

Executive Summary

**SPECIAL REPORT FOR STRENGTHENING THE OUTWARD
ORIENTATION OF BUSINESSES – CREATIVE ECONOMY:
SOFTWARE & DIGITAL CONTENT**

PROJECT TEAM

Executive Note

Special Report for Strengthening the Outward Orientation of Businesses – Creative Economy: Software & Digital Content

AT A GLANCE

Software is one of the fastest-growing markets in the world: global exports of computer services **quadrupled in a decade** and passed EUR 1 trillion, and they are served remotely, with no presence abroad. Greek value absorbed by foreign customers **grew 2.5 times**, with the United States, Germany and the United Kingdom as the leading customers, but European competitors are growing faster. The obstacle is neither demand nor production capability, it is **access to the customer, the documentation the customer asks for and the distribution channels**.

×4

global exports of computer services, 2015-2025

EUR 706 m

Greek value reaching foreign customers, ×2.5 since 2015

29.5%

of the value in five priority markets

13.2%

export intensity, against 20.9% to 48.4% for competitors

1. The opportunity: a market that doubles every five years

Global exports of digitally delivered services reached EUR 4.67 trillion in 2025. Within them, computer services grow by about 15% a year, rose from 12.7% to 21.8% of the total and passed EUR 1 trillion. Europe buys more than half, while demand in Latin America, Asia and Africa more than quadrupled.

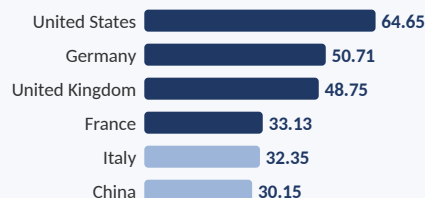
- **Greece doubled, competitors quadrupled.** Greek receipts reached EUR 1.64 billion, double 2015. Portugal, however, which started from a level 1.5 times the Greek one, reached EUR 5.53 billion, 3.4 times the Greek figure, and Poland and Romania more than quadrupled theirs.
- **We export a small part of turnover.** Exports correspond to 13.2% of the sector's turnover, the lowest in the group.
- **The 2030 market will be larger in every scenario.** Greek receipts range from EUR 1.90 to 3.01 billion. The upside scenario is not a matter of luck, it depends on technology adoption, documentation and access to foreign customers.

2. Where the value is: five markets with a Greek presence

Greek software and information services value absorbed by foreign demand reached EUR 706 million in 2024. It grew 2.5 times since 2015, much faster than the economy as a whole, and 63% goes outside the EU. The United States, Germany, the United Kingdom, France and Ireland combine large demand with an existing Greek presence and absorb 29.5% of the value.

What it means: Greek software already has customers in the big markets. The task is to multiply them, with priority on the five markets.

Greek value by destination market, 2024, EUR million (dark: priority markets)



3. The local base: profitable, growing, with a double role

In the nine municipalities, the sector's businesses grew significantly in three years, from 38 to 67, and their turnover almost doubled, to EUR 27.9 million. They are profitable, with positive results every year. Around them, Attica concentrates 73.4% of the sector's employment in the country, with 7,396 units and 33,873 persons employed.

- **The obstacle is scale.** The typical business has a turnover of EUR 85 thousand, unchanged since 2020. On its own it cannot carry the cost of documentation, promotion and presence abroad.
- **Where the large provider cannot reach.** International groups control scale and distribution. They do not control proximity to the customer who asks for customisation, nor the documentation of each supplier.
- **The sector is also a supplier to the strategy.** The digital platforms of West Athens can require the same evidence the international buyer checks. Every local contract then builds a track record that counts abroad.

4. What the buyer asks for: evidence, from the first request

The international buyer does not ask for a declaration, it asks for evidence: **a software bill of materials per release, a licence register and an active vulnerability reporting channel.** Whoever has them ready moves from first contact to negotiation. The dates are known and do not move:

02/02/2025 staff AI literacy	28/06/2025 accessibility of products and services
12/09/2025 switching providers and data portability (SaaS)	02/08/2026 main body of the AI regulation
11/09/2026 reporting of vulnerabilities and severe incidents	11/12/2027 full cyber resilience, CE marking

The same milestones also create new demand for compliance services within the sector itself. In production, 52.9% of Greek businesses in the sector use artificial intelligence against 65.7% in the EU, and almost half struggle to fill specialist posts, mainly for lack of experience rather than of candidates.

5. The entry path in four phases

1 Readiness now: responsible person, vulnerability channel, software inventory	2 Market and entry mode within 2026, from the five markets	3 First presence within 2027, two presences in the same market	4 Scaling 2028-2030, licences, subscriptions, second market
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The milestones are regulatory, so acceleration is allowed, reversing the order is not. Documentation is designed once and reused in every later market, and the shift to licences and subscriptions lets revenue grow without a matching increase in staff.

6. Five measures with measurable targets

Measure	Horizon	Success indicator
1. Software documentation file ahead of each milestone	By 11/12/2027	All supported businesses with a bill of materials, licence register and vulnerability channel
2. Collective training with a deliverable result	By 2029	67 businesses and 134 staff members completing a unit
3. Collective approach to the five priority markets	By 2029	Every business takes part with a complete file
4. Access to distribution channels: app stores, cloud marketplaces	By 2029	Productivity from 49.4 towards 80.0 thousand euro per person employed
5. Local digital contracts with the international buyer's evidence	By 2029	Full coverage of the local base, 67 businesses

The measures address the three points where local businesses stall today: **the documentation the buyer asks for, access to the customer and distribution channels**. All three carry a fixed cost that weighs disproportionately on small businesses, which is why they are organised collectively. First in line is the documentation file, because its date does not move and it opens the door to every next step.

7. How results will show

67 businesses supported by 2029, full coverage of the local base	100% of supported businesses with a complete documentation file by 11/12/2027	EUR 2.24-2.40 bn Greek receipts in 2030 in the baseline scenario, from 1.64
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Greek value in foreign demand is also tracked, from a baseline of EUR 706 million in 2024, together with the sector's productivity, from a baseline of EUR 49.4 thousand per person employed.

8. The principal risk and the response

The risk is twofold. The gap with European competitors is widening and has doubled within five years. At the same time the cost of documentation is fixed per business and is triggered on dates that do not move, weighing disproportionately on a business with a turnover of EUR 85 thousand. **The response is built into the strategy: collective production of the file and a gradual shift to revenue from licences and subscriptions, so that revenue grows faster than staff.**

This Note summarises the Special Internationalisation Report for the creative economy: software and digital content (NACE 62). Every figure is documented in the Report together with its primary source. Sources: World Trade Organization, Eurostat, register of businesses with published financial statements, EU legislation. Single currency the euro, with conversion from dollars at the ECB annual average rate. Scenario ranges are ranges of assumption, not confidence intervals.

Special Report for Strengthening the Outward Orientation of Businesses –
Creative Economy: Software & Digital Content

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Με τη συγχρηματοδότηση
της Ευρωπαϊκής Ένωσης



ΔΥΤΙΚΗΣ ΑΘΗΝΑΣ

