CONCLUSION

TECH REALITY CHECK 26

HOW DIGITALLY PREPARED ARE EUROPEAN ORGANISATIONS IN 2026?

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INTRODUCTION

Year after year, organisations across Europe invest in new technology. But do they truly have control over it? Do they understand what it costs, what value it delivers, and what would happen if a critical supplier were to disappear tomorrow? And do they actually translate technology into new ways of working, or does it merely result in doing the same things more efficiently?

The rise of AI, increasing geopolitical pressure on digital sovereignty, and a growing awareness of organisations' dependency on Big Tech make it crucial for organisations to maintain control over their own digital landscape – and to be able to account for that control. At the same time, reality proves more complex than technological possibilities might suggest. Many organisations are aware that they have issues, such as legacy systems, unclear cost structures or dependencies they do not fully understand, yet too often this awareness does not translate into concrete action or decision-making. The gap between recognising problems and taking action remains wide – and is only widening as AI accelerates the pace of change.

About this research

The Tech Reality Check is an annual study by Conclusion into the digital reality of organisations in Europe. The focus is not on ambition, but on practice: what do organisations really have under control? What challenges do they face? And where do the biggest risks and opportunities lie?

In this first edition (2026), four themes take centre stage: control over costs, value and technical debt; digital autonomy and resilience; collaboration within data ecosystems; and agility in an AI-driven organisation. Results are compared across four countries: the Netherlands, Germany, Spain and Portugal. Four European economies, each grappling in their own way with the same fundamental question: how can you ensure that technology works for your organisation – rather than the other way around? The findings are surprising and at times uncomfortable. The Tech Reality Check reveals a structural pattern: organisations often have a clear understanding of their digital challenges but fail to translate that insight into consistent choices in governance, investment and ways of working.

Each chapter opens with aggregated findings across all four countries, followed by country-level paragraphs that underpin and nuance those findings.

Many organisations call themselves leaders, but still struggle with the reality of technology.

Tech Reality Check 2026 is based on a quantitative online survey among 1,058 IT decision-makers and business leaders in medium-sized and large organisations across four European countries: the Netherlands (n = 247), Germany (n = 329), Spain (n = 403) and Portugal (n = 79). The fieldwork was conducted by Markteffect in February 2026. The target group consists of decision-makers responsible for IT and digital strategy, working within organisations with significant digital operations.

The sample was designed to provide a representative view of digital practices in each of the four countries. Please note: the Portuguese sample consists of 79 respondents; results for Portugal should therefore be considered indicative. All country-level findings throughout this report reflect the self-reported perceptions of survey respondents and cannot be generalised to the countries as a whole. Country names are used for readability, but should be read as shorthand for 'respondents in that country'.

Chapter in figures

A lot of insight, little direction

60%
Experience technical debt as a barrier to innovation; only 18% take it into account in investment decisions

85%
Have a Total Cost of Ownership (TCO) overview

67%
Measure the value of digital capabilities only 28% do so structurally (using KPIs)

60%
Estimate that much of their technology is barely used

2

CONTROL OVER THE DIGITAL LANDSCAPE

costs, value and technical debt

Organisations pay for technology they do not always fully understand, cannot always accurately value, and in some cases barely use. One of the most striking paradoxes is that while 60 per cent experience technical debt as a major barrier to innovation, only 18 per cent take it into account as a criterion in investment decisions.

Cost visibility is present, but depth is lacking

Although the majority of organisations state that they have a reasonable understanding of their technology costs (on average, 85 per cent report a largely or fully complete overview based on Total Cost of Ownership), the actual depth of insight varies significantly by region. In Germany, a comprehensive view – including indirect costs and future obligations – is more the rule than the exception (71 per cent). In Spain (56 per cent) and Portugal (47 per cent), this is already considerably less common. The Netherlands ranks lowest: only 35 per cent of Dutch organisations report having a fully comprehensive cost overview.

85% have cost visibility. But a complete overview? That is a different matter.

A similar pattern emerges when organisations are asked whether they can demonstrate which digital capabilities cost more than they deliver in value. While 84 per cent say they can, the depth of substantiation differs markedly across countries.

For many, value measurement is not yet a structural practice

Knowing what something costs is one thing; knowing what it delivers is another. Sixty-seven per cent of respondents state that they measure the value of digital capabilities largely or structurally, but there is an important distinction between these two categories. Only 28 per cent measure value structurally, using KPIs and fixed measurement moments. The remaining 39 per cent measure ‘largely’, leaving room for interpretation and assumptions.

By contrast, 33 per cent of organisations do not measure value structurally at all. Within this group, a quarter indicate that they combine measurement with estimation, while others rely primarily on assumptions or do not measure value at all. Structural value measurement is therefore far from common practice, even in countries that perform strongly on other aspects of this theme. This lack of depth in measurement has tangible consequences. At 60 per cent of organisations, respondents estimate that a large or very large share of digital capabilities is barely used – a figure based on self-reported perception rather than objective usage measurement. Organisations are therefore not only paying for technology they do not fully understand, but also for technology they barely use.

