



# European Digital Maturity Index: A roadmap to market leadership through content innovation



# Foreword

Across the UK and Europe, enterprises are navigating the challenges and opportunities that come with rapid digitalization. The imperative today is not whether to transform, but how effectively it can be achieved. For organizations striving to compete and thrive in a data-driven, customer-centric world, understanding where they stand in their digital transformation journey is essential.

To help leaders chart this path with clarity and confidence, we've partnered with industry experts to create the European Digital Maturity Index (EDMI). This report empowers enterprises to benchmark their progress, uncover areas for growth and gain actionable insights to inform their transformation strategies.

The Index evaluates critical dimensions including cloud adoption, open source integration, the use of AI and automation, and — perhaps most significantly — the maturity of content services infrastructure. These factors collectively offer a clear perspective on how the region measures up in digital capabilities.

Beyond these metrics, our research explores broader transformation focus areas and the common hurdles that organizations face. We provide practical recommendations grounded in the successes of businesses further along their respective journeys — guidance designed to help others overcome challenges and accelerate progress.

But this Index is more than just a snapshot of where organizations stand today. It's designed to spark change and serve as a catalyst for growth. It encourages decision-makers to assess their priorities, seize new opportunities and lead their teams with purpose toward a digitally robust future.

We hope this resource serves as an invaluable tool for leaders across Europe, inspiring them to unlock new potential, foster innovation and confidently steer their organizations through the fast-evolving digital landscape.

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**Arsalan Minhas**

AVP Sales Engineering, EMEA & APAC





## Methodology



We conducted a benchmark survey of 3,000 IT decision makers across Europe (UK, France, Germany, Spain, Benelux, Nordics) to self-report their level of infrastructure maturity across key criteria. We then scored these numbers to establish a proper understanding of the maturity of businesses to help them build a roadmap to turn digital ambition into success.

# Digital transformation in Europe: The current state of play

## What's driving technological innovation for European enterprises?

While businesses are committed to digital transformation across Europe, our Index reveals that many are not as advanced in their efforts as they believe. What's motivating this shift, and what's slowing it down?

While the universal push for growth and operational efficiency drives digital transformation, significant hurdles — such as security concerns, skill shortages and cost pressures — must be navigated along the way. Successful digital strategies must adapt to accommodate these challenges, while still addressing unique regional priorities.

## Main areas of focus in digital transformation

Digital transformation is not a one-size-fits-all solution, as priorities shift based on regional and organizational needs. However, a few focus areas consistently emerge as top-of-mind for enterprises across Europe.

## Cybersecurity dominates

Cybersecurity remains a shared and essential priority. Among UK IT leaders, 91% flag data and cybersecurity as areas of focus, with similar concerns across DACH (86%). With the growing sophistication of cyber threats, organizations see robust cybersecurity measures as integral to successful technological progress.



**Cybersecurity is what keeps our CEO awake at night.**

Cybersecurity and data security are the things that keep our CEO awake at night. Though we're a small company of 250-260 people, the amount of money that goes through our systems is huge, so we're a prime target for attacks.

**Peter**

Decision-maker at a private equity company



## Business growth as a leading driver

Expanding operations remains a top motivator for digital innovation. IT decision-makers in the UK, for example, show a clear focus on growth, with nearly half (44%) identifying it as a key result of tech investments.

### Renault: driving global competitiveness with Hyland

Are disconnected data silos slowing down your business processes? Renault faced a challenge familiar to many global organizations — managing data across 26 countries.

By implementing Hyland Nuxeo, Renault cut out manual processes, optimized compliance and unlocked previously untapped productivity. This wasn't just a technical evolution — it was a strategic step that drove their global competitiveness.

[!\[\]\(339a16584d5da0f0a3ca4e9ec17bf6a1\_img.jpg\) Read Renault's story.](#)



**We want a single source of truth for everyone.**

My number one goal is to make sure that we have one single source of truth for the group, and that means bringing people in slowly, smaller departments, smaller areas into that same source of truth. We need to be able to learn in terms of technology, be efficient and basically provide people the tools to best do their jobs.

