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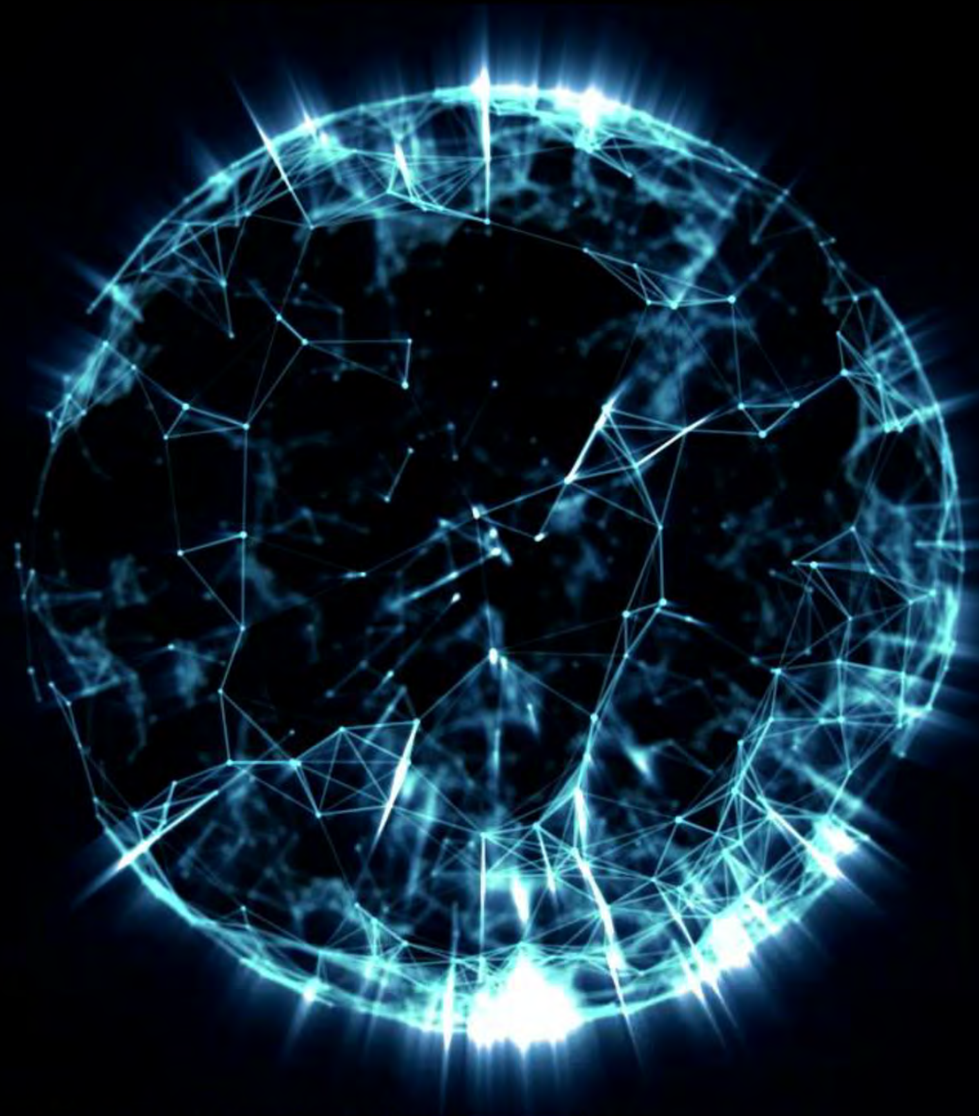
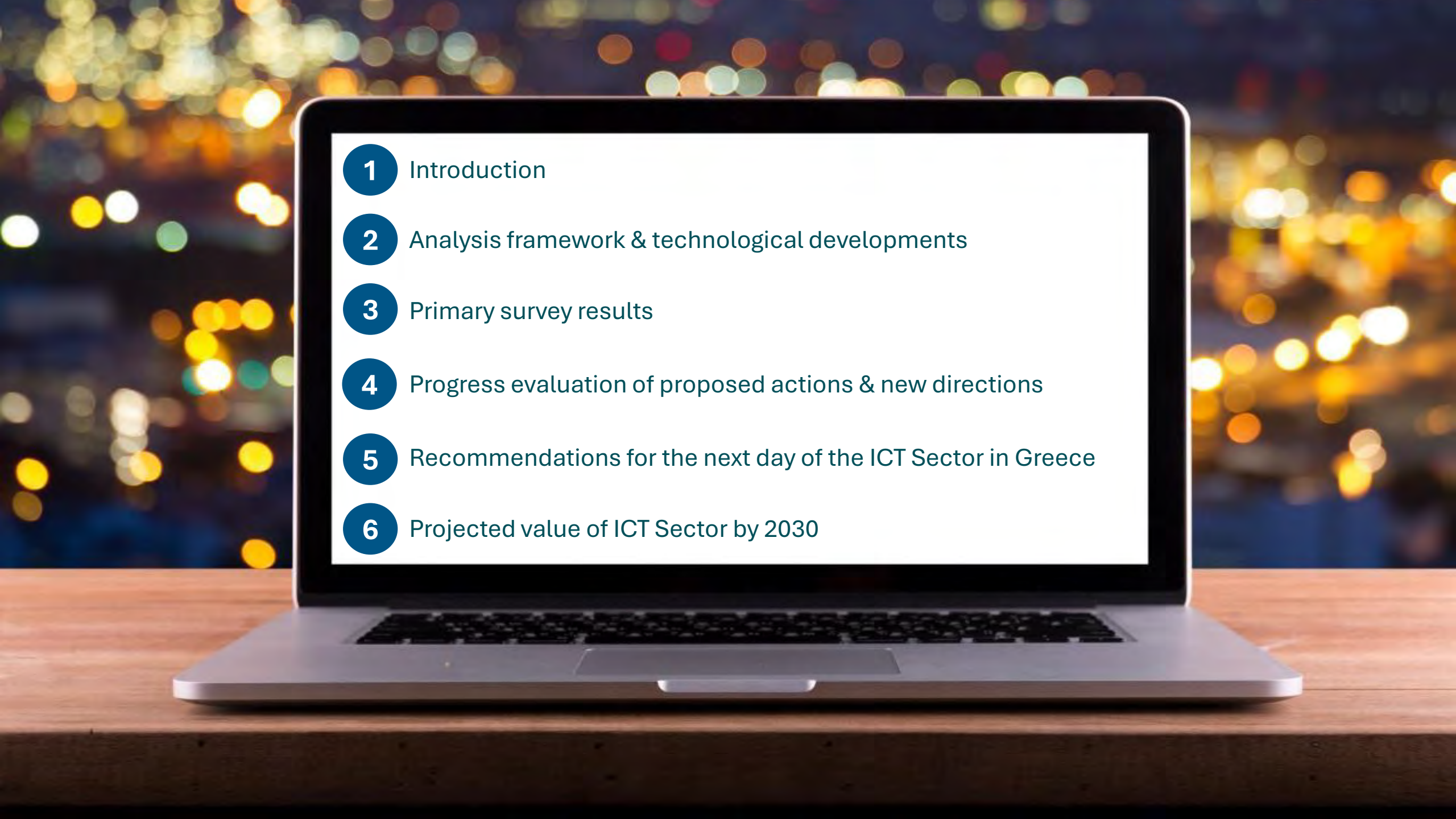
SEPE 36 YEARS
FEDERATION OF HELLENIC ICT ENTERPRISES
DIGITALEUROPE & WITSA MEMBER



Study: Digital Greece 2025 - From Strategy to Implementation

December 2025

MAKING AN IMPACT THAT MATTERS since 1845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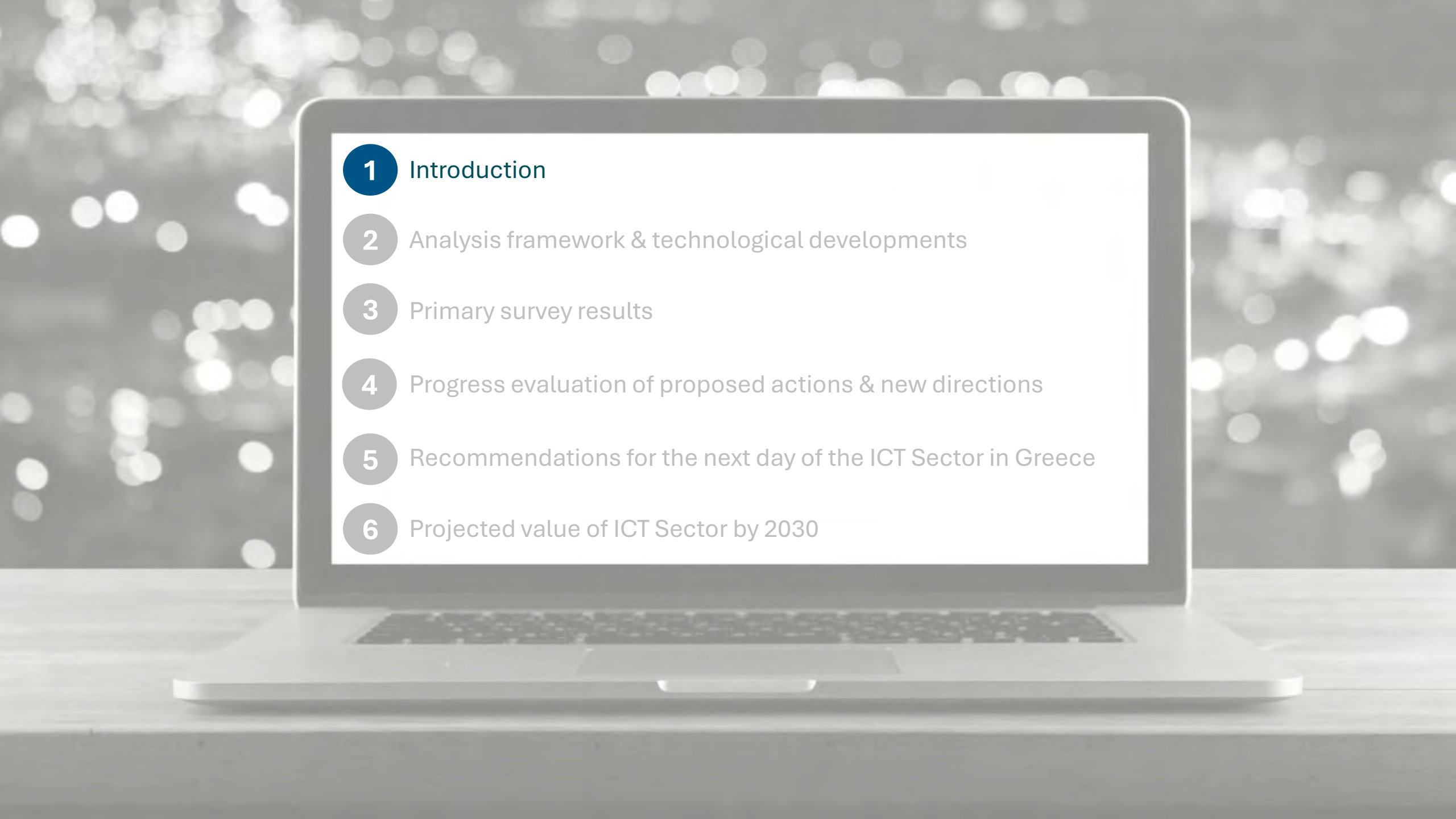
6 Projected value of ICT Sector by 2030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Introduction I Study's Purpose: Status Review of past SEPE proposals

The current study focuses on the assessment of past SEPE policy proposals developed in the context of 2019 and 2024 studies regarding the developement of the Greek ICT Sector

