



Accelerating digital transformation with AI and Low-Code

A market overview of EMA, the United States of America and Asia Pacific regions from a large-scale survey

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Introduction

Digital transformation and rapid technological progress have fundamentally changed the demands and expectations placed on businesses. In today's fast evolving business environment, it's essential for companies to innovate across their operations, which not only enables them to respond to shifting demands, but also empowers them to implement necessary software solutions that help maintain their competitiveness. Therefore, efficiency, and the ability to swiftly adapt to changing market conditions, have become significant competitive advantages for businesses.

The growing importance of customized software solutions is a derivative of the growing use of digital technologies that increasingly shape all of what we do. Having the right software shapes the critical path of operational execution and competitive advantages. Traditionally, developing software was a time-consuming and expensive process, requiring extensive programming knowledge and development resources. However, Low-Code platforms have revolutionized this approach, by enabling faster and more simplified software development.

These platforms offer visual drag-and-drop development environments that empower even non-developers (so called "Citizen Developers") to create complex applications, thereby reducing dependency on specialized developers and accelerating the development process.

While Low-Code platforms offer substantial advantages, they also face challenges - such as integration complexities and varying regional priorities, that could impact their global adoption. Understanding these differences is essential, as they highlight why Low-Code is not just relevant, but critical for business success. The strategic insights gathered in this study underscore the growing importance of Low-Code platforms in maintaining competitiveness, urging companies to actively integrate these technologies for them to thrive in today's rapidly evolving digital landscape. The findings highlight the opportunity companies are reaping from Low-Code, enhancing their ability and efficiency when integrating these capabilities into their operations. Conclusively, the findings indicate those firms that does not use Low-Code are potentially missing out on these benefits.

Additionally, the findings not only emphasize the transformative potential of Low-Code, but also illuminate the necessity for companies to strategically align their technology investments with the trends and growth patterns specific to their regions, as well as with emerging innovations such as Artificial Intelligence (AI), to secure long-term success in a competitive market.

These and other areas are examined in detail in this follow-up study. The insights are drawn from a KPMG survey of 2,170 IT and business executives across diverse industries, providing a robust foundation for the analysis. The survey respondents are employees from companies across Europe, the Middle East, Africa, the USA, and ASPAC, with company sizes ranging from 50 to over 5,000 employees.

The rise of Low-Code: Accelerating digital transformation in modern enterprises

Low-Code as a strategic priority

Low-Code is becoming a key part

of corporate software strategies, with 37% of companies surveyed, including 64% of „Digital Leaders,“ integrating it into their development approach.

Adoption

is highest in the USA (41%) and ASPAC (43%), indicating its strong global momentum.



Efficiency and business impact

As a **primary benefit** of Low-Code companies highlight process efficiency improvement (52%, particularly in Africa (58%) and USA/ASPAC (55%).



64% of respondents cite efficiency improvement, while 62% highlight productivity enhancement as key drivers for adopting intelligent automation.

AI, automation, and process optimization



AI-powered Low-Code solutions

are valued for speed and agility (59%), with the strongest conviction in ASPAC (68%), USA (61%), and Europe (47%).

38% of respondents are already using or planning AI with Low-Code

and another 40% plan to start within the next 12 months.

Adoption trends and market development

While some of the companies surveyed have fully embraced Low-Code, **18 % are still in the early adoption phase** and 17% remain in the evaluation stage.

28% of companies use Low-Code for complex enterprise applications, up from 26 % in 2023 and 18 % in 2022.



Security, governance, and best practices

Security is the top priority for 85%

of respondents when choosing a Low-Code platform, followed closely by ease of integration (84%) and backend integration & API management (83%).

39% of companies have already implemented or are planning Low-Code

governance guidelines,

with the highest adoption in ASPAC (44%) and Europe (31%).



Measuring success and future outlook

47% of companies assess Low-Code success

using KPIs

such as user satisfaction, budget adherence, and development timelines.



AI's rising importance in Low-Code:

33% of respondents view AI as critically important for Low-Code platforms, with this figure projected to rise to 38%.

01

Digitalization as a driver of Low-Code adoption

For several years, digital transformation, encompassing the digitalization of business processes and technological innovations such as process automation, has remained a prominent and highly relevant topic for businesses and organizations in different market sectors. However, the implementation of digitalization projects shows a more diverse picture. 45 percent of the surveyed companies, categorized as „Digital Advanced,‘ have formulated robust digital strategies, leading to harboring larger projects and significant investments. They acknowledge that digitalization must be a central part of their business strategy to remain competitive and ensure future growth. More than one in four companies (27 percent) have taken it a step further when setting their classification. As „Digital Leaders,“ these companies invest a significant amount of money and resources into their digital transformation and corresponding business models.

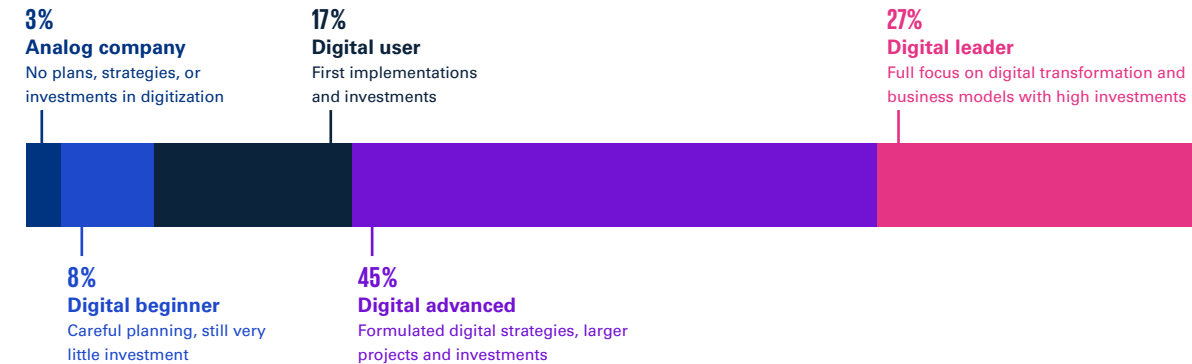
Differences in the adoption of digital technologies can be influenced by various factors, including strategic priorities, technological preferences, and infrastructure challenges. The use of Low-Code platforms, for example, allows companies to rapidly develop and deploy digital solutions, addressing technological and resource-related constraints while fostering innovation. Additionally, support for mobile and cloud-based technologies through international digitalization initiatives can accelerate the adoption of such solutions.

In contrast, a continued focus on traditional IT investments may lead to a more gradual integration of newer digital approaches. These varying conditions contribute to differing adoption rates of digital transformation strategies across companies and industries.

A total of 17 percent of companies identify themselves as „Digital Users“. These companies have started implementing and investing in digital technologies, recognizing the benefits and beginning to integrate them into their processes.

This indicates active initial digital measures and a commitment to further transformation. Additionally, 8 percent of companies classify themselves as „Digital Beginners.“ These organizations engage in careful planning and exploration of digital solutions but have made very little investment in technologies such as Low-Code platforms. The varying levels of adoption reflect different strategic approaches and readiness for digital transformation across businesses.

Figure 1:
Which stage best represents your company’s progress on the path to digitization?



Base: 2,170 IT and Business Executives
Source: Accelerating digital transformation with Low-Code platforms, KPMG International, 2025

Low-Code adoption advances

As companies progress in their digital transformation journeys, the integration of Low-Code as a central component of their software development strategies is becoming increasingly prevalent worldwide. Its adoption varies based on digitalization levels and regional conditions, reflecting diverse dynamics. Currently, 37 percent of companies have made Low-Code central to their software development strategy. This adoption is notably high in the ASPAC (43 percent) and US (41 percent) regions, showcasing these regions as leaders in modern software development. Meanwhile, the Middle East and Europe report lower adoption rates of 30 percent and 29 percent, respectively, indicating significant potential for growth.

The more digitally mature companies are, the more likely they are to integrate Low-Code technologies as a central part of their development strategies.

The integration of Low-Code technologies is closely tied to the level of digitalization. Among highly digitalized companies, 64 percent have incorporated Low-Code into their development strategy. This is significantly higher compared to advanced digitalized (32 percent) and normally digitalized (14 percent) companies.

The trend highlights not only the proactive digitalization efforts of these leaders, but also their inclination towards using Low-Code platforms.

The correlation between digitalization and Low-Code adoption underscores the strategic importance of these platforms in fostering agile and efficient development.

Currently, 18 percent of companies are in an initial phase of their Low-Code adoption journey, with Europe and the Middle East both slightly higher at 21 percent each. This indicates active exploration and introduction of Low-Code solutions in these regions, though full adoption remains limited.

Additionally, 16 percent of companies plan to start Low-Code projects within the next 12 months, and 7 percent aim to begin within the next two to five years. These plans indicate a growing willingness to invest in new technologies, with the phased implementation reflecting a deliberate weighing of risks and benefits. This enables companies to respond to dynamic market changes while advancing their technological maturity.