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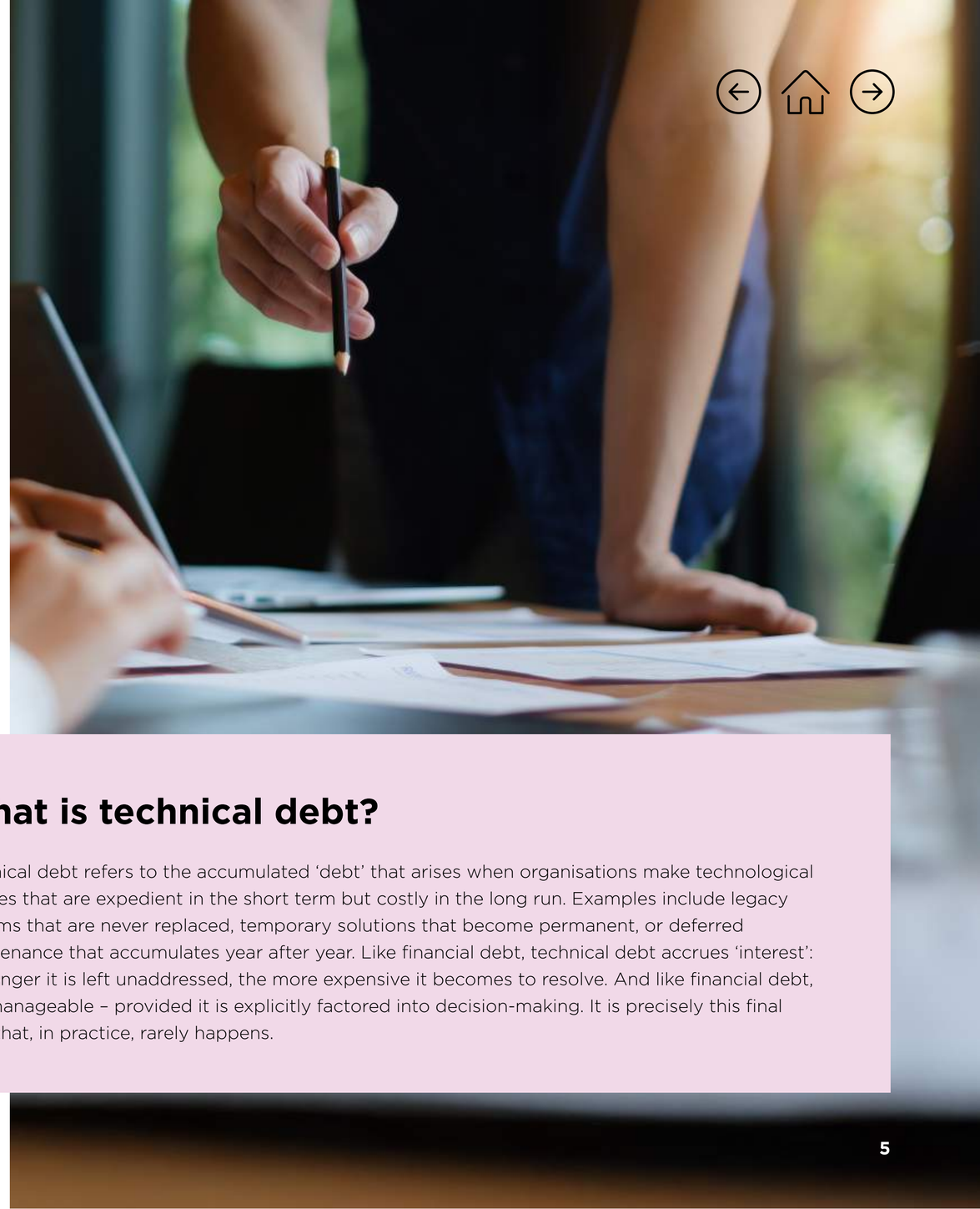
Technical debt is felt, but not addressed

Technical debt represents a major or structural barrier to innovation for 60 per cent of organisations. But that figure masks the severity of the issue: 30 per cent experience this constraint to a very great extent, meaning that at one in three organisations, technical debt is actively obstructing renewal and innovation. This picture is consistent across all four countries; it is not the exception, but the norm.

Nevertheless, only 18 per cent cite technical debt as a criterion in investment or decommissioning decisions. In addition, around 10 per cent of organisations indicate that there are no clear criteria at all, or that decisions are largely influenced by internal politics or management preferences.

The constraint is widely experienced, but barely reflected in the decision-making that could actually remove it. This is not coincidental: technical debt is highly visible in its consequences – slow systems, costly dependencies, delayed projects, constrained innovation, and heightened security and continuity risks – but remains abstract enough as a subject to be repeatedly deprioritised. As long as that remains the case, the debt continues to grow largely unnoticed.

Technical debt constrains innovation at 60 per cent of organisations, yet only 18 per cent include it as an investment criterion.



What is technical debt?

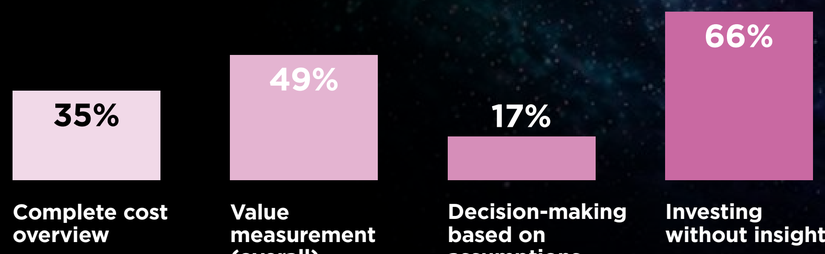
Technical debt refers to the accumulated ‘debt’ that arises when organisations make technological choices that are expedient in the short term but costly in the long run. Examples include legacy systems that are never replaced, temporary solutions that become permanent, or deferred maintenance that accumulates year after year. Like financial debt, technical debt accrues ‘interest’: the longer it is left unaddressed, the more expensive it becomes to resolve. And like financial debt, it is manageable – provided it is explicitly factored into decision-making. It is precisely this final step that, in practice, rarely happens.

THE NETHERLANDS

Least control, most assumptions

Across all aspects of this theme, the Netherlands reports the lowest scores of the four countries. Only 35 per cent of Dutch organisations report having a fully comprehensive cost overview – a substantial gap compared with Germany (71 per cent), Spain (56 per cent) and Portugal (47 per cent).

Value measurement also lags behind: only 49 per cent measure value largely or structurally, compared with 77 per cent in Spain and 71 per cent in Germany. Most striking is that 17 per cent of Dutch organisations base the value of digital capabilities primarily on assumptions – the highest proportion of all countries, and far above Spain (2 per cent) and Germany (4 per cent). This lack of measurement does not go unnoticed. Sixty-six per cent agree with the statement that investments are made too often without knowing what they deliver. This, again, is the highest score of all four countries.

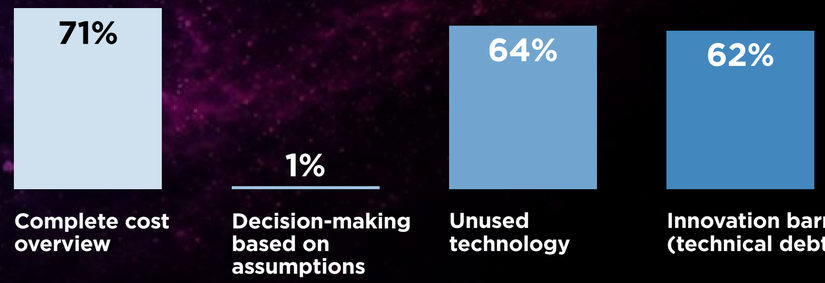


GERMANY

Strong visibility, weak utilisation

German respondents report the strongest cost visibility of all countries: 71 per cent have a complete TCO overview, and only 1 per cent rely primarily on assumptions.