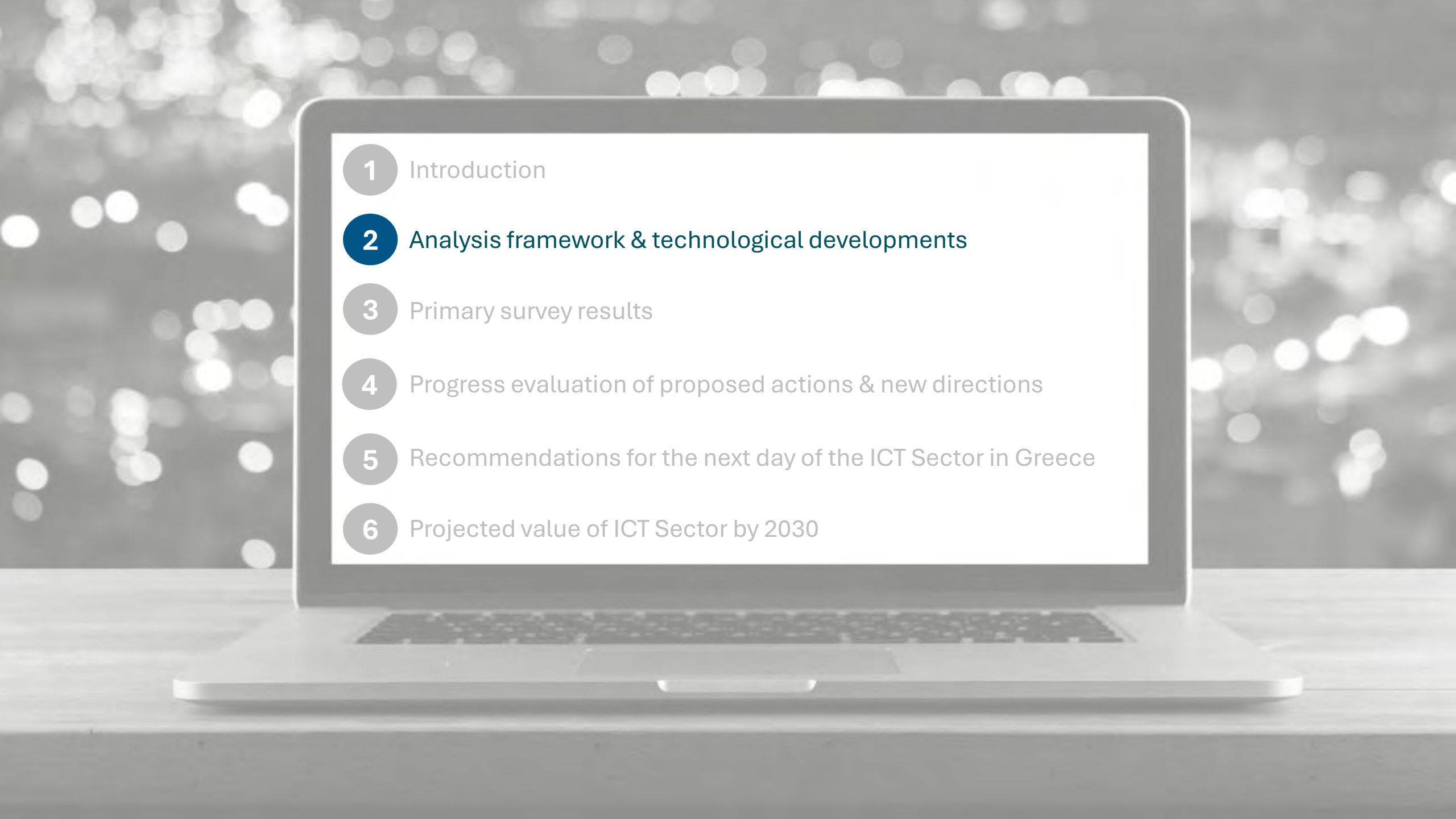
Study 2019

ICT Sector Strategic Planning Study for Greece

Study 2024

The prospects of the ICT sector in Greece

The study evaluates the progress of the implementation of the recommendations within a rapidly evolving environment shaped by digital acceleration triggered by COVID-19, the subsequent digital transformation strategies, geopolitical tensions, and the dynamic development of Artificial Intelligence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Analysis framework I Technological developments from 2019 to the present

From 2019 to the present, rapid technological advancements have transformed digital infrastructure from a supporting mechanism to a critical strategic asset

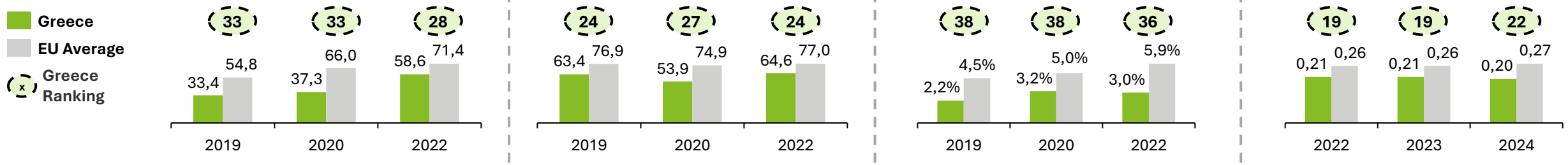
2019 - "Infrastructure in transition" *ICT infrastructures are shifting from traditional on-premise systems towards the cloud, with fragmented and primarily pilot adoption of new technologies such as AI. Technology is mainly utilised to improve efficiency and reduce costs, operating in a supportive rather than strategic capacity.*	 **Technological Evolution**	2025 - "Digital Infrastructure as a Competitive Advantage" *Digital infrastructure is a key pillar of operational strategy. Cloud-native, AI-driven, and data-centric architectures enable speed, scalability, and innovation, turning technology investments into a driver of competitive advantage and value creation.*
Early adoption of AI - AI is mainly applied on a pilot basis, in individual use cases (analytics, automation), with limited scalability and no integration into corporate strategy	**AI: From experimentation to business core**	**AI-first organizations** - AI is embedded in products, processes, and decisions. It supports productivity, innovation, and new business models
Cloud as an alternative infrastructure - Cloud is used in addition to on-premise systems, mainly for flexibility and cost reduction	**Cloud: from infrastructure to strategic platform**	**Cloud-native architectures** - Cloud is the core digital infrastructure, critical for AI, data, and rapid application scaling
Traditional IT operating model - IT operates primarily supportively, with a focus on system maintenance and stability	**IT: from support to a lever of value**	**Strategic & AI-enabled IT** - IT actively contributes to strategy, innovation and business value creation
Central data centers - Data processing is mainly done in central infrastructure, with limited real-time capabilities	**Edge & Compute Power Decentralization**	**Hybrid and edge ecosystems** - Data is processed close to its source, supporting real-time applications and IoT
Cybersecurity as a technical function - Security is addressed in a fragmented manner, primarily as a mechanism for system protection	**Cybersecurity: from defence to strategic resilience**	**AI-driven & integrated security** - Security is integrated at every level, also addressing AI-based threats
Experimental immersive technologies - VR/AR and digital twins are in research phase or pilot stage	**Spatial computing & physical-digital convergence**	**Business Utilization of Immersive Tech** - Usage in education, industry, logistics, and human-machine collaboration
Digital skills under development - Digital transformation depends on skilled IT executives	**Organizational & Labor Transformation**	**AI-augmented human resources** - Widespread use of AI tools by non-technical roles and new work models

Sources: Deloitte Studies "Tech Trends 2024", "Tech Trends 2025", "Tech Trends 2026"

Analysis Framework I Digital Maturity of Greece

Greece records positive momentum in digital skills, e-government, ICT and AI readiness, but remains below the EU average in overall level of digital maturity

	Key enablers	Digital public services for citizens	ICT sector contribution to GDP	Digital skills of ICT specialists
Indicator definition	*The indicator assesses the use of core digital tools for the provision of e-government services, such as eID, electronic documents and digital correspondence*	*The indicator measures the share of core public services for citizens that can be fully completed online, based on 7 main 'life events'*	*An indicator reflecting the percentage of GDP generated by the Information and Communication Technologies (ICT) sector*	*Individuals with advanced digital skills in information management, collaboration, problem-solving, content creation and security*
	Score (0-100) I n = 38 countries*	*Score (0-100) I n = 27 countries*	*% of GDP I v = 38* Countries*	*Score (0-100) I n = 27 countries*



Notes	Greece demonstrates steady **improvement in its ranking**, narrowing the gap with the average of the examined countries; however, it continues to lag behind. The adoption of core digital tools and services can further strengthen convergence	An **improvement** in Greece's score is observed; nevertheless, the country continues to underperform relative to the average of the countries examined, **despite progress in the digitalisation of public services**	The contribution of the ICT sector to Greece's GDP **exhibits a mildly upward trend**. However, it remains significantly **below the average of the countries examined**, reflecting moderate growth and limited investment activity in the sector	A **stable performance** is observed in the digital skills of ICT specialists in Greece; however, the country **remains below the average** of the countries examined, due to gaps in specialised training and limited talent attraction

Sources: Eurostat, European Commission

*Note: In addition to the 27 EU Member States, the ranking also includes, among others, non-EU countries, such as Nordic countries, Balkan countries, the United Kingdom etc.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Primary Survey I Survey profile

With the aim of highlighting the significant contribution of the ICT sector to the overall increase in productivity of Greek businesses, a primary survey was conducted among SEPE members

Primary survey conducted during the period 30.10 - 17.11.2025

The objective of the survey was to assess the progress made across key thematic areas of policy recommendations developed within the framework of previous SEPE studies, as well as to identify new needs and priorities that have emerged in recent years as a result of technological and geopolitical developments and socio-economic changes affecting ICT sector

The survey focuses on **four (4) main pillars:**

1. Opportunities & Challenges
2. Assessment of 2019 & 2024 studies' recommendations
3. Strategic priorities
4. Progress & Prospects of ICT sector

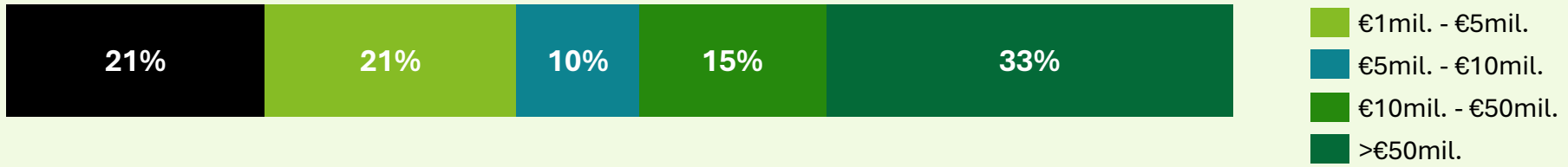
Primary Survey I Survey demographics

Most of the executives who responded to the survey are employed at larger companies within the industry

Participation

190 executives

Distribution of respondents based on company's turnover they work for



Distribution of respondents based on the total number of employees in the companies they work for