Figure 2:
Low-Code/No-Code in software development: Status Quo

	Total	Europe	Middle East	Africa	USA	ASPAC
We can basically imagine the use in our company in the future	4%	5%	5%	3%	4%	3%
We plan first projects within the next 2 – 5 years	7%	8%	9%	5%	5%	8%
We are planning the first concrete projects within the next 12 months	16%	19%	20%	12%	15%	16%
We are currently still in the evaluation phase	17%	17%	15%	20%	15%	19%
First projects have already been implemented	18%	21%	21%	19%	18%	14%
Is already a central component of our software development strategy	37%	29%	30%	41%	43%	40%
Base	2,170	641	214	230	638	447

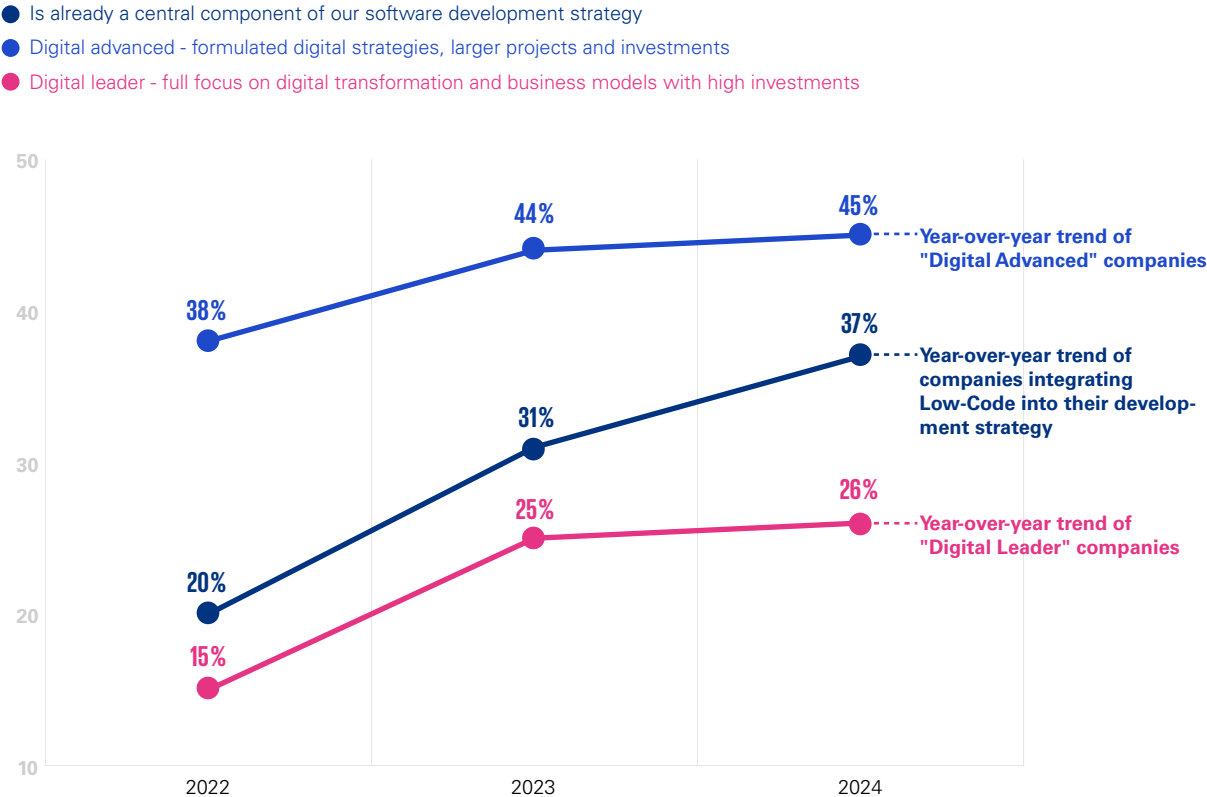
Base: 2,170 IT and Business Executives (ASPAC 447, USA 638, Africa 230, Middle East 214, EU 641)
Percentages may not sum to 100% due to rounding
Source: Accelerating digital transformation with Low-Code platforms, KPMG International, 2025

Steady increase in digitalization and Low-Code usage

The results show that the increasing adoption of Low-Code technologies is closely linked to the advancing digital transformation of companies. In the previous study from 2022, 39 percent of companies were highly digitalized with formulated digital strategies. By 2024, this has risen to 45 percent. Similarly, the proportion of advanced digitalized companies, fully focused on digital transformation, has increased from 15 percent to 27 percent over the same period.

Simultaneously, there is an increasing rate of integration of Low-Code platforms into the development strategies of companies. No-Code, a subset of Low-Code, enables users without programming expertise to create applications using visual development interfaces and pre-built components. Results of the study of 2022 show that 20 percent of companies used Low-Code as a central component, while this proportion has risen to 37 percent by 2024. This increase highlights the growing recognition of Low-Code’s advantages in accelerating development processes and enhancing agility. The rapid adoption indicates that Low-Code platforms are becoming essential tools for companies to quickly respond to market changes and drive digital transformation. As digital needs evolve, the role of Low-Code in shaping future business strategies will only grow more prominent.

Figure 3:
Do you already use Low-Code or No-Code development platforms in your company or are you planning to use Low-Code/No-Code development in the future as part of your software development?



Base: 2,170 IT and Business Executives in 2024, 2000 in 2023 and 715 in 2022
The percentages represent the share of companies within each specific category using or planning to use Low-Code/No-Code platforms. As these categories are not mutually exclusive and reflect different aspects of adoption, they do not sum to 100%.
Source: Accelerating digital transformation with Low-Code platforms, KPMG International, 2025

02

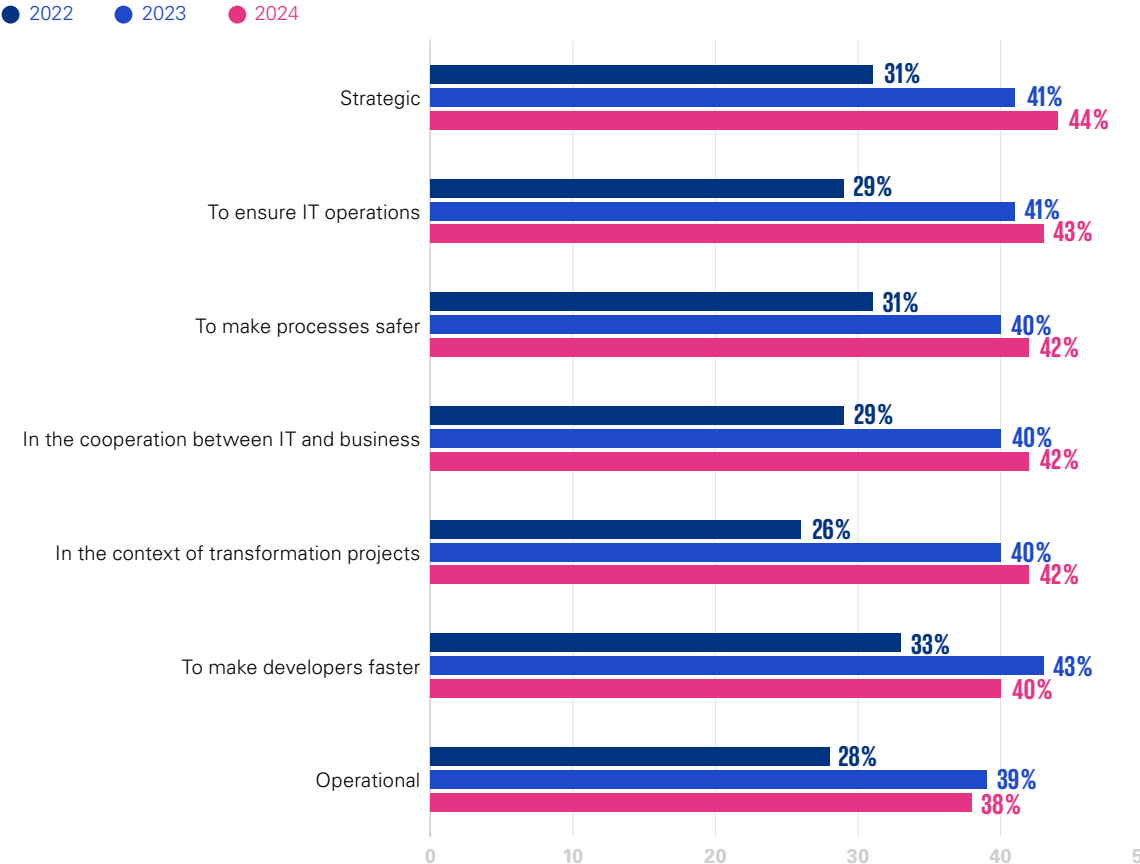
Low-Code: Gaining strategic traction in the enterprise

The rising adoption rate of Low-Code platforms is directly tied to their growing strategic importance, as companies increasingly rely on these technologies to drive innovation, agility, and maintain competitiveness in the fast-paced digital landscape. Companies are increasingly recognizing the benefits of Low-Code technologies in software development and their alignment with business strategies. For instance, 44 percent of surveyed companies now rate Low-Code as very critical to business success, a significant increase from 31 percent in 2022 and 39 percent in 2023. This upward trend underscores the expanding recognition of Low-Code platforms as key drivers for efficiency gains.

In Europe, 32 percent of companies rate Low-Code as very critical to strategic planning and initiatives, while this figure stands at 46 percent in the USA.

Regionally, the strategic relevance of Low-Code varies significantly across markets, reflecting differences in innovation cultures, regulatory environments, and digital maturity. In Europe, 32 percent of companies consider Low-Code to be very important for their strategy, compared to 46 percent in the USA and 70 percent in Africa. In the USA, the higher appreciation of Low-Code technologies may be explained by the intensive innovation-culture and high competitive pressure companies face, forcing them to respond quickly and with flexibility to market changes. In Africa, the opportunities for rapid digitalization and the need to catch up on development backlogs likely play a significant role here.

Figure 4:
How important is the topic Low-Code development in your company?



Base: 2,170 IT and Business Executives in 2024, 2,000 in 2023 and 715 in 2022 | Multiple answers possible | Filter: Presentation of the response option "Very critical to success"
Source: Accelerating digital transformation with Low-Code platforms, KPMG International, 2025; Low-Code Adoption as a driver of digital transformation, KPMG International, 2023; Shaping Digital Transformation with Low-Code platforms, KPMG International, 2022

European companies may prioritize proven methods over Low-Code, due to stricter regulations and an already high level of digitalization, leading to more cautious adoption.

While regional differences underscore varying strategic priorities, it is also crucial to understand how Low-Code's growing importance is creating substantial operational and transformational impacts within companies. This is especially evident in the steady increase of its use in operational processes.