**Catherine**

Decision-maker at  
global travel company



## Lower priority areas include culture and reducing staff burden

With growth and efficiency taking precedence, factors like reducing staff workload and cultural transformation are seen as lower priorities across Europe. For instance, only 16% of IT decision-makers in the UK marked reducing staff burden as a central driver for technological innovation.

## Improving processes gains traction

Operational efficiency is another top motivation, with 40% of respondents from the UK citing streamlined operations as a goal, followed by 36% in Benelux and the Nordics. Economic pressures — including high inflation and political instability — are fueling organizations' focus on cost-effective, efficient processes.



**We aim to reduce our digital footprint.**

The big thing that we try to do is to reduce the digital footprint. So, we don't want multiple platforms, multiple UIs for us or for our staff where we can help it.

**Patrick**

Decision-maker at a community trust

## Streamlining processes: The Spanish Ministry of Justice's document management transformation

The Spanish Ministry of Justice revolutionized efficiency with Hyland Alfresco. Now managing over 300,000 daily transactions, the ministry has enhanced access to judicial records, implemented secure e-signatures and increased transparency — setting a new standard for public sector innovation.

[!\[\]\(4fe57c3593bf1b21d272ae7ac8dfaf77\_img.jpg\) Read the story.](#)





# Moving to the cloud

The shift to cloud infrastructure is a top priority, particularly in the UK (89%), Benelux (84%) and DACH (83%), as enterprises seek scalability and flexibility to handle complex tasks. However, legacy systems continue to pose challenges, with 77% of decision-makers stressing the need for modernization to fully embrace new technology.



## **We became 100% cloud in a year and a half.**

This year, we transitioned to being 100% cloud-based. When we were on-premises, there was always the risk associated with server locations, such as concerns about humidity or the potential for disasters.

As a relatively small company, we lacked high-tech server rooms capable of rapid-fire suppression or precise environmental control. Embarrassingly, our servers were housed in the basement — the worst possible place for them. It often kept me up at night worrying that a flood could bring everything down.

### **Catherine**

Decision-maker at a global travel company



## **We're moving away from legacy systems.**

Top in our strategy is to move away from legacy systems and onto the cloud. We have done a lot of work over the last few years to migrate systems from on-premises and we're about 80% of the way there now.

### **Andy**

Decision-maker at an IT services provider

## **Liberty Mutual: Streamlining operations with Alfresco on AWS delivers \$21 million savings in five years**

Liberty Mutual's journey to the cloud highlights just how impactful this shift can be. By modernizing their systems and transitioning to the AWS cloud with Hyland, they were able to reduce their dependency on legacy technology while improving responsiveness and scalability — and all while making eight-figure savings over a five-year period.

This better equipped Liberty Mutual to both meet customer expectations and adapt to the rapidly evolving insurance landscape. This success story is a testament to how cloud adoption not only enhances operational efficiency but also positions businesses for long-term growth.



[Read Liberty Mutual's story.](#)



## The rise of AI integration

AI is no longer optional. Most enterprises across Europe are adopting AI to some degree, with the UK leading the way. Meanwhile, France and the Nordics see AI playing a supportive role alongside cybersecurity and system upgrades.

## Improving data management

A critical element of digital transformation is effective data management. Upgrading document management tools is a top focus, particularly in the UK (88%) and Spain (83%), as organizations manage massive data flows. Intuitive, user-friendly systems are also recognized as essential to boosting employee productivity and overall experience.



### Our goal is to leverage AI for standardization of documents.

The goal is to leverage AI to consolidate and present critical reference materials like policy documents and legal guidelines for our clinicians. This will not only drive efficiency — something our staff will greatly appreciate — but, more importantly, it will promote standardization. By reducing data silos and fragmentation, we can ensure consistent and accessible information for everyone.

#### Patrick

Decision-maker at a community trust

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## How DAB Bank AG transformed their data management with Hyland

DAB Bank AG achieved this by digitizing their B2B trading processes with Alfresco. By enhancing transparency, improving search capabilities and enabling audit-proof storage, they transformed their document management and compliance processes — all while positioning themselves for future growth.