1 - 3 persons

Businesses with between 1 and 3 employees

~5% of total sample

4 - 10 persons

Businesses with between 4 and 10 employees

~13% of total sample

11 - 50 persons

Businesses with between 11 and 50 employees

~25% of total sample

51 - 99 persons

Businesses with between 51 and 99 employees

~11% of total sample

100 - 250 persons

Businesses with between 100 and 250 employees

~28% of total sample

> 250 persons

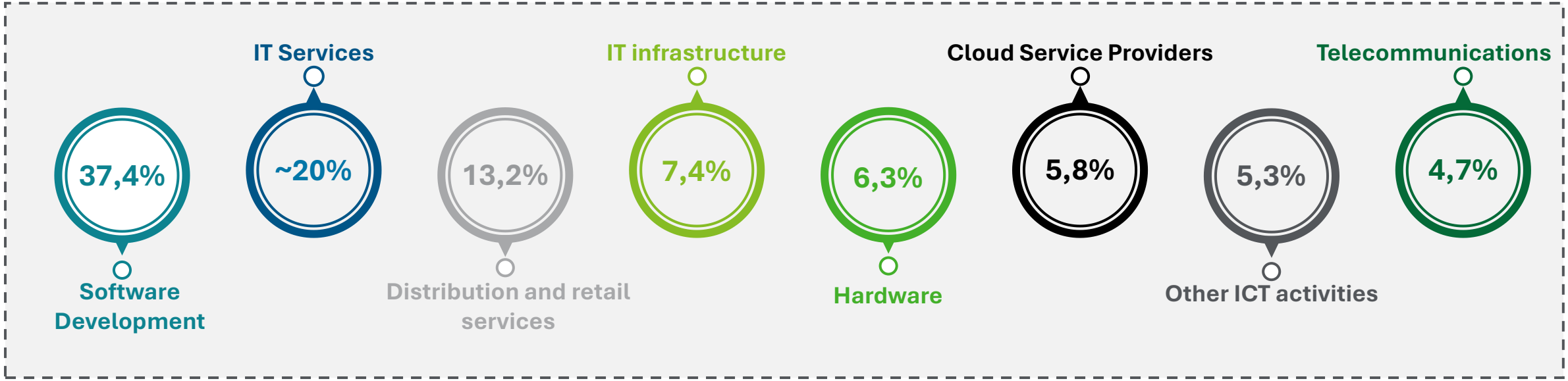
Businesses with more than 250 employees

~18% of total sample

Primary Survey I Survey demographics (continued)

The majority of the sample is comprised of companies primarily focused on software development and IT services, although the full spectrum of ICT services is represented, while the sample covers a wide range of management positions

Organization's main focus in the ICT sector



Role within the company

56,32%
Top management executives

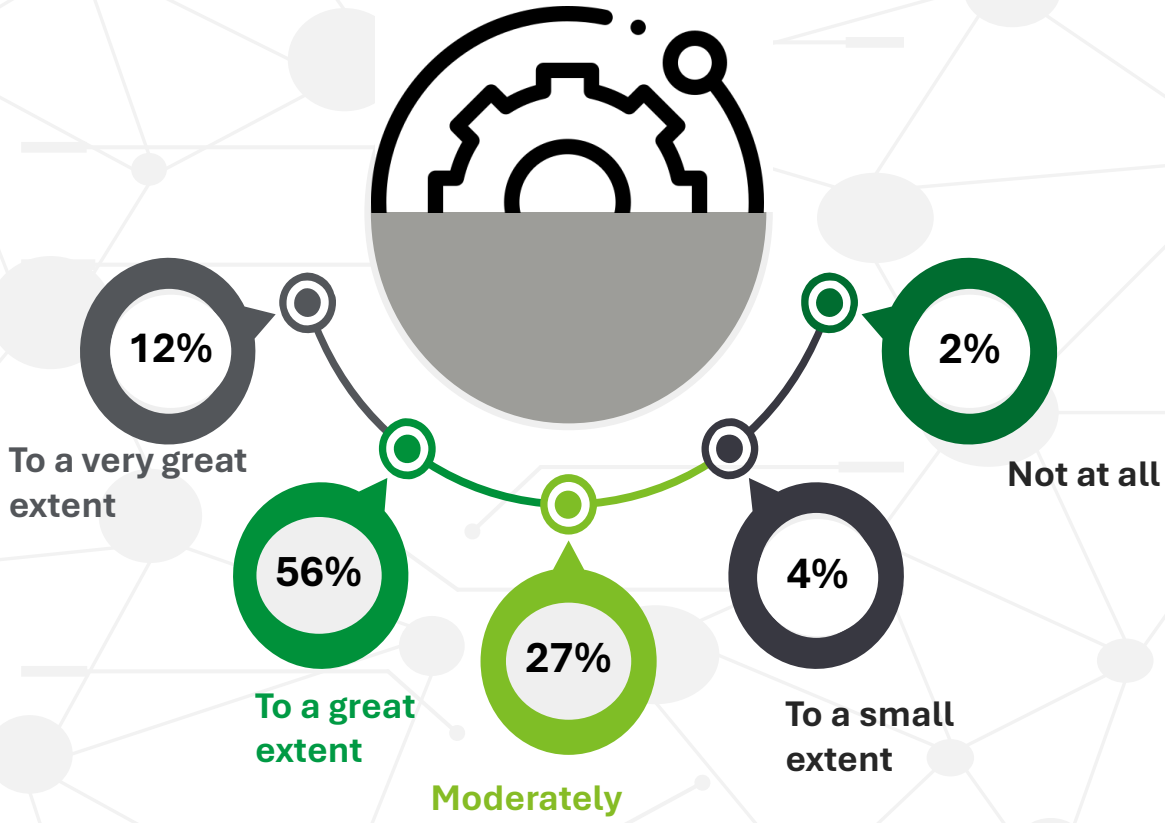
15,79%
Senior management executives

16,84%
Managers

Primary Survey I Progress and prospects of ICT sector

The majority of the executives in the sample, state that significant progress has been made in the ICT sector from 2019 until today while at the same time they are optimistic about the future of the ICT sector in Greece

To what extent do you consider that progress has been made **in the ICT sector since 2019**?



Assessment of the future of ICT sector in Greece in the next 5 years

Significantly optimistic	11,1%	27% (2024)
Cautiously optimistic	55,8%	53% (2024)
Neutral	19%	6% (2024)
Restless	11,6%	10% (2024)
Highly pessimistic	2,6%	4% (2024)

Primary Survey I Digital transformation of Greek public sector

Most respondents consider the funding allocated to digital transformation initiatives to be “moderately adequate”, as such initiatives do not lead to a significant contribution to the development of the economy and society

How **adequate do you consider the funding allocated to digital transformation initiatives** within public administration?

Very adequate – Funding **fully covers the needs for the digital transformation** of society and the economy

Adequate – Funding provides **substantial support for digital transformation** but does not cover all sectors of society and the economy

Moderately adequate – Funding contributes to digital transformation but **does not provide a significant boost** to the development of the economy and society

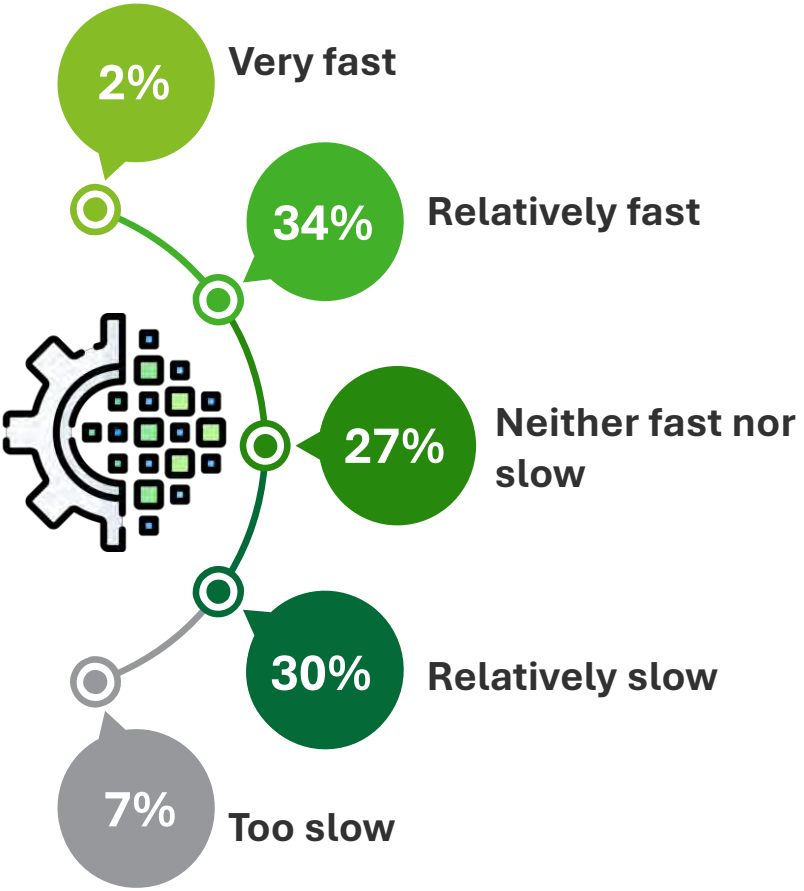
Rather inadequate – Funding is **insufficient** to cover most of the needs of digital transformation in society and the economy

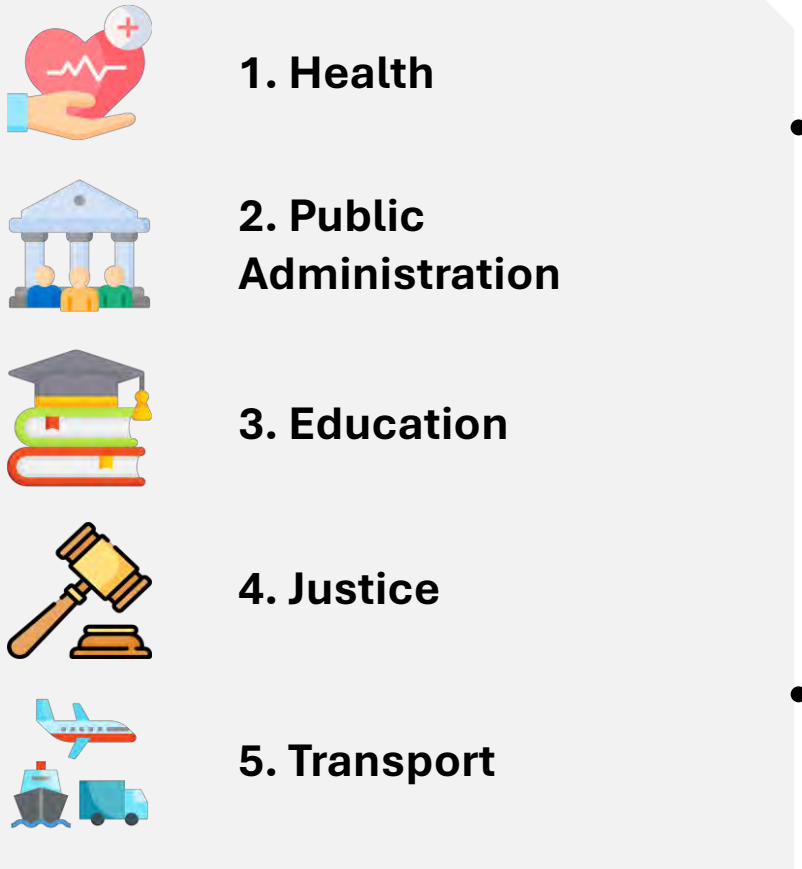
Very inadequate – The digital transformation of society and the economy **remains without substantial financial support**

Primary Survey I Digital transformation of Greek public sector (continued)

The majority of respondents assessed the speed of implementation of digital transformation initiatives as relatively fast, while the healthcare sector was identified as the top priority for further digitalisation

How do you assess the **speed of implementation of the** State's digital transformation initiatives?