The percentage of companies rating Low-Code as very critical for operational workflows rose from 28 percent in 2022 to 37 percent in 2023, and further to 38 percent in the current study. This trend underscores the essential role of Low-Code in enhancing the efficiency of daily operations. Additionally, Low-Code's significance in transformation projects, especially digital transformation, has grown markedly. The percentage of companies viewing Low-Code as critical for transformation projects increased from 26 percent in 2022 to 34 percent in 2023, and to 42 percent in 2024. This indicates the growing relevance of Low-Code for successfully executing and accelerating transformation initiatives.

Additionally, 42 percent of companies view Low-Code as crucial for fostering cooperation between IT and other business units. This collaboration is increasingly seen as vital for maximizing the benefits of Low-Code, with its importance rising from 29% in 2022 to 40% in 2023.



03

Process efficiency and service quality through Low-Code

03 Process efficiency and service quality through Low-Code

Low-Code technology offers companies numerous advantages that can vary depending on priorities, business models, and regional factors. Implementing Low-Code development projects allows different strategic goals to be achieved and specific challenges to be efficiently addressed. One of the leading advantages of introducing Low-Code is the improvement in process efficiency, highlighted by more than half of the surveyed companies (52 percent). This benefit is particularly pronounced in regions like Africa, where 58 percent of companies leverage Low-Code to address the pressing need for rapid digitalization and to overcome infrastructure challenges, such as the shortage of skilled developers and the high cost of legacy IT systems. Similarly, in the US and ASPAC regions, where 55 percent of companies report using Low-Code for process optimization, the competitive market landscape and strong focus on innovation drive the adoption of this technology. In contrast, Europe reports lower use with 44 percent, possibly indicating that European companies already possess more established processes or prioritize different aspects of Low-Code implementation, such as regulatory compliance, data security, and custom software development. Additionally, the presence of established legacy systems and overall market stability in Europe could contribute to the lower emphasis on process efficiency through Low-Code, as companies may be more cautious in adopting new technologies or may not feel the same urgency to optimize processes as the other regions do.

These regional differences highlight how strategic priorities and digital maturity shape Low-Code adoption. Larger enterprises and digitally advanced industries leverage the technology to address complex operational challenges often in line with their long-term innovation strategies.

US companies (55 percent) are more likely to focus on process efficiency through Low-Code than companies in Europe (44 percent).

A significant advantage of Low-Code technology is its ability to enhance service and product quality, as noted by 48 percent of companies. This improvement is crucial for maintaining competitive advantages and ensuring customer satisfaction in increasingly demanding markets. However, only one-third (33 percent) of companies in Europe recognize this benefit, suggesting that European companies might already have established high-quality standards or prioritize different aspects of their Low-Code initiatives. Additionally, Low-Code contributes to an increase in employee productivity, with 46 percent of companies reporting this benefit.

The high flexibility and scalability of applications are advantages cited by 43 percent of the respondents. In Europe, this value rests below average with 35 percent, possibly due to a more cautious adoption rate and varying market conditions. European companies might prioritize stability and risk management over rapid technological shifts, leading to a slower integration of scalable and flexible Low-Code solutions.



In contrast, 49 percent of companies in the ASPAC region value this advantage, indicating a higher acceptance rate and willingness to implement Low-Code technologies. Moreover, the introduction of Low-Code technology within companies significantly enhances workforce digital skills, with 40 percent of respondents noting that these platforms make training and reskilling employees much easier compared to traditional development methods. Other advantages mentioned by the surveyed companies include cost reduction (39 percent), increased automation (38 percent), and faster problem-solving (38 percent) through the use of Low-Code technology. Overall, these results show the significant improvements to various operational and strategic aspects within the companies, with notable regional and industry-specific differences in the realized benefits. This highlights the versatile impact of Low-Code across different business environments and strategic priorities.

04

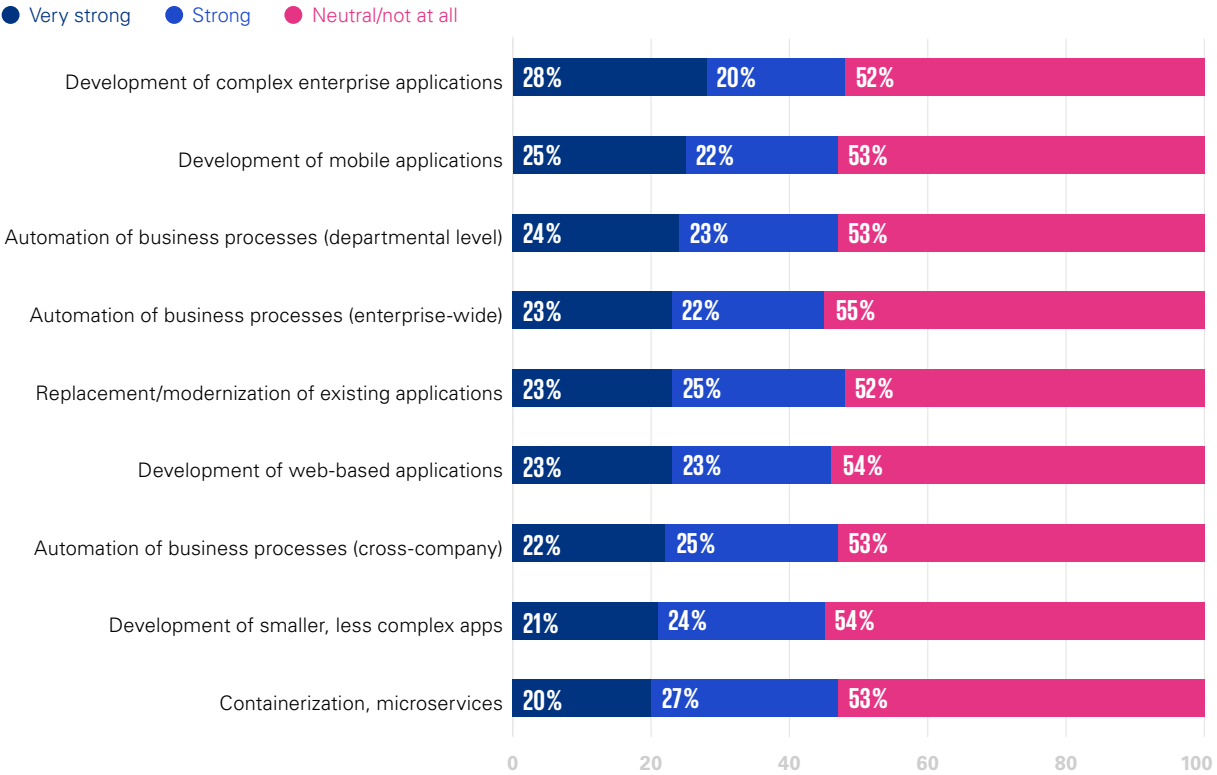
Complex enterprise applications dominate Low-Code usage

Low-Code development is rapidly becoming a cornerstone in modern enterprise technology strategies, offering companies the agility to quickly adapt to changing market demands. As businesses strive for greater efficiency, Low-Code platforms have emerged as powerful tools, enabling the swift development of AI-augmented enterprise applications. The survey reveals that 28 percent of companies now extensively leverage Low-Code to develop complex enterprise applications with embedded AI capabilities, reflecting its growing role in streamlining processes, reducing development time, and enhancing business responsiveness. This trend highlights Low-Code’s role as an AI enabler, helping businesses deploy intelligent solutions faster in dynamic markets.

Low-Code is increasingly used for complex enterprise applications, with 28 percent of companies adopting it extensively.

In this context, the US and ASPAC regions report a slightly higher usage rate at 30 percent, compared to Europe’s lower rate of 22 percent. This discrepancy likely reflects varying regional priorities, with the US and ASPAC regions emphasizing speed and innovation, while European companies may prioritize traditional development methods for ensuring security and reliability in critical applications.

Figure 5:
To what extent do you currently use Low-Code development in the following areas as part of your software development processes or do you plan to use it in the future?

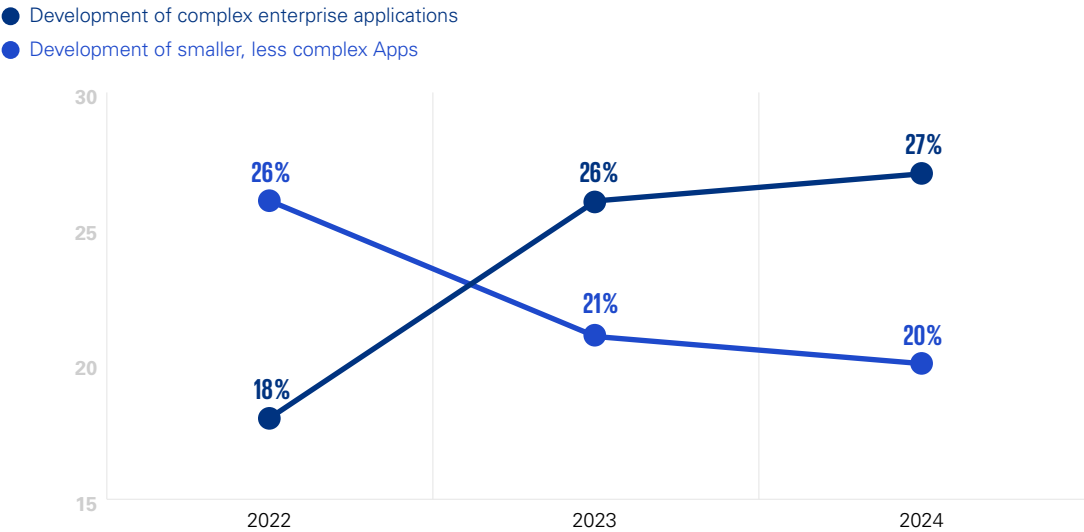


Base: 1,193 IT and Business Executives using Low-Code
Source: Accelerating digital transformation with Low-Code platforms, KPMG International, 2025

For the development of smaller, less complex applications, 21 percent of the surveyed companies currently utilize Low-Code technologies. While Low-Code remains widely used in less complex projects, a declining trend is evident. In contrast, the adoption of Low-Code for complex enterprise applications has risen significantly over time. In 2022, 18 percent of companies used Low-Code extensively for complex applications. This increased to 26 percent in 2023 and now stands at 27 percent in 2024, highlighting a steady growth in the use of Low-Code for intricate development needs. Conversely, the proportion of companies using Low-Code for the development of smaller, less complex applications decreased from 26 percent in 2022 to 21 percent in 2023 and has continued to seep to 20 percent in 2024. This trend indicates that companies increasingly recognize the benefits of Low-Code for handling more complex projects while placing less emphasis on simple applications. This shift suggests a growing maturity and trust in Low-Code platforms to manage critical and complex business needs.

