

From paper to pixels:

Information Management In Europe:
2025-2032. A Market Perspective



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Introduction

Europe's Information Management market is changing. Strict data protection laws, the shift to remote work, and the rise of cloud-based solutions are reshaping how businesses manage documents, records, and data.

Based on research from Fortune Business Insights and other sources, this report explores the growth of digital information management in Europe. It covers the adoption of Enterprise Content Management (ECM) and Document Management Systems (DMS), the shift from physical to digital records, and the compliance challenges European businesses face.

We hope this white paper gives you some insight into why these changes are occurring, and serves as a primer for helping you embark on your digital journey.

Our expert contributors



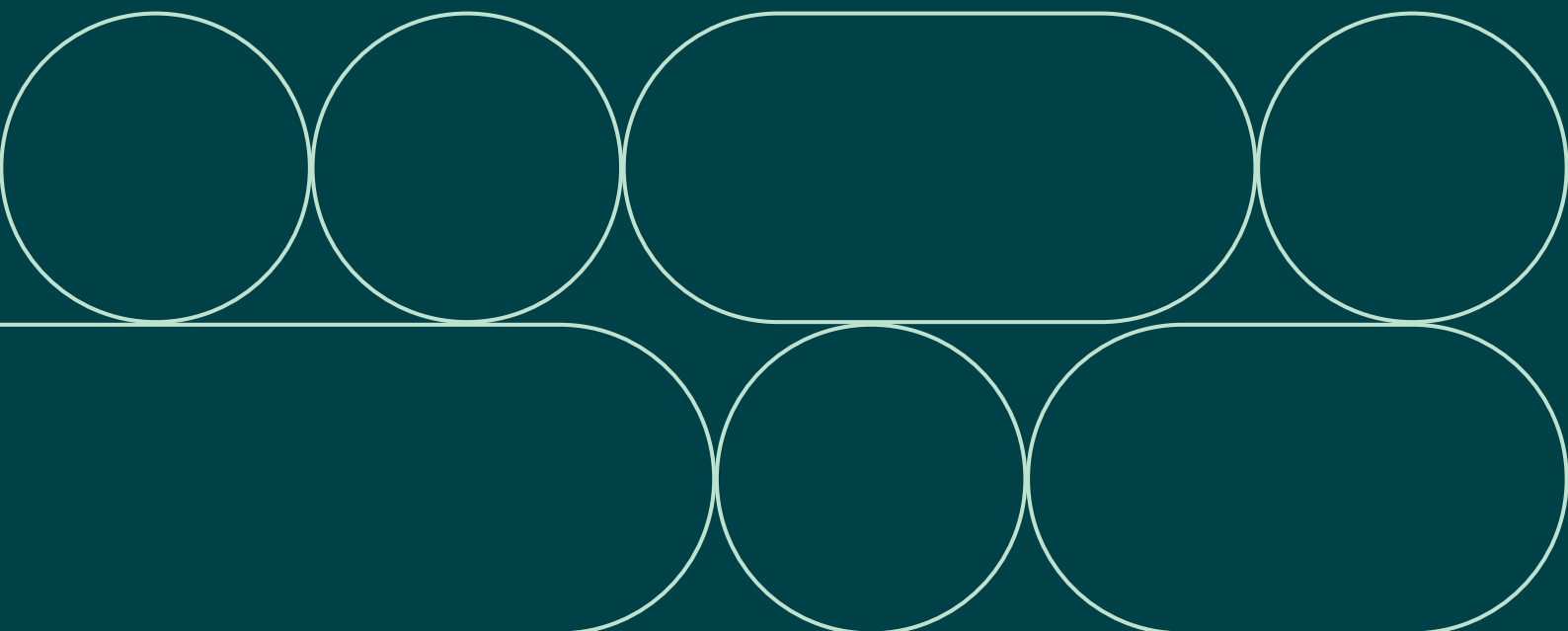
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Why is information management so important?

Information Management refers to everything from boxes of physical documents in a warehouse (think healthcare records), to how an organization stores and analyses its data (think a legal firm receiving a large batch of digital documents for a case). When we talk about “digitization”, we’re referring to taking all those records and making them digitally manageable. The global Information Management marketplace, as of 2024, is worth around US \$43bn.

“Organizations should carefully consider interoperability when adding new systems.”