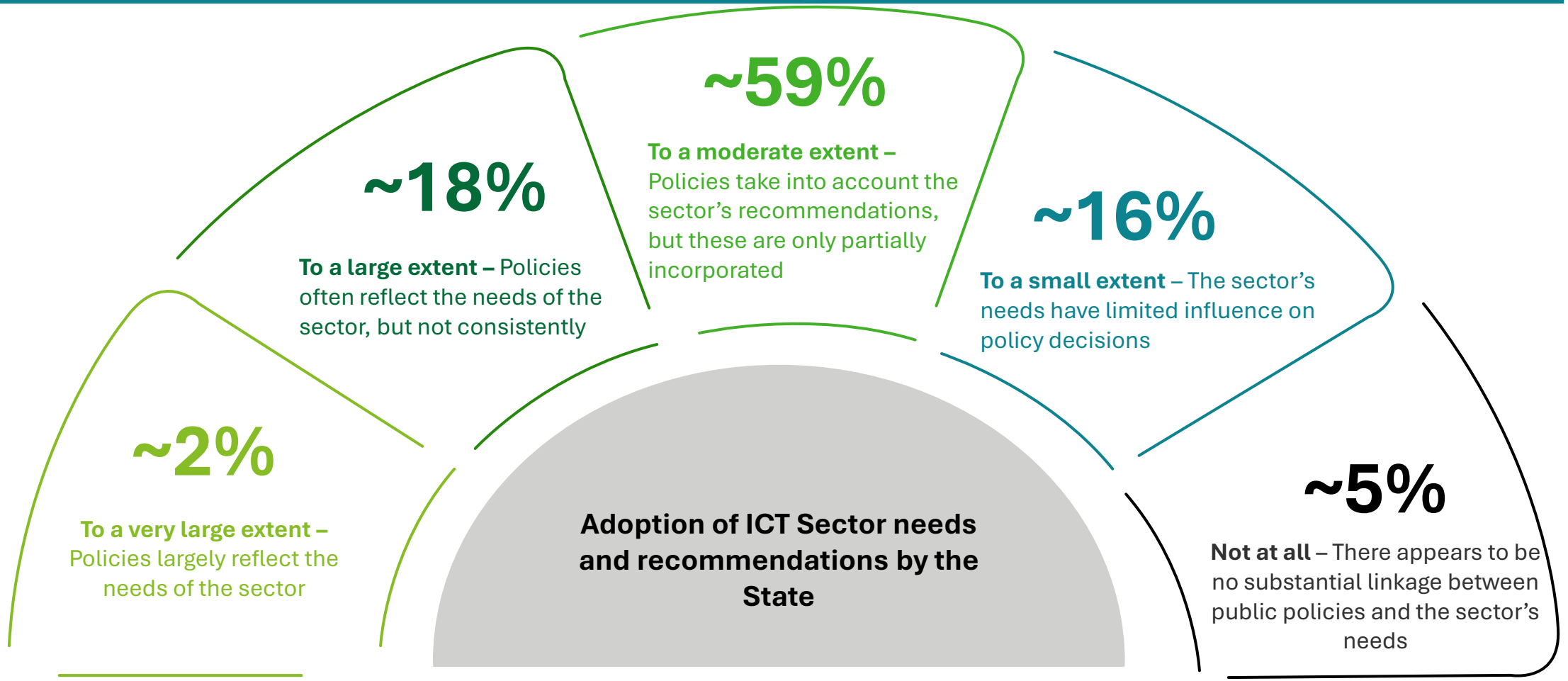




Primary Survey I Adoption of ICT sector recommendations by the State

Most respondents believe that public policies take into account the needs and recommendations of the ICT sector; however, these are only partially incorporated

To what extent do you believe that the **State takes into account the needs and recommendations** of the ICT sector?



Primary Survey I ICT sector challenges

The most significant challenges faced by the majority of companies in the sample are bureaucracy and the lack of specialised human resources

What are the **3 biggest challenges** that the ICT sector continues to face?

**Multiple-choice question*

48,9%

Bureaucracy

47,9%

Lack of human resources

43,2%

Delays in digital transformation projects

33,2%

Low levels of research and development

24,2%

Weak linkage between universities and the labour market

20,5%

Limited funding

20%

Limited international outreach

17,9%

Brain Drain

17,4%

Lack of an investment-friendly environment

15,3%

Insufficient digital infrastructure

10,5%

Limited domestic market demand

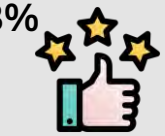
Primary Survey I Assessment of the implementation of 2019 & 2024 study proposals

The acceleration of eGovernment takes the highest satisfaction regarding the progress made in recent years

To what extent are you **satisfied with the progress made by the State** in the following areas over the past years?

Strengthening human resources and skills

~40% of respondents believe that *moderate to very significant progress* has been made in recent years, with "Digital skills empowerment" reaching ~ **48%**



Promoting innovation & research

~35% of respondents believe that *moderate to very significant progress* has been made in recent years

Accelerating e-government

~84% of respondents believe that *moderate to very significant progress* has been made in recent years

Enhancing internationalization & competitiveness

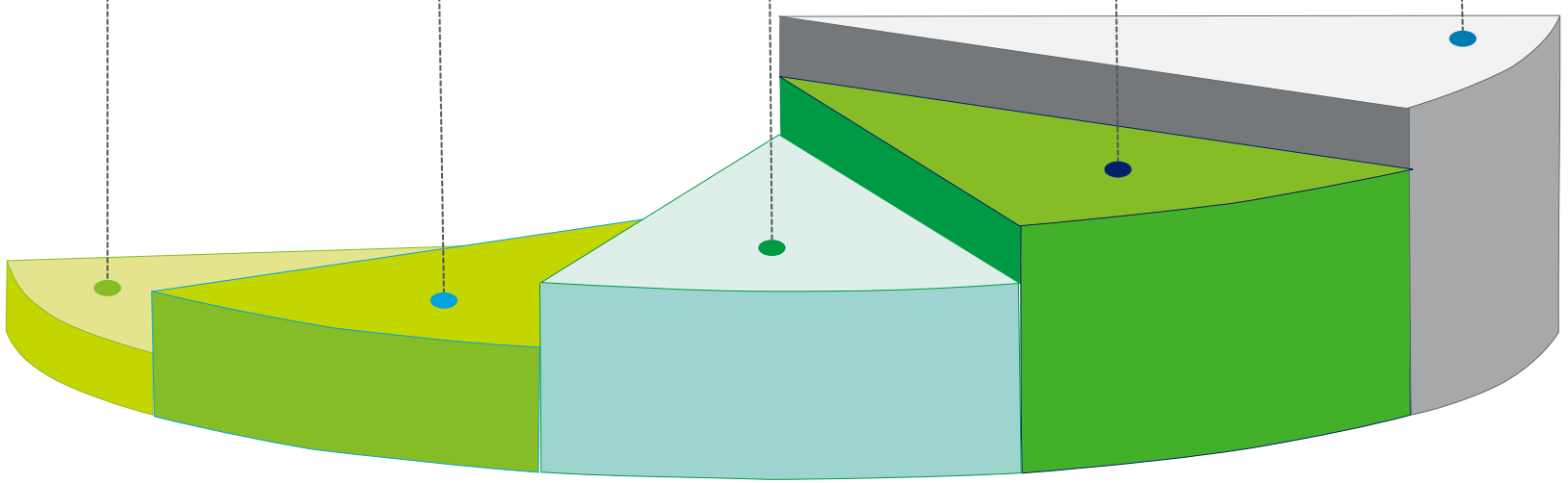
~51% of respondents believe that *moderate to very significant progress* has been made in recent years, with "Investments in infrastructure" reaching~ **72%**

Primary Survey I Maintenance of public sector's information systems

The survey's results indicated that maintenance of public sector's information systems is essential; however, the lack of stable funding limits its effectiveness

Which of the following statements best reflects your views on the **maintenance and operation of information systems in the public sector**?

3,7%	23,2%	41,1%	21,6%	10,5%
Maintenance and operation of information systems **are adequately funded and planned**	There is **partial provision** for maintenance, but available resources are insufficient for the sustainable operation of critical systems	Maintenance of information systems is **handled in a fragmented manner**, without a stable policy or budget	**Lack of funding and institutional framework** for maintenance jeopardizes the continued operation of critical information systems	**There is no substantial provision or policy** for the maintenance and operation of public sector information systems



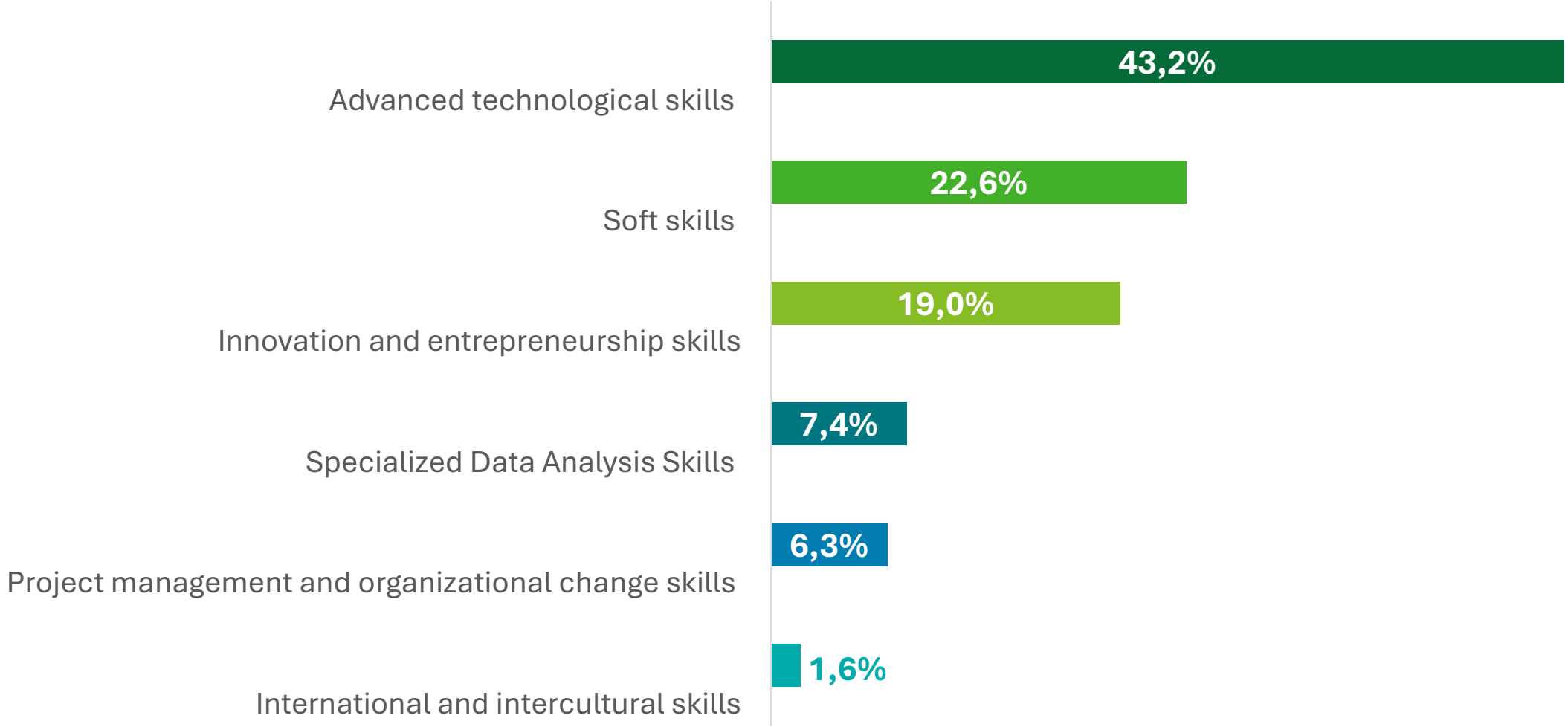
Factors hindering the maintenance and smooth operation of public sector's information systems

- **37,4%** - Lack of stable funding
- **26,8%** - Lack of specialised personnel
- **20,5%** - Limited provision for equipment upgrades
- **7,4%** - High operational and support costs
- **6,3%** - Continuous and rapid development of technological solutions

Primary Survey I Critical skills for the ICT sector

The most critical skills to be developed among ICT professionals concern the acquisition of advanced technological and transversal skills, as well as innovation and entrepreneurship skills

Which do you consider to be the **most critical skills that ICT sector professionals** should develop by 2030?