Additionally, 25 percent of companies increasingly use Low-Code development for mobile applications. Europe, again, shows below-average use with 19 percent, while the USA (with 30 percent) and the ASPAC region (with 28 percent) are in the lead here, which indicates that European companies may be more cautious in adopting new technologies and prefer conventional development methods.

Figure 6:
To what extent do you currently use Low-Code development in the following areas as part of your software development processes?



Based: 2,170 IT and Business Executives in 2024, 2,000 in 2023 and 715 in 2022 | Question targeted at the ones already using Low-Code; previous years' survey results for the answers "Development of complex enterprise applications" and "Development of smaller, less complex apps." Source: Accelerating digital transformation with Low-Code platforms, KPMG International, 2025; Low-Code Adoption as a driver of digital transformation, KPMG International, 2023; Shaping Digital Transformation with Low-Code platforms, KPMG International, 2022

In the USA and ASPAC regions, the higher use of Low-Code could be attributed to a stronger innovation culture and a greater focus on bringing mobile applications to market at a faster pace. These regions prioritize rapid development and deployment to stay competitive and meet dynamic market demands.

25 percent of companies increasingly use Low-Code for mobile application development, and 24 percent for business process automation.

Furthermore, nearly a quarter of the companies (24 percent) frequently use Low-Code for automating business processes and workflows at the departmental level.

Europe shows an below average value of 18 percent, while the USA (28 percent) and ASPAC regions (25 percent) show higher values. This suggests that European companies may be more conservative in their approach to process automation, relying more on proven methods. Stricter regulatory requirements and data protection concerns in Europe could also slow down the adoption of new technologies like Low-Code. In contrast, in the US and ASPAC regions, a stronger innovation culture and less restrictive regulatory frameworks foster the faster and more frequent use of Low-Code technologies for automating business processes.

Low-Code for developing business apps

In the area of complex enterprise applications, 57 percent of the surveyed companies use Low-Code for developing Enterprise Resource Planning (ERP), Customer Relationship Management (CRM), and Supply Chain Management (SCM) solutions. Companies in Africa (68 percent) and ASPAC regions (65 percent) are leading in this field, indicating a higher integration and broader use of Low-Code in those regions. Europe usage rate stands below average (48 percent), suggesting a more cautious introduction and integration of Low-Code technologies in the business apps environment. This trend highlights the regional differences in adopting Low-Code for critical business applications, with Africa and the ASPAC showing a more aggressive approach towards leveraging Low-Code for comprehensive solutions.

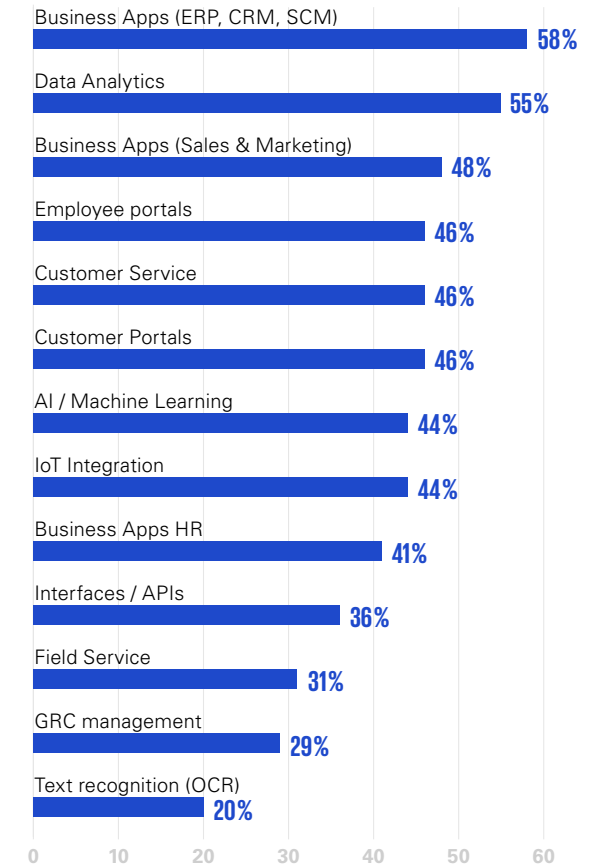
In the domain of data analysis, 55 percent of companies generally use Low-Code technologies, which emphasizes the importance and need for quick, adaptable solutions, for processing and analyzing larger datasets. 48 percent of those companies also use Low-Code for developing e-commerce and sales applications, with a focus on quickly adapting to market changes and customer demands. For the development of employee and customer portals, 46 percent of the surveyed companies are using Low-Code. Such solutions can be developed quicker this way, improving interaction and communication with employees and customers efficiently. It is evident that Low-Code platforms are primarily utilized for creating complex enterprise applications, and there is a noticeable trend towards more sophisticated projects using these platforms.

Low-Code infused with AI and ML

Low-Code platforms have become the go-to solution for integrating AI and GenAI into business applications, offering an ideal balance of speed and flexibility. Enterprises now use them more for advanced machine learning solutions (44%) than for basic tasks like text recognition (20%), demonstrating their value in deploying sophisticated cognitive capabilities.

By significantly accelerating AI integration - from predictive analytics to GenAI - these platforms enable faster scaling compared to traditional methods. This simplifies complex deployments, making them indispensable for intelligent automation as AI becomes increasingly critical.

Figure 7:
In which areas of the company/processes do you currently deploy applications with Low-Code development?



Base: 1,193 IT and Business Executives using Low-Code | Multiple answers possible
Source: Accelerating digital transformation with Low-Code platforms, KPMG International, 2025

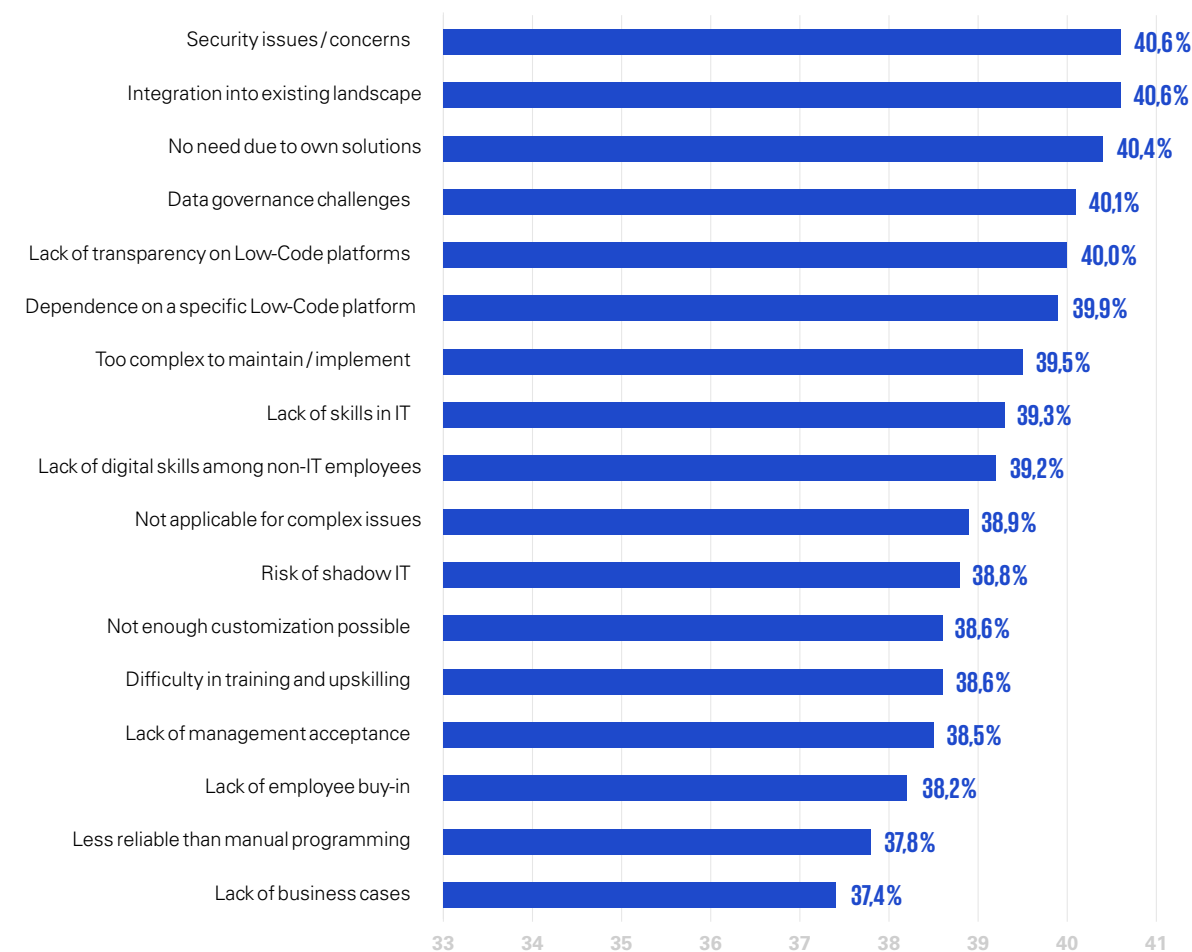
05

Security and integration issues as major challenges

Despite the numerous advantages, there are significant challenges that hinder or prevent companies from actively using Low-Code development platforms. Among these, security issues and concerns are the most prominent, cited by 41 percent of the surveyed companies as a high or medium challenge. Security stands out as a major concern in the ASPAC region, noted by 47 percent of companies, compared to a smaller proportion, only 32 percent, in Africa. This disparity suggests that the heightened sensitivity to security in the ASPAC region reflects the region’s advanced digital maturity and higher exposure to cyber threats. In contrast, Africa’s focus on addressing IT skills and digital competency gaps, as reported by 37 percent of companies, reflects the region’s broader need to build foundational digital capabilities. This indicates that, while the ASPAC region is focused on security, Africa’s priorities may revolve around addressing skills gaps and improving digital capabilities.