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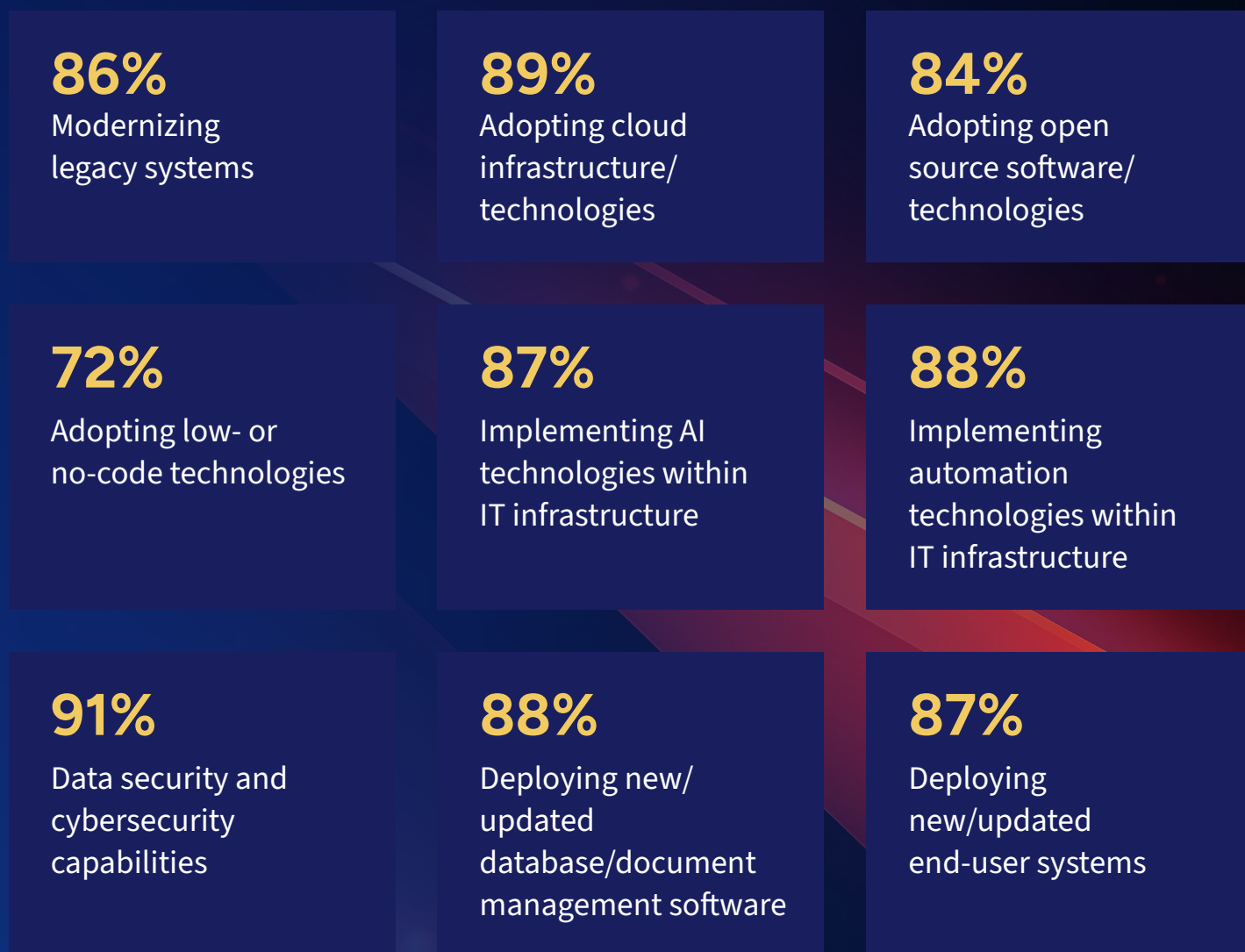
[Read the DAB Bank AG story.](#)



## Region spotlight: UK

Enterprises in the UK lead the adoption of cloud adoption, automation and AI, as well as wider modernization initiatives. This speaks to a comprehensive and aggressive approach to driving innovation that benefits from a robust tech ecosystem, strong government support and a competitive business environment fed with abundant venture capital — all of which are creating a fertile ground for innovation.