A striking turning point emerges, however. Germany also scores highest on barely used digital capabilities (64 per cent report a large or very large share) and experiences the greatest innovation constraint due to technical debt (62 per cent to a large or very large extent). Strong visibility does not automatically translate into better utilization, though it may equally reflect a greater willingness to acknowledge existing issues.

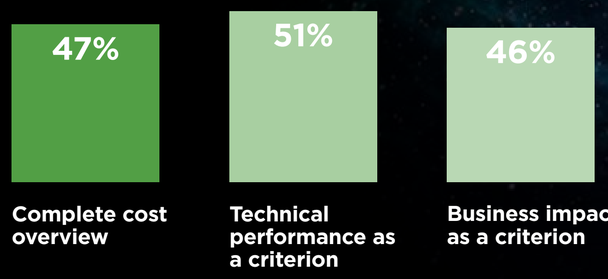


PORTUGAL

Pragmatic and average

Portuguese respondents report an average level of cost visibility: 47 per cent have full TCO insight, in line with the European average.

Notably, technical performance (51 per cent) and contribution to business objectives (46 per cent) are the most frequently cited investment criteria – both higher than in the other countries. This points to a relatively pragmatic orientation.

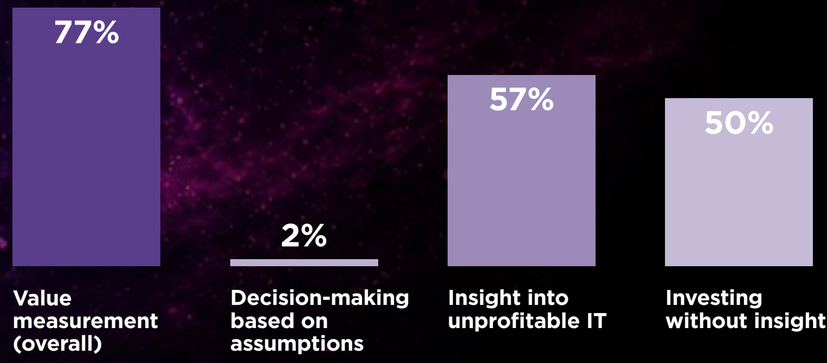


SPAIN

Awareness is present, practice remains complex

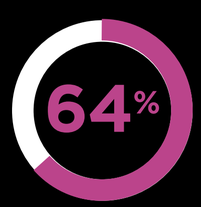
Spain scores strongly on value measurement: 77 per cent measure value largely or structurally, and only 2 per cent rely primarily on assumptions.

Also notable is that 57 per cent of Spanish respondents state that they are able to demonstrate to a very great extent which capabilities cost more than they deliver in value – the highest score of all countries. At the same time, 50 per cent acknowledge that investments are made too often without knowing what they yield, indicating that awareness is present, but that practice remains more stubborn.



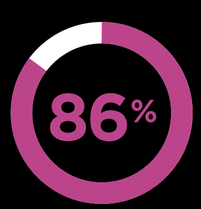
Chapter in figures

Aware, but vulnerable

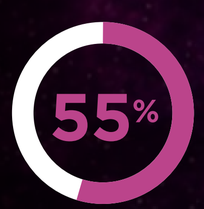


Have a complete overview of dependencies

Have an active sovereignty policy



Are aware of jurisdictional risks



Only address risks after incidents occur

48% **Expect major disruptions if a supplier fails**

59% **Experience innovation barriers caused by risk management**

10% **Expect immediate operational shutdown**

72% **See delays in IT solutions as increasing risk**

3

DIGITAL AUTONOMY

dependencies, risks and resilience

What if a critical supplier were to drop out tomorrow? Two in three respondents state that they have a complete overview of their critical dependencies. Having an overview, however, is not the same as assessing risk. Knowing what you depend on is a starting point. But genuine risk assessment requires a further step: estimating the likelihood of disruption and its potential impact. This assessment forms the foundation for risk assessment, which in turn require the active mitigation of unacceptable risks. The data reflects this gap: while 64 per cent report a complete overview of dependencies, only 50 per cent have translated this into active sovereignty policy, and 55 per cent acknowledge that risks only receive attention once something goes wrong.

Most organisations have visibility of dependencies, far fewer have active policy

Sixty-four per cent of respondents indicate that they have a complete, organisation-wide overview of critical dependencies for day-to-day operations. The five most common types of critical dependency are cloud services or infrastructure components (47 per cent), external preconditions such as energy supply and cooling (44 per cent), key individuals with unique knowledge (42 per cent), supplier dependency (36 per cent) and legacy systems that are difficult to replace (36 per cent).

Eighty-six per cent know that data under foreign jurisdictions entails risks – but only 50 per cent have active policy in place.

Eighty-six per cent report being aware, to a (very) large extent, of the risks associated with technology or data falling under non-European legislation. Half of them (50 per cent) have translated that awareness into active sovereignty policy that is actually applied; the other half either have policy under development, apply it only partially, or have none at all.

Notably, 83 per cent state that roles and responsibilities regarding dependencies are well or very clearly defined, while formal policy lags behind. Organisations know who is responsible; what needs to be done is less clearly anchored.

Sovereignty policy lags behind awareness

The gap between awareness and policy becomes most visible when organisations are faced with the question of what happens when things go wrong. Almost half (48 per cent) expect serious problems if a critical supplier or cloud platform were to fail: 10 per cent say operations would come to an immediate halt, while 38 per cent expect major disruption with severely reduced services. A further 43 per cent anticipate 'limited disruption', with core processes able to continue.

Fifty-nine per cent experience innovation being constrained to a large or very large extent by risk management measures designed to limit technological dependencies. This finding reveals a genuine organisational tension: the more tightly organisations control technological risk, the more respondents feel it holds back their ability to innovate. By contrast, 39 per cent report experiencing little or no such constraint. Organisations that are most structured in this area appear to pay a price for it: the tighter the control over risk, the greater the perceived constraint on the ability to change.

Forty-eight per cent expect serious disruption if a critical supplier drops out tomorrow.

'Postponing structural IT solutions leads to escalating costs and risks.' Seventy-two per cent agree with this statement. Procrastination is a widespread European pattern.

