Published by: DOV Deutscher Outsourcing Verband

Analytics by: ICTMARKETS Analytics - Advisory - Services

Institutional partner: AHK Deutsch-Portugiesische Industrie- und Handelskammer Câmara de Comércio e Indústria Luso-Alemã

Partners: CUATRECASAS, TRH TechRemoteHub, sourcing partner

PORTUGAL ICT

The Portuguese ICT Sector 2026 - 2030

ICT Services | Employment | Education | ICT Business | Revenues | International

Ecosystem partners: ANGE, qpdc digital business community, DSPA Data Science Portuguese Association, StartUP Portugal, tice.pt

TECH SOURCE PORTUGAL

ICT Ecosystem Networks in Portugal

Content

Economy

Service sector, ICT, GDP contributions, infrastructure, office market

Pages: 12-14

Education

Universities, students and graduates

Pages: 14,15

Workforce

Employment, English and German languages, salaries

Pages: 15,16

Startups

Nr. of startups, sectors and incubators

Pages: 16

Foreign Investm.

Numbers and major foreign investments in ICT centers

Pages: 17

ICT Policy

National Digital Strategy, Ai agenda, ICT associations

Pages: 17 - 18

Outs. and export

Revenue and export markets

Pages: 22

ICT companies

Maturity, segments, specialization, seniority mix, export, training …

Pages: 23 - 31

Ai landscape

Examples, Ai and data center market

Pages: 36 - 39

Business Insights

Opinions, experiences and backgrounds

Pages: 40 - 59

Contacts

Partner profiles and list of selected ICT companies

Pages: 60

Published by:

Analytics by:

Institutional partner:

Partners:

Ecosystem partners:

Streetmap of Lisbon

PORTUGAL ICT Quickfacts

IT service revenue
13 bln €
Estimate, forecast 16,6 bln € by 2028

IT services export
4.4 bln €
2024

ICT GDP contrib.
10%
of IT services

Employment ICT
245,000
in 2025, +17,000 in 2026

ICT companies
13,000
73% are exporting ICT services

Tech startups
4,380
(over 5,000 Startups in total)

