



UNLOCKING GREECE'S AI POTENTIAL 2026

The next wave of AI is here – Greece must act to harness its impact

Greece is emerging as one of Europe's fastest-growing AI landscapes. This report builds on [Unlocking Greece's AI Potential 2025](#), which found adoption accelerating across the economy, with startups leading the way on innovation. The 2026 edition looks at how that trend has developed – shifting the focus from whether businesses use AI to how they use it, and at what the rapid arrival of technologies such as agentic AI means for the country as innovation cycles compress.

AI adoption has risen to **47%** of businesses, up from **34%** last year – a **38%** year-on-year growth rate, the fourth-highest in Europe and well ahead of the European average of **29%**. As adoption accelerates and cloud technologies become more deeply embedded, businesses are increasingly treating AI as a strategic capability that drives long-term competitiveness. Organisations already using AI report measurable benefits – higher productivity, stronger growth expectations, better decision-making, and faster innovation cycles.

This momentum is matched by growing public confidence. Nearly three in ten citizens (**29%**) now use AI daily, and **57%** expect it to improve their lives over the next year – a constructive backdrop of familiarity and optimism as AI moves further into the mainstream.

Yet rapid adoption also highlights the opportunity that still lies ahead. While almost half of Greek businesses have adopted AI, only **17%** have reached the most advanced stage of integration – developing custom AI systems, combining multiple models, or deploying agentic and autonomous capabilities. Most adopters (**61%**) remain focused on foundational applications that improve efficiency and automate routine tasks. As businesses deepen their use of AI, there is substantial scope to unlock new products, services, business models, and sources of competitive advantage.

Cloud infrastructure continues to underpin this progress, with adoption rising from **49%** to **60%** in a year. Nearly half of businesses (**47%**) identify access to cloud infrastructure as one of the most important factors supporting AI implementation. Looking ahead, the next phase of adoption will increasingly depend on readiness to deploy emerging technologies such as agentic and physical AI. Awareness is growing, but only **19%** of businesses currently feel fully or very ready, with skills shortages (**41%**) and insufficient financial resources (**34%**) being the key reasons why businesses don't feel ready yet.



Startups continue to place Greece at the forefront of AI innovation, leading the market on adoption, innovation, and readiness for next-generation technologies. At the same time, many founders say they would consider relocating to access greater capital, more favourable scaling conditions, and faster routes to market. Keeping these businesses in Greece will depend on better access to growth capital, simpler routes to scale, and a regulatory environment that keeps pace with them.

Greece has already established many of the foundations needed to become one of Europe's leading AI economies – strong adoption momentum, expanding cloud infrastructure, growing technical talent, and a strong startup community. The next stage is to translate these foundations into deeper AI integration across businesses of every size and sector. By continuing to invest in skills, expanding access to finance, fostering a pro-innovation regulatory environment, supporting startup growth, and accelerating public-sector digital transformation, Greece can realise the full economic and societal benefits of the next generation of AI.

Key findings

- AI adoption continues to rise rapidly, with **47%** of Greek businesses now using AI – up from **34%** last year – placing the country among Europe's fastest-moving AI markets.
- AI is increasingly strategic: **63%** of businesses identify it as a top or high priority, and **72%** say it plays a critical or important role in their overall business strategy.
- Productivity gains are widespread, with **88%** of AI adopters reporting measurable improvements and **76%** expecting AI to support business growth over the next year.
- Innovation cycles are compressing, as **56%** of AI adopters report faster innovation timelines, rising to **74%** among startups, with AI cited as the primary driver.
- Citizens are engaged and optimistic: **29%** now use AI daily, **57%** expect it to improve their lives in the year ahead, and **47%** view AI more positively when the public sector adopts it.
- Startups are setting the pace, with **73%** having adopted AI – far above the **47%** national rate – and continuing to lead on innovation and readiness for next-generation technologies.
- Despite this, most businesses remain at a basic stage of AI adoption, with **61%** of adopters focused primarily on efficiency and automation rather than transformative applications.
- Advanced AI adoption remains limited, with only **17%** of adopters reaching the most transformative stage involving custom systems, multiple models, or agentic AI.
- Cloud adoption is a major enabler, rising from **49%** to **60%**, with **47%** of businesses identifying cloud infrastructure as a key factor supporting AI adoption.
- Choice and flexibility matter for competitiveness: **71%** of businesses say the ability to choose and switch AI providers is extremely or very important to their adoption, **62%** say they have adequate choice today, and **47%** already use providers from more than one region.
- Businesses are not yet ready for next-generation AI, with only **19%** feeling fully or very ready to adopt technologies such as agentic AI, advanced robotics, and physical AI.
- Skills and financing are the biggest barriers, with **48%** citing AI skills shortages and **36%** identifying insufficient internal financial resources.
- Greece has an opportunity to retain and scale its startups: **41%** say they would consider leaving Europe to access greater capital, faster scaling, and larger markets – a signal that better growth conditions at home could keep them rooted.





