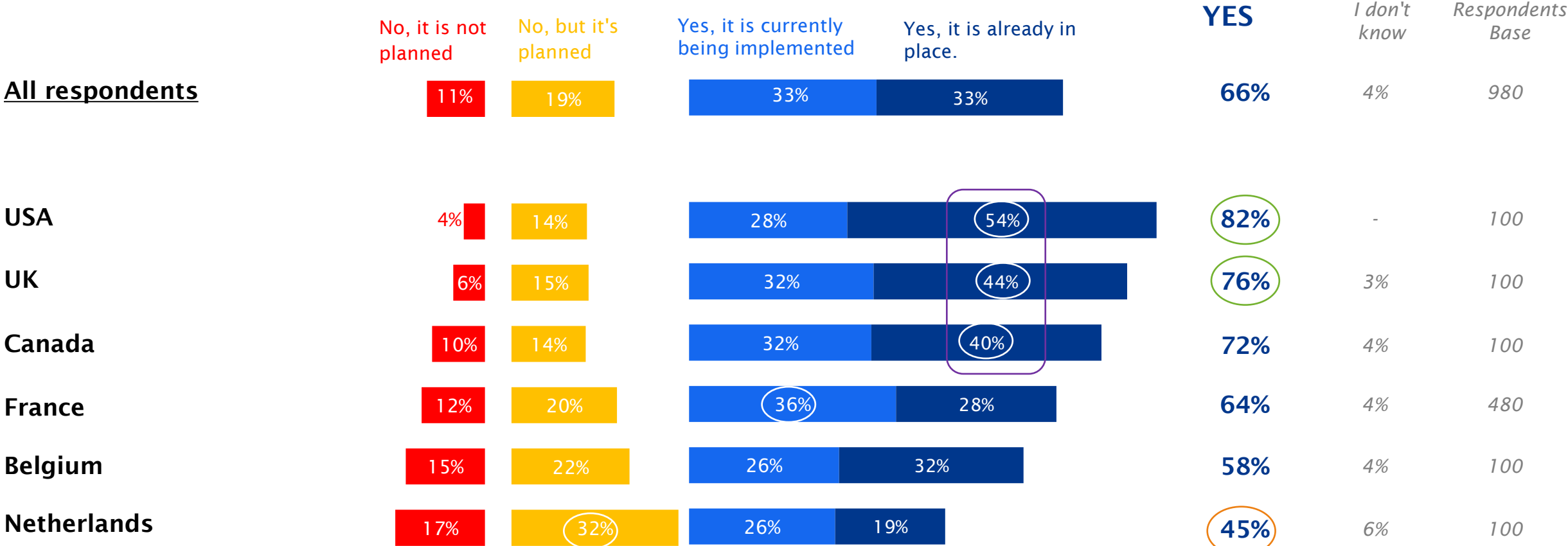
2 AI solutions favored by organizations

3 The impact of AI on transformation and investment priorities

AI Adoption in Data Exploitation and Valorization

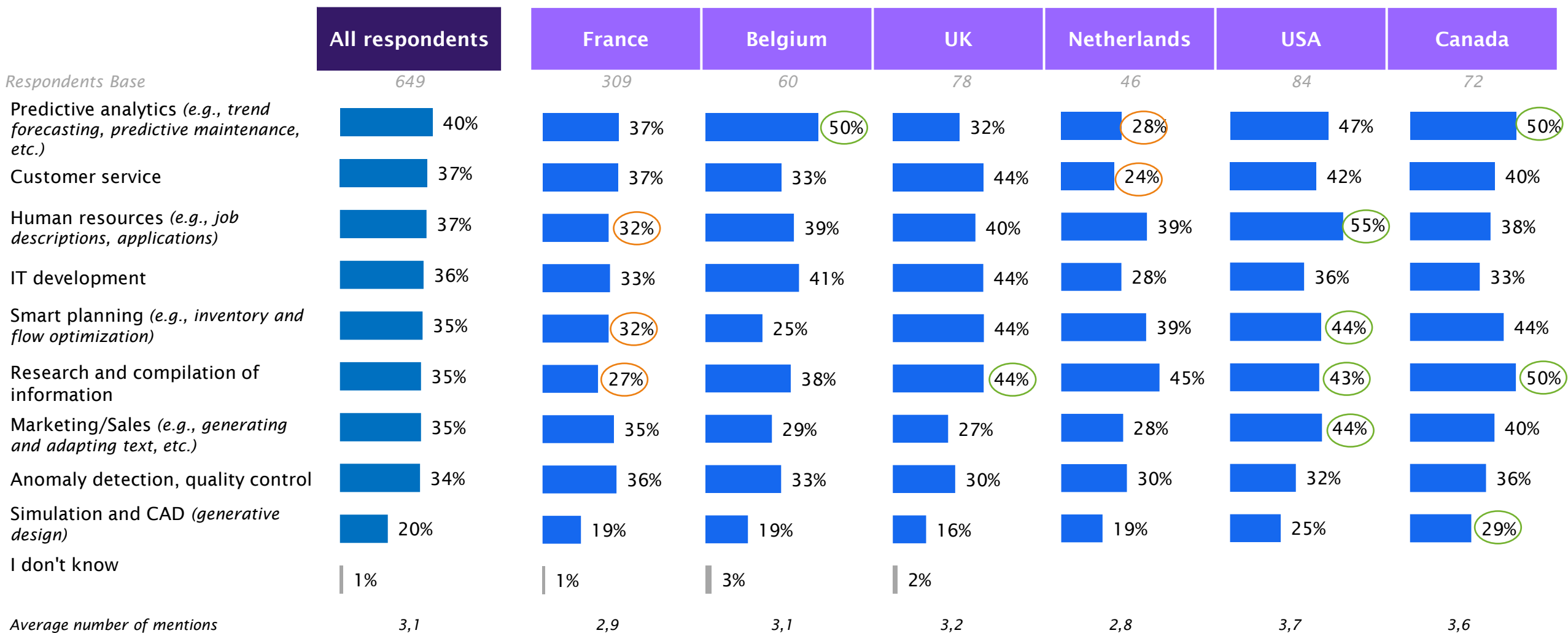
The USA leads in using AI for data exploitation, far ahead of the other countries surveyed. However, the Netherlands stands out compared to all other countries.

Does your organization use AI to leverage its data?



The use of AI varies across the countries surveyed. In Belgium and Canada, it is primarily employed for predictive analytics. In the USA, it is used more broadly for human resources, production planning, research, marketing, and information gathering, like respondents in the UK and Canada.

For what purpose(s) does your organization use artificial intelligence solutions?