Primary Survey I ICT Strategic pillars

According to the respondents, promoting investments and regulatory frameworks for AI and robotics, as well as the development of digital skills programs, are considered the most important ICT strategic pillars

Which **strategic pillars** should be prioritised in the coming years to ensure competitiveness and resilience of the ICT sector, enabling it to drive the country's digital transformation?

**Multiple-choice question*

1. Promotion of investments and regulatory frameworks for Artificial Intelligence and robotics I **15,2%**
2. Programs for the development and retention of human resources with digital skills I **14,6%**
3. Design and development of advanced infrastructure (cloud, data centers, new generation networks) I **12,4%**
4. Uninterrupted implementation and continuous updating of national cybersecurity strategy initiatives I **11,6%**
5. Measures to enhance internationalisation and global outreach of ICT companies I **11,2%**
6. Strengthening research and innovation (R&D) ecosystems I **9,2%**
7. Institutional reinforcement of public-private partnerships I **8,2%**
8. Policies for green and sustainable digital transformation I **6,9%**
9. Digital public services in strategically important sectors (Tourism, Culture, etc.) I **5,6%**
10. Policies for the digital modernisation of industry and supply chain I **5,1%**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Evaluation of proposals progress I 4 distinct pillars of proposals

Based on the recommendations of the 2019 and 2024 studies, ten (10) thematic areas were identified, organised, and consolidated into four distinct pillars, in order to better reflect the core policy directions

Strengthening human resources I Digital orientation within the education system

The development of a digital orientation within the education system constitutes a critical tool for strengthening human capital skills

1. Digital orientation within the education system

It concerns **initiatives related to "digital literacy"** that are expected to have a long-term impact on the digital transformation of the country, contributing to all strategic goals of ICT sector

Key actions set for achievement:

- Development and implementation of a "Digitally enabled Curriculum" in Greek schools, based on a long-term vision
- Enrichment of curricula, establishment of more IT departments and closer linkages with businesses and industry

Indicative measurable targets defined*:

- **1.500 additional graduates per year,** through the creation of 30 new postgraduate programmes

**Based on the proposals developed by 2019 and 2024 studies*

Current situation

- **~53%** of the population aged 16-74 in Greece possess at least basic digital skills, compared to an **EU average of 56%**
- **Greece ranks 23rd,** with a gap of 16 points from the average score (476 points), among 31 countries in terms of digital literacy in schools
- **~60%** of students in Greece are at very low levels of digital literacy (Level 1 or below), while **only ~39% reach intermediate or advanced** levels (Level 2-4) with the **majority of these (31%)** at level 2
- **~6,5% of students** enroll in ICT related programmes, of whom **only ~4,7% of new entrants graduate** (2024)
- **An additional annual demand of ~7 – 7,5k ICT specialists** per year is estimated for the period 2023 – 2030

Finland has integrated Artificial Intelligence across all levels of education, aiming to foster digital literacy, critical thinking, and responsible use of technology. Through systematic teacher training and early familiarisation of students with AI applications and ethical considerations, citizens are cultivated with a conscious and critical approach to technology.

Germany's dual education system closely links universities and businesses, combining theoretical knowledge with practical training. Through the co-design of curricula with industry, graduate employability is enhanced, and skills are aligned with labour market needs.

Sources: Eurostat, ICILS 2023, Greece 2024 Digital Decade Country Report, SEPE-Deloitte Study, DAAD

Indicative best practices

Strengthening human resources I Digital orientation within the education system

Significant actions have been implemented to strengthen the digital orientation of the education system; however, it is now considered essential to ensure the effective utilisation of the investments already made

Indicative actions implemented for the development of a "digital orientation" within the education system

- **Investments in technological equipment for schools and students** (over 36.000 interactive whiteboards, 177.000 robotics and STEM kits)
- **Digitisation of educational content and access to new platforms** (Digital educational platform e-me, Digital school "digitalschool.gov.gr", eVivlio: access to educational and literary books)
- **Upgrading of school curricula with an emphasis on digital literacy and 21st century skills** (Robotics, STEM/STEAM, Youth Entrepreneurship, New Technologies, English starting from kindergarten, etc.)
- **Inter – University programs / entrepreneurship competitions** that bring together students from different universities (e.g. "IDEA – Innovation Design & Entrepreneurial Action program")
- **Collaboration between the University of Macedonia and Deloitte:** Creation of the 1st Professional Postgraduate Program titled "Enterprise Software Systems Development"
- **Training of educators in the use of technologies and innovative teachnig methods** (150.000 teachers trained in the use of interactive whiteboards, 166.500 teachers trained in Skills Workshops, etc.)
- **Financial instruments** for digital transformation of education (RRF - ~492 million €) and promotion of of youth entrepreneurship (NSRF '21-'27 programs)
- **Targeted programming programs for students / graduates / employees** to acquire practical coding skills (Java, etc.)
- **Innovation and entrepreneurship programmes and initiatives aimed at strengthening linkages between universities and industry** (including initiatives of the Ministry of Education to promote entrepreneurship within Higher Education Institutions)
- **Collaboration between SEPE and the Hellenic Authority for Higher Education (HAHE)** for the development of targeted actions to strengthen ICT departments, aiming to improve graduation rates

Intended pathway towards 2030...

A systematic and structured integration of technological equipment into daily educational practice, accompanied by continuous monitoring, documentation, and evaluation of its use, in order to ensure optimal functionality, pedagogical effectiveness and maximum return on investment

Strengthening human resources I Talent Development & Attraction

The development and attraction of talent constitute a cornerstone for the qualitative and dynamic strengthening of human capital, supporting the transition towards a “digital society”

2. Talent development & attraction

Continuous upskilling of citizens in digital skills, together **with talent attraction** through addressing the “brain drain” challenge, represent critical drivers for enabling the transition to a digital society

Key actions set for achievement:

- Design and implementation of lifelong learning (LLL) initiatives in digital skills for vulnerable groups, as well as training of business executives in digital technologies
- Design and implementation of re-skilling initiatives for the unemployed, particularly in programming
- Induction of incentives for the repatriation of scientists and ICT professionals

Indicative measurable targets defined*:

- **Awarding of 1.000 tech visas** on an annual basis to attract talent and expertise from abroad
- **Repatriation of 1.000 ICT professionals / specialists** over a period of 5 years through targeted outreach to specific labour markets, in cooperation with sectoral stakeholders (e.g. SEPE)

Current situation

- **40%** of employees will **require reskilling within a three-year period** in order to adapt to Artificial Intelligence and automation (2024)
- **~2,5%** of the workforcei in Greece are **ICT specialists** compared to an EU average of approximately **5%** (2024)
- **Only ~13%** of enterprises provide **ICT-related training to employees**, compared to an EU average of **22,4%** (2022)
- **~8,5%** unemployment in Greece (June 2025) versus 5,9% in the EU
- **~70%** of employees will require **reskilling or retraining** by 2030 to retain their jobs or secure new employment
- **~330.000** Greeks remain abroad (2025)

In **Sweden**, unemployed individuals registered with the Public Employment Service are offered **free training programmes** in occupations facing labour shortages, lasting from a few weeks to six months. These programmes combine classroom instruction with workplace training, providing participants with practical experience and valuable employer connections that enhance employability.

The **UK Government** announced in June 2025 the **establishment of the Global Talent Taskforce** and the **allocation of £54 million** through the Global Talent Fund to attract leading scientists and professionals worldwide, covering relocation and research costs for five years. In total, over £115 million is being invested to position the United Kingdom as a leading global destination for talent.

Sources: DESI, SEPE, HFRI, ELSTAT, World Economic Forum, Aksverige, UK Government

**Based on the proposals developed by 2019 and 2024 studies*

Indicative best practices

Strengthening human resources I Talent Development & Attraction

In the context of talent development and attraction, the implementation of several actions is observed, while the next step for the evolution of the pillar is the formulation of a coherent talent development strategy in the ICT sector

Indicative actions implemented for "Talent Development & Attraction"

Rebrain Greece platform - rapid matching of highly skilled professionals with specialised job positions, facilitating the reintegration of Greek talent into the domestic market

Tax Incentives – Non-Dom Regime: Flat annual tax of €100.000 for eligible individuals, with extension provisions for family members I 50% income tax exemption and relief from presumptive taxation criteria for individuals transferring their tax residence to Greece

Collaboration with multinational technology firms to provide free online training programmes for unemployed individuals in digital skills, cloud computing, and related fields.

Reskilling & Upskilling through Universities - Provision of 50–200 hours of theoretical training in digital and green skills to 80.000 unemployed individuals over 18 years of age

Public Sector Training in Digital Technologies - Microsoft Hellas cooperation with EKDDA for the training of ~250.000 employees by 2025. National Digital Governance & Innovation Hub for training employees in SMEs and the public sector

Networking & International Talent Attraction Programs - Organisation of events and forums reconnecting Greeks abroad with the domestic labour market, (e.g. Digital Skills Forums, international events and Career Days in major migration hubs)

Golden Visa for startups - New residence permit scheme for 3rd country nationals investing €250k in start ups registered with Elevate Greece (from 2025)

Training and Certification Programs in the ICT Sector by sectoral organisations – e.g. Training of 1.600 unemployed individuals in ICT, in cooperation with SEPE

National Coalition for Digital Skills & Jobs - coordinates national-level initiatives aimed at strengthening digital competencies across multiple sectors, including entrepreneurship and business development

National Academy of Digital Competences - Creation of a single training platform for digital skills of business executives (from 2021). Includes 337 courses +1.800 hours of training

Intended pathway towards 2030...

To establish and develop a coherent and sustainable support ecosystem that strengthens and promotes careers in the technology sector, grounded in a specialised, evidence-based and long-term national talent development strategy for the ICT sector

Promoting innovation & research I Building a high-impact R&D and innovation environment

The promotion of innovation and research is pivotal, as it shapes an ecosystem that fosters creativity, scientific excellence, and technological advancement

3. Building a high-impact research & innovation ecosystem

Concerns initiatives aimed at establishing and strengthening a dynamic research and innovation ecosystem, with the objective of enhancing long-term competitiveness and technological development in the ICT sector

Key actions that had been set for achievement:

- Establishment of "Digital Innovation Hubs" to support the digital transformation of Greek enterprises
- Further development of the start-up "ecosystem“ infrastructure and the creation of "innovation and entrepreneurship hubs"

Indicative measurable targets that had been set*:

- **Establishmnet of 1 new large-scale technology park** focused on ICT sector, operational within the next 3 years

Current situation

- **€3,37** billion, total R&D expenditure **representing 1,49% of GDP** (2023)
- **2,5%** of Greek workforce are **ICT specialists** compared to an EU average of 5% (2024)
- **23,1%** increase in **new STEM PhDs graduates** per 1.000 population between 2018 and 2025
- **~€125,5 R&D expenditure per capita**, below the EU average of €284,70, ranking Greece 19th in the EU
- **75,8%** of the EU average performance in the European Innovation Index 2025
- **Greece ranks in 42nd** position in the Global Innovation Index

Sweden serves as a benchmark for university–industry collaboration through its Industridoktorand (industrial PhD) programmes, which enable doctoral candidates to be employed by companies while conducting research. The Swedish model—where doctoral candidates receive salaries rather than scholarships—strengthens private sector engagement in research funding and supervision, facilitating applied research and knowledge transfer.

