

1 AI in the news: An American story?

2 **Surprising Truths About a Hidden Giant**

Talent Paradox: Europe on par in "Frontier" Minds

Usage Paradox: Europe as the World's AI "Trainers"

Startup Paradox: Europe Grows Them, America Owns Them

3 Where Europe can win: Picking the Right Battles

4 Way forward

European talent has largely shaped the AI revolution.

The invention of AI is as much a European and Canadian as a US story.

3 of the top AI scholars are European (same as Canada and USA)

Top-10 most cited scholars in the field of “Artificial Intelligence” on Google Scholar

 Yoshua Bengio  Cited by 1 050 275	 Oriol Vinyals  Cited by 402 361
 Geoffrey Hinton  Cited by 1 010 673	 Jeff Dean  Cited by 392 936
 Ilya Sutskever  Cited by 752 661	 Michael I. Jordan  Cited by 354 361
 Shaoqing Ren  Cited by 477 394	 Diederik P. Kingma  Cited by 344 742
 Quoc V. Le  Cited by 408 785	 Stefano Giagu  Cited by 338 891

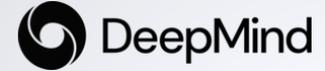
Europe's contributions in AI are far more significant than people think or report.



Mistral is competitive with the best AI labs (and its new app *Le Chat* is very fast...).



LLama, Meta's foundational model, was invented in Paris.



DeepMind is based in London and its founder Demis Hassabis, now Nobel Prize winner, runs Google AI efforts.



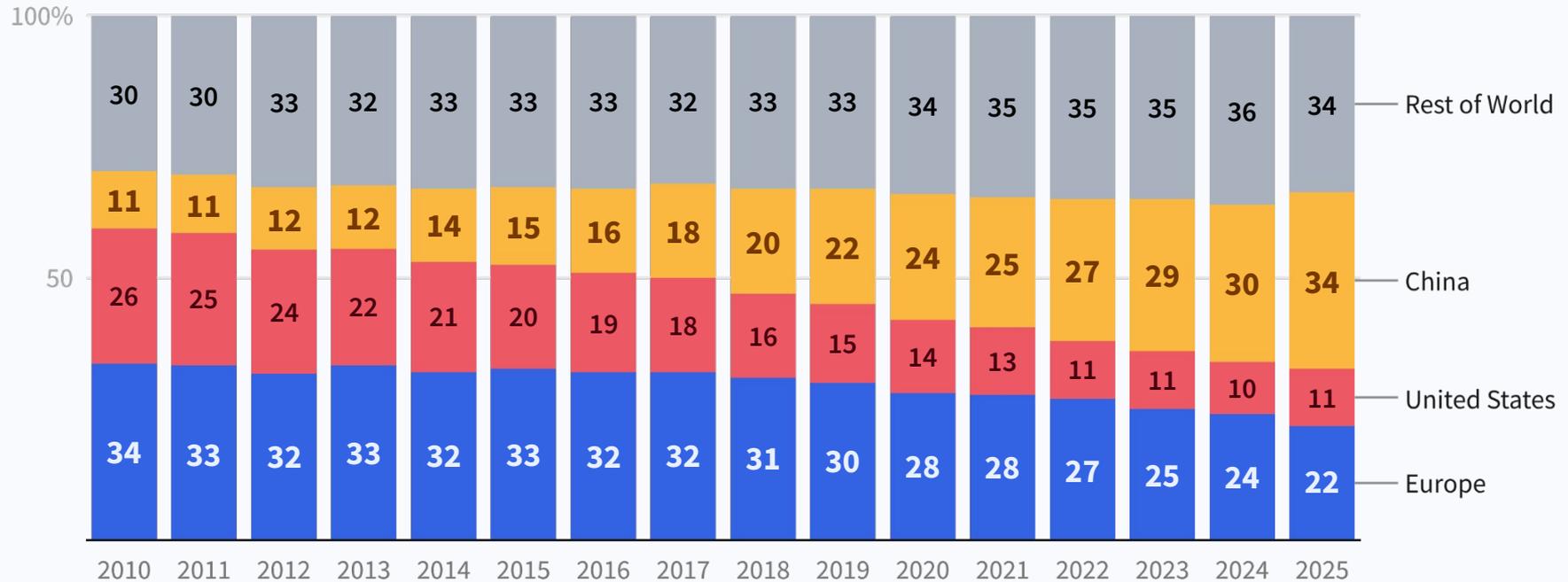
Hugging Face, the heart of the open-source AI community globally was started by French founders.