Figure 1 – Factors driving innovation in the UK





# How content services solutions are shaping digital transformation in Europe

The state of content services across Europe offers a powerful lens through which to gauge the progress of businesses on their digital transformation journey. Encouragingly, the adoption of content services platforms is already widespread, signaling a region-wide recognition of the value of the technology.

However, variations exist. Some remain hesitant to fully embrace cloud-based services, underscoring a rising tension between the critical need to modernize and the universal barriers that stand in the way. But in a world where the pace of digital disruption is accelerating, businesses that fail to prioritize modern content services risk losing their competitive edge in markets that reward agility and innovation.

## Growing appetite for advanced content services solutions

We see a powerful appetite for cloud-based, automated and scalable solutions indicating that European enterprises are prioritizing flexibility and scalability. This chimes with the top-ranking motivations for innovation being growth and efficiency, as companies navigate hybrid work environments and how best to improve digital collaboration.

## How Scania drives global collaboration with Hyland

Scania transformed its workforce with Alfresco, uniting 5,000 employees across borders and departments. By improving communication, streamlining knowledge sharing and optimizing workflows, Scania gained the agility to lead in a competitive market.



**More than 95% of our assets are stored or indexed within our database.**

We use one system to store our digital assets, including around 80,000 images accumulated over the past 20-25 years, many of which are tagged and soon to be AI-tagged. For day-to-day digital asset storage and indexing, we rely on a separate document management system. Overall, more than 95% of our assets are stored or indexed within our database.

### **Simon**

Decision-maker at an architecture firm

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 [Read Scania's story.](#)



## Content services maturity highest in Benelux

There's a more pronounced shift toward fully cloud-enabled content services in Benelux, the UK and Spain, where leaders demonstrated the highest preference for this type of solution. For the French market, the comparative emphasis appears to be on interoperability and cohesive data management systems.

## A cautious approach to cloud in DACH

DACH organizations appear mature in their content services integration, but may prioritize control over scalability when it comes to the cloud. The region has a more cautious approach to cloud-based services compared to Benelux and the UK, while fully federated and scalable content services ranks relatively high, implying a focus on cohesive data management within organizations. Rising concerns around data sovereignty may have a role to play, though this isn't limited to the DACH region.

## The end of paper is here

The sanctioned use of paper for business documentation is well and truly over. Only enterprises in Benelux (1%) and Spain (1%) indicated that paper-based records were still part of their content management infrastructure. Instead, European organizations have moved beyond basic digital repositories and are progressing toward modern content services setups, emphasizing scalability, integration and automation.

## L'Oréal: Innovating at scale with Hyland

What's standing in the way of your organization's next innovation? L'Oréal, a global beauty leader, overcame this hurdle with Nuxeo. By transforming its document management, L'Oréal seamlessly handled over 7 million documents, ensured GDPR compliance, and boosted operational efficiency. This empowered them to innovate faster and bring groundbreaking products to market.



### How would you describe the current state of your organization's content management system?

As we've moved offices and grown, we've prioritized eliminating paper, and it's been quite successful. Our repository is a secure system that we carefully monitor and protect. Staff appreciate it for its ease of use and reliability, ensuring everything stays within this controlled environment.

#### Peter

Decision-maker at a private equity firm



20% of decision-makers in France say their enterprises are using cloud-based content services platforms, compared with 16% in the Nordics.



# European Digital Maturity Index: The Path to transformation excellence

## What is digital maturity?

Digital maturity goes beyond simple technology adoption. It's about embedding digital capabilities into every aspect of your business — operations, culture and customer engagement. A digitally mature organization consistently leverages technology to stay competitive, focusing on optimization, innovation and a growth mindset.

To reach true maturity, businesses must prioritize investments in technologies aligned with a well-defined digital strategy, supported by leaders committed to fostering a digital-first mentality. It's about recognizing that yesterday's strategies won't secure tomorrow's success.

Content services act as the critical foundation for digital transformation. By streamlining information management, they empower businesses to foster collaboration, optimize workflows and make faster, more data-driven decisions. Without robust content services, digital transformation risks being fragmented and inefficient — a failing strategy in an increasingly competitive marketplace.

## Europe content services maturity score



European businesses are showing moderate success in their content services maturity. However, challenges remain in shifting to fully cloud-based, AI- and ML-powered solutions. For organizations ready to act, the opportunity to lead is clear.