Citizens are using AI more, and most see it as a positive force

Public familiarity with AI has moved well beyond the early-adopter stage. **82%** of citizens say they are very or somewhat familiar with AI, and nearly three in ten (**29%**) now use AI-powered tools daily, with a further **27%** using them at least weekly. Much of this use is already woven into everyday life – **64%** have used chatbots in the past six months and **53%** personalised media recommendations – and **48%** of those in work say their personal use of AI is more advanced than their use at work, a sign that appetite is running ahead of workplace adoption.

Sentiment is broadly constructive. **57%** expect AI to improve their daily lives over the next year, **40%** would like the pace of digital innovation to be faster, and **47%** say they view AI more positively when the public sector adopts it.

The effect on work is already being felt, and mostly welcomed. **38%** say AI is significantly affecting their jobs, and of these, **61%** report a positive impact. Confidence is not unconditional, however: only **18%** have taken part in any AI-specific training in the past year, while **59%** say they would like further digital skills training, citing lack of time (**42%**) and cost (**35%**) as the main barriers. Sustaining public confidence will depend on making the benefits of AI tangible in everyday services, and on giving people the skills to use it.



Deepening AI adoption across Greek businesses

Headline adoption figures alone risk masking an underlying trend. Looking deeper into how businesses are implementing AI – from initial experimentation to full transformation – many organisations still remain at basic levels of adoption.

Basic adoption:

61% of AI-adopting businesses remain focused primarily on more basic uses of AI and incremental gains (e.g. driving efficiencies and streamlining processes), rather than innovation (e.g. developing new products or disrupting industries). These businesses are using publicly available chatbots for routine tasks or purchasing ready-made AI solutions. This is a decrease from **66%** last year – demonstrating progress towards transformative innovation.

Intermediate adoption:

22% have advanced to the intermediate stage, integrating AI across multiple business functions and achieving efficiency improvements and more innovative customer experiences.

Transformative adoption:

17% of AI-adopting businesses have reached the most transformative stage of integration, using advanced AI systems, combining multiple models, creating custom AI systems, or deploying agentic or autonomous AI. This is up from **12%** last year.

For businesses across Greece, progress towards integrating AI's advanced use cases – and with them, transformative innovation – is not as fast as it could be, representing significant untapped potential. With next-generation AI emerging rapidly and compressing innovation timelines, it is more critical than ever that businesses are empowered to move beyond AI's most basic use cases and harness the technology for transformation.

As innovation cycles compress, the ability to deploy advanced AI safely and at scale becomes a key differentiator. In practice, this means moving beyond experimentation towards AI that is embedded into core systems, supported by high-quality data, governance, and AI-ready talent.

The cloud continues to drive AI uptake

Cloud services are a key enabler for AI adoption in Greece. **60%** of businesses report using cloud services, up from **49%** last year, and adoption is broad-based – spanning SMEs (**58%**) as well as large enterprises (**67%**). Nearly half of businesses (**47%**) say access to cloud infrastructure has been one of the most helpful factors in enabling their AI adoption and integration. Government support also plays a significant role: **66%** of AI adopters say grants or public programmes were important to their adoption, and **17%** say they were crucial.

The country also benefits from a highly skilled developer base. This combination of cloud access, developer expertise, public support, and strong digital ambition is enabling many Greek businesses not only to adopt AI but to harness its most transformative uses. These factors will remain critical levers for the country's ongoing digital transformation.



Businesses say they aren't yet prepared for the next wave of AI

The emergence of next-generation AI technologies – such as agentic AI, physical AI, and advanced robotics – presents a significant opportunity, but many businesses remain unprepared. Awareness of agentic AI is increasing, yet the gap between familiarity and deployment remains significant: **22%** of businesses say they have heard of agentic AI. Of those, only **2%** report fully deploying agentic AI, while **18%** are experimenting or piloting it. **44%** say they have plans to use agentic AI or are considering it, while **26%** say they have no plans to adopt the technology.

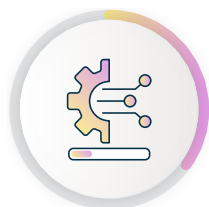
The majority of businesses do not feel ready to adopt next-generation AI technologies, but startups emerge as a bright spot:



Only **19%** of businesses say they feel fully or very ready to adopt next-generation AI technologies.