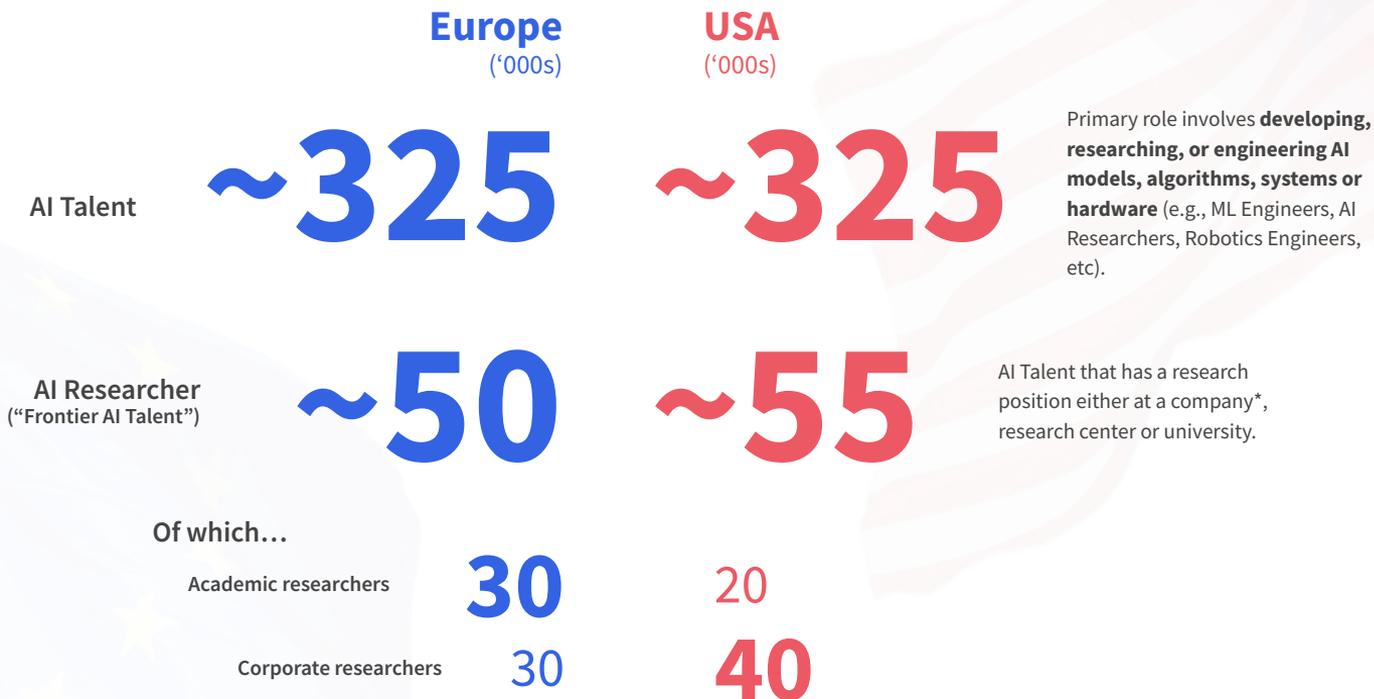
Europe is producing its fair share of beloved fast-growing AI applications, such as ElevenLabs, Granola, and Lovable.