Another major challenge is the complexity of integration into existing systems, identified by 41 percent of companies as a high or medium concern. Effective data management practices are also a significant hurdle, with 40 percent of surveyed companies struggling in this area. These issues highlight the difficulties many companies face in implementing Low-Code platforms seamlessly into their current IT infrastructure, which can significantly impede the adoption and efficient use of these technologies.

Figure 8:
What challenges do you see when using Low-Code development in your company?



Base: 2,170 IT and Business Executives | Items "very high challenge" + "high challenge"
Source: Accelerating digital transformation with Low-Code platforms, KPMG International, 2025

Additionally, 40 percent of companies surveyed express concerns about the lack of transparency of Low-Code platforms. This lack of clarity can lead to mistrust, as companies may struggle to fully understand and verify the security and business models of these platforms. An equally large proportion of companies view the potential dependence on a particular Low-Code provider or platform, often referred to as „vendor lock-in,“ as a significant challenge. This fear can prevent companies from fully committing to a specific Low-Code platform, due to concerns that future adjustments and integrations could become costly or complex. Linking developed applications to a provider can make future transitions difficult, locking companies into long-term dependencies.

The challenges associated with adopting Low-Code platforms highlight the critical need for thorough evaluation and strategic planning. Key concerns, such as security vulnerabilities, integration complexity, and transparency issues with vendors, must be carefully addressed. Companies should implement robust security protocols to safeguard against potential threats and develop clear integration strategies to seamlessly incorporate Low-Code solutions into existing IT infrastructures.



Additionally, fostering transparent relationships with vendors can mitigate risks associated with vendor lock-in and ensure that companies fully understand the platforms they adopt. By proactively addressing these challenges, organizations can navigate the complexities of Low-Code adoption more effectively.

This involves implementing robust security protocols, developing clear integration strategies, and fostering transparent, flexible relationships with vendors. These steps will enable companies to maximize the potential of Low-Code platforms in driving innovation and enhancing operational efficiency.

06

Rising citizen developers: Balancing innovation & security

Empowering employees without deep programming knowledge to develop applications using Low-Code platforms, known as the rise of citizen developers, is increasingly recognized as a transformative strategy that enables companies to rapidly innovate and respond to business needs. This approach enables organizations to quickly develop and deploy applications, enhancing agility and reducing the burden on professional IT staff. Overall, 52 percent of the surveyed companies plan to leverage citizen developers for the majority of their Low-Code applications, highlighting a significant shift towards democratizing application development across various industries. This trend is particularly pronounced in regions like ASPAC and the US, where adoption rates are slightly higher, while Europe is slightly below average with 46 percent, likely due to stricter regulatory and compliance requirements and a more cautious approach towards allowing non-technical staff to develop applications.

Only 5 percent of companies do not plan to use citizen developers in the context of Low-Code development.

Moreover, 42 percent of companies plan to leverage citizen developers primarily for less complex applications, likely due to concerns about the technical expertise required for more intricate development projects and the potential risks of inexperienced developers handling mission-critical tasks.

The ASPAC region shows above-average values with 47 percent, while Europe lags behind with 33 percent. Only 27 percent of companies see the use of citizen developers to be limited to specific platforms.

Balancing innovation and security: The role of citizen developers

The use of citizen developers can affect the security of companies in various ways. Citizen developers are often non-professional developers, who create applications using Low-Code platforms. This bears both opportunities and challenges. On the positive side, citizen developers can accelerate application development, reduce the burden on professional IT staff, and bring innovative solutions closer to business needs by leveraging firsthand user knowledge.

In addition to numerous benefits, there are nevertheless also risks that need to be adequately managed. Citizen developers often do not have the same security awareness as professional developers, which can lead to more vulnerable applications. „Untrained“ citizen developers can lack a proper understanding of the software development lifecycle and the guardrails that need to be taken into consideration from requirements engineering to post-go-live support or versioning & collaboration during development. As a result, these apps/projects can either very quickly turn out to be of inadequate quality or become unusable, due to a lack of support if necessary adjustments (interfaces, etc.) are not made.

Furthermore, the lack of standardization can lead to inconsistencies, and the increased risk of shadow IT arises when applications are developed outside the oversight of regular IT processes. These issues highlight the need for robust governance and oversight mechanisms.

A closer look at security aspects shows that half of the surveyed companies (exactly 50 percent) consider the security of data and user information during development with Low-Code platforms to be very important. Controlling which applications access company data is crucial for another 50 percent, while 51 percent consider managing access rights of Low-Code applications to be critical. Regular security checks and audits are important for 50 percent of companies, and maintaining an inventory of Low-Code applications is essential for 51 percent.

These results indicate that the use of citizen developers requires careful planning and structured approaches to adequately manage underlying risks. Comprehensive training in security practices, such as secure coding, data protection, and threat awareness, is essential for citizen developers. Additionally, appropriate governance, regular monitoring and controls by the IT department are crucial to maintain oversight. Companies should also consider developing or improving their internal data governance models to support these efforts. Implementing standardized development processes and robust security guidelines can help leverage the benefits of citizen developers while mitigating associated risks. By following these strategies, companies can safely harness the innovative potential of citizen developers in their Low-Code initiatives.

Figure 9:
To what extent is the handling of the following security aspects of Low-Code development platforms regulated in your company?

	Total	Europe	Middle East	Africa	USA	ASPAC
Securing data and user information in Low-Code development	28 %	19 %	32 %	44 %	29 %	32 %
Control over which applications access which corporate data	24 %	16 %	24 %	39 %	27 %	23 %
Access rights of Low-Code applications to corporate data	24 %	16 %	23 %	36 %	26 %	26 %
Security tests and audits	25 %	17 %	22 %	41 %	28 %	28 %
Inventory of Low-Code applications	22 %	14 %	24 %	33 %	24 %	24 %
Complete documentation of applications	22 %	15 %	20 %	37 %	24 %	24 %
Awareness in dealing with Low-Code applications	25 %	20 %	26 %	37 %	27 %	25 %
Base	2,170	641	214	230	638	447

Strongly

Balanced

Weakly

Base: 2,170 Companies, Scale „very strong“| Multiple answers possible
Source: Accelerating digital transformation with Low-Code platforms, KPMG International, 2025

07

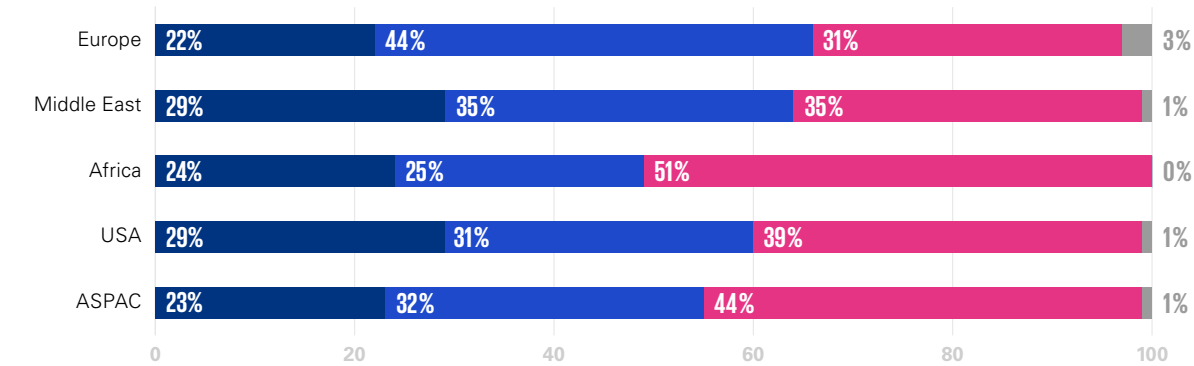
Measures for Low-Code governance

Implementing policies and governance for the use of Low-Code platforms in companies is crucial for ensuring a structured and secure development environment. 39 percent of surveyed companies report that they already have Low-Code guidelines and defined governance structures in place, or are in the final stages of planning to introduce them. This is particularly prevalent in Africa (50 percent), indicating a strong regional focus on governance. In the ASPAC region, this value resides at 44 percent, while in Europe it reaches 31 percent, indicating regional differences in the implementation of governance strategies. With 47 percent stating that they already have a comprehensive governance strategy in place, showing that advanced digital companies pursue a more comprehensive governance strategy to ensure the security and efficiency of their Low-Code development projects is granted. The emphasis on governance in Africa and the ASPAC region likely stems from a proactive approach to managing rapid digital growth and emerging security challenges. In contrast, European companies may focus on integrating governance within existing, well-established processes.

Another 35 percent of companies already have Low-Code guidelines instated, however with no defined Low-Code governance. In Europe, this value is particularly high with 44 percent, indicating that while many companies in Europe implement guidelines, they are more reserved regarding governance.

Figure 10:
In what way are Low-Code guidelines and Low-Code governance managed or do you plan to manage them in your organisation?