David Jones
AIIIM Survey author

“Employees spend nearly half their time creating and organizing documents – yet 47% still struggle to find what they need”

Digital Worker Experience Survey
Gartner, 2023

The Association for Intelligent Information Management (AIIIM), a nonprofit published their a survey in 2023, asking firms how they were managing information. This found an increase in both sophistication and complexity. 80% of organizations surveyed were using ECM and DM systems, which isn’t surprising. Interestingly, the number of organizations using between 7-10 Information Management systems rose from 3% in 2013 to 14.4% in 2023. This pattern reflects that increase in complexity, in some cases driven by regulatory requirements.

Enterprise Content Management (ECM) systems drive what we call “digital transformation”. ECMs can include various services under their umbrella: Document Management (DM) systems. Document analysis tools (something AI is increasingly playing a role in), e-Discovery for law firms, Digital Asset Management and much more. These services are designed to simplify how information is managed.

¹ The State of the Information Management Industry, AIIIM, 2023.

What is included within this “Digital Transformation”?



Document Management

DM systems help organizations manage documents electronically, reducing dependency on a purely physical system. This is one of the highest-growth solutions, driven by the need for improved compliance with data-protection laws. Newer Document Management systems feature AI for enhanced document analysis.

Total value in Europe (2024):
US \$2bn / -> 2032 CAGR 16.9%



Digital Asset Management

Systems used specifically for rich-media and digital assets (videos, images and so on), the need for robust digital asset management solutions is rising. This sector is growing, especially in industries like media, advertising, and e-commerce. In some cases, this growth is driven by the need to convert physical assets (e.g. photographic plates) into digital formats.

Total value in Europe (2024):
US \$1.6bn / -> 2032 CAGR 19.1%



Web Content Management

This refers to systems like CMS (Content Management Systems) used to publish to websites. These are critical for effective management of digital presence. The demand for web content management systems is increasing, particularly in the retail, media, and telecom sectors.

Total value in Europe (2024):
US \$2.4bn / -> 2032 CAGR 15.9%



E-Discovery

This is a solution tailored for the needs of the legal industry. It refers to electronically identifying and collating all relevant information in response to lawsuits. This is the most valuable sector as of 2024, although it is not the fastest growing.

Total value in Europe (2024):
US \$4bn / -> 2032 CAGR 11.9%

Growth in Europe

In this section we will examine the rates of growth of the Information Management systems across Europe. Europe is particularly important in this regard because the General Data Protection Regulation (GDPR) set one of the key global drivers for adoption of ECM systems globally.

Growth Overview

Europe's Information Management economy has a compound annual growth rate (CAGR) that will remain in the double digits until the early 2030s, despite its already mature status.

The adoption of ECM solutions is a significant component of this growth, helping organizations streamline operations, reduce reliance on physical documents, and enhance data security.

According to recent data from Fortune Business Insights², the overall rate of compound annual growth throughout Europe is forecast at 15.3%. By 2032 it is expected that the total value of the ECM industry across Europe will be nearly US \$33bn.

Global Market Share and Growth Rates

	Forecast Market 2024	CAGR growth forecast (2032)
North America	35%	11.1%
Europe	26%	15.3%
Asia Pacific	26%	22.8%
Middle East and Africa	7%	21%
South America	6%	17%

² Enterprise Content Management: Global Market Analysis, Insights and Forecast 2024 – 2032, Fortune Business Insights, 2024.

This growth in ECM and other Information Management software will be largely cloud based. However, it’s interesting to note that in spite of this, forecasts still put nearly a quarter of all ECM solutions as being “on-premise” based in 2032.

Why? largely due to security concerns. On-premise solutions can provide peace of mind for clients and customers, and Europe’s rigorous data-protection laws are unforgiving when it comes to data breaches.