United Kingdom leads in the development of Centres of Excellence (CoEs) targeting strategic priority sectors. A notable example is the NICER programme (investment of £30 million), implemented by the UK Department for Environment in collaboration with British universities, promoting circular economy solutions and sustainable development.

Sources: WIPO, Eurostat, ECB, European Commission, ICT Specialists, SSF, US

Indicative best practices

**Based on the proposals developed by 2019 and 2024 studies*

Promoting innovation & research I Building a high-impact R&D and innovation environment

To further reinforce a high-performance research and innovation ecosystem, continued cultivation and support of innovative ideas and research initiatives is proposed, with a strong emphasis on applied research and market-oriented outcomes

Indicative actions implemented for "Building a high-impact R&D and innovation environment"

Pharos Initiative – "The Greek AI Factory" aims to accelerate AI development and support startups and SMEs in the Artificial Intelligence sector through the provision of infrastructure, advisory services, and financial instruments

European Digital Hubs (EDIHs) - Greece hosts 7 EDIHs, including Smart Attica, which operate as OSSs supporting SMEs and public sector bodies in addressing digital transformation challenges through testing, advisory, and skills development services

Regional Innovation Centers - 13 Regional Innovation Centres within Regional Directorates of Education, aimed at strengthening primary and secondary education through innovation exposure and technological capacity-building

Multinational Digital Innovation Hubs – Creation of digital and R&D hubs by major multinational corporations across the regions, promoting advanced technological services, digital transformation capabilities, innovation diffusion, and high-value job creation

EIT Community Hub Greece - The EIT Community Hub Greece connects the Greek innovation ecosystem with the network of the European Institute of Innovation & Technology, enhancing collaboration between startups, academia, and industry at European level

Tax and financial incentives for R&D support - A robust framework of fiscal incentives supports private R&D investment, including: Super-deductions (100%–315%) for self-financed R&D expenditures (buildings, equipment, software, etc.), 50% tax deductions for angel investors, Incentives for employee and founder stock options, Tax incentives for corporate transformations, including mergers and spin-offs

University–Industry Collaboration - Establishment of Research Centres of Excellence within universities, functioning as structured collaboration nodes between academia and industry to facilitate knowledge transfer, commercialization, and joint innovation projects

National Recovery and Resilience Plan – "Greece 2.0" – Under the National Recovery Plan "Greece 2.0", financed through NextGenerationEU, the "Industrial PhDs" action supports research excellence and applied innovation within universities, strengthening links between doctoral research and industrial needs

Centres of Excellence in Strategic Sectors - Development of sector-focused Centres of Excellence through structured partnerships between enterprises and research institutions in critical domains, enhancing technological specialization and competitive advantage

Intended pathway towards 2030...

Leveraging modern infrastructure and developing new organizational and research structures to advance applied research and innovation, with the ultimate objective of substantially enhancing business productivity, competitiveness, and internationalization capacity

Promoting innovation and research I Support for business innovation and startups

The support of entrepreneurial innovation and startups has been identified as a strategic priority, as it shapes an investment-friendly environment that facilitates capital inflows, knowledge transfer, and sustainable growth

4. Support for business innovation and startups

Initiatives aimed at strengthening entrepreneurial innovation and the startup ecosystem, fostering a pro-investment environment that accelerates knowledge diffusion, capital attraction, and long-term scalability

Key actions that had been set for achievement:

- Tax incentives for startups developing patented technologies, to ensure retention of headquarters and core activities in Greece
- Activation and expansion of tax incentive for intellectual property - IP BOX

Indicative measurable targets that had been set*:

- **100% tax super-deduction** for investments and training in selected frontier technologies (e.g., cybersecurity, AI, quantum technologies)

Current situation

- **24%** of startups have **female founders** , highlighting that gender representation remains comparatively low (2024)
- **€>555 million** in **total investments** across more than 90 Greek startups (2024), reflecting a 15% increase compared to 2023
- A **5% contraction** in the broader European startup ecosystem (2024), highlighting the **importance of maintaining national competitiveness**

Portugal has emerged as **one of Europe's most dynamic startup hubs** through targeted policies attracting talent and capital. It offers one of the most favorable stock option tax regimes (14%), a reduced 12,5% corporate tax rate for startups, and strong R&D tax incentives under SIFIDE II, alongside incentives for angel investors.

Mission French Tech, in collaboration with **Bpifrance**, provides **financial and advisory support** to 125 high-impact companies addressing societal challenges, while the French Tech Next40/120 program accelerates the 120 most promising scale-ups toward global leadership.

Sources: European Commission, OECD, World Bank, Foundation, Startup Portugal

**Based on the proposals developed by 2019 and 2024 studies*

Indicative best practices

Promoting innovation and research I Support for business innovation and startups

To further enhance entrepreneurial innovation and startup development, greater emphasis must be placed on delivering targeted, high–value-added services that empower startups and accelerate their scaling trajectory

Indicative actions implemented for"Supporting business innovations and start-ups"

Startup & Innovation Support Initiatives - Programs providing ecosystem mapping, structured networking, access to financing instruments, mentoring, and accelerator implementation for Greek startups and AI-driven ventures

Talent & Investment Attraction Programs - Golden Visa schemes for startups **I** Digital Nomad Visa targeting innovative entrepreneurs and digital professionals

Financing and access to capital - EquiFund II Initiative & regulatory framework for Crowdfunding, providing startups and innovative enterprises with improved access to growth capital and facilitate cross-border investment activity

Investment Tax Incentives - Family Offices Regime (7% deemed profit margin rule) and the new Venture Capital Mutual Fund framework (AKES), simplifying taxation structures and create favorable investment vehicles to attract capital into innovative startups

HDBI - Operates as a sovereign fund of funds, investing in private venture capital schemes supporting SMEs and startups, contributing up to 70% per investment vehicle with a maximum duration of five years

Intended pathway towards 2030...

Prioritization of high–value-added, targeted support services — including strategic advisory, structured mentoring, access to collaboration networks, investor ecosystems, and international markets — is critical to ensure sustainable growth, competitiveness, and scale-up capacity of Greek startups

Acceleration of e-Government I Upgrading Digital Governance

Upgrading e-government constitutes a key lever for improving efficiency, transparency, and citizen-centric service delivery within public administration

5. Upgrading Digital Governance

Includes interventions aimed at advancing public sector digital transformation and open data policies, ensuring interoperability between entities and optimizing administrative processes

Key actions that had been set for achievement:

- Acceleration of electronic public service development, including the implementation of a unified digital public services platform
- Leveraging Big Data Analytics to enable predictive government capabilities

Indicative measurable targets that had been set*:

- **100%** annual funding coverage for maintenance and expansion of public ICT systems

Current situation

- **295 projects underway** out of **475 foreseen** under the "Digital Transformation Bible"
- **50%** of citizens **report no significant reduction in bureaucracy** over the past five years
- **Greece scores ~55** points in 2025 in the **Digital Decade index** for transparency, service design, and personal data management (EU average ~69,5)
- **Greece has ~79** points in the **Digital Decade index for digital public services** to businesses compared to an EU average of **86,2** (2025)
- **~76%** of internet users interacted online with public authorities (EU average 74,7%)

Finland has achieved near-maximum Digital Decade performance in digital public services (2024). Through its Digital Compass strategy, it has allocated €559 million toward digital transformation through 2030. The central digital gateway Suomi.fi provides unified access to public services for citizens and businesses.

In the **United Kingdom**, the Government Digital Service, operating under the Cabinet Office, leads public sector digital transformation and establishes service design principles for government bodies.

Sources: DSM 2020-2025, ERT, DESI, Suomi.fi, European Commission

**Based on the proposals developed by 2019 and 2024 studies*

Indicative best practices

Acceleration of e-Government I Upgrade of e-Government

Despite significant improvements in e-government through targeted investments, Greece needs to transition to a new digital trajectory where all interactions with public administration are fully digital

Indicative actions implemented for"Upgrade of e-Government"

RRF contribution to Greece's digital transition pillar (~22% of the estimated budget in digital targets which equals to ~ €2 billion). The projects mainly concern the development of digital infrastructure, the modernization of public services, the digitization of SMEs and the enhancement of digital skills

NSRF 2021-2027 - ~€940 million allocated for digital transformation, primarily targeting technology infrastructure, digital services and innovation initiatives

Digitization of public services and citizen service platforms - Gov.gr consolidates 2.200+ services into a single digital gateway while platforms such as MITOS facilitate administrative processes for citizens and businesses

National Portal for Legislative Codification - Provides electronic access to legislation and codifications; currently in final implementation stage

Digitisation of records (e.g. health, justice, etc.) in order to facilitate the development of new services, cross-agency interoperability and open data utilization for transparency and innovation

Upgrading technological infrastructure to improve the performance of public services through modern server and cloud systems, along with the development of a data protection framework based on modern protocols (National Cybersecurity Strategy)

Creation of an Interoperability Center to enhance coordination between agencies, promote standardized procedures and support secure data exchange, with the aim of improving cooperation between public services and for more efficient service

Public administration evaluation survey by the Ministry of the Interior to collect feedback, identify weaknesses and promote targeted improvements

Intended pathway towards 2030...

Transition to a fully integrated, end-to-end digital environment connecting public administration, citizens and businesses. Key features include: advanced CRM functionalities comparable to private sector systems, Personalized, high-quality digital services, Efficient management of citizen and business relationships, Seamless interoperability across all government entities.

Enhancing internationalization & competitiveness I Improving ICT businesses competitiveness factors

Improving the competitiveness factors of Greek businesses strengthens the country's international reputation as a modern and reliable business destination

6. Improving ICT businesses competitiveness factors

Concerns interventions aimed at enhancing Greece's national brand, increasing ICT businesses internationalization and attracting investment through tax and social security incentives

Key actions that had been set for achievement:

- Overall promotion and visibility of "Brand Greece" by economic diplomacy and SEPE. Design and implementation of a long-term international campaign to promote the ICT sector globally

Indicative measurable targets that had been set*:

- **1 platform** to promote the ICT sector and connect Greek businesses with foreign partners

Current situation

- **27th place** among EU Member States in **exports** of medium and high-tech products (2024)
- **~3%** of the Gross Value Added was represented by the **ICT sector** in Greece in 2022 (compared to 5,46% in the EU)
- **26th** among EU countries in ICT investments (2024)
- **~50%** reduction in patent applications between 2021–2024, with 107 applications in 2024

General Business Environment:

- During the period 2019 - 2024 the **Gross Fixed Capital Formation** (Investment Index) **increased by +83,7%**

Ireland is recognised for ICT sector promotion, contributing roughly three times more to GDP than the Eurozone average while ICT exports exceed €35 billion per year. Through Technology Ireland, sector members collaborate closely with government agencies to influence policy and enhance international visibility

Since early 2025, **Belgium** implemented a new framework of investment rebates and innovation tax incentives (IID), modernized eligible technologies and enhanced tax stability. The percentage amounts to 13,5% for patents and for one-off rebates for investments in research and development (R&D).