This compares to **34%** of startups who say they feel ready for next-generation AI tools.



36% say they are only somewhat ready, while **41%** say they are slightly ready or not ready at all.



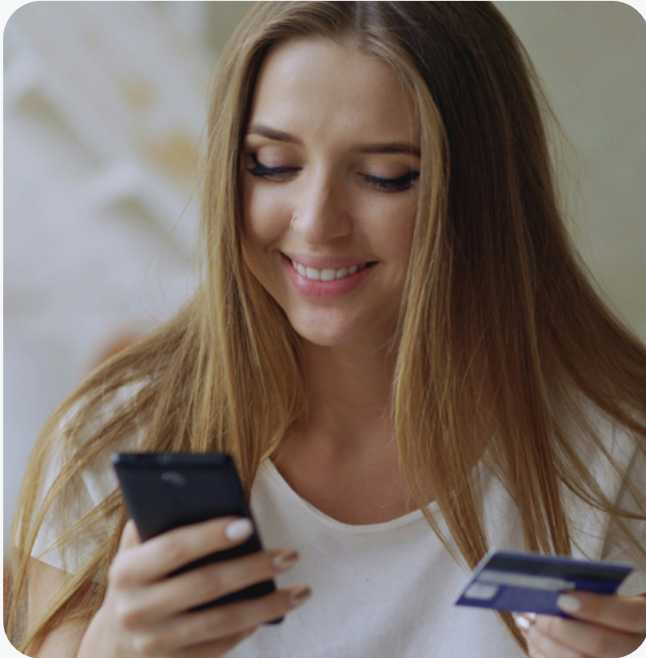
Among those unprepared for next-generation tools, **41%** cite skills shortages as a barrier and **34%** cite insufficient internal financial resources.

When businesses are adopting these technologies, the benefits are already clear. Businesses deploying agentic AI report increased operational efficiency or productivity (**54%**), faster decision-making and execution (**48%**), and improved scalability of operations (**39%**). These early gains underline the transformative potential of next-generation AI – and the risk of falling behind for those unable to move beyond experimentation.

These findings point to a clear readiness gap as the next wave of AI approaches. While awareness of emerging technologies such as agentic AI is growing, most businesses remain at an early stage of adoption and lack the capabilities required to deploy them effectively at scale. Without stronger foundations in skills, investment, and organisational preparedness, many firms risk being left behind as these technologies move from experimentation to mainstream use. Closing this readiness gap will be critical to ensuring that businesses can fully capture the benefits of next-generation AI and remain competitive in an increasingly fast-moving innovation landscape.



Case study: Skroutz



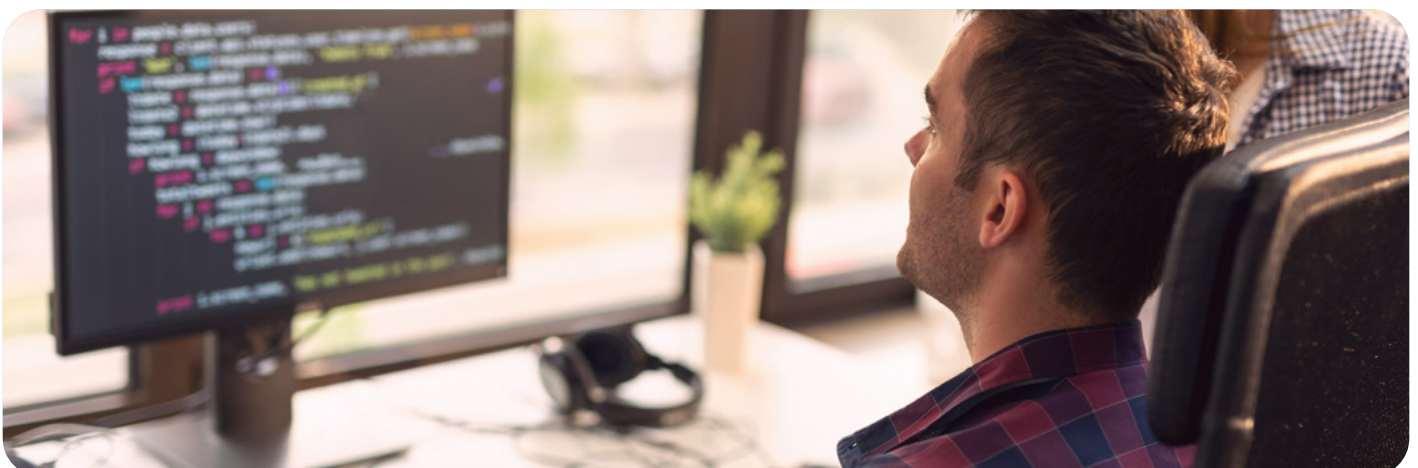
Skroutz is Greece's most visited online marketplace, serving millions of users every month and connecting buyers with thousands of merchants across millions of products. Founded in Athens, Skroutz has grown from a price comparison engine into a full-service marketplace – with its own delivery network, payment infrastructure, and an expanding presence across European markets.