ECM systems: Cloud vs. on-premise solutions

Cloud	on-Premise
2023	2023
67.8%	32.2%
2032 (forecast)	2032 (forecast)
76.4%	23.6%

Industry-specific growth

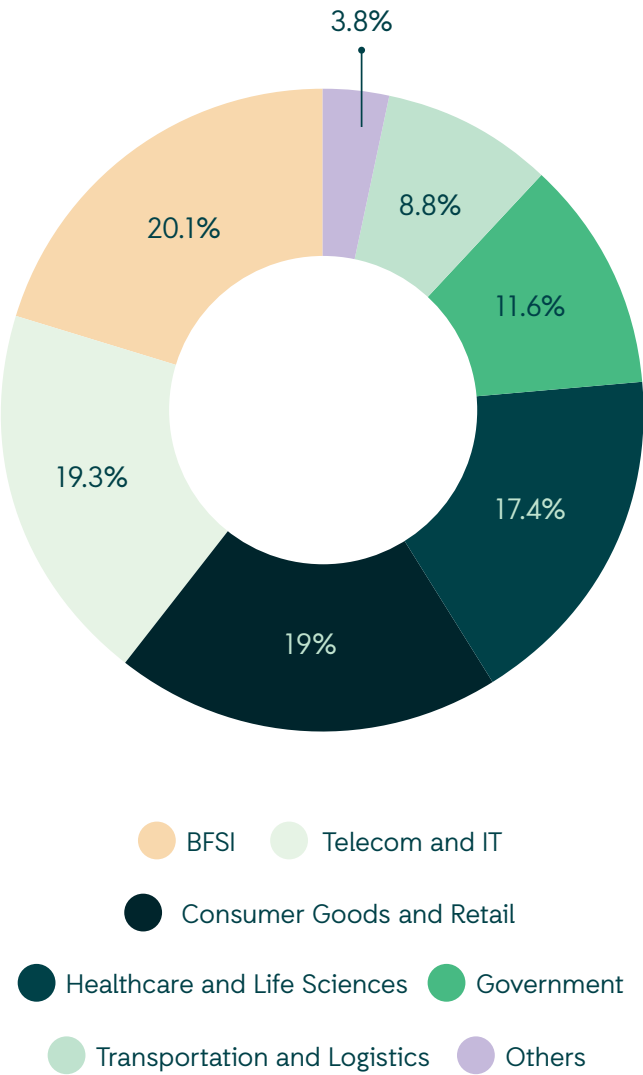
Banking and Financial Services (BFSI) is the largest single market for ECM systems. It accounts for 20.1% of total spend or US \$2.1bn. The second largest industry by spend was Telecoms and IT. Generally IT, Telecoms and BFSI are the largest markets for ECM providers, in Europe and globally.

BFSI, IT and Telecoms represent a large part of Europe’s substantial service-based economy. More practically speaking, the high-rate of ECM and digital solution adoption among this sector is down to a desire to reduce.

back office expenses and ensure the huge volumes of data that they’re dealing with are compliant with the evolving GDPR regulations.

Consumer goods and retail represent the second largest industry segment. This is because Europe’s economy is also driven by domestic consumption. Large online retailers in particular are grappling large amounts of customer data (sometimes leading to leaks and reputational damage).

Total value of ECM market in billions of USD in Europe (2024)