While China surges, European AI researcher output is holding up

Share of researchers having 1k+ citations, per country of origin



Europe is on par with the US on AI talent

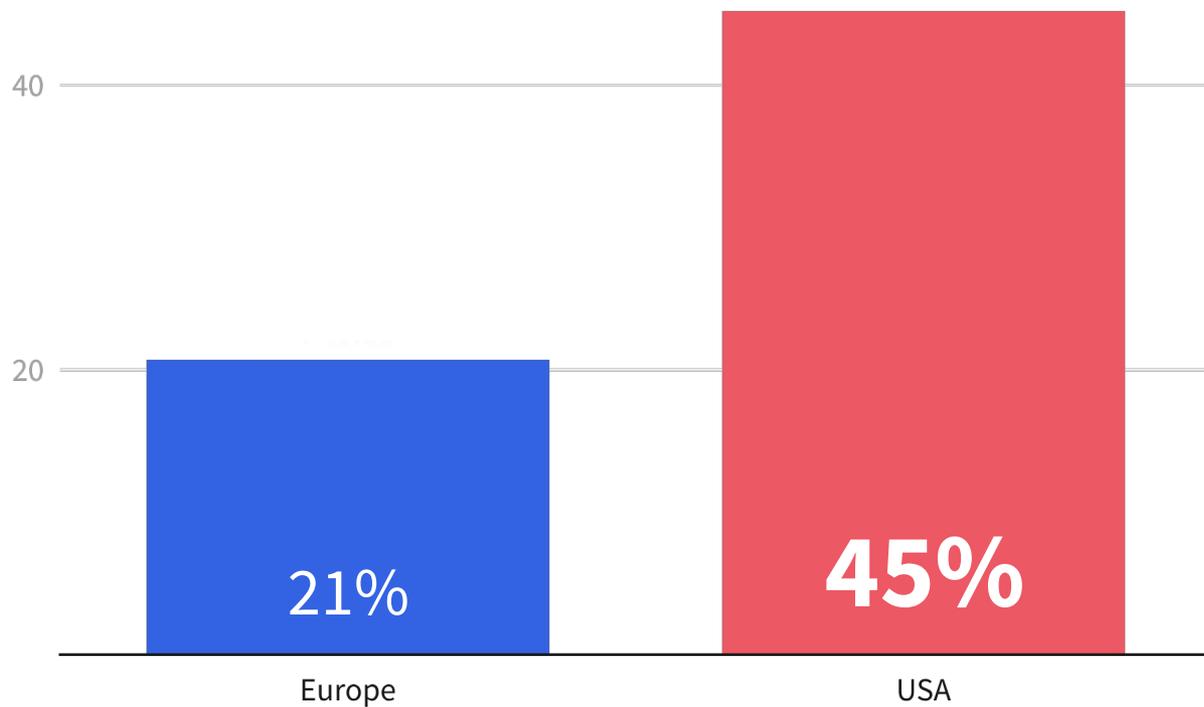


‘US hegemony’ in AI is built on imported talent.

Overall Europe hosts 67k extra-European AI Talent, which make up 21% of the Talent pool.

In comparison, the US host 149k extra-American AI Talent, which make up 45% of the Talent pool.

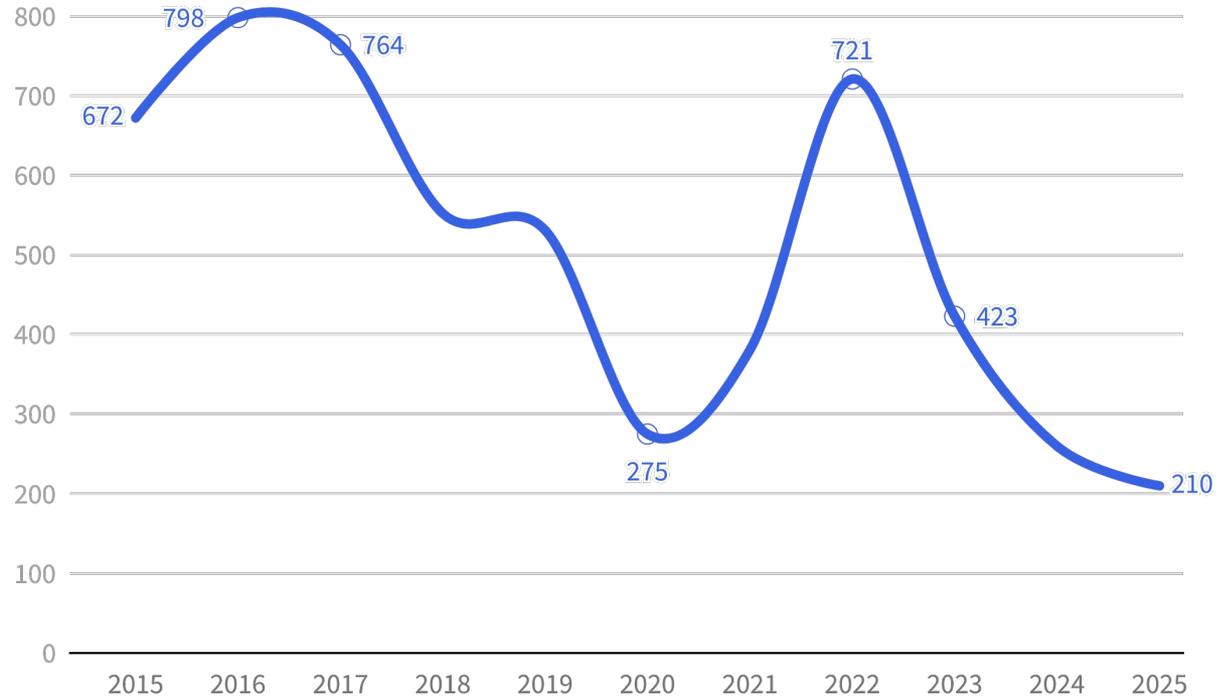
Share of AI Talent with foreign origins



The tide is turning.