As the platform scaled, so did its data and infrastructure needs. Skroutz runs on AWS to serve customers better, deliver new platform features faster, leverage AI, and fuel its expansion into new markets. Under the hood, the company has built a sophisticated data platform on Amazon Redshift to support reporting, business intelligence, and decision-making – enabling teams across the organisation to access data seamlessly and derive faster insights. To keep pace with its rapidly evolving product, Skroutz developed a real-time data pipeline using change data capture (CDC) and streaming technologies, enabling schema changes in operational databases to propagate to its data warehouse without disrupting development teams or risking data loss.

The launch of the AWS Local Zone in Athens in July 2026 marks a significant step for Skroutz. With AWS compute and storage now available locally in Greece, Skroutz can process data closer to home, delivering even faster, more personalised experiences to its Greek users while continuing to use AWS's global infrastructure to grow across Europe. As the company continues migrating workloads to the AWS Cloud, it is exploring services such as Amazon Managed Streaming for Apache Kafka (Amazon MSK) and Amazon Redshift streaming ingestion to process large volumes of data with lower latency and higher throughput.

"AWS has been fundamental to our ability to scale and innovate at the pace our customers expect," said Apollon Oikonomopoulos, CIO, Skroutz. "AWS infrastructure located in Athens, coupled with access to AWS's global infrastructure is exciting for us. Access to local compute and storage capabilities will help us deliver even faster, more personalised experiences to our Greek users and support our data processing needs closer to home while we continue to use AWS global infrastructure to grow our business across Europe."

Skroutz exemplifies the kind of innovation that the Athens Local Zone is designed to support – a Greek-born company that has built a world-class technology platform on AWS and is now positioned to benefit from local infrastructure that strengthens its ability to innovate at home while scaling globally.





Retaining and scaling Greece's AI leaders

Startups are integrating AI deeply, and remain one of Greece's strongest assets. As highlighted in last year's report, this ecosystem needs to be nurtured. The high-potential AI startups that Greece incubates are growing fast, and as they do so, they run quickly into scaling constraints. The faster a startup moves, the sooner it encounters barriers that raise the cost of growth. This raises a question: can these Greek-founded startups scale at home, or will they look abroad for better growth conditions? The priority is therefore to make scaling in Greece as straightforward as starting.

A share of startups would consider relocating

A notable share of startups indicate openness to relocating in order to secure faster growth. This reflects willingness to consider options rather than firm plans to leave, and the pull is towards Europe's wider environment as much as Greece specifically – but it is a clear signal of where growth conditions could improve.



41% of startups say they would consider leaving Europe to scale their business.



44% say they would not consider leaving.



15% are unsure.

When asked why they would consider leaving Europe, startups consistently point to their ability to grow and scale. The top five reasons are:



Founders are following the pathways that reduce friction and shorten time to market.

Relocation is not inevitable, and startups are clear about what would make Europe a more attractive place to scale. Among those that would consider relocating, the following factors would encourage them to stay:



These levers align with a broader competitiveness agenda: enabling startups to scale from Greece. The opportunity is to retain and grow these companies by improving access to growth capital, reducing procurement friction, supporting talent development, and maintaining a proportionate regulatory environment.





Businesses value choice and flexibility in the AI and cloud landscape

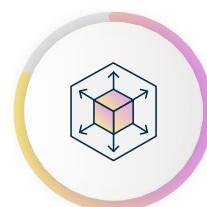
As Greek businesses move from early adoption to scaling and integration, the ability to choose between technology providers becomes increasingly critical. Businesses consistently emphasise the importance of access to global technology providers, particularly as they seek to innovate and scale beyond domestic markets:



74% say access to global technology companies is important for their AI adoption



77% say it is important for innovation



81% say it is important for scaling quickly

When selecting AI tools and providers, businesses prioritise speed, scalability, resilience, and security, and the ability to make the right technology choices based on customer needs. Rather than relying exclusively on domestic providers, many operate across mixed ecosystems, choosing partners on capability and performance:

- **71%** say the ability to choose and switch between different providers of AI technologies is extremely or very important to supporting their AI adoption
- **62%** say they currently have adequate choice to select and switch between providers
- **47%** report using a mix of providers from different regions, rather than working primarily with providers from their home country

For businesses that use providers based outside their home country, the top reasons are perceived technological leadership or advanced capabilities (**49%**), a wider range of features or product offerings (**44%**), better scalability, performance or integration options (**41%**), and competitive pricing or favourable commercial terms (**37%**).