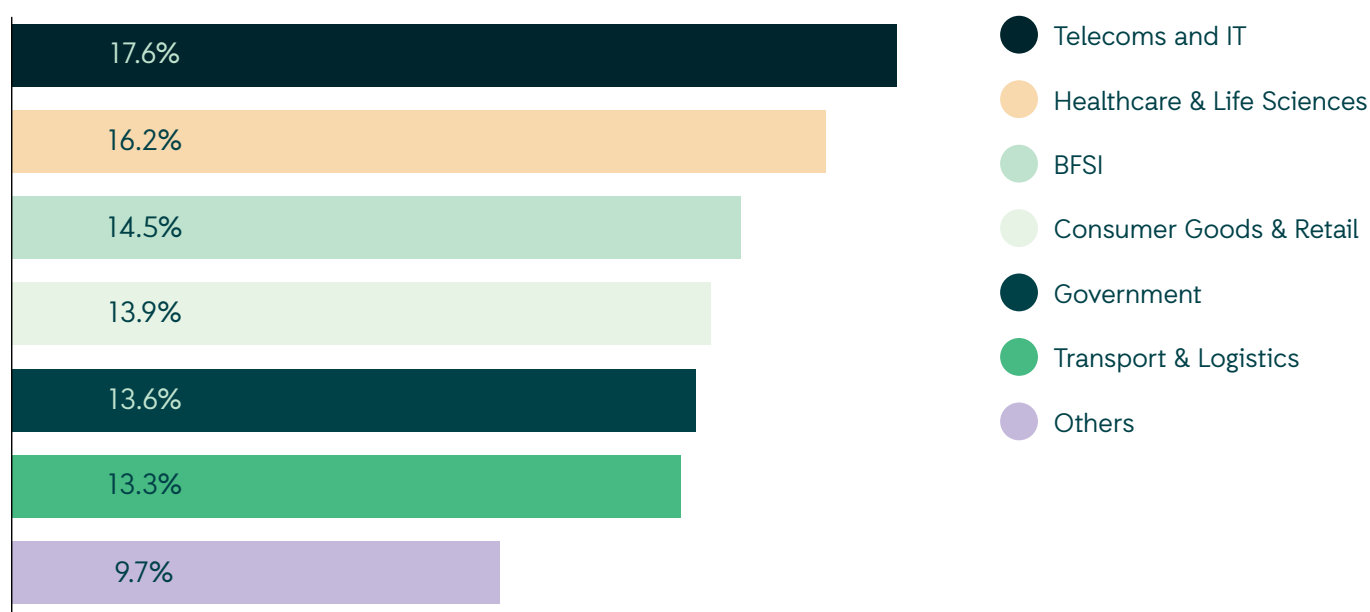


When we look at the forecast growth over the next seven years, Telecoms and IT firms show the highest rates of forecast spend. The sheer quantity of the data that needs to be processed by Telecoms and IT firms that needs to be processed is enormous.

The second highest rate of growth is among healthcare organizations. Healthcare data is the single most sensitive type of information to manage. ECM uptake here is often driven more by security concerns, again, especially

in Europe given the concerns around GDPR compliance, as well as fears around war and cyber attacks. For example, according to a PwC survey, data breaches in the healthcare sector have the highest loss value at 47.3%. The November 2024 example of a French hospital's data breach resulting in the leaking of 750,000 patient records is example of how much reputational damage an organization can suffer from a data breach.⁴

Forecast CAGR in Europe (2024-2032)



³ Global Digital Trust Insights, PwC, 2024.

⁴ French hospital hit by massive data breach, Tech Monitor, 2024.

What is driving Europe's growth

Driver 1: Data-Protection laws

The biggest driver of Information Management software is the growth of data-protection law. Europe is the global leader in this segment. A report by PwC suggests that 44% of consumers are willing to pay more for a service if they know their data is adequately protected.⁵ This rigor around personal data has driven more urgent adoption of ECMs and other systems.

Data literacy remains a key issue in Europe and throughout the world. The average data breach in Europe cost US \$4m in 2024, and this number has been rising for several years now, reflecting increased risk of both fines and reputational damage.⁶

Data literacy gaps among organizations and individuals is a key risk factor moving forward that software will, at least theoretically, help to ameliorate. Much as accounting software provides updates on tax legislation, ECMs increasingly reflect local regulation around data-retention rules and more. Again, in Europe's strict data-protected environment.

⁵ Global Digital Trust Insights, PwC, 2024.

⁶ Cost of a Data Breach, IBM, 2024.





What are the key features of Europe's General Data Protection Regulation (GDPR)?



Scope

Any organization that processes the personal data of EU residents must comply with the GDPR, regardless of where the organization is based. This extraterritorial scope ensures that global businesses handling EU data are held to the same standards



Penalties

Non-compliance with GDPR can result in severe penalties, including fines of up to 20m Euros, or 4% of annual global turnover (whichever is higher). These fines are among the most stringent worldwide.



Governing Authority

The GDPR is enforced by the DPAs (Data Protection Authorities) of each EU member state. These DPAs collaborate under the umbrella of the European Data Protection Board (EDPB) to ensure consistent application of GDPR across the EU. Notable DPAs include CNIL in France and the ICO in the U.K. (pre-Brexit).



Future?

As GDPR enforcement continues to mature, legal precedents are now firmly established (and continue to be established). Schrems II, invalidating the EU-U.S. privacy shield is an excellent example of why it is absolutely critical for organizations to understand emerging regulatory requirements, and use solutions that can help them achieve this.



Information Management

GDPR mandates the implementation of appropriate security and maintenance measures, including the appointment of a DPO (Data Protection Officer) for organizations protecting sensitive data at scale. Additionally it requires clear data retention schedules and documentation of how this data is processed. This, combined with the fear of financial penalties, is what drives adoption of Information Management solutions across Europe within the context of data-protection law.