STEM graduates
28,000
estimate per year

Salaries - Sw engineers
35k - 58k €
Junior - Senior range, annual

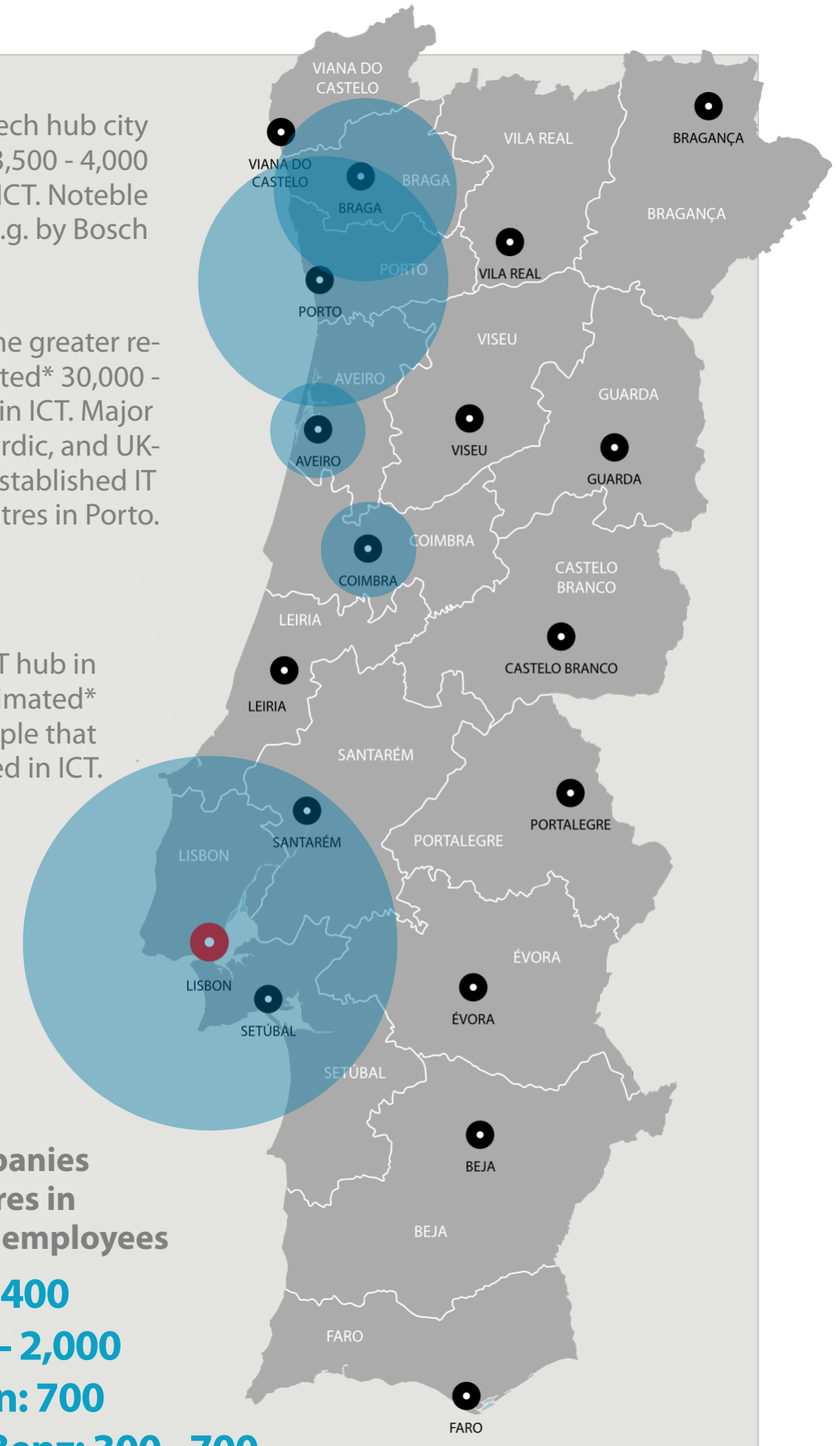
IT service export markets
(2023-24)

Germany	UK	France	USA	Spain
18%	17%	11%	7%	6%

Braga, emegring tech hub city with an estimated* 3,500 - 4,000 people employed in ICT. Noteble R&D centres e.g. by Bosch

Porto employes in the greater region an estimated* 30,000 - 50,000 people in ICT. Major French, German, Nordic, and UK-based firms have established IT centres in Porto.

Lisbon is a major IT hub in Europe, with an estimated* 100,000 - 150,000 people that are employed in ICT.



German companies with ICT centres in Portugal and employees

Siemens: 1,400
Bosch: 800 - 2,000
Volkswagen: 700
Mercedes-Benz: 300 - 700
Estimates, based on thrid party information

** Estimates are based on national employment numbers for cities / regions and the approx. ratio of ICT employment in the country.*