- We have/plan to have neither Low-Code guidelines nor Low-Code governance
- We have/plan to have Low-Code guidelines, but no defined Low-Code governance
- We have/plan to have Low-Code guidelines and defined Low-Code governance
- Don't know / No information



Base: 2,170 IT and Business Executives
Source: Accelerating digital transformation with Low-Code platforms, KPMG International, 2025

These companies recognized the need for more tailored approaches to address the unique challenges of Low-Code, particularly in integrating IT governance within existing frameworks that primarily focus on financial and operational risks.

This reluctance may stem from a cautious approach towards additional regulations or complexity, reflecting a preference to integrate Low-Code within existing frameworks rather than establishing separate governance structures.

European companies might prioritize minimizing disruption to established processes and focus on adapting guidelines to fit their current systems, rather than investing in comprehensive, standalone governance models.

One in four companies (25 percent) neither have Low-Code guidelines nor defined Low-Code governance, and do not plan to introduce them.

Interestingly, every fourth company has neither established Low-Code guidelines nor planned Low-Code governance. This figure is even higher in the Middle East and the USA, both at 29 percent, compared to Europe (22 percent) and ASPAC (23 percent). These numbers highlight a notable difference in how regions prioritize formalized Low-Code strategies, potentially leading to unstructured development processes and security vulnerabilities.

Implementation of policies and governance

The implementation of Low-Code policies and governance in companies encompasses a variety of measures, including compliance with industry standards for applications and APIs being highlighted by 50 percent of inquired companies. This aspect is particularly important for 57 percent of companies in the ASPAC regions, while the value in Europe resides at 36 percent.

These differences could be due to stricter regulatory requirements and a greater emphasis on technological innovation and quality assurance in the ASPAC region. In Europe, more mature internal processes or less external pressure may explain the lower emphasis on compliance with industry standards.

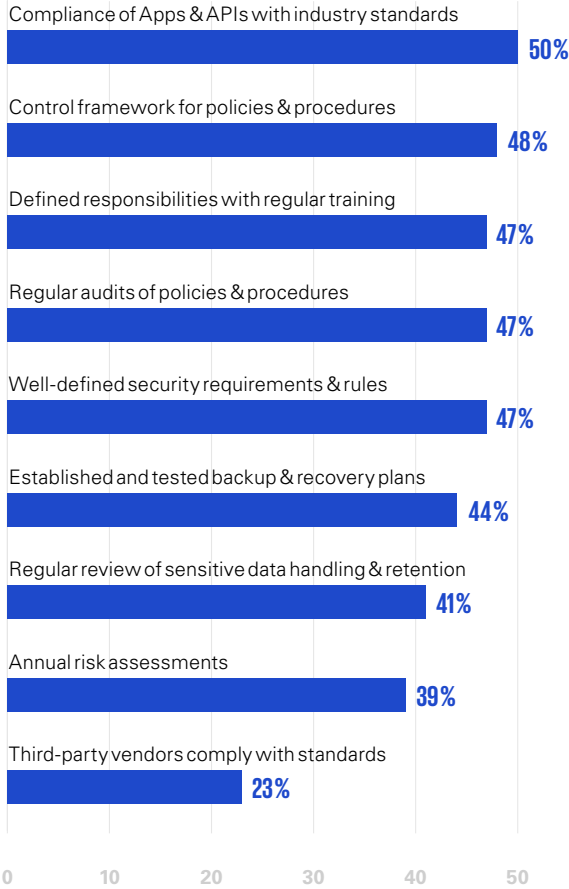
A framework for policies and procedures is present in 48 percent of the surveyed companies, with Africa (59 percent) and the ASPAC regions (54 percent) in the lead.

In Europe, this value resides at 41 percent. Additionally, 47 percent of companies conduct regular audits, to evaluate policies and procedures. This approach is widespread in the ASPAC region (55 percent), and it is less common in Europe (37 percent). These differences suggest that stronger mechanisms to ensure compliance with Low-Code policies and governance are established in the ASPAC region and Africa, possibly due to stricter regulatory requirements and a higher awareness for security and compliance.

To ensure that all stakeholders possess the requisite knowledge and clearly understand their responsibilities, 47 percent of companies surveyed indicate their Low-Code guidelines and governance include clear guidance on training, establish functions, roles and responsibilities. Additionally, 47 percent of the surveyed companies reported using well-defined security requirements and rules to implement their Low-Code guidelines and governance.

The results indicate that companies in the ASPAC region and Africa tend to enforce stricter Low-Code governance measures, driven by regulatory demands and the need for robust security frameworks. In contrast, European companies, often guided by mature internal processes and less external pressure, may prioritize integration with existing systems landscape. This divergence underscores the importance of tailoring governance strategies to regional and organizational contexts.

Figure 11:
What measures do you use to implement your Low-Code guidelines and Low-Code governance in your company?



Base: 2,170 IT and Business Executives | Multiple answers possible
Source: Accelerating digital transformation with Low-Code platforms, KPMG International, 2025

08

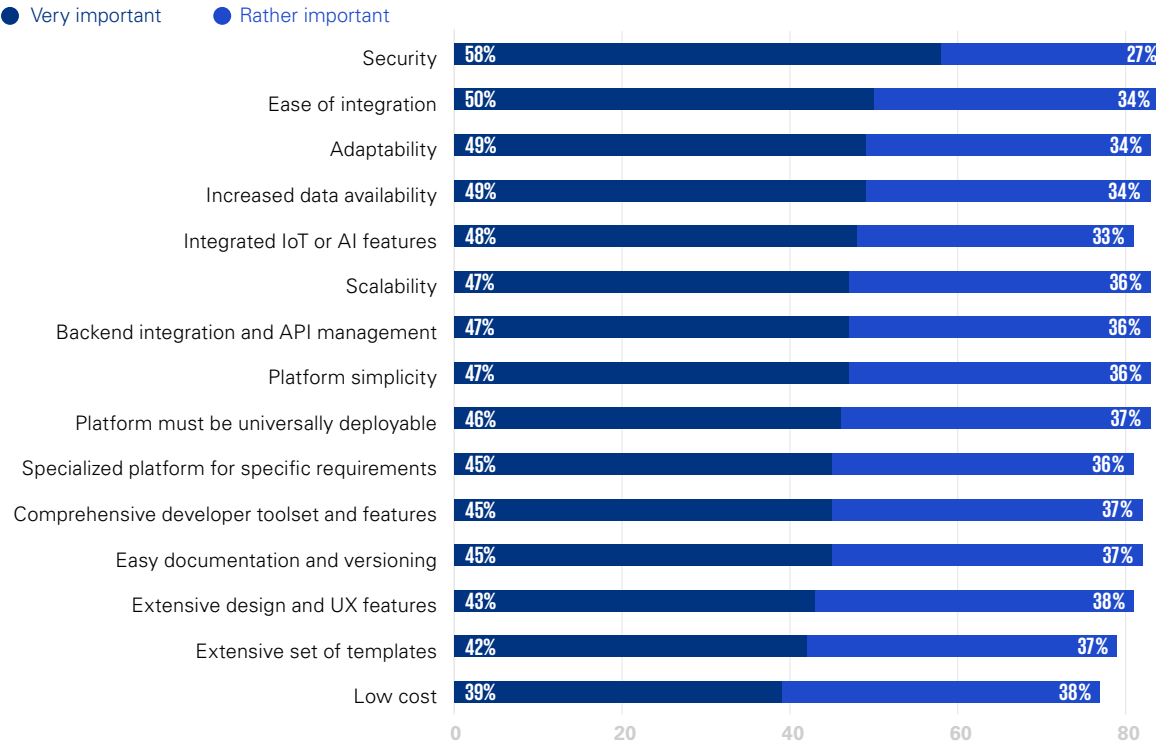
Security as a primary factor in the adoption of Low-Code platforms

The decision to use a Low-Code platform in companies is influenced by several key factors. At the top of this list is security according to 85 percent of the surveyed companies. This underscores the importance of a robust security framework in a time when data breaches and cyberattacks are common.

Closely following security, 84 percent of companies prioritize easy integration, recognizing that seamless interoperability with existing systems is crucial for maintaining business continuity and minimizing operational disruptions during digital transformation.

Another critical factor is the management of backend integration and APIs, considered crucial by 83 percent of respondents. Additionally, 83 percent of companies value the scalability of their platform. This evolution reflects a strategic shift: Low-Code platforms must now deliver out-of-the-box advanced functionalities like IoT connectivity and AI models, alongside core features, empowering businesses to implement next-gen solutions while maintaining security, integration, and scalability standards.

Figure 12:
How important are the following factors for you when deciding on a Low-Code platform for your business?



Basis: 2,170 IT and Business Executives respondents | Items: „Very important“
Source: Accelerating digital transformation with Low-Code platforms, KPMG International, 2025

A comprehensive set of templates is also considered important to very important, by 79 percent of respondents. The significance of this factor has grown steadily over the past few years: In the 2022 study, 36 percent rated this factor as very important, rising to 41 percent in 2023, and standing at 42 percent in the current study. Similarly, the adaptability of the platform (83 percent) has seen increased importance, with 40 percent rating it very important in 2022, 48 percent in 2023, and 49 percent in the current study. This trend reflects a growing expectation for flexibility and efficiency in using Low-Code platforms.

Overall, nearly all factors are considered important for decision-making, although cost is rated on the lower end.

These findings underscore the importance of a comprehensive analysis when selecting a Low-Code platform, as providers need to ensure that their solutions offer a broad range of features and capabilities.