Digital sovereignty: not about avoiding dependency, but managing it

The debate around digital sovereignty intensifies whenever geopolitical tensions rise. But reducing it to anti-American sentiment misses the point, argues Lucas Jellema, CTO of Conclusion. “Digital sovereignty is about knowing where you are dependent and where you do not want to be, and what the impact of disruptions can be so you can determine and mitigate risk to an acceptable level. If you are clear on that, innovation and control can coexist perfectly well.”

That view aligns closely with the findings of this study: 86 per cent of respondents say they are aware of jurisdictional risks, but only 50 per cent have translated that awareness into active policy. The gap between knowing and doing is substantial – and in a world where geopolitical dynamics can shift rapidly, that gap is a risk in itself.

Resilience comes from within

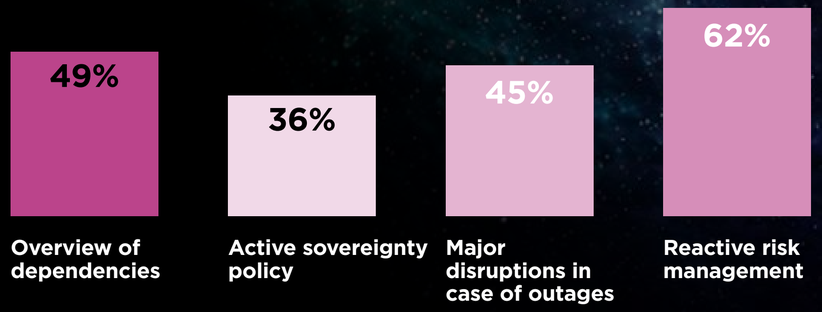
Most organisations approach cybersecurity as a technical issue: the right tools, the right procedures, top-down control. True resilience, however, works differently, says Roel Gloudemans, Director IT Risk & Compliance at Conclusion. “Instead of imposing obligations from the top down, we actively engage process owners in the conversation. Where are the weak spots? And what would the impact be if something actually went wrong?” This approach reflects a broader conclusion from the research. Fifty-seven per cent of respondents say they feel vulnerable because critical systems run on technology that only a handful of people truly understand. That is not merely a technical problem, but a governance and cultural one. Technology can be secured; knowledge monopolies and lack of ownership are far harder to address.

THE NETHERLANDS

Awareness without control

The Netherlands consistently scores below the European average on this theme. Only 49 per cent report having a complete overview of critical dependencies, compared with 70–71 per cent in Spain and Germany.

Active sovereignty policy is present at just 36 per cent of Dutch organisations – significantly less than in Spain (56 per cent) and Germany (53 per cent). This limited preparedness has tangible consequences: 45 per cent expect major disruptions if a critical supplier or cloud platform fails – the highest figure of all countries, alongside Portugal. This may partly reflect the relatively high dependence on public cloud services among Dutch organisations, though the survey does not measure cloud usage directly. At the same time, 62 per cent confirm that risks associated with foreign jurisdictions only receive attention once something goes wrong. The awareness that change is needed is there; active control is not.



GERMANY

Strongest governance, highest cost

Germany demonstrates the strongest governance around dependencies: 71 per cent have a complete organisation-wide overview, and 48 per cent report that roles and responsibilities are very clearly defined – the highest figures of all countries.

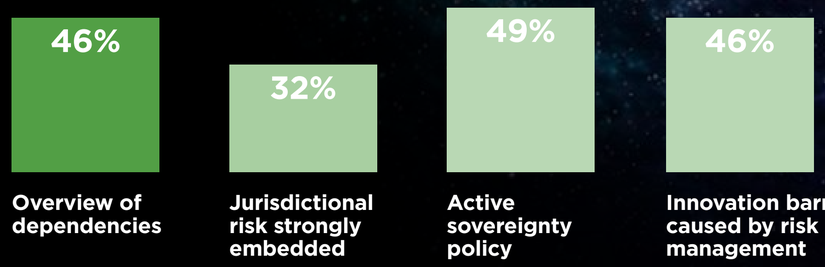
The downside is evident: Germany also experiences the strongest innovation constraint due to risk management, with 62 per cent reporting this to a large or very large extent. Those who are most organised also feel they pay the highest price.

PORTUGAL

Policy in place, awareness uncertain

Portugal has the least visibility of critical dependencies of all countries (46 per cent have a complete overview), and only 32 per cent report having integrated jurisdictional risks to a very large extent – the lowest score of all.

Yet 49 per cent do have active sovereignty policy, in line with the European average and notably higher than the Netherlands. Perceived innovation constraint due to risk management is lowest in Portugal, at 46 per cent. This raises the question of whether this reflects lower levels of constraint – or lower awareness of what is at stake.

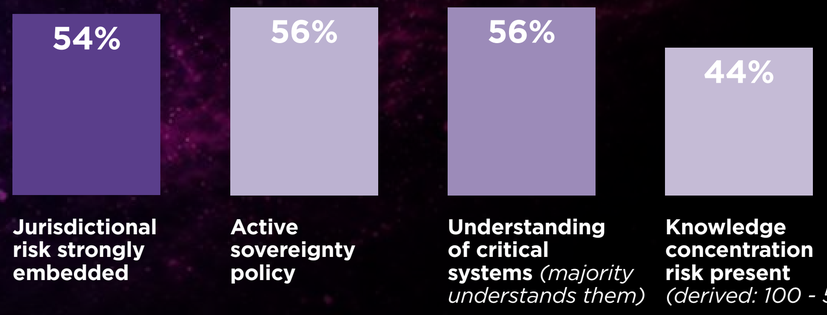


SPAIN

Control as a mindset

Spain shows the strongest awareness of jurisdictional risks: 54 per cent have integrated this to a very large extent, and 56 per cent have active sovereignty policy – the highest levels of all countries.

Also notable is that Spain is the only country where a majority (56 per cent) reject the statement that critical systems run on technology understood by only a few people. In all other countries, the opposite holds: 68 per cent of Dutch respondents, 67 per cent of German respondents, and 60 per cent of Portuguese respondents agree with this statement – pointing to a widespread and structural knowledge concentration risk that sets Spain apart from its European peers.