AI Solutions Favored by Organizations

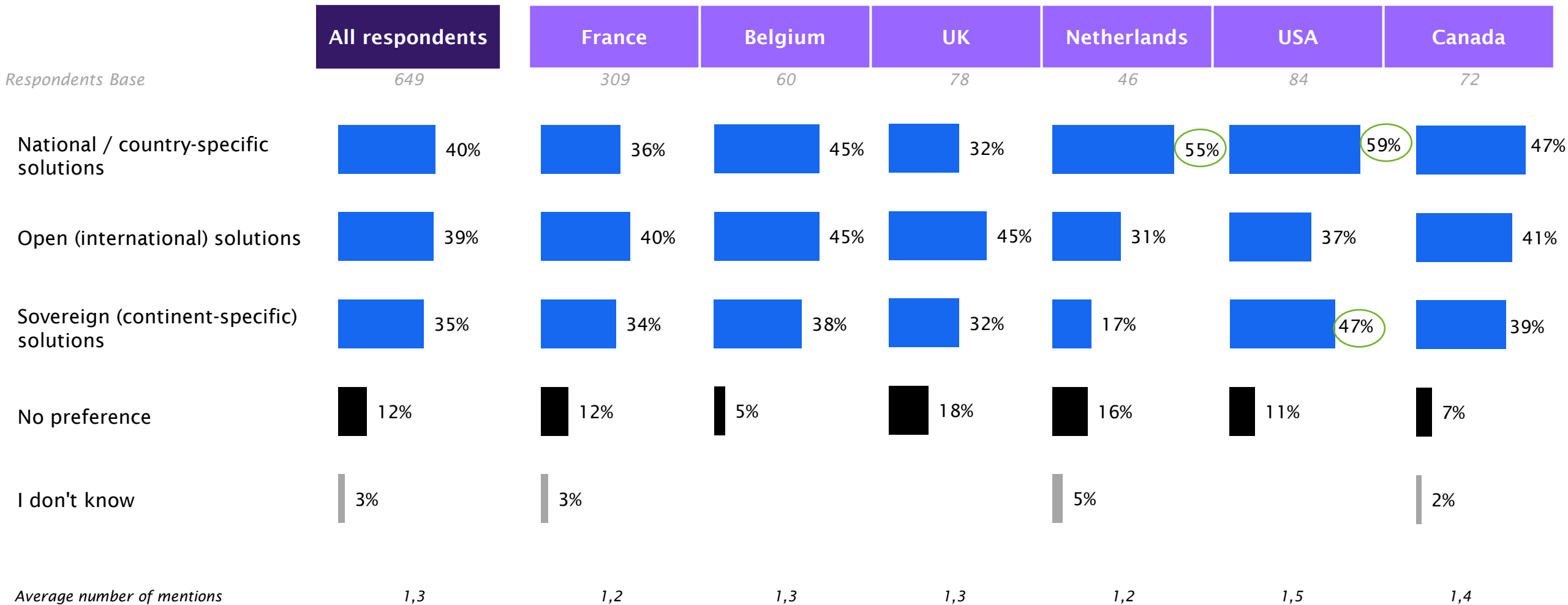
Most of the countries surveyed primarily rely on market-available AI solutions for data exploitation. In the USA, organizations tend to favor consumer-grade AI solutions, which are more widely deployed in their country. Additionally, respondents in Belgium, the USA, and Canada are more likely to use internally developed AI solutions.

Which Artificial Intelligence (AI) solutions does your organization use?

	All respondents	France	Belgium	UK	Netherlands	USA	Canada
<i>Respondents Base</i>	649	309	60	78	46	84	72
Market AI solutions deployed by my organization <i>(ex : Copilot, Mistral, Agentforce, Anthropic)</i>	61%	64%	48%	60%	70%	58%	59%
Consumer-grade AI solutions, as my organization has not deployed an internal solution <i>(ex. ChatGPT, Gemini)</i>	50%	47%	54%	55%	35%	63%	50%
AI solutions specifically developed by my organization and dedicated to it <i>(ex : custom developments / using open models)</i>	26%	22%	36%	22%	26%	37%	35%
I don't know	2%	2%	1%	1%	5%	-	4%
<i>Average number of mentions</i>	1,4	1,3	1,4	1,4	1,4	1,6	1,5

National AI solutions are most frequently used in the USA and the Netherlands, while in other European countries, organizations tend to favor open solutions.