The implication for policy is that procurement and sovereignty frameworks should remain risk-based and technology-neutral – preserving provider choice and the ability to switch, and assessing providers on security, resilience, capability, interoperability, and value rather than on where they are based.



Where businesses and citizens want public investment directed

When asked where public investment in technology and innovation should be directed over the next 5–10 years, businesses prioritise areas with clear societal and economic returns: skills, education and workforce training (**44%**), healthcare and life sciences (**39%**), and energy security and the green transition (**36%**), with defence and security (**31%**) also featuring. Citizens rank these priorities similarly, placing healthcare and life sciences first (**48%**), followed by skills, education and workforce training (**41%**), energy security and the green transition (**38%**), and defence and security (**29%**). By comparison, only **8%** rank public investment in Europe-based AI and cloud infrastructure among their highest priorities.

This is best read as a statement of relative priorities rather than a judgement on the value of sovereignty or of infrastructure investment. Public investment in AI and cloud infrastructure has an important role to play, particularly where it builds research capacity, strengthens resilience, and delivers clear capability and competitiveness outcomes. Greece is already investing on this basis, through initiatives such as the DAEDALUS supercomputer and the Pharos AI Factory. Public investment should complement private investment and help researchers, businesses, and public bodies access computing capacity, cloud and AI services, and the expertise to use them. Success should be assessed through stronger research capabilities, sustained adoption, productivity gains, and improvements in public services.

Case study: Athena Research Center



Greece's ambition to be a leading AI economy depends not only on adopting AI, but on building homegrown capabilities. Meltemi and Llama-Krikri – open large language models for the Greek language, trained on AWS infrastructure – are a powerful example of what Greek research expertise, combined with global cloud technology, can achieve.

Developed by the Institute for Language and Speech Processing (ILSP) of Athena Research Center, one of Greece's foremost research institutions, Meltemi – released in March 2024 – was the first open large language model for Greek: a 7-billion-parameter model built on Mistral-7B through continual pretraining on a corpus of roughly 40 billion tokens, including 28.5 billion Greek tokens drawn from sources such as Greek web content, academic repositories, parliamentary proceedings and legal texts. Its successor, Llama-Krikri-8B, built on Meta's Llama 3.1-8B, scaled the approach to a 91-billion-token corpus (56.7 billion Greek tokens) with a 128k-token context window, improving Greek benchmark performance by **10.8%** over its base model. Its instruction-tuned version supports chat, translation, retrieval-augmented generation and specialised legal, financial, medical and scientific tasks.

As Athena RC describes its approach: "Continued pre-training empowers organizations like Athena RC, a leading research center in Greece, to build Greek-first foundation models that expand language capabilities beyond English. By continually pretraining large language models on extensive Greek data, Athena RC strengthens the models' core understanding of the Greek language, culture, and usage – not just their domain knowledge. Their Meltemi-7B and Llama-Krikri-8B models demonstrate how continued pre-training and instruction tuning can create open, high-quality Greek LLMs for applications across research, education, industry, and society."

Both models were trained on AWS, using Amazon EC2 instances powered by NVIDIA GPUs, made available to the Greek academic and research community by GRNET under the OCRE Cloud framework. Along the way, AWS teams have worked alongside ILSP – from collaboration with the AWS Generative AI Innovation Center to hands-on enablement on Amazon SageMaker HyperPod for large-scale distributed training. Building on this foundation, ILSP is now training a third, larger Greek model on AWS, based on the Qwen model family.

Meltemi and Llama-Krikri demonstrate how national AI capabilities and global cloud technology can be complementary. Greek research expertise – in natural language processing, data curation, and model alignment – was the driving force behind the project, while access to AWS cloud infrastructure made it possible to train and deploy the models at the necessary scale. This combination – local expertise, global technology – is exactly the kind of partnership that will enable Greece to develop competitive, sovereign AI capabilities while remaining connected to the global innovation ecosystem.



AWS is committed to supporting businesses in Greece

In June 2026, AWS announced the upcoming launch of AWS infrastructure in Greece. In July 2026, AWS [announced the general availability of the AWS Local Zone in Athens](#), Greece, bringing AWS compute, storage, and networking capabilities closer to customers in Greece. With this launch, AWS customers can process and store data in-country while delivering single-digit millisecond latency to end users.