Chapter in figures

High ambition, limited breakthrough

66% Are working on data ecosystems (to some extent)

85% Have established structural collaboration

55% Are ready for secure data sharing

20% Are limited or not ready for data sharing (16% + 4%)

4

COLLABORATION IN DATA ECOSYSTEMS

ambition versus reality

Organisations are increasingly sharing data with partners, suppliers and other parties across their sector or region, within so-called data ecosystems. Two thirds are already engaged in this to some extent, but truly structural collaboration remains rare. The main barrier is not technical, but one of governance and risk perception: more than half hesitate due to concerns about liability and loss of control.

Collaboration is growing, but remains superficial

Only 14 per cent have realised a fully-fledged, structural collaboration within data ecosystems. Most organisations are still in earlier stages, and almost everyone has at least started: only 3 per cent have not begun at all. The issue, therefore, is not a lack of movement, but a lack of breakthrough. Organisations explore, experiment and participate, but fail to progress towards structural collaboration. The five most significant barriers to collaboration are legal and privacy concerns such as GDPR (51 per cent), insufficient data quality or unclear data ownership (33 per cent), lack of shared standards (32 per cent),

What is a data ecosystem?

A data ecosystem is a collaborative arrangement in which organisations exchange data with one another to jointly create more value than they could on their own. Examples include a hospital sharing patient data with GPs and pharmacists, a retailer connecting inventory data with that of its suppliers, or public authorities linking registries to improve public services.The core is not the technology, but the agreement: who shares what, with whom, under which conditions and for what purpose? It is precisely these agreements – around ownership, liability and standards – that in practice prove to be the greatest barrier.

unclear or conflicting interests (30 per cent), and insufficient technical infrastructure (30 per cent). Notably low on the list are lack of trust in partners (23 per cent) and the absence of a business case (16 per cent). The problem, then, lies less in motivation or trust, and more in legal and technical preconditions that are not yet adequately in place.

Fifty-four per cent agree with the statement that their organisation wants to collaborate in data ecosystems, but does not dare to do so because of risks related to liability and loss of control. This uncertainty around governance and risk is therefore not just a practical obstacle; it also acts as a psychological constraint.

Everyone wants to collaborate in data ecosystems. But daring to do so is another matter.

Data maturity and strategy determine returns

Organisations with a comprehensive data strategy and higher levels of data maturity report measurably greater improvements in costs, efficiency and service delivery. Fifty-nine per cent have a comprehensive strategy for data exchange; 35 per cent have a partial strategy, and 4 per cent have none at all. Technological readiness also varies strongly. Fifty-five per cent state that they are largely or fully ready for secure data sharing.

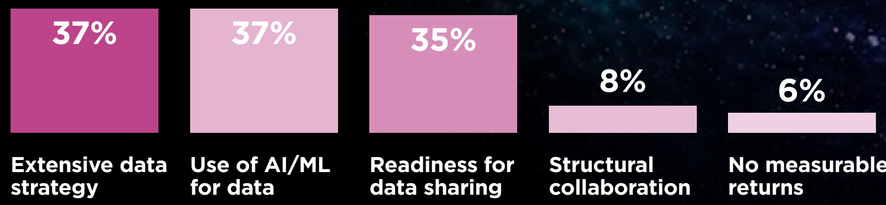
Four per cent indicate that they are not ready at all; for them, data sharing would immediately lead to problems. In addition, 16 per cent say they are only limitedly ready, meaning that one in five organisations still need to take substantial steps.

THE NETHERLANDS

Weakest foundation, yet tangible results

The Netherlands has the weakest starting position on this theme of all countries. Only 37 per cent have a comprehensive data strategy, compared with 67 per cent in Spain and Germany and 53 per cent in Portugal.

Technology adoption is lowest: AI/ML for data processing is used by 37 per cent of Dutch organisations, versus 64 per cent in Germany – a gap that is consistent across multiple indicators in this survey, though it reflects the perceptions of IT decision-makers in this sample rather than a verified country-wide measurement. Readiness for secure data sharing also lags behind. Thirty-five per cent of Dutch respondents say they are largely or fully ready, compared with 65 per cent in Spain. Only 8 per cent have achieved structural collaboration. Yet just 6 per cent report seeing no measurable improvements at all, suggesting that those organisations that are active do in fact achieve results.

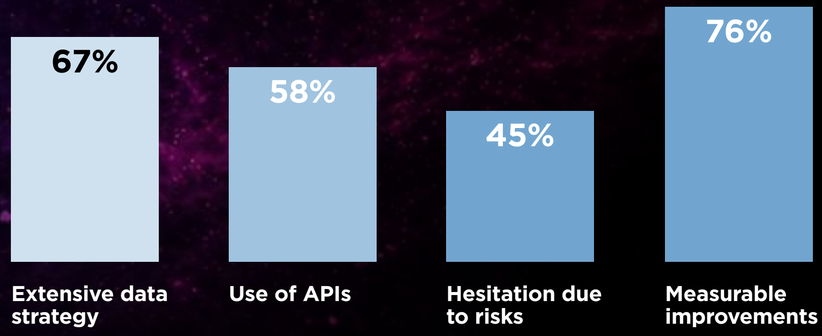


GERMANY

Strategy, execution and governance pay off

Germany combines a strong strategic foundation (67 per cent have a comprehensive data strategy) with the highest use of APIs (58 per cent) and the lowest legal barrier.

Only 45 per cent say they do not dare to collaborate because of liability and loss-of-control concerns, compared with 54–58 per cent in the other countries. The result is clear: 76 per cent report clear or structural improvements – by far the highest proportion among all countries.



PORTUGAL

Willingness combined with uncertainty

Portugal experiences the highest legal barrier of all countries: 62 per cent identify GDPR and privacy concerns as the greatest obstacle to data collaboration.

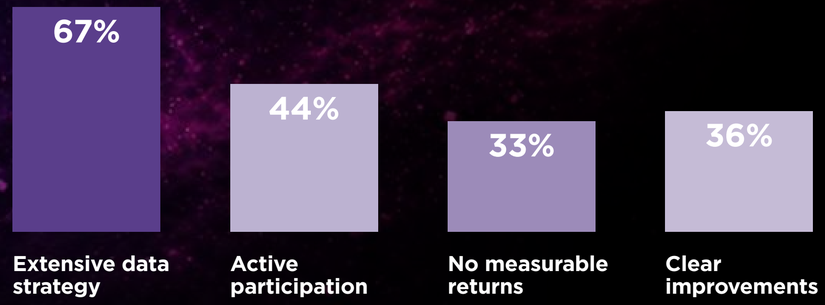
At the same time, Portugal is the only country where a substantial group has not yet started at all (8 per cent). Notably, once organisations do begin, the step towards some form of collaboration is made relatively quickly (37 per cent). The willingness is there, but legal uncertainty most strongly inhibits the first move.