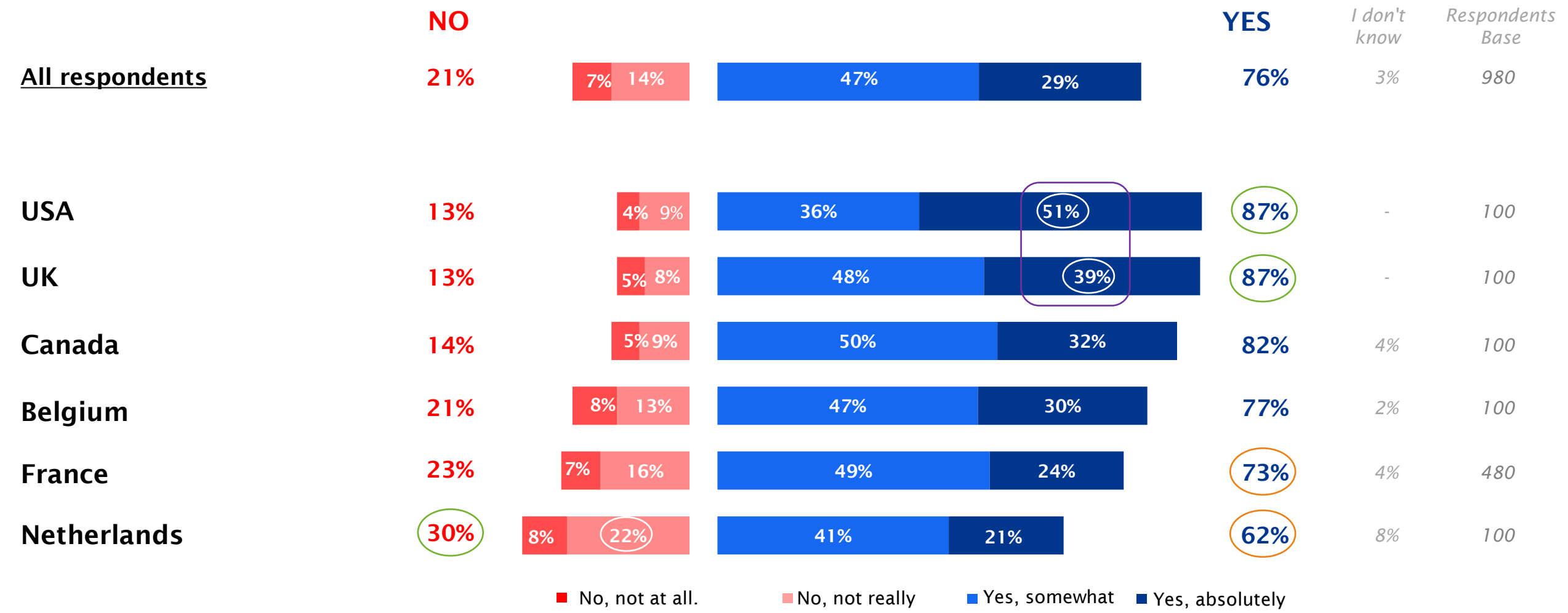
When selecting AI solutions, does your organization prioritize:



The impact of AI on transformation and investment priorities

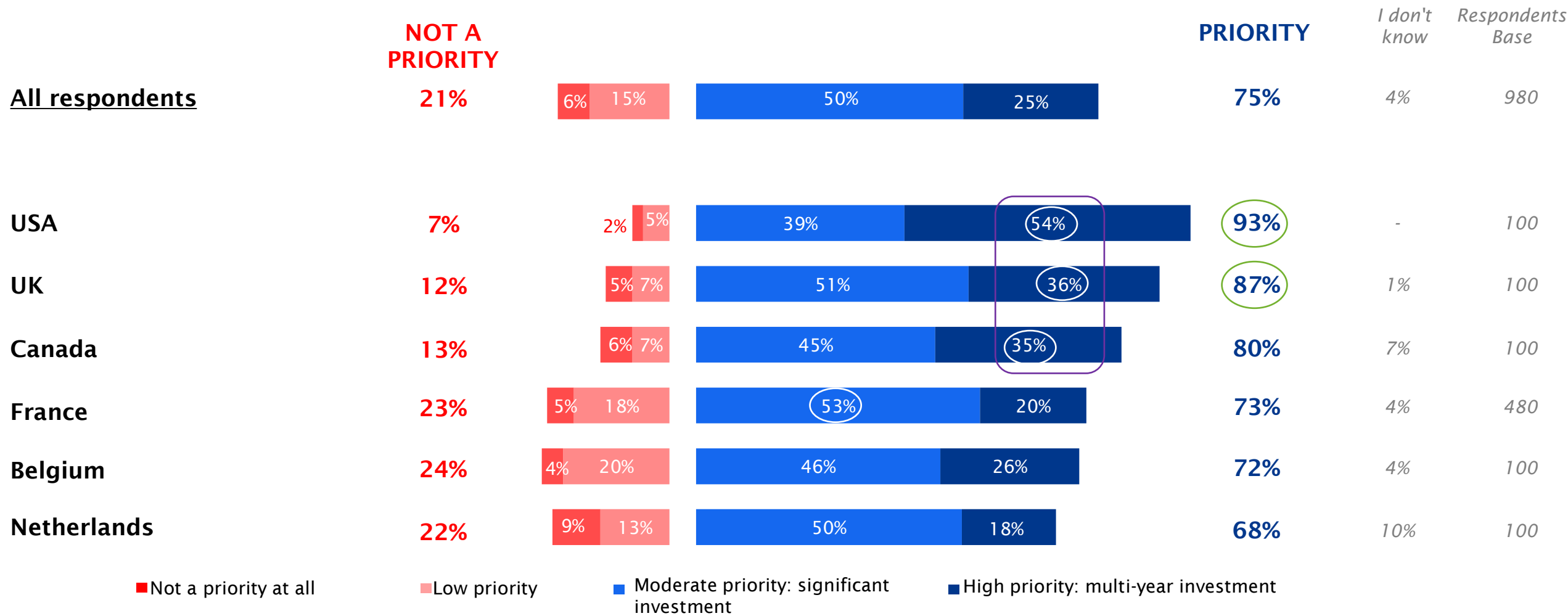
Respondents in the USA and UK stand out from other countries, believing that their organization's AI transformation has significantly accelerated since the launch of ChatGPT. In contrast, respondents in France, the Netherlands, and Belgium are more cautious, with fewer sharing this perception.