Sources: Eurostat, European Commission, Enterprise Ireland

**Based on the proposals developed by 2019 and 2024 studies*

Indicative best practices

Enhancing internationalization & competitiveness I Improving ICT businesses competitiveness factors

To further improve the competitiveness of Greek ICT enterprises, it is imperative to develop and consolidate a strong and recognizable Greek brand in selected sub-sectors of the ICT sector

Indicative actions implemented for"Improvement of competitiveness factors of ICT enterprises"

Tax incentives for investments in R&D - Self-financed projects are deducted from the gross income of legal entities at the time of their implementation, increased by 100% (Law 5222/2025). It concerns, among others: Depreciation of buildings, laboratory equipment and specialized software, operating and salary costs, consumable costs for access to databases, purchase of intangible assets or know-how

Patent Box - Tax exemption for patent profits (100% to 3 years, 10% for the next 7 years), linked to related R&D expenses

International Ecosystem Promotion and Branding Initiatives- Endeavor Greece's "Innovation Nation" campaign - 1st national initiative aiming to promote the country as a global center of innovation and technology, **I** Extroversion campaigns for the ICT sector through the NSRF 2014–2020 & 2021–2027 and RRF, "Work From Greece" initiative (2021) for digital nomads

Bilateral cooperation and international networks - Cooperation agreements with the Netherlands, Israel and USA for research and innovation in digital technologies **I** Participation in European initiatives for AI, Big Data, cybersecurity, etc.

Reduction of tax & insurance burdens - Corporate income tax has been reduced from 28% (2019) to 22% (2023), while employee social security contributions have been reduced from 16% to 13,87%, with the prospect of a further reduction

Participation in international ICT exhibitions and technology forums , giving a platform to Greek companies to promote innovative products and connect with investors (e.g. National pavilions at MWC Barcelona, Hannover Messe, VivaTech, CES Las Vegas with the participation of Greek start-ups and ICT companies, Support from organizations such as Enterprise Greece and EKT, etc.)

Intended pathway towards 2030...

Creation and systematic consolidation of a strong and recognizable Greek brand in selected sub-sectors of the ICT sector, in which Greece can develop and capitalize on a comparative and strategic advantage, such as health, culture and related sectors of high added value

Enhancing internationalization & competitiveness I Development of digital infrastructure

The development of modern infrastructure that improves business efficiency and international presence plays a critical role in strengthening competitiveness and internationalization

7. Development of digital infrastructure

Focuses on **implementing all necessary prerequisites** for the **effective and timely deployment of private investments in next-generation networks** and the **enhancement of telecommunications infrastructure**. It also aims to develop comprehensive programs for the implementation of smart cities, making urban areas more efficient, resilient, and human-centric

Key actions that had been set for achievement:

- Seamless licensing of mobile base stations, special provisions for 5G development and facilitating of FTTH network installation and routing processes
- Development of integrated programs for smart city implementation

Current situation

- **~13%** of Greek households **lacked internet access** in 2024 (The lowest percentage in the EU)
- **34,8%** of fixed broadband subscriptions were **>= 100 Mbps** in 2024, compared to 71,8% EU average
- **99,8%** of Greek households were covered by at least one **5G mobile network** in 2024, well above the EU average of 94,4%

The **Netherlands** has one of the most advanced digital infrastructures in Europe, with 98% high-speed broadband coverage and 100% 5G, ensuring reliable connectivity across the country. The National Digital Connectivity Strategy is based on a market model, where private providers develop the infrastructure, while the state and local authorities focus on removing barriers and coordinating licensing

Prague is a model of digital transformation of cities through the Smart Prague 2030 strategy, expanding the initial 2016 initiative. A central tool is the Golemio data platform, which enables comprehensive utilization of urban data for more efficient and connected city services

Sources: DESI, Eurostat, Invest in Holland, Smart Prague

**Based on the proposals developed by 2019 and 2024 studies*

Indicative best practices

Enhancing internationalization & competitiveness I Development of digital infrastructure

Initiatives for the development of modern digital and technological infrastructure lay the foundation for future smart and sustainable cities in the country, strengthening its economic growth

Indicative actions implemented for"Development of digital infrastructures"

5G auction & investments - Greece was among the first 3 EU countries to complete the 5G tender process, with a total investment of €372 million from operators in 2020

Incentivising broadband services - Smart Readiness: Subsidizes work within buildings (cables, infrastructure) that facilitates the transition to "smart" buildings - e.g. installation of fiber optics, interconnection infrastructure with smart meters. It aims to cover 120.000 buildings with fiber optic infrastructure by 2025 **I** Gigabit Voucher: Voucher worth €200 to cover part of the cost of the initial connection and subscription for the first 24 months

Licensing procedures - The base stations licensing framework (2022) simplifies procedures for faster deployment of next-generation networks, while the digital platform "e-dieleysis" (2024) coordinates transit requests between companies and municipalities, facilitating the implementation of infrastructure

Funding of 17 Municipalities of the country, 16 municipalities with a population of more than 100.000 inhabitants and the Municipality of Trikala as a model of "smart Municipality", for the development and use of new technological means that will improve the management and functionality of the urban environment in Greek cities

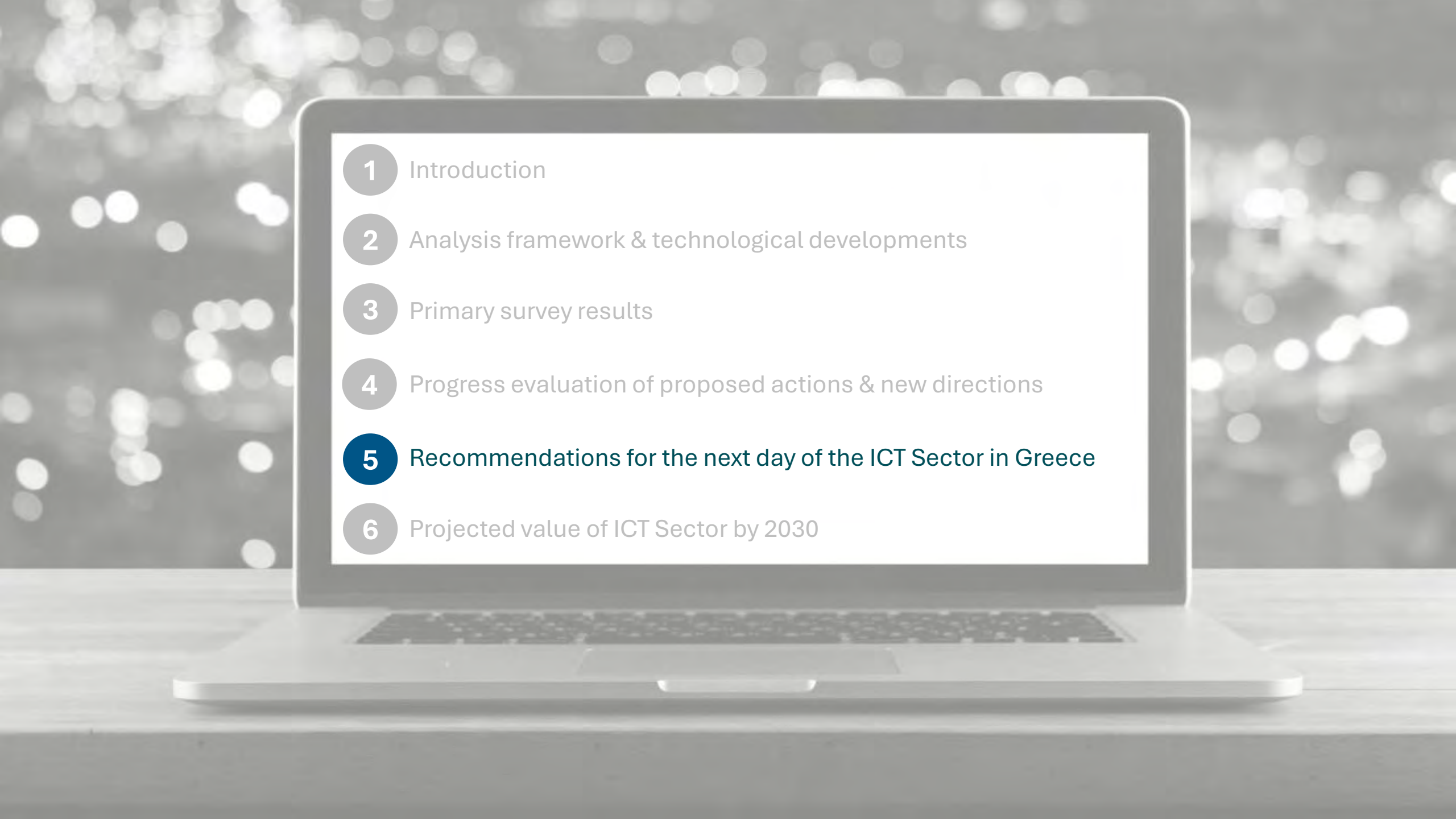
Extension of the above Funding Action to 52 Municipalities ("Digital Transformation of Local Authorities" (through NSRF 2021-2027)) with a budget of ~ €235,3 million.

Cooperation with European Investment Bank (EIB) - New agreement with 6 municipalities (Athens, Thessaloniki, Kozani, Trikala, Ioannina, Kalamata) for investment strategies in climate neutrality & smart cities

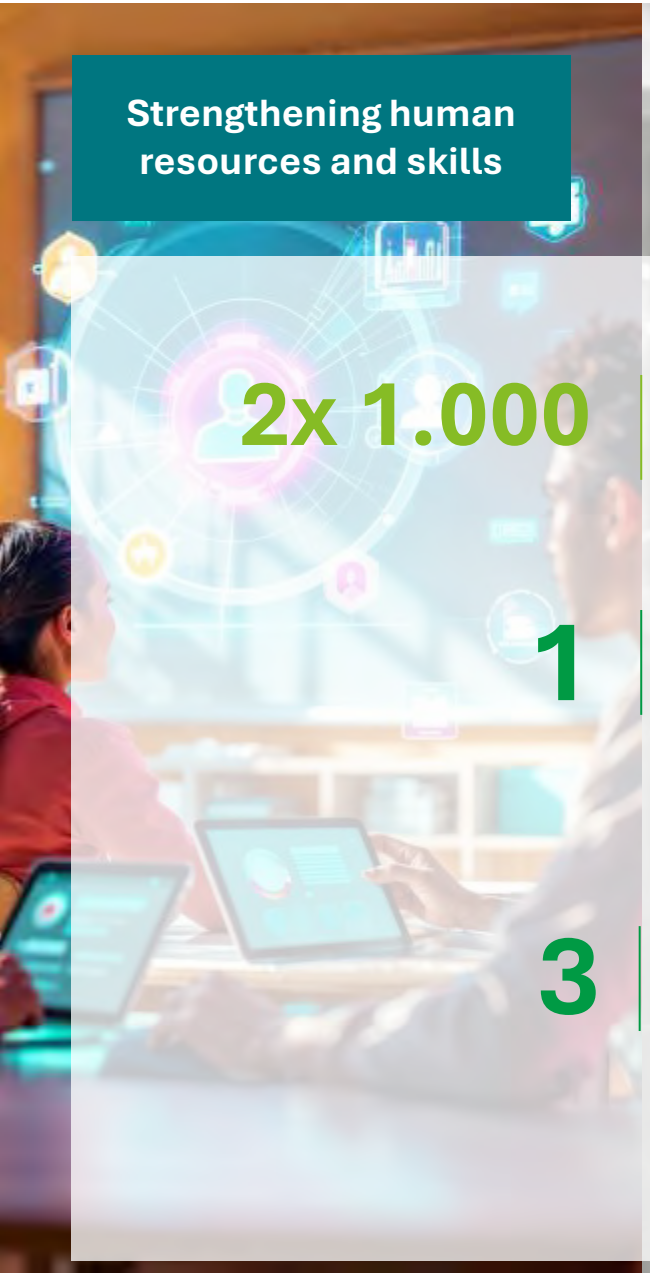
Implementation of individual "smart cities" actions, (e.g. smart lighting, traffic management) without a single strategic framework, as a result of which they are not connected to an integrated system, as in international seamless mobility initiatives

Intended pathway towards 2030...