Executive Summary

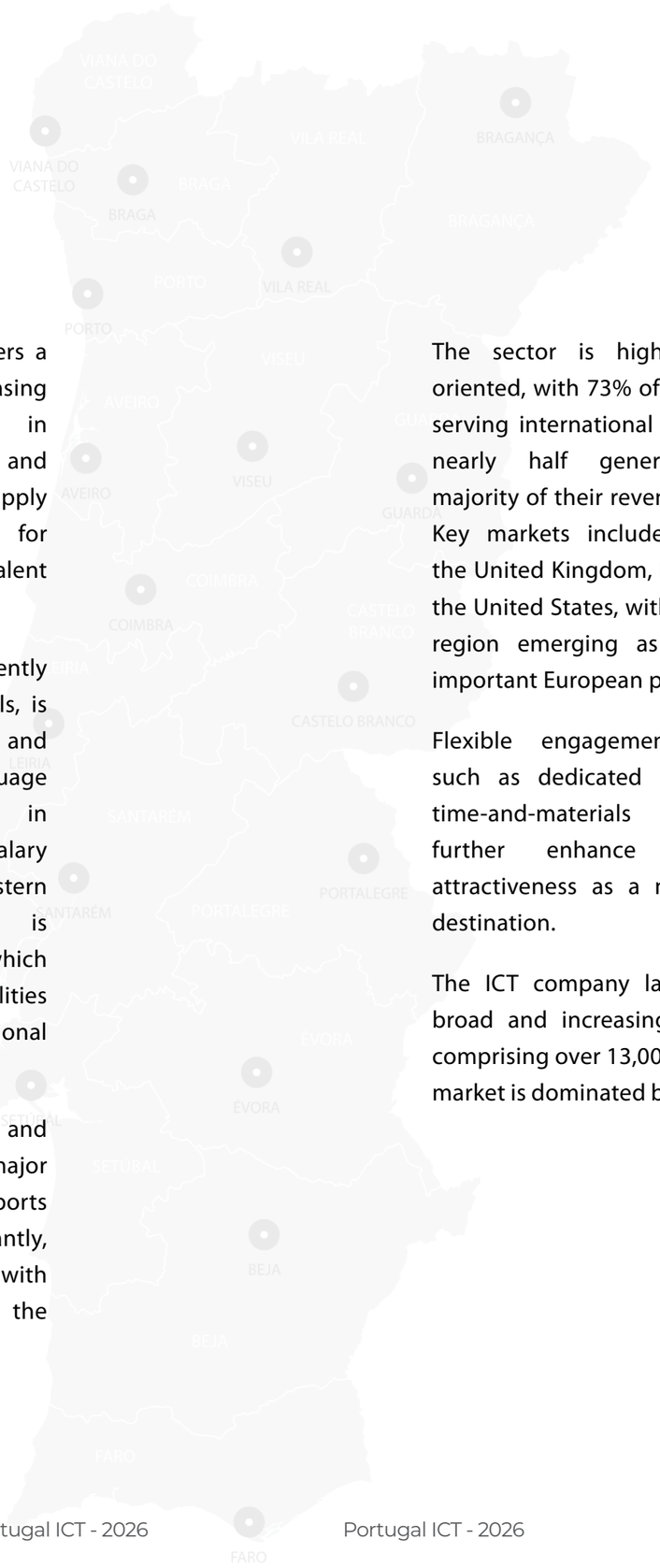
Portugal's ICT sector has evolved into a strategic pillar of the national economy, contributing close to 10% of GDP and benefiting from a strong services-driven environment, modern digital infrastructure, and growing international demand.

The country is positioning itself as a competitive nearshore destination for European and global markets, supported by policy initiatives, infrastructure investments, and a rapidly maturing ecosystem.

Education and talent development form a solid foundation for sector growth. Portugal has over 100 higher education institutions with strong STEM coverage, producing approximately 28,000 STEM graduates annually. STEM enrolment exceeds the EU average, and the majority of graduates transition directly into the workforce. However, while the education system delivers a steady pipeline, increasing demand - particularly in advanced fields such as AI and cloud - puts pressure on supply and highlights the need for continued upskilling and talent attraction.

The ICT workforce, currently around 245,000 professionals, is expanding steadily and characterized by high language proficiency, particularly in English, and competitive salary levels compared to Western Europe. The workforce is relatively senior, which strengthens delivery capabilities for complex international projects.

Portugal's outsourcing and export landscape is a major growth driver. ICT service exports have increased significantly, reaching over €4 billion, with strong growth expected in the coming years.



The sector is highly export-oriented, with 73% of companies serving international clients and nearly half generating the majority of their revenue abroad. Key markets include Germany, the United Kingdom, France, and the United States, with the DACH region emerging as the most important European partner.