User satisfaction and budget adherence as primary KPIs

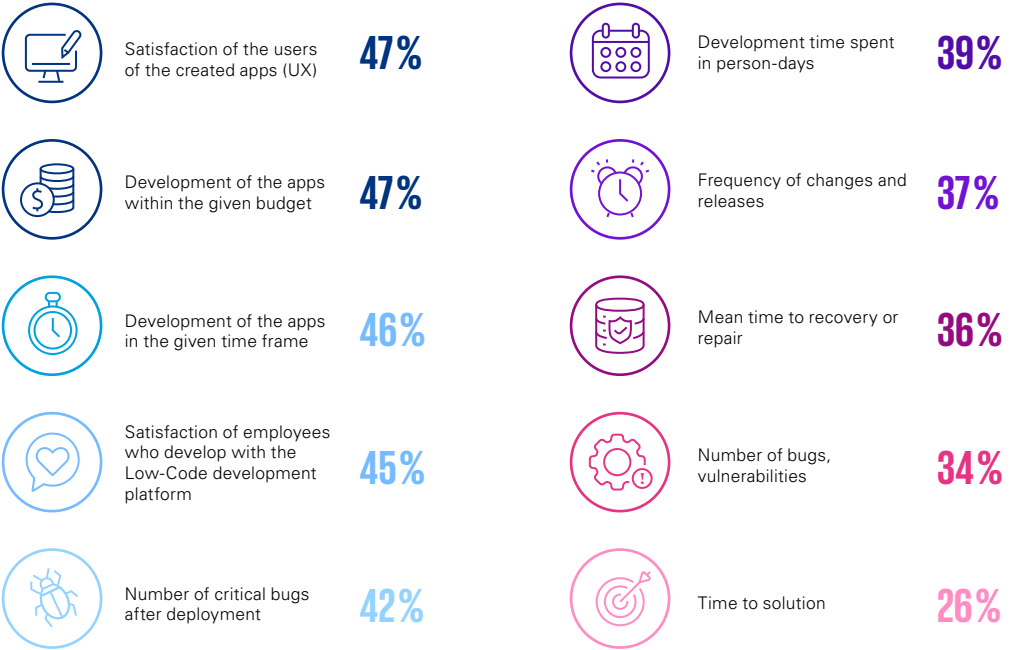
The success of Low-Code projects in companies is evaluated against various key performance indicators, as stated by the surveyed companies. User satisfaction (or User Experience) ranks highest, with 47 percent of companies emphasizing its importance when assessing the success of a Low-Code project. This focus on user-friendliness and acceptance aligns with broader business objectives of maximizing adoption, driving productivity, and enhancing overall end user satisfaction. The development of apps within the specified budget also follows closely with 47 percent, highlighting the need to manage projects cost-efficiently. This indicates that balancing user needs and budget constraints is a top priority for companies using Low-Code platforms.

The third important KPI is the development of apps within the specified timeframe, which 46 percent of respondents consider important. This underlines the importance of time management and being able to meet deadlines. Employee satisfaction with the Low-Code platform is also crucial, cited by 45 percent of companies. Additionally, 42 percent of respondents consider the total number of critical errors after final deployment as an important KPI, emphasizing the need to ensure the quality and stability of applications.

These KPIs collectively highlight the importance of efficiency, employee engagement, and application reliability in the success of Low-Code projects.

To achieve these goals, companies should implement strategic approaches that include robust user training, thorough governance frameworks, and continuous performance monitoring to ensure that Low-Code applications meet both business objectives and user expectations.

Figure 13:
What KPIs do you use to measure the success of Low-Code development after you deploy an app, or what KPIs do you plan to measure success?



Base: 2,170 IT and Business Executives | Multiple answers possible
Source: Accelerating digital transformation with Low-Code platforms, KPMG International, 2025

09

Global trends in AI and Low-Code

The significance of Low-Code technologies and approaches differs among companies, with certain technologies emerging as particularly noteworthy. At the top of the list is data analytics, which 59 percent of respondents consider important to very important, for the future. This underscores the increasing importance of data-driven decision-making in companies. Low-Code platforms increasingly support advanced analytics, either through integrated tools or by enabling custom solution development, helping businesses extract insights from large datasets and strengthen data-driven decision-making. Intelligent Automation is also significant, with 58 percent of respondents rating it as important for the future.

Companies in the ASPAC regions in particular exceed the average with 62 percent and prioritize this technology. The growing acceptance of process automation reflects its potential for improving efficiency by automating repetitive tasks and optimizing human intervention. Additionally, 58 percent of respondents see Process Mining as relevant for the future. Process Mining leverages data analysis to optimize business processes, underscoring the increasing importance of data-driven process optimization to enhance operational efficiency.

In 47 percent of European companies, AI plays an important to very important role in the Low-Code area, while this figure resides at 58 percent for USA companies.

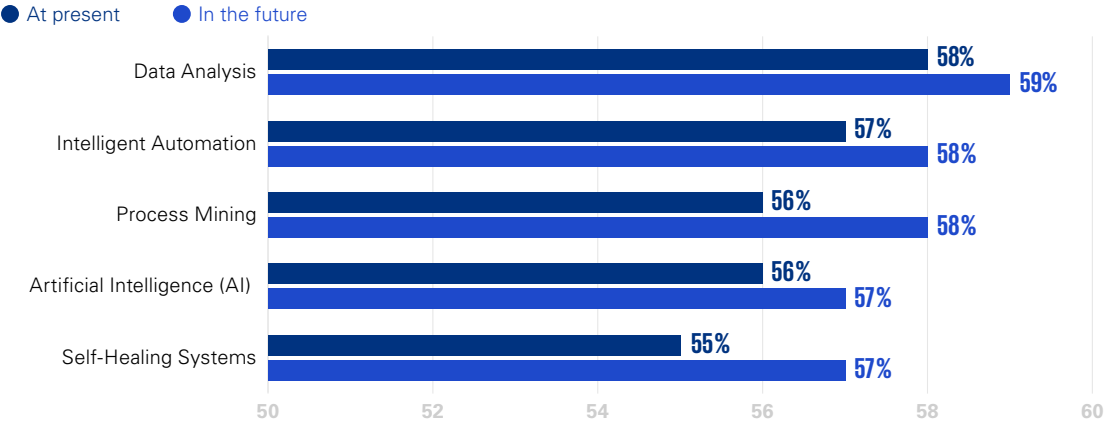
Additionally, AI is increasingly seen as a pivotal component of Low-Code platforms, with 56 percent of companies recognizing its current importance and 57 percent anticipating its future impact. As AI continues to evolve, it is expected to play a key role in optimizing Low-Code developments, enabling more intelligent, responsive applications and companies planning to invest even further into this technology as time progresses. Overall, an increase in importance is expected across all technological areas.

Low-Code for delivering AI infused applications

The use of Low-Code platforms for developing AI and Gen-AI-infused applications is gaining significance across the globe. Currently, 38 percent of surveyed companies are actively developing, or planning to develop, AI-infused applications using Low-Code. This adoption is particularly strong in the USA (47 percent), however lags in Europe (25 percent), likely due to differences in regulatory environments, innovation cultures, and the maturity of AI integration strategies.

Additionally, another 40 percent of companies plan to develop AI-based applications with Low-Code within the next 12 months, with pronounced planning in regions like the Middle East (47 percent) and Africa (47 percent). This indicates a strong global trend towards adopting AI within Low-Code environments, although regional disparities remain.

Figure 14:
How important do you consider the following technologies and approaches to be for Low-Code?



Base: 2,170 IT and Business Executives | Question on current and future importance
Source: Accelerating digital transformation with Low-Code platforms, KPMG International, 2025

47 percent of US companies use Low-Code for developing AI-based solutions or plan to do so, whereas in Europe, only one in four companies (25 percent) have indicated the same.

In the next one to two years, 15 percent of companies intend to develop AI-infused applications with Low-Code, with Europe being significantly above average with 22 percent. This indicates a strong trend in Europe towards the future use of Low-Code for AI-based solutions. While the focus in Europe is more on planning and implementations in the future, US companies are already more advanced in the active use.

Benefits of AI in Low-Code development environments

The use of AI in Low-Code development environments can offer numerous benefits. Foremost are speed and agility, cited by 59 percent of the surveyed companies as the most significant advantage. These qualities are particularly valued in the USA (with 61 percent) and the ASPAC regions (with 68 percent), indicating the need for quick market entry and flexibility. Europe is below average with 47 percent, suggesting that European companies feel less pressure to respond to market changes, or are simply in an earlier stage of integrating AI into their Low-Code developments.

This highlights regional differences in the adoption and prioritization of AI-driven agility and speed.

Speed and agility are seen as primary advantages of AI in Low-Code environments for 61 percent of US companies, while only 47 percent of European companies sharing this view.

Another critical benefit is efficiency, which was also rated as important by 59 percent of companies. This is considered essential in all regions, with the ASPACs (67 percent) being in the lead here. This indicates the high value placed on optimizing workflows and resource utilization, through the use of AI in Low-Code environments.

Furthermore, 53 percent of the surveyed companies consider cost efficiency to be an important to very important advantage of AI in Low-Code development platforms. AI can reduce costs and increase the profitability of developments. Scalability is another decisive factor, as stated by nearly half of the surveyed companies (49 percent), while personalization is important for 43 percent. These findings underscore the transformative potential of integrating AI into Low-Code environments. As companies continue to embrace these technologies, we can expect further advancements that will not only accelerate processes and improve efficiency but also pave the way for more personalized, scalable, and cost-effective applications in the future.



Figure 15:

What advantages are or would be crucial for you to use AI in Low-Code platforms?