“Protecting employee data is an enormous part of what modern Information Management services can provide!”

Tim Rushent,
Director of Digital, EMEA



Driver 2: Remote work

Remote work has been a key theme in terms of workplace trends since the COVID-19 pandemic. Approximately 10% of all workers in Europe are “usually working from home” as of 2023. This ranges from 21% in Finland to 1% in Romania, with a general correlation between economic maturity and higher rates of hybrid working patterns.⁷

This trend is expected to continue, although fully “work from home” remote working models are becoming less popular among large multinationals over the past year. Fully remote SMEs are expected to be some of

the most prominent drivers of things like ECM adoption because of a need for informational rigor coupled with a lack of physical presence.⁸

Organizations in Europe therefore have to account for an IT environment where many people are not working from an on-premise workstation. This drives investment in ECMs and digitalization because it allows for more effective management and delivery of the information that they need when not in the office.

Driver 3: Paperless Offices

BusinessWeek famously claimed in 1975 that paper would be all but obsolete by 1985 for example. Paper clearly has more staying power than that. However, it’s true we’re using less paper in offices than ever before.

The cost of paper filing and management is contributing factor towards “going paperless”, with ECMs and other systems. According to an M-Files report, the average cost to file a document is between US \$20 and \$125 per misfiled file and \$350 per lost document.⁹

In terms of market indicators, key players such as Box Inc. seem to be positioning their products for a more paperless future. Box Inc’s 2022 product, Box Canvas, looks to leverage collaboration at an enterprise level by providing a virtual whiteboarding tool for example.

Governments departments, often the most traditional institutions are also going paperless. The Internal Revenue Service (IRS) in the U.S. launched a paperless processing initiative in 2023, designed to cut down on the amount of paper that is processed during tax season. When talking about Europe specifically, there are elements of tax and payment systems that are far ahead of the curve of most other countries. For example, the U.K.’s 2026 “MTD” (Making Tax Digital) initiative, which aims to fully digitize tax receipts regardless of business type.

More generally, the productivity gains of digitalizing physical records is becoming increasingly obvious, driving an uptick in their adoption. According to global management consulting firm McKinsey, employees spend 9.3 hours every week searching for relevant information to do their jobs.

⁷ Statista, 2023

⁸ Statistics on Remote Workers, Apollo Technical, 2024.

⁹ The Total Economic Impact of M-Files, 2023.

How can you get started?

Whatever industry you're in, getting started with digitally transforming your documents is similar. If you're not familiar with how your organization is generating, using, and retaining data, then it needs to begin with a conversation.

Set clear priorities and responsibilities. What do you want to achieve, and when do you want it by?

“Remember that digital is not just about tech. It also includes people, processes and systems. These need to be mapped out too!”





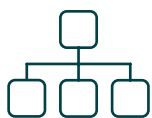
Where will I start from?

What does your current position look like? Do you have all the information on how your business works right now in terms of how it is gathering and storing records? Take time to map that down. Use this as your benchmark to measure changes and success against. Ideally start small with something that will deliver quick wins and build confidence. (Every project must solve a shared business problem)



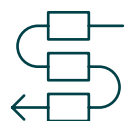
Where am I going?

What does the end of the journey look like? Do you know what you want to achieve? How that will benefit your customers, employees, and organization as a whole. Make sure everyone knows and is included in the objectives. This could include creating or updating your Information Governance Policy to make sure all data you create on your CIM has a date by which it is deleted.



Who is going with you?

Are the leaders involved? Have you fully understood who this will affect and how much – both internally and externally? Create a Stakeholder Engagement Matrix that includes all teams that create data that could potentially be labelled as “sensitive” for example.



Plan your route

Does everyone know where they need to be and by when? Does the plan have milestones to stop and re-evaluate? Creating a programme of tasks and activities will deliver quick wins whilst still allow for the bigger picture achievements.



Execute and improve

Bring your plan to fruition. Learn and use this experience to support the next project. What benefits did it deliver? If you start with something very basic like ensuring a certain proportion of all your records are scanned and digitized, then maybe the next project could be something more ambitious, like a Document Management Solution.

Crown Information Management help clients to maximize the value of their “corporate memory” through the storage, active management and timely distribution of information assets.

In 40 countries, Crown provides secure archiving and retrieval of information in physical and electronic format, as well as digital imaging, media management and data destruction.

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