Since 2020, AWS has rapidly expanded infrastructure in Greece to better serve Greek customers:



January 2020 – AWS launched [Amazon CloudFront](#) in Athens, bringing content delivery closer to customers in Greece.



January 2021 – AWS [opened its first corporate office](#) in Athens to better support organisations of all sizes in Greece.



March 2025 – AWS launched [AWS Direct Connect](#) in Athens, so customers can establish private, dedicated network connections between on-premises infrastructure and AWS with dedicated 10 Gbps and 100 Gbps connections with MACsec encryption.

The launch of the Athens Local Zone marks the latest investment in a multi-year commitment to help Greek enterprises, startups, and government agencies innovate and scale.

The Greek government and enterprises recognise the Athens Local Zone as critical infrastructure for strengthening the country's digital economy and innovation ecosystem. Whether you're a startup building AI-powered products, an enterprise modernising legacy systems, or a public agency delivering citizen services, the Athens Local Zone provides the foundation to build locally and scale globally.



Tackling barriers to deeper AI adoption

1. Access to a skilled workforce and finance pathways

Skills shortages remain the most commonly cited constraint on adoption and expansion:



48% cite shortages of AI and digital skills as a barrier to adopting or expanding AI



36% cite insufficient internal financial resources



31% cite insufficient internal workforce capacity

These challenges are reflected in businesses' self-assessment of capability. Only a minority report a strong AI skillset today, while most say their skills need improvement:

- Only **16%** say they currently have a strong AI skillset
- **44%** say they have some AI skills but need improvement, and **27%** say they are only just beginning to develop AI skills
- **84%** expect AI skills to be important in their industry over the next five years
- The technical roles businesses expect to become more important over the next five years are software developer (**48%**), data governance or privacy officer (**35%**), and solutions architect (**31%**)

Skills shortages are reported most frequently in manufacturing (**55%**), followed by construction (**53%**) and retail and wholesale (**51%**), and the barrier is cited by **49%** of SMEs – indicating that limited access to technical expertise continues to slow deployment across the Greek SME ecosystem. Citizens are feeling the change too: **38%** say AI is significantly affecting their jobs, and of these, **61%** report a positive impact.

Finance remains an additional structural constraint. Many businesses lack dedicated AI budgets, and those that have them often allocate only a small share of IT spend to AI – limiting their ability to move beyond pilots and narrow use cases:

- **36%** cite insufficient internal financial resources as a barrier
- **27%** cite an unclear ROI or business case
- **54%** say they do not have a dedicated AI budget
- **68%** expect AI to take a larger share of IT spend over the next three years, predicting it will rise to **18%** of their total IT budget

2. Regulatory readiness is improving, but complexity and cost remain

Regulatory readiness in Greece is improving. The share of businesses citing regulatory uncertainty as a barrier has fallen sharply, from **48%** last year to **24%** this year, while the proportion that say they do not understand their roles and responsibilities under the EU AI Act has dropped from **67%** to **31%**.¹ This points to a maturing understanding of the regulatory landscape.

At the same time, the cost of compliance remains material. Businesses report that scaling AI internationally still introduces legal complexity, higher compliance costs, and operational friction, particularly for firms operating across multiple markets and regulatory environments. This scaling friction is compounded by the broader compliance burden businesses already face:



Businesses estimate that **45%** of their total tech spend goes towards compliance with national and international regulations.



When asked what makes up this **45%**, **41%** cite data privacy and protection compliance, followed by cybersecurity risk management (**33%**) and legal consultations or external advisory services (**26%**).



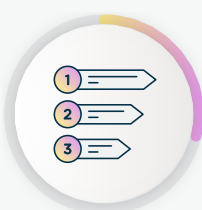
61% say compliance costs have increased over the past three years, and **57%** expect them to rise further over the next three.

3. Strengthening incentives and access to public procurement

Businesses report that limited external support, weak demand signals, and complex procurement processes make it harder to justify the risk and investment required to scale AI or develop new AI-driven products:



51% say government support – such as grants or tax incentives – is crucial or very important in their decision to adopt AI.



29% say other business priorities take precedence over AI investment.



26% say a lack of incentives or external support discourages AI investment.

Public-sector demand can help accelerate diffusion, but procurement remains a consistent barrier:

- **42%** say opportunities to sell to the government are crucial or very important in their decision to adopt AI
- **27%** cite complex or slow public procurement processes as a challenge to scaling AI solutions

These barriers highlight a common challenge: Greece has shown it can adopt AI – scaling it is the harder task. Addressing these constraints will be critical to ensuring that AI-driven growth extends beyond early adopters and delivers broad-based economic transformation.