Systematic use of data through the transformation of information into evidence-based knowledge and actionable insights, aimed at designing and operating more resilient, sustainable, and efficient cities, leveraging data-driven approaches and smart urban governance technologies.


1 Introduction
2 Analysis framework & technological developments
3 Primary survey results
4 Progress evaluation of proposed actions & new directions
5 Recommendations for the next day of the ICT Sector in Greece
6 Projected value of ICT Sector by 2030

Recommendations I Measurable goals & new objectives



Strengthening human resources and skills

Promoting innovation & research

Accelerating e-government

Enhancing internationalization & competitiveness

2x 1.000

1.000 additional graduates per year through new Postgraduate Programs **(at least 30 MSc programs) | Annual issuance of 1.000 tech visas** to “attract” talent from abroad

1

nationwide program integrating computational thinking and basic programming skills from primary school — students transition from “consumers” to “creators” of digital technology

Monitoring mechanism for the usage of newly available equipment

3

Areas to be selected and developed as **Digital Nomads Hubs** under a comprehensive national strategy for attracting and leveraging digital nomads in the domestic ICT sector, ensuring highly attractive conditions (schools, healthcare, housing)

Recommendations I Measurable goals & new objectives

Strengthening human resources and skills

Promoting innovation & research

Accelerating e-government

Enhancing internationalization & competitiveness

x2

Improvement of country’s performance in the indicator "**Expenditure on Research and Development as a percentage of GDP**", in order to achieve the target of 3% of GDP – with a particular focus on applied research

1

new platform – supporting the substantial evolution of Elevate Greece as a service hub aimed at empowering start-ups (promotion, networking with investors, information on financial tools, training, mentoring)

+9

Positions improvement in the country's ranking on the **European Innovation Scoreboard**, approaching the European average and ranking the country in the "Strong Innovators" category

Recommendations I Measurable goals & new objectives

Strengthening human resources and skills | Promoting innovation & research | **Accelerating e-government** | Enhancing internationalization & competitiveness

100% **Annual funding guaranteed for the maintenance and expansion needs of ICT systems in Public Administration** – treating these expenditures as fixed and ongoing requirements

100% **Digitization of all public services** and mandatory **elimination of paper-based transactions** within the **next 5 years,** enabling:

- **Predictive** government
- **Seamless implementation of the "once only principle"**
- **Availability of open data sets for use by the private sector** to develop commercial applications, value-added services, and innovative solutions

1 **"e-Government Observatory"** to record the country's digital public administration systems, including their needs, and to monitor national digital transformation initiatives

Recommendations I Measurable goals & new objectives

Strengthening human resources and skills

Promoting innovation & research

Accelerating e-government

Enhancing internationalization & competitiveness

1 new **digital platform** for registering and showcasing Greek ICT sector companies, aiming to increase visibility, strengthen collaborations, promote business opportunities nationally and internationally, and serve as a springboard for commercial missions abroad (at least 5 per year).

100% **tax super-deduction for investments and training activities** in selected cutting-edge technologies (e.g., cybersecurity, AI, quantum)

1 **open data platform aggregating and leveraging data from all smart cities,** enhancing interoperability and supporting evidence-based decision-making at the national level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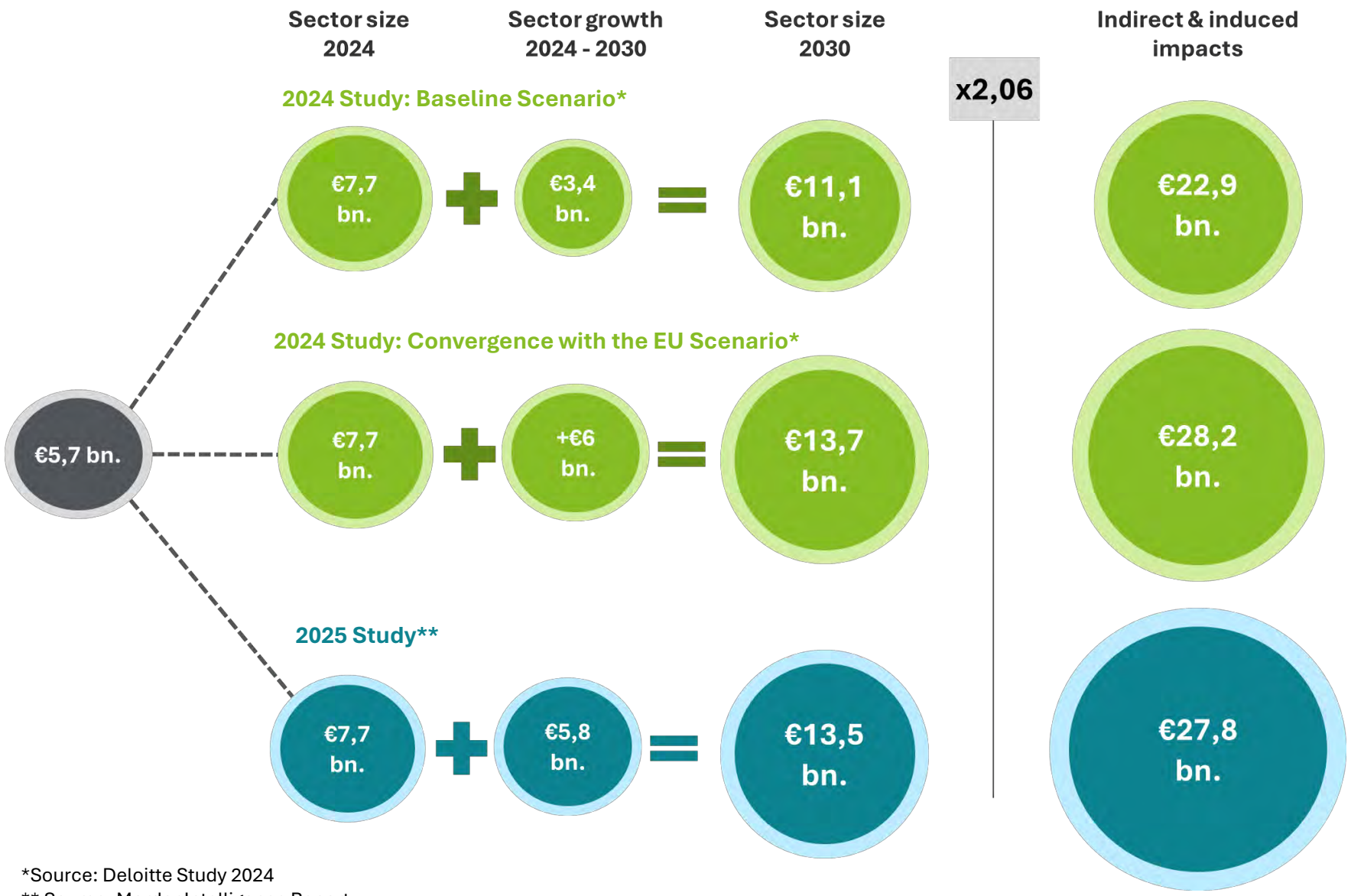
Expected value of ICT sector in 2030 I Projected value and impact



*Source: Deloitte Study 2024
** Source: Mordor Intelligence Report

Notes

- The size of the sector in **2019** was estimated at **€5,7 billion.**
- In the 2024 study, **two alternative scenarios** were analyzed for the sector's evolution up to 2030. According to the baseline scenario, the sector's size in 2030 was **projected at €11,1 billion**, while under the convergence with the EU scenario average, it was **projected at €13,7 billion**. These scenarios **implied indirect and induced impacts** of **€22,9 billion and €28,2 billion, respectively**
- The current study revises the 2024 figures, showing that the **size of the sector in 2030** will **exceed the baseline scenario** and approach the **convergence with the EU scenario**, reaching €13,5 billion.
- The €13,5 billion "translates" into **a 6% contribution to projected real GDP** in 2030 leading to **~€28 billion in indirect and induced effects accross the wider economy**

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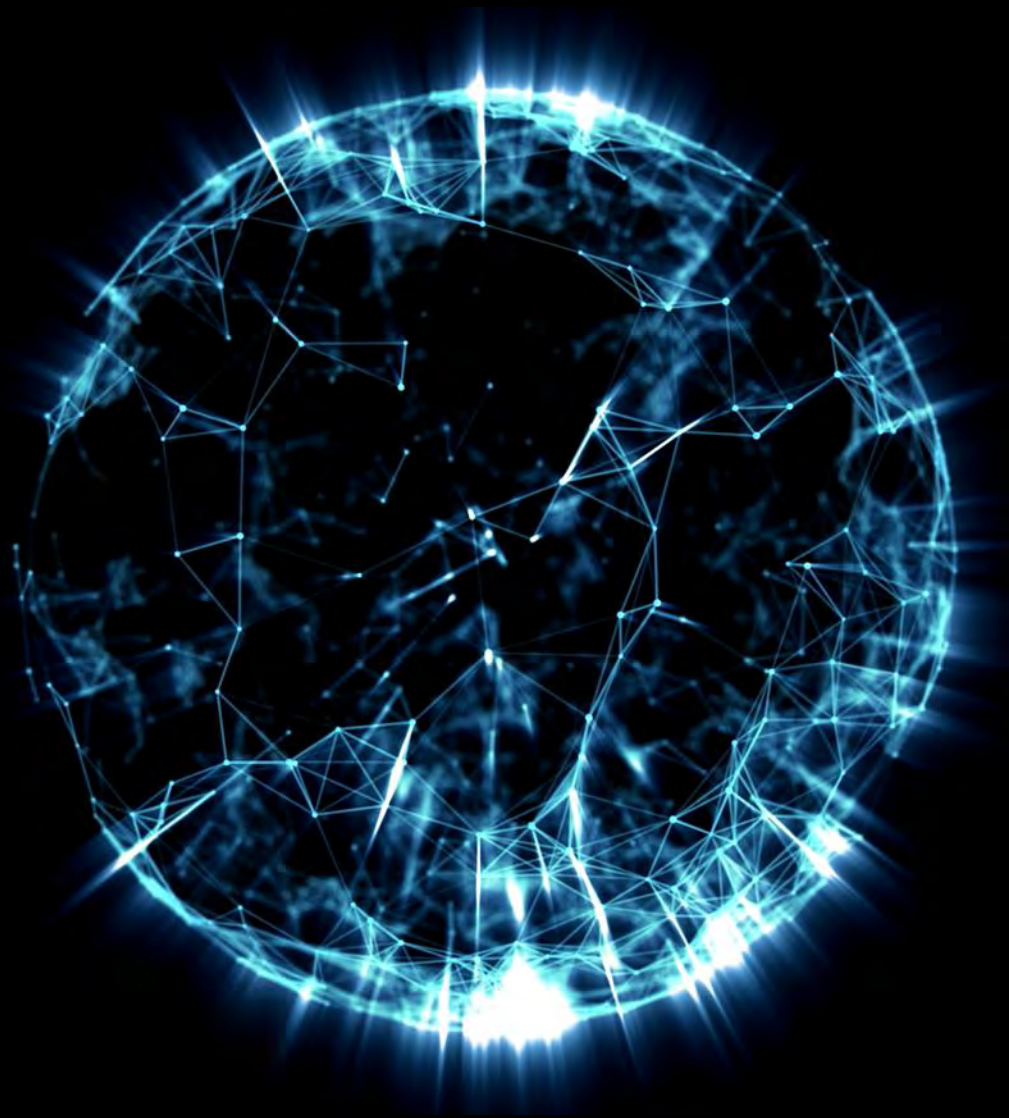

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