US dominance in AI is fast eroding as the best minds in the field decide to take their skills elsewhere. The net flow of AI talent from Europe to the US is at its lowest in the last decade.

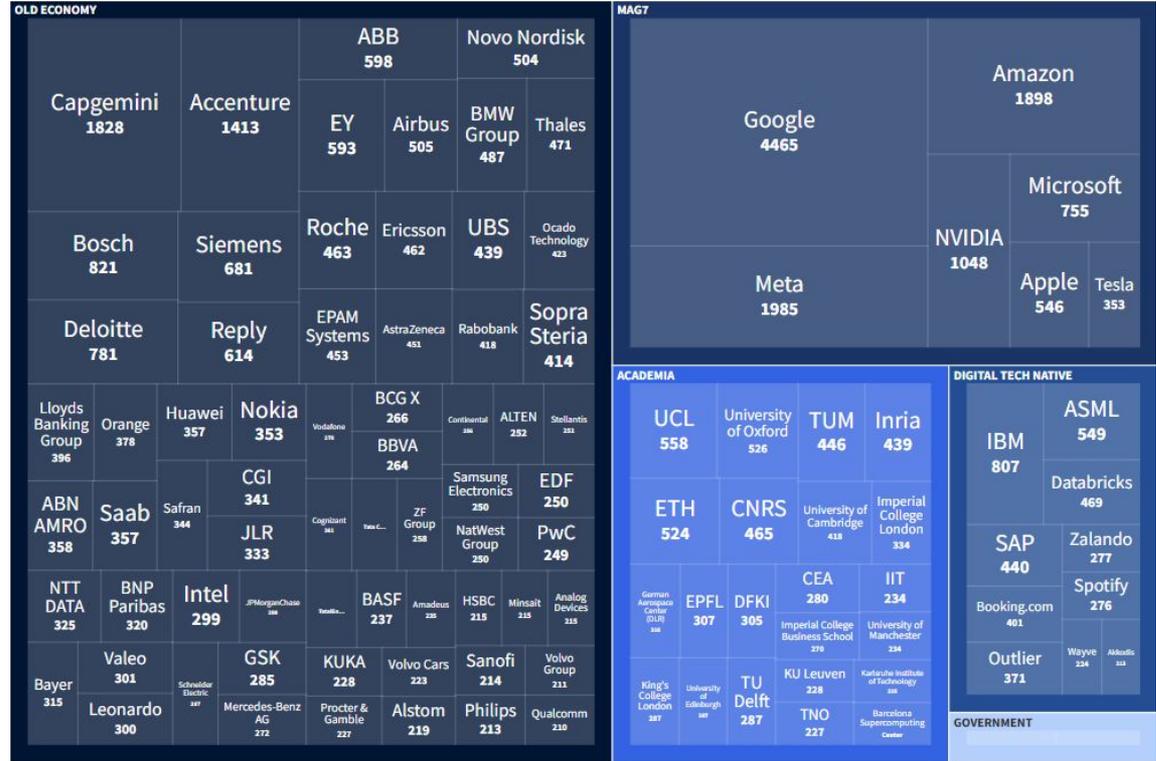
Europe --> US net AI talent flow



Top-100 employers of AI talent in Europe.

Traditional economy AI talent employment in Europe across consultancies, industrial groups and finance; not European AI companies