Recommendations: Unlocking Greece's AI future

To translate initial AI adoption into genuine transformation, Greece must now focus on scaling what works and removing the barriers that hold businesses back.

Scale on Greece's own strengths

The country already has many of the foundations required to compete in an accelerated AI era. When asked what matters most for supporting growth in their business and industry, Greek businesses point to access to the most advanced AI tools and services (**62%**), private investment and venture capital (**57%**), and skilled AI talent (**55%**). **46%** agree that Europe has the infrastructure and ecosystem needed to scale globally, while **52%** rate Europe as highly or somewhat competitive as a global hub for AI and innovation. Greece's startups are a testament to the value of supporting innovative businesses. The challenge now is how quickly Greece can scale what already works, so that innovation spreads beyond a handful of firms and into the wider economy.

Accelerate digital transformation and close the skills gap

To accelerate private-sector adoption, Greece should establish a virtuous cycle of investment and growth centred on digital transformation and a skilled workforce. A renewed emphasis on updating business processes, applying innovations commercially, and investing in R&D can help Greek companies compete globally. Central to this is closing the skills gap that businesses consistently report as a brake on adoption. Government and industry must work together to equip citizens with the digital skills they need – both those already in work and the workforce of the future – so that the benefits of AI reach every region and business size.

Strengthen incentives and access to public procurement

The priority should be to make adoption support easier for SMEs to access, with simple application routes, technology-neutral eligibility and no constraints on provider choice – consistent with the **71%** who say the ability to choose and switch between providers is extremely or very important. Eligible costs should cover commercial cloud and AI services, systems integration, practical training and technical assistance, wherever these support a defined business use case. Public procurement should be opened up on the same terms, with shorter processes and set-asides or pilots that give smaller firms a route in: **42%** say opportunities to sell to government are crucial or very important to their decision to adopt AI. Programmes should then be judged on what they produce – tracking sustained use and business outcomes such as productivity, revenue and new products, not just funds disbursed.



Build on Greece's digital progress to scale trusted public-sector AI

The finding that **27%** cite slow or complex procurement supports a practical recommendation: simpler procedures, supplier qualification requirements proportionate to the contract, and specifications focused on service outcomes, security, and total cost of ownership. Public bodies should plan how successful pilots can progress to wider deployment through appropriate competitive procurement. Practical guidance should help buyers evaluate cloud and AI services and enable startups and SMEs to compete directly or through partnerships, including with global cloud providers that meet applicable requirements. This would connect better public services with opportunities for Greek businesses to grow.

Keep procurement and sovereignty frameworks risk-based and technology-neutral

Sovereignty should strengthen customers' control over their data, operational resilience, and freedom to choose and switch providers. Procurement and sovereignty frameworks should remain risk-based and technology-neutral, assessing providers on verifiable security, resilience, capability, interoperability, and value. They should avoid excluding providers based on headquarters or ownership. Preserving access to global cloud and AI services supports opportunities for Greek startups and SMEs to develop competitive products, participate in public procurement, and reach international markets. Building Greek AI capabilities and maintaining access to global technology are complementary objectives.

Implement the EU AI Act clearly and proportionately

Regulatory readiness is improving, but complexity and compliance costs remain material. Greece's adoption of Law 5321/2026, which establishes the national framework for implementing the EU AI Act – including a regulatory sandbox and a public-sector AI registry – is an opportunity to give businesses the certainty and confidence to invest. Greece should implement the AI Act without adding national AI-specific obligations beyond those needed to give effect to the EU framework. National measures should use the Act's definitions and respect its allocation of responsibilities. Practical business guidance should align with relevant EU-level guidance, including from the AI Office, while coordination among competent authorities should avoid conflicting interpretations and duplicative requirements. This would give Greek businesses greater certainty to invest and scale across the Single Market. Implementation should be consistent with clear and proportionate rules, practical guidance for businesses of all sizes, an accessible and effective sandbox, and effective coordination among the competent authorities that avoids unnecessary duplication. Regulatory clarity that supports rather than slows innovation will help translate improving readiness into deeper adoption.





The window for AI transformation is narrowing – Greece must act to translate adoption into impact

Greece enters the next phase of AI adoption with clear momentum and real strengths. Adoption is rising quickly, businesses are reporting tangible productivity and growth benefits, and citizens are increasingly familiar with and optimistic about the technology. Yet progress remains uneven. Advanced use is still concentrated among a minority, readiness for next-generation AI is low across much of the business landscape, and too many businesses remain constrained by gaps in skills and finance. As innovation cycles compress, the distinction between basic adoption and transformative use will become increasingly important.