# The European Digital Maturity Index

The inaugural **European Digital Maturity Index** provides a roadmap for enterprises, helping them benchmark their progress and identify opportunities. From innovators who redefine industry standards to those just starting their digital journeys, this Index highlights the state of digital transformation in Europe — mapping out key drivers, challenges and actionable milestones.

To determine enterprise digital maturity, we measured adoption across seven key areas of technology:

1. Content services maturity
2. Cloud services and infrastructure adoption
3. Open source technologies use
4. Low-code or no-code technologies implementation
5. AI technologies adoption
6. Automation practices
7. Data security and cybersecurity approaches

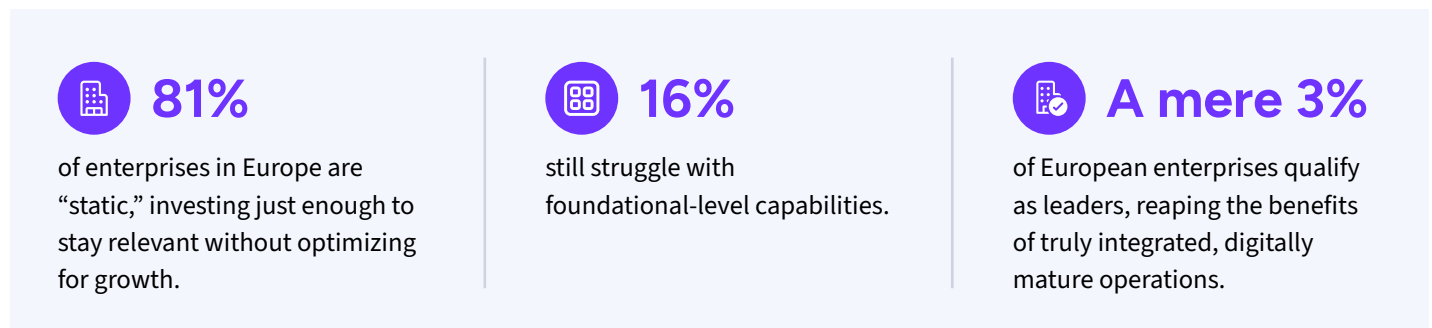
Points assigned across these areas collectively formed percentage scores at both regional and enterprise levels, providing an insightful overview of the region's digital transformation landscape.

## How digitally mature are European enterprises?

The findings reveal four distinct categories of digital maturity among enterprises: Lagging, foundational, static and leading.

While most European businesses have surpassed the foundational stages of digital transformation, most remain stuck in “static” maturity. Alarming, only a small fraction have reached the leading-edge maturity required to innovate and stay competitive.

### Key findings at a glance:



Interestingly, many decision-makers see their organizations as “pro-innovation.” Three-quarters of surveyed executives (76%) identified their companies this way, with higher concordance in DACH (81%) and the UK (83%). Similarly, 74% of respondents said their C-suite leadership strongly supports innovation with readiness to invest.

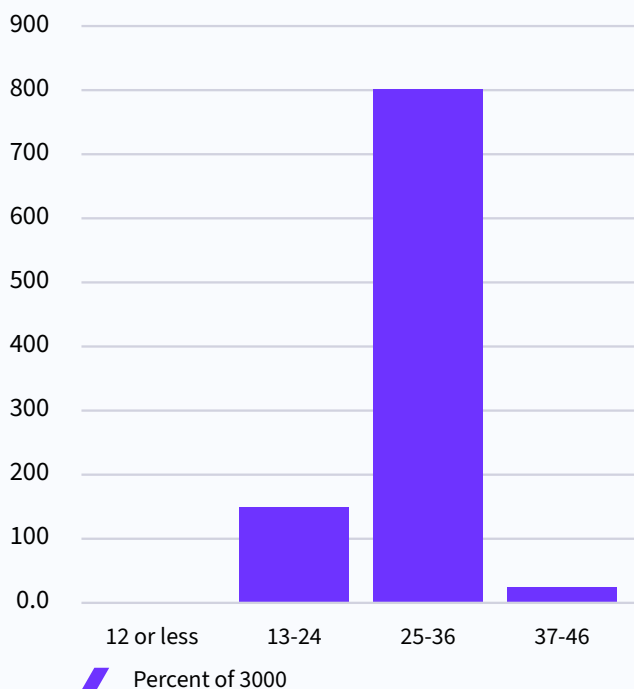
However, an evident gap remains between perception and execution. Many businesses may prioritize innovation as an idea, yet their lack of implementation leaves them stagnant, struggling to adapt in today's rapidly evolving digital economy.