SPAIN

Active, but polarised

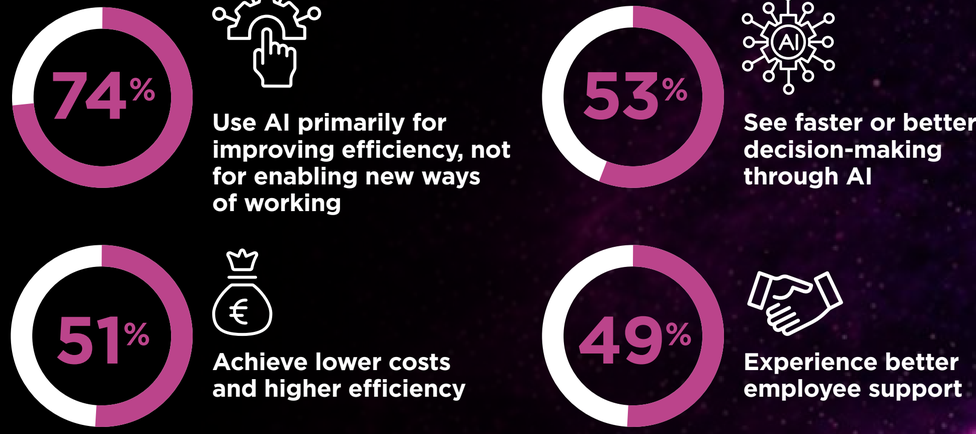
Spain is the most active country in data ecosystems: 44 per cent participate actively, and 67 per cent have a comprehensive data strategy.

However, outcomes are strikingly polarised. One third of Spanish respondents (33 per cent) report no measurable improvements at all – a figure that includes organisations at all stages of maturity, including those still in early exploration – while 36 per cent report clear improvements. This suggests a divide between organisations that are already reaping the benefits of collaboration, and those that, despite active participation, have yet to see tangible results.



Chapter in figures

Working more efficiently, rarely transforming



5

AGILITY IN AN AI-DRIVEN ORGANISATION

people, culture and adoption

AI makes work more efficient, but it does not yet change how work is done. Three quarters of organisations report using AI as a productivity tool. This picture is strikingly consistent across all four countries, regardless of their level of digital maturity.

AI delivers efficiency, but not new ways of working

Seventy-four per cent of respondents indicate that they primarily use AI to work more efficiently, rather than to work differently. This pattern is consistent across countries, with scores ranging from 71 to 79 per cent. For now, AI appears mainly to function as a productivity tool, irrespective of a country's digital maturity. The AI benefits reported by organisations reinforce this picture. Process improvement and efficiency dominate. Lower costs and higher efficiency are cited by 51 per cent, while better support for employees is mentioned by 49 per cent. Faster or better decision-making is reported by 53 per cent. Creating more room for innovation (45 per cent) and improving services for customers or citizens (43 per cent) score slightly lower. Only 6 per cent report seeing no noticeable AI effects at all.

Leadership and learning culture are the decisive factors

Fifty-nine per cent of leaders actively steer technological change: thirty-four per cent actively set direction and stimulate adoption, while a further 25 per cent take explicit ownership and are visibly accountable for technological transformation. On the other end of the spectrum, 19 per cent wait until change becomes unavoidable, and 17 per cent facilitate teams but do not assume a steering role themselves. Thirty-six per cent of organisations have a coherent learning programme: a structural, organisation-wide programme for developing digital skills, as opposed to isolated or ad-hoc training initiatives. When it comes to experimentation, 29 per cent of organisations actively stimulate and facilitate teams to explore new technologies. A majority (64 per cent) occupies a middle ground, where experimentation is allowed but not actively encouraged or facilitated, while 6 per cent actively discourage it. When asked what organisations have actually changed over the past two years as a result of new technology broadly (not AI specifically) incremental adjustments dominate.

The tools are there; what is lacking is the willingness to genuinely adapt processes and roles accordingly.

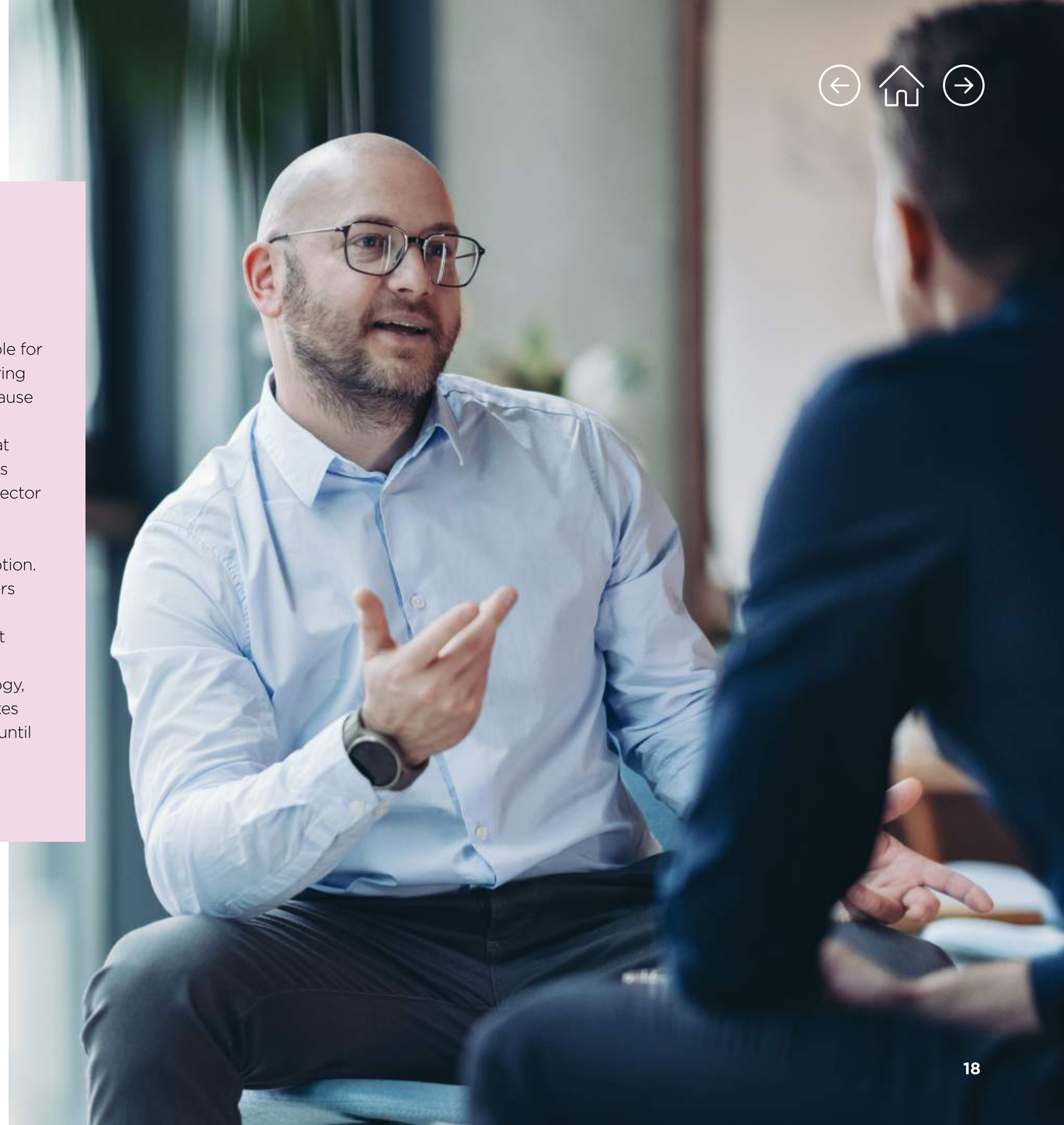
Sixty per cent report adjustments to existing processes, and 47 per cent report changes in role distribution or responsibilities. Fundamentally different ways of working are reported by 52 per cent, while the introduction of new products or services is reported by only 40 per cent. Organisations adapt, but rarely transform.