Base: 2,130 IT and Business Executives | Filter: Development of AI-based solutions using Low-Code is relevant
Source: Accelerating digital transformation with Low-Code platforms, KPMG International, 2025



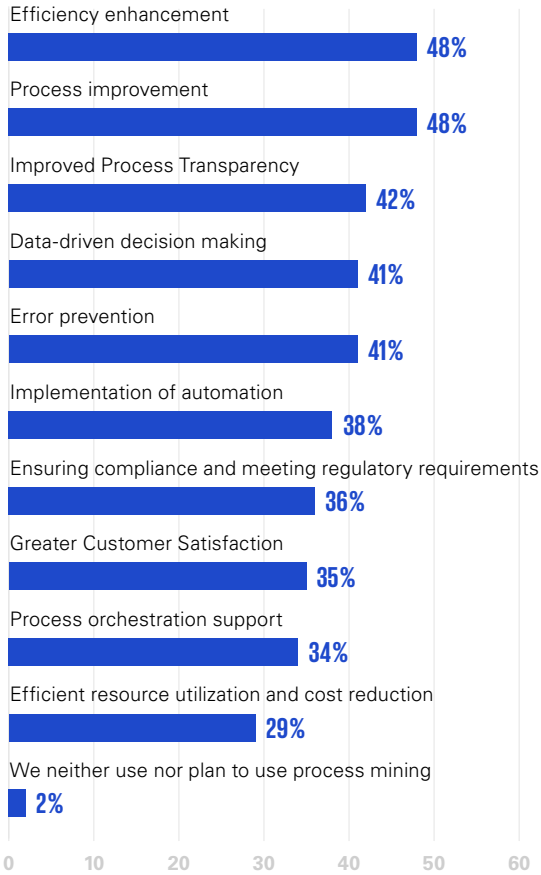
10

Efficiency improvement through process mining and intelligent automation

Process Mining and Intelligent Automation can offer numerous advantages in the context of Low-Code platforms, as seen by the surveyed companies' responses. Efficient use of these technologies can optimize processes, increase productivity, and reduce costs. Nearly half of the companies (48 percent) view Process Mining as a central tool for efficiency improvement and process optimization, making it a key component in their current or future digital strategies. Transparent visualization and traceability, cited by 42 percent of respondents, along with data-driven decision-making (41 percent), are seen as key benefits of Process Mining. These features not only enhance process transparency, but also empower companies to make informed decisions that drive efficiency and improve overall business performance.

Moreover, 35 percent of companies aim to achieve higher customer satisfaction through Process Mining, and 29 percent see it as a means to use resources more efficiently and reduce costs. Process Mining enables organizations to identify process improvements through data-driven insights, which can then be quickly addressed using Low-Code platforms. Overall, Process Mining, when combined with Low-Code, can become an integral part of many companies' digitalization strategies by delivering significant added value in terms of process improvement, efficiency, transparency, and decision-making.

Figure 16:
Does your company use process mining with Low-Code, or would it and what are the reasons for it?



Base: 2,170 IT and Business Executives
Source: Accelerating digital transformation with Low-Code platforms, KPMG International, 2025

Intelligent automation and Low-Code

Low-Code platforms that integrate Intelligent Automation capabilities offer a comprehensive range of benefits, from streamlining workflows and reducing manual errors to accelerating time-to-market. Companies increasingly view these advanced capabilities as strategic: 64 percent emphasize increased efficiency, and 62 percent highlight productivity enhancement as key factors in their decision-making. In essence, platforms that provide robust Intelligent Automation are in high demand.

Efficiency increase (64 percent) and productivity (62 percent) are primary factors for the use of Intelligent Automation.

The integration capability of the technologies is also seen as significant by 48 percent of the respondents, with this ability being particularly appreciated in the ASPAC region (55 percent). Cost savings in application development are equally a significant advantage for many companies. These two aspects reflect the central role that Intelligent Automation and Low-Code platforms play in the modern business world. Companies benefit not only from improved connectivity and collaboration between different systems and processes, but also from significant savings in the development and implementation of new applications. This enables companies to remain more agile and competitive, by using resources more efficiently and responding more quickly to market demands.

11 Outlook

The future of Low-Code platforms presents both enormous potential and challenges that companies must strategically manage. The survey results indicate a growing need for expanded features and improved integration capabilities. Companies worldwide increasingly recognize the advantages of Low-Code technologies for their digitalization strategies and strive to utilize them comprehensively.

Expanded features and integration capabilities

Companies expect Low-Code platforms to increasingly provide APIs for business applications and customizable developer toolsets & features. It is essential for global Low-Code platform vendors to identify and address regional needs. For example, regions like ASPAC place a high value on integration capabilities of these technologies, whereas US companies focus more on advanced AI/ML-based processing technologies. These regional differences highlight the varying requirements and priorities across different markets, reflecting different levels of technological maturity and business needs.

Security and data protection

Security and data protection features remain a central focus for companies, especially in Europe, where increasingly stringent regulatory requirements prevail. Companies in this region demand advanced security mechanisms that ensure the protection of sensitive data and compliance with regulations.

This demand for robust security solutions and secure in-house developments reflects the growing sensitivity and awareness on cybersecurity. Simultaneously, the results show that governance and defined guidelines for the use of Low-Code platforms are becoming increasingly important. While many companies in Europe have implemented guidelines for Low-Code usage, their governance strategies often lack maturity, especially when it comes to robust security measures and clearly defined roles and responsibilities. Implementing such governance strategies is a particularly high priority for advanced digital companies, with the goal to guarantee the security and efficiency of their Low-Code development capabilities.

Trends and strategic relevance

Looking ahead, Low-Code platforms are expected to play an increasingly central role in digitalization strategies, particularly within large enterprises. For instance, future developments may include more sophisticated AI-driven automation tools, enhanced collaboration features for global teams, and greater integration with emerging technologies such as blockchain and IoT. The data presented in this study highlights that while Low-Code technologies are increasingly being adopted across various industries and regions, significant opportunities remain for deeper integration. To drive further digital transformation, companies must intensify their use of Low-Code platforms, leveraging their potential to enhance agility and efficiency.



Companies recognize that Low-Code not only accelerates development processes and increases productivity, but also enhances competitiveness. Especially in dynamic markets such as the USA and the ASPAC region, companies have already made significant progress and are extensively using Low-Code technologies to strengthen their market position.

Looking ahead, a growing trend suggests that not only will the majority of companies adopt Low-Code in the future, but the challenges associated with its implementation will also become more diverse and region-specific. As these challenges become more heterogeneous, organizations will need to tailor their strategies to address them effectively. Concurrently, the advantages of Low-Code are becoming increasingly apparent, with more companies recognizing its potential to drive innovation, streamline operations, and maintain a competitive edge in their markets. In addition, integrating AI into Low-Code platforms accelerates development and reduces time-to-market, as there is a growing trend toward building AI-infused applications.

Low-Code provides the ideal toolbench for rapidly deploying apps and incorporating AI capabilities across the value chain, effectively acting as an accelerator for AI adoption. The willingness to invest in and develop Low-Code technologies will enhance long-term innovation and efficiency, while continuous improvement of these platforms remains crucial to meet evolving business demands.



The growing role of Low-Code in AI development

AI-powered innovation

The strong focus on artificial intelligence signals a shift toward innovation. Low-Code platforms are increasingly leveraged to build AI-infused applications, such as chatbots, efficiently driving digital transformation.

GenAI application surge

Generative AI is gaining traction as a key driver for differentiation. Companies are turning to Low-Code to rapidly develop GenAI solutions, such as automated decision-making support, thereby enhancing overall business efficiency.

Automation through AI

Automation remains a critical need across industries. Low-Code platforms enable seamless integration of AI-driven automation, such as predictive workflows, effectively streamlining operations and increasing productivity.

Ultimately, companies must stay proactive by investing in Low-Code and AI, adapting to emerging trends, and continuously refining their digital strategies.

Study design and sample

The study „Source: Accelerating digital transformation with Low-Code platforms“, conducted by techconsult GmbH on behalf of KPMG AG Wirtschaftsprüfungsgesellschaft, surveyed 2,170 companies that develop software in-house or via external providers. It covers key topics such as the adoption and strategic importance of Low-Code, its benefits in terms of efficiency and productivity, as well as challenges related to security, integration, and governance. The study also examines current trends, including intelligent automation and AI, and how companies are leveraging them to enhance their business processes.

Figure 16:
In which region is your company's headquarters located?

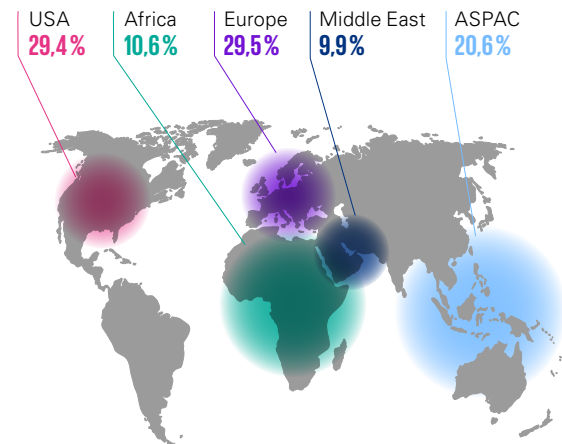
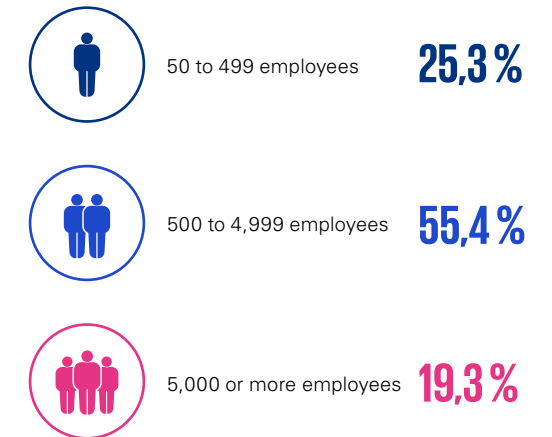


Figure 17:
Which industry can your company's be assigned to?

- Information/Communication Technology **48%**
- Banks and insurance companies **12%**
- Industry (incl. Chemistry, Pharma) **8%**
- Service **8%**
- Trade **6%**
- Transport and logistics **6%**
- Healthcare **5%**
- Energy and water supply **4%**
- Public administration **3%**

Figure 18:
How many employees are employed in your company in total?



Base: 2,170 IT and Business Executives in 2024
Source: Accelerating digital transformation with Low-Code platforms, KPMG International, 2025

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