## The opportunity for growth

What's stopping European enterprises from reaching the next level of digital maturity? This gap often stems from fragmented systems, misaligned strategies or insufficient infrastructure investment.

But the opportunity is undeniable. Enterprises that take deliberate steps toward digital maturity not only survive — they thrive. A digitally mature organization fosters innovation, optimizes performance and gains a sustainable competitive edge.

**EMEA Maturity Curve**



## The role of content services in digital maturity

At the heart of impactful digital transformation is effective information management. Content services platforms transform siloed, static data into actionable insights, enabling teams to collaborate seamlessly across departments, geographies and devices.

By simplifying workflows and automating repetitive tasks, content services solutions aren't just tools — they're catalysts. They amplify your organization's ability to adapt, innovate and create new value, turning operational challenges into measurable advantages.

Organizations using advanced content services as part of their digital strategy are far better positioned to accelerate digital transformation while unlocking innovation opportunities.

Why content services matter:

### Streamlined workflows

Save time and reduce errors by automating document-heavy processes.

### Collaboration

Enable real-time coauthoring and approvals, eliminating bottlenecks.

### Insight generation

Transform unstructured information into usable data, enhancing decision-making.

Ultimately, content services platforms don't just support digital transformation — they make it achievable, sustainable and scalable.



# Top barriers to digital transformation in European enterprises

Digital transformation is no longer just an option for businesses — it's essential. Yet, the road to becoming digitally mature is full of obstacles. From cost concerns to skill shortages, enterprises across Europe face unique challenges. Below, we break down the top barriers to digital transformation and how businesses are working to overcome them.

## 1 Cloud adoption and operational expertise

**Europe maturity score:** 66%

Cloud adoption across Europe continues to face significant hurdles. While its potential for revolutionizing operations is clear, few enterprises have fully embraced it. For instance, only **6% of UK organizations** and **2% in France and the Nordics** report having fully cloud-based infrastructures.

A critical barrier to progress is reliance on legacy technologies, with **26-30% of enterprises** across regions still depending on on-premises systems for essential processes. **Cost concerns** — both for initial investments and ongoing operations — compound the challenge. Additionally, **cybersecurity fears** and compliance with stringent data sovereignty laws remain top-of-mind for decision-makers.

Interestingly, hesitation persists in several regions: **25% of enterprises in France** doubt cloud benefits, while **35% in the Nordics** believe their current systems are sufficient.



**Only 2%**

of enterprises in France and the Nordics have fully cloud-based infrastructures.



**27%**

of Spanish enterprises still use on-premises or legacy technology for most operations.

## 2 Open source, low-code/no-code technologies

**Europe maturity score:** 60%

Adoption of open source and low-code/no-code technologies remains cautious across Europe. Most enterprises employ a **hybrid approach**, using open source solutions for cost and flexibility while maintaining proprietary systems for critical areas. Only **2% or fewer** are fully open source.

For low-code/no-code technologies, progress is slow, with skepticism surrounding their ability to handle complex business needs hindering adoption. **Half of decision-makers** across Europe believe these solutions cannot meet their organization's demands. Additionally, **cultural resistance** plays a significant role — **53% of enterprises in France** report hesitation from staff or management about adopting these tools.



**16-22%**

of European enterprises are still in the early stages of exploring open source technologies.



**53%**

of enterprises in France cite resistance to low-code/no-code adoption, the highest in Europe.



### Cisco's 6-week open source solution

Cisco cut through its content chaos by implementing Alfresco platform to develop “SalesConnect,” a centralized sales and training hub. Deployed in just six weeks, the platform now streamlines operations for 87,000+ users across 151 countries, boosting operational efficiency and significantly reducing time spent searching for critical information.