As a result, much of AI's potential as a driver of organisational renewal remains untapped. This is not a question of technology; the tools are available. It appears primarily to be a matter of leadership and culture: who actively steers change, who creates space for experimentation, and who invests structurally in the skills required for new ways of working?

Ownership as a driver of change

At Conclusion, security is based on a simple principle: whoever is responsible for a process is also responsible for securing it. Not because it is imposed, but because people understand what is at stake. "Employees think for themselves: what could go wrong in my process? That is resilience," says Roel Gloudemans, Director IT Risk & Compliance at Conclusion.

The same principle applies to AI adoption. This research shows that three quarters of organisations use AI to work more efficiently, but fundamentally different ways of working are still rare. The difference does not lie in the technology, but in leadership and culture: who takes ownership of change, and who waits until that change becomes unavoidable?

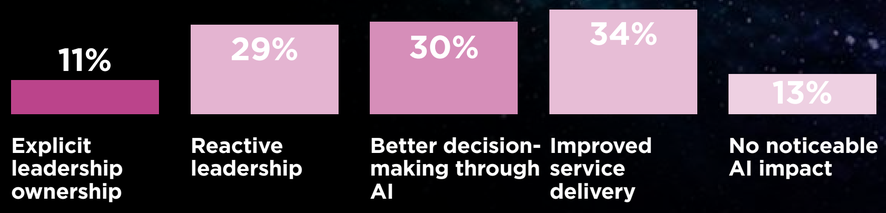


THE NETHERLANDS

Cautious leadership, limited AI impact

The Netherlands scores lowest on almost all dimensions of agility. Only 11 per cent of Dutch leaders take explicit ownership of technological transformation – the lowest proportion of all countries, and nearly three times lower than Germany (31 per cent) and Portugal (30 per cent).

Twenty-nine per cent wait until change becomes unavoidable, also the highest percentage across all countries. On reported AI benefits, Dutch respondents show the lowest or second-lowest scores on every measured metric. This is most striking in decision-making (where only 30 per cent of Dutch respondents report faster or better decision-making as an AI outcome, compared to 64 per cent in Germany) and in service delivery, where 34 per cent report improved services to customers or citizens, compared to 56 per cent in Portugal. Thirteen per cent report seeing no noticeable AI effects at all – the highest share of all countries.

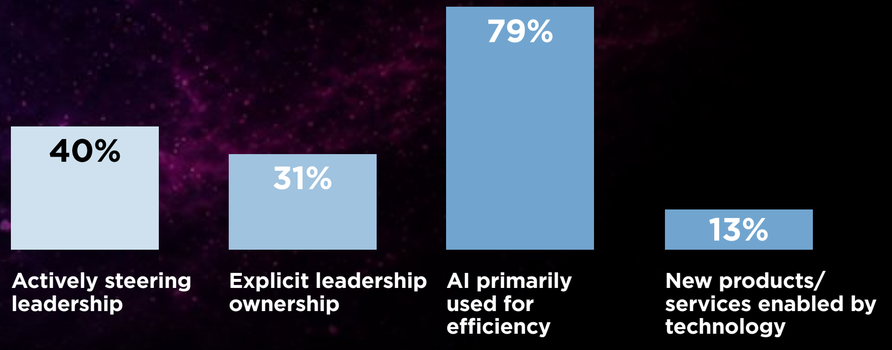


GERMANY

Leading on technology, lagging on renewal

Germany demonstrates the most active leadership. Forty per cent of leaders actively set direction and stimulate adoption, while 31 per cent take explicit ownership and are visibly accountable for technological transformation.

At the same time, German respondents most strongly confirm that AI has not yet changed how work is done: 79 per cent agree that AI is primarily used for efficiency. Strong leadership and efficiency gains are valuable in themselves, but they do not yet appear to be translating into fundamentally different ways of working. Notably, Germany scores lowest on the introduction of new products or services as a result of technology: only 13 per cent, compared with 47–55 per cent in the other countries.



PORTUGAL

AI benefits despite a weak foundation

Portugal stands out positively when it comes to reported AI benefits. Portuguese respondents report the highest scores for lower costs and higher efficiency (59 per cent) and for improved services to customers or citizens (56 per cent) – both the highest among all countries.