The task now is to help more businesses deploy AI at scale to innovate and compete. This will require closing the skills gap, improving access to finance, supporting startups to scale from Greece, preserving the flexibility to choose the best technologies, and implementing regulation clearly and proportionately. With these shifts, Greece can ensure the next wave of AI contributes to productivity, resilience, and innovation across the wider economy – and secure its place among Europe's leading AI economies.

Appendix

Glossary of Terms:

- **Adopted AI:** Currently consistently use at least one artificial intelligence tool.
- **Startup:** A business founded in the last 2 years which provides a new product/service or innovation and is aiming for rapid growth in terms of employees and turnover.
- **SME:** A small or medium-sized enterprise employing fewer than 250 people.
- **Large business:** A business with more than 250 employees, inclusive.
- **Large enterprise:** A large enterprise (also referred to as a large business or established enterprise) is a business with 500 or more employees, founded 10 years ago or more.
- **Basic AI adoption:** These organisations are using AI primarily for incremental improvements such as efficiency gains and process streamlining rather than for innovation. They rely on publicly available chatbots for routine tasks or purchasing ready-made AI solutions.
- **Intermediate state of AI adoption:** In these firms, AI is supporting a more innovative customer experience alongside operational efficiency.
- **Advanced use of AI/Transformative use of AI:** These firms are integrating the most advanced use cases of AI, combining multiple models, developing custom AI solutions, or using agentic and autonomous AI. At this stage, organisations are rapidly innovating with AI and, in turn, disrupting their industry.
- **Next-generation AI technologies:** Emerging AI capabilities such as agentic AI, physical AI, and advanced robotics that extend beyond traditional predictive or generative models.
- **Agentic AI:** AI systems capable of autonomously planning, executing, and optimising tasks or workflows with limited human intervention.
- **Physical AI:** AI embedded directly into physical equipment, machinery, and real-world systems, such as production lines, robots, and vehicles, enabling them to perceive their environment, make real-time decisions, and act autonomously without relying on cloud connectivity.
- **Digital skills gap:** The mismatch between the digital and AI-related skills organisations require and the skills currently available within the workforce.

Methodology

The fieldwork for this study was undertaken by Strand Partners' research team for Amazon Web Services. This research has followed the guidance set forth by the UK Market Research Society and ESOMAR. For the purposes of this study, business leaders are defined as founders, CEOs, or members of the C-suite in organisations.

'Citizens' are nationally representative members of the public based on the latest available census.

For inquiries regarding our methodology, please direct your questions to: polling@strandpartners.com.

In Greece:

- We conducted a survey targeting 1,000 nationally representative members of the public, ensuring representation based on age, gender, and NUTS 1 region.
- Additionally, we surveyed 1,000 business leaders, representative by their business size, sector, and NUTS 1 region.

Sampling:

Our sampling process used a mix of online panels that are recognised for their validity and reliability. These panels are carefully curated to ensure diverse representation across various demographics. For the business leaders, the panels are selected with a consideration for organisational size, sector, and position within the company. Our objective with the sampling strategy is to achieve an optimal mix that mirrors the actual distribution of our target populations in the respective markets.



Weighting Techniques:

Post-data collection, we applied iterative proportional weight to correct any discrepancies or over-representations in the sample.

Survey:

This study was designed with the objective of delving deep into the digital landscape:

- **Usage Patterns:** This survey gauges the evolving patterns of digital technology usage. We are particularly interested in examining the adoption and implementation levels of technologies, focusing on cloud computing and artificial intelligence.
- **Perceptions and Attitudes:** The survey seeks to unearth the prevailing perceptions and attitudes towards digital technologies, understanding the perceived benefits, challenges, and potential ramifications of both present and emerging tech solutions.
- **Barriers and Opportunities:** The survey scrutinises the predicted challenges and potential avenues that both businesses and individuals anticipate on their digital trajectory. This involves pinpointing challenges, from skill deficits to regulatory complications, and recognising opportunities for growth, innovation, and market development.
- **'Size of the Prize':** The survey shed light on the economic repercussions and growth prospects linked with digital transformation. By elucidating the 'size of the prize', we aspire to stress the importance of digital transformation and foster further investments and technology adoption.

References:

1. Year-on-year comparisons are drawn from the 2025 and 2026 waves of this study; movements should be read with the usual caveats regarding question wording and respondent bases across waves.