[Read Cisco's story.](#)

## 3 AI and automation

**Europe maturity score: 57%**

AI and automation adoption remain in their exploratory stages for many European enterprises. With **17-23%** of organizations currently experimenting, integration is primarily limited to specific business areas.

The most cited obstacle? **Cybersecurity concerns**, with **over half (54%) of UK decision-makers** citing this as a reason for slow AI adoption. Cost, coupled with staff skill shortages, also present challenges. Enterprises must address skill gaps by investing in **upskilling employees** to effectively integrate AI technologies.

Decision-makers do recognize the potential AI holds — less than **2% of enterprises** plan to avoid it entirely, signaling that AI's role in business transformation is gaining momentum.

 **21%**

**of decision-makers in Benelux** strive to integrate AI widely across their operations.

 **54%**

**of UK enterprises** consider cybersecurity the leading barrier to AI adoption.

## 4 Prioritizing security, privacy and compliance

**Regional maturity score: 65%**

Security and compliance remain pivotal components of digital transformation strategies. Although at least **50% of European enterprises** have most systems protected, critical gaps persist. For instance, only **2% of French enterprises** believe they have comprehensive cybersecurity measures.

Budget constraints, complexity of implementation and rapidly evolving threats add further pressure. Alarming, **35% of enterprises in France and Benelux** incorrectly assume their organization isn't a likely cyberattack target. This false sense of security risks leaves organizations vulnerable.

 **Only 2%**

**of French enterprises** report having robust cybersecurity measures in place.

 **45%**

**of DACH enterprises** limit security to systems required for compliance.

# Navigating the digital transformation obstacle course

European enterprises face a challenging path toward digital maturity, with barriers often tied to cost, complexity and control concerns. But progress is not only possible — it's necessary.

Here's how organizations can address these obstacles and position themselves as leaders in a rapidly evolving digital landscape.



## Address cloud adoption hesitancy

Despite its advantages, cloud adoption still lags due to hesitation around legacy systems and security concerns. The solution? Start by building robust security frameworks that align with regional privacy regulations. Clear communication about the long-term benefits of cloud solutions — like increased efficiency, ROI and agility — will help foster confidence and drive adoption across the organization.



## Build your business case for the cloud

For some organizations, moving content services to the cloud feels inevitable — yet perpetually delayed. But forward-thinking teams understand the urgency of accelerating cloud adoption to remain competitive. The benefits speak for themselves:

- Scalability and accessibility
- Built-in security to protect against evolving risks
- Streamlined collaboration across distributed teams

Migrating to the cloud empowers IT to focus on innovation rather than maintenance. It's not just a tech upgrade — it's a blueprint for future enterprise success.



## Upskill your workforce

Digital transformation depends on the people who drive it. Enterprises can cultivate internal champions by upskilling teams on open source, low-code or no-code tools while offering hybrid solutions that balance open source flexibility with the reliability of proprietary systems. Building an empowered workforce reduces perceived risks and accelerates transformation.





### **Collaborate with the right partners**

AI and automation offer immense potential, but many organizations remain in the exploratory phase. By partnering with trusted technology providers, enterprises can harness AI's power to reduce costs, enhance security and scale intelligently — unlocking more tailored, effective solutions to meet business needs.



### **Prioritize security and exceed compliance**

An effective security strategy goes beyond basic compliance. Enterprises must proactively integrate advanced cybersecurity measures across platforms, anticipate emerging threats and continuously strengthen defenses. Staying ahead of the threat landscape ensures data integrity and builds trust with customers.



### **Thrive with a modern content services platform**

Content services have evolved from simple document storage to strategic tools that empower organizations to leverage content as a competitive advantage. With the market projected to hit \$133.7 billion by 2030, these platforms are no longer optional — they're critical for enterprises that want to lead in the digital-first era.

## **Unlock the power of your content**

The digital transformation journey is challenging, but the destination is worth it. By addressing barriers and focusing on solutions, your organization can achieve a future-proof, customer-centric and data-driven model that accelerates growth and innovation.

### **Start your transformation today.**

**Explore our platform  
and technology**

**Learn how we've  
delivered success for  
enterprises like yours**

**Connect with an expert  
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