Top 100 organizations for AI talent in Europe

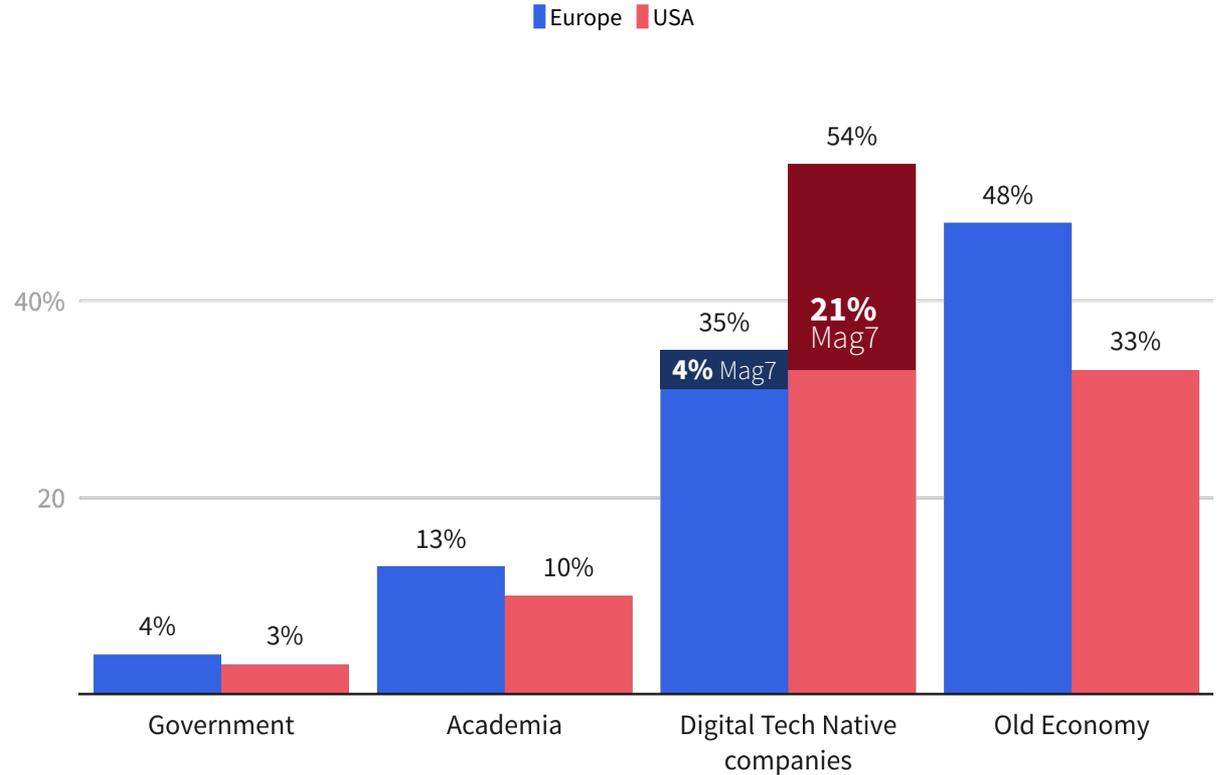


Europe has a massive pool of AI talent, but it is structurally misallocated to traditional economy roles.

Europe appears caught in a "retrofitting loop," where its elite talent is utilized to enhance legacy sectors rather than to build the next generation of global tech platforms

The US advantage is mostly driven by Big Tech.

AI talent employed by type of organization, Europe vs US



US Big tech dominates AI talent employment in the US and in Europe

The top 7 employers of AI talent in the US are the Big Tech Mag 7, and just two of the top 15 are old economy companies.

Top employers of AI talent in the US

Company	Type	People count	HQ
Google	Mag7	18,040	
Meta	Mag7	16,468	
Amazon	Mag7	12,536	
NVIDIA	Mag7	9,338	
Apple	Mag7	4,268	
Microsoft	Mag7	4,121	
Tesla	Mag7	3,119	
OpenAI	Digital tech native	1,809	
Capital One	Old economy	1,602	
JPMorganChase	Old economy	1,510	
IBM	Digital tech native	1,456	
Waymo	Digital tech native	1,418	
Databricks	Digital tech native	1,318	
Intel Corporation	Digital tech native	1,246	
Booz Allen Hamilton	Old economy	1,125	

In Europe 6 of the top 15 including the top 3 employers are US Big Tech. The top European employers are consultancies and old economy (industrials)

Top employers of AI talent in Europe

Company	Type	People count	HQ
Google	Mag7	4,465	
Meta	Mag7	1,985	
Amazon	Mag7	1,898	
Capgemini	Old economy	1,828	
Accenture	Old economy	1,413	
NVIDIA	Mag7	1,048	
Bosch	Old economy	821	
IBM	Digital tech native	807	
Deloitte	Old economy	781	
Microsoft	Mag7	755	
Siemens	Old economy	681	
Data Reply IT	Old economy	614	
ABB	Old economy	598	
EY	Old economy	593	
UCL	Academia	558	