

Conversational agents: the *Autorité* starts inquiries *ex officio* with a view to issuing an opinion

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Background

Following on from [Opinion 24-A-05](#) of 28 June 2024, which analysed the competitive functioning of the generative artificial intelligence (AI) sector, in particular the upstream segment of the value chain where generative AI models are designed and trained, and its [study](#) on the competition issues surrounding the energy and environmental impact of AI, the *Autorité de la concurrence* is now starting inquiries *ex officio* into the competitive functioning of the conversational agent sector, located downstream in the value chain. While the downstream segment of the value chain currently appears dynamic with the presence of several operators, recent developments suggest that conversational agents could have an impact on the competitive functioning of several key sectors of the economy.

With a more than 60% increase in the number of users in 2024, the use of conversational agents is growing rapidly in France. The sector is concentrated around the services of several key operators – ChatGPT (OpenAI), Gemini (Google), Le Chat (Mistral AI), Perplexity and Copilot (Microsoft) – and recent developments raise questions about its competitive structuring, operators' business models and the opportunities for other sectors.

Accordingly, the *Autorité* intends to focus on the new issues emerging in particular from the use of conversational agents in the e-commerce sector, also called “agentic commerce”. However, the relationship between conversational agents and search engines will not be part of the sector-specific inquiry.

As part of its inquiries, the *Autorité* will soon launch a public consultation and will issue its opinion in 2026.

A rapidly evolving sector

According to France Num^[1], conversational agents are “*AI-based tools designed to interact with users in natural language. They can answer frequently asked questions, guide a customer through a purchase journey, schedule appointments or assist an employee with routine tasks*”.

Other stakeholders believe that a distinction should be made between chatbots that manage customer interactions via decision trees and do not necessarily use artificial intelligence (AI) and generative AI-powered virtual assistants like Siri (Apple) and Alexa (Amazon) and ChatGPT-type conversational agents.

In its opinion, the *Autorité* will focus on the latter category of conversational agent.

The use of conversational agents is growing rapidly, with a more than 60% increase in the number of users in France in 2024. According to a study by the market research group IFOP, the use of chatbots varies by user age: 85% of 18-24-year-olds (68% in 2024) and 63% of 25-34-year-olds (47% in 2024) use generative AI, but only 31% of those aged 35 and over^[2].

The sector is gradually consolidating around a few key operators^[3]. ChatGPT (OpenAI) is the leading conversational agent with 21.6 million unique visitors in September 2025, followed by Google Gemini (2.8 million), Mistral AI with “Le Chat” (1.5 million), Perplexity (1.3 million) and Microsoft Copilot (1 million). The different agents can typically understand natural language, answer questions, generate text, explain code and create visual content.

The functioning of the conversational agent sector and the emergence of agentic commerce will be a key focus of the opinion

- **Conversational agents**

While the foundation models of conversational agents have already been examined in the generative AI opinion, conversational agent developers are now seeking to diversify the ways their services can be used and the avenues for monetisation, with a view to ensuring their commercial viability. In particular, the sector-specific inquiry will focus on the following issues:

- **the integration of advertising into conversational agents:** the *Autorité* will examine how adverts are displayed and the role of advertising in operators' business models;
- **the integration of conversational agents into existing services:** the *Autorité* will pay particular attention to leverage effects and self-referencing, given that conversational agents are deployed by dominant operators;
- **partnerships formed by conversational agent developers;**
- **the transformation of conversational agents into platforms:** conversational agents are more than simple question-and-answer interfaces and are evolving into full-fledged platforms, giving users direct access to third-party services without leaving the chat window.

However, the relationship between conversational agents and search engines will not be part of the sector-specific inquiry.

- **Agentic commerce**

E-commerce is one of the key application areas where developers are investing significant efforts to create agents that guide users through their purchase journey, with the aim of monetising certain of their services. Such agents, which can autonomously perform tasks on behalf of humans, no longer aim merely to respond to user queries, but also to assist users autonomously in a range of tasks and, in some cases, to perform the tasks entirely on their behalf.

Thus, the conversational agent can browse various online stores on a user's behalf, make recommendations, provide external links to e-commerce sites and facilitate payment, potentially without the user ever having to leave the agent's environment. Depending on the level of automation and task delegation desired

by the user, the conversational agent can even function as a shopping assistant, anticipating future purchases or their recurrence.

More broadly, the entire e-commerce ecosystem may need to adapt to the emergence and growth of agentic commerce. Logistics service providers and payment solution developers, in particular, will need to be able to interact with users' agents to deliver a complete and efficient service.

The sector-specific inquiry will provide a comprehensive overview of the agentic commerce value chain, identifying both established operators and new entrants to the market. It will examine the relationships between the various services that comprise the value chain, their interactions with traditional e-commerce and the competitive challenges posed by this emerging sector.

The *Autorité* will launch a public consultation

As part of its inquiries, the *Autorité* will soon launch a public consultation. The observations received will feed into its work, with the final opinion to be issued in 2026.

[1] France Num is a French government initiative supporting the digital transformation of small and medium-sized enterprises.

[2] IFOP, [Third wave of the barometer on French people's perception and use of generative AI](#), 4 July 2025.

[3] Médiamétrie, [Young people at the forefront of the conversational AI revolution](#)

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