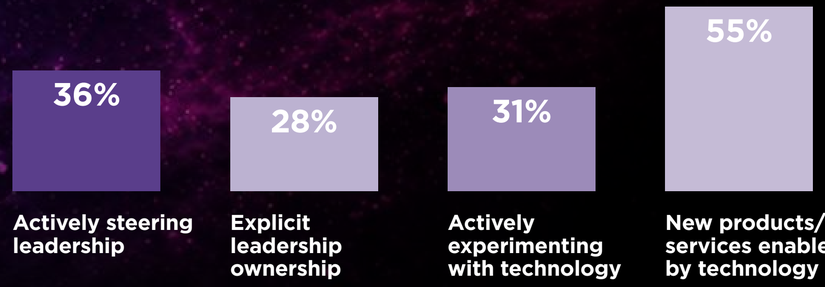
This is remarkable for a country that lags behind on digital maturity, data strategy and dependency management. It suggests that practical AI adoption does not necessarily require a strong digital foundation.

SPAIN

Leadership and renewal

Spain combines active leadership (36 per cent actively set direction, 28 per cent take explicit ownership) with the highest score for the introduction of new products or services as a result of technology (55 per cent).

At the same time, 31 per cent of Spanish organisations actively encourage experimentation – the highest proportion of all countries. Spain is thus the only country where active leadership visibly translates into the introduction of new products and services. Nowhere else are new products or services introduced as frequently as a result of technology.



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CONCLUSIONS AND RECOMMENDATIONS

Technology is widely embedded in European organisations. Systems continue to proliferate, and AI has rapidly secured a permanent place in day-to-day operations. Yet control, direction and the ability to genuinely translate technology into new ways of working continue to lag behind. Germany has the strongest governance, but struggles with innovation constraints. Spain is ambitious, yet polarised in its outcomes. Portugal adopts AI enthusiastically, but lacks a solid strategic foundation. And the Netherlands lags behind on nearly all themes when measured against its own self-image as a digital frontrunner.

The gap between recognition and action

IT decision-makers in the four countries surveyed seem to have a clear understanding of their organisations' digital shortcomings. They know where risks lie, where costs escalate and where systems fall short. But this insight too rarely translates into concrete choices in governance, investment and ways of working. The greatest challenge therefore lies not in awareness, but in decision-making and execution – recognising that even strong governance can be constrained by legacy-heavy environments that limit the pace of transformation.

Organisations know where the pain points are, but too rarely take the step towards action.

The Netherlands is falling behind
Dutch organisations show a less mature picture than their European peers on multiple fronts. The combination of limited insight, cautious leadership and weaker adoption of new ways of working means that the potential of technology is less effectively realised than in the other countries surveyed. For a country that likes to position itself as a digital leader, this represents a fragile starting point.

Germany as a benchmark – with a caveat
Germany demonstrates what strong governance and structure can deliver: visibility, clarity and control. At the same time, this level of control is accompanied by a stronger constraint on innovation and agility. The tension between control and movement is therefore not an exception, but a structural dilemma.

Germany shows that a strong digital foundation is not yet a guarantee for transformation.

Spain: ambition without assurance
Spain combines the most active leadership with the strongest data strategy and the highest score for the introduction of new products and services. Yet outcomes remain strikingly polarised. One third of Spanish respondents see no measurable improvements at all in data ecosystem collaboration, while another third report clear or structural improvements across multiple processes. Ambition and activity alone are therefore no guarantee of success. The organisations that reap the benefits appear to be those where strategy, data maturity and governance were already in place before collaboration began.

Technical debt as a structural constraint
Legacy systems and postponed decisions continue to form a persistent brake on innovation. Although the consequences are widely felt, technical debt often remains implicit in decision-making. As long as it is not explicitly factored into choices, debt continues to accumulate and transformation becomes increasingly difficult.

AI for efficiency, not for transformation
The use of AI clearly leads to more efficient ways of working, but barely translates into fundamentally different ways of operating. Technology is primarily used to accelerate existing processes, rather than to redesign them. As a result, much of AI's transformative value remains untapped. A notable exception in the overall picture is Portugal. Portuguese respondents report the highest scores of all countries on two AI outcomes – lower costs and improved service delivery – despite having a weaker digital foundation on other themes.

Data collaboration: ambition collides with uncertainty
More than half of organisations say they want to collaborate in data ecosystems, yet few succeed in organising this structurally. The main obstacles are not technology or intent, but governance, contractual arrangements and uncertainty around responsibilities. The step from experimentation to structural collaboration proves more difficult than expected.

Recommendations

The greatest challenge for organisations is not implementing new technology, but organising control and direction around it. This requires deliberate choices in governance, leadership and ways of working.

1 MAKE TECHNICAL DEBT EXPLICIT IN DECISION-MAKING

As long as technical debt remains implicit, costs and risks continue to accumulate. Making it an explicit part of investment decisions creates a more realistic view of the impact of choices – both in the short and the long term.

2 TRANSLATE AWARENESS INTO CONCRETE COURSES OF ACTION

Insight into risks is insufficient if it is unclear what should happen before and when those risks materialize – both to reduce the likelihood of disruption and to enable an effective response if it occurs. Organisations must explicitly define how they deal with dependencies, outages and external influences – and act accordingly.

3 POSITION DATA COLLABORATION AS A STRATEGIC CHOICE

Successful collaboration in data ecosystems requires more than technical integration. It calls for clear agreements, shared standards and active control over ownership and accountability. Without this foundation, collaboration remains fragmented.

4 APPROACH AI AS ORGANISATIONAL CHANGE

The impact of AI does not lie in the technology itself, but in how individual professionals and organisations adapt their processes and decision-making. As long as AI is used primarily as an optimisation tool, its transformative potential will remain limited.

5 INVEST IN LEADERSHIP AND CAPABILITIES

Technological change is ultimately shaped by human behaviour. Leadership that provides direction and employees with the right skills and mindset are essential for technology to genuinely lead to new ways of working.

About Conclusion

Conclusion is an ecosystem of more than forty specialised expert companies focused on business transformation and IT services. From strategy and design to implementation, management and continuous development, Conclusion supports organisations at every step of their digital journey. Not with technology as an end in itself, but as a means to make organisations stronger, more agile and future-ready.

Putting the insights from this research into action?

The outcomes of the Tech Reality Check inevitably raise questions – about where your organisation stands, what is missing, and which step should be taken first. The specialists at Conclusion are happy to think along with you, whether it concerns controlling costs and technical debt, digital autonomy, data collaboration or AI adoption.

More information: **conclusion.com**

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