Three years after the launch of ChatGPT, would you say that your organization has accelerated its transformation in Artificial Intelligence?



Respondents in the USA place AI at the center of their strategic investments, showing a much stronger commitment to multi-year engagement than in the other countries surveyed. In contrast, European countries appear more cautious. While AI investments have begun, they are considered less of a priority compared to the USA.

What role will AI play in your organization's major investments in the coming years?



Appendices

Differences that are significantly higher than the overall results are shown in **green**, and those that are lower than the overall results are shown in **orange**.

L'USINE NOUVELLE **L'USINE DIGITALE**  **EQUANS**

Appendix 1: Departments surveyed by country

Unadjusted raw data

Total	France	Belgium	UK	Netherlands	USA	Canada
-------	--------	---------	----	-------------	-----	--------

What is your role within the company?

Total (excluding public sector)	707	386	61	65	65	65	65
Information Systems Department (ISD) / IT	22%	16%	13%	40%	12%	48%	32%
Executive Management	19%	17%	16%	29%	26%	12%	20%
Finance Department	13%	12%	15%	6%	23%	14%	15%
Production Management	13%	16%	20%	6%	9%	3%	12%
Marketing/Sales Management	9%	10%	13%	6%	8%	6%	2%
Operations Department	8%	6%	10%	9%	6%	9%	12%
R&D Department / Design Office	4%	6%	5%	2%	2%		2%
Maintenance Department	4%	6%			5%	2%	3%
Innovation Department	4%	5%	5%		3%		2%
Industrial site management	2%	2%			2%	5%	
Energy/Environment Department	1%	2%		2%	2%	2%	
Real Estate Management	1%	2%	2%				
Legal Department	1%	1%	2%		3%		

Appendix 2: Revenue by country

Unadjusted raw data

Total	France	Belgium	UK	Netherlands	USA	Canada
-------	--------	---------	----	-------------	-----	--------

What is your company's turnover?

Total	707	386	61	65	65	65	65
Less than 5 million euros	21%	21%	21%	18%	34%	17%	17%
Between €5 million and less than €10 million	18%	19%	21%	17%	11%	12%	28%
Between €10 million and less than €50 million	22%	22%	20%	18%	23%	31%	15%
Between €50 million and less than €100 million	11%	9%	16%	15%	5%	18%	14%
100 million euros and above	22%	23%	8%	25%	20%	20%	26%
I don't know	6%	7%	13%	6%	8%	2%	

Appendix 3: Data processing issues according to the countries surveyed

Unadjusted raw data

Total	France	Belgium	UK	Netherlands	USA	Canada
-------	--------	---------	----	-------------	-----	--------

In the context of your business, is data processing an issue:

Total	980	480	100	100	100	100	100
Central	61%	63%	54%	65%	56%	60%	61%
Secondary	30%	28%	33%	29%	37%	29%	31%
It's not an issue.	9%	9%	13%	6%	7%	11%	8%