Flexible engagement models such as dedicated teams and time-and-materials contracts further enhance Portugal's attractiveness as a nearshoring destination.

The ICT company landscape is broad and increasingly mature, comprising over 13,000 firms. The market is dominated by small and mid-sized companies, but many demonstrate strong international experience and compliance maturity, with widespread adoption of certifications such as ISO 9001 and ISO 27001.

Service offerings are primarily focused on custom software development, IT consulting, and managed services, reflecting a strong orientation toward service-based delivery rather than product development.

Carlos Coutinho Silva, EVP 99x Europe & CEO 99x Tech Portugal

Tomás Santos, Nearshore Sales Director Europe 99x Europe

Portugal ICT - 2026

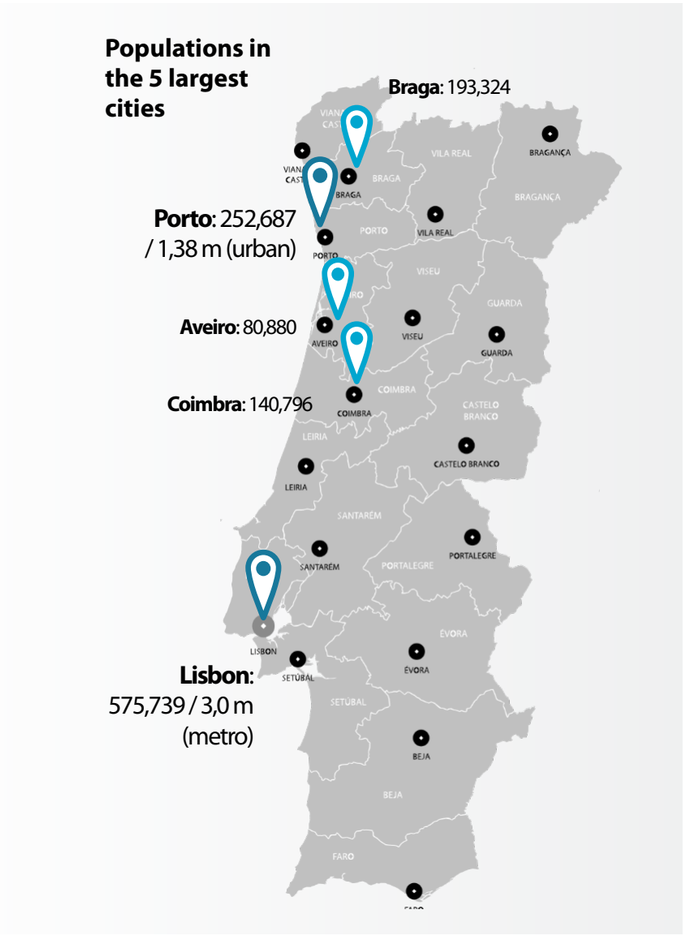
1

Economy of Portugal in the Context of ICT

PORTUGAL ICT 2026 99x DOV DEUTSCHER OUTSOURCING VERBAND GERMAN OUTSOURCING ASSOCIATION

Economy of Portugal

Portugal's economy has shown steady resilience and moderate growth in recent years, supported by strong domestic demand, exports, and a recovery in tourism.
Structurally, the country is a service-driven economy, with services clearly dominating economic output.



The service sector accounts for roughly 66–67% of GDP, while broader measures of gross value added place its contribution even higher at around 75%+, highlighting its central role in economic activity.

This reflects Portugal's reliance on industries such as tourism, retail, financial services, and transport, alongside a gradual shift toward higher-value-added activities.

ICT Sector's GDP contribution

Within this service-oriented economy, the Information and Communication Technology (ICT) sector has emerged as a key growth engine. **The ICT sector contributes close to 10% of Portugal's GDP**, underlining its increasing strategic importance and rapid expansion.

Driven by a strong talent base, competitive labor costs, and an expanding startup ecosystem - particularly in Lisbon and Porto - the sector has evolved from traditional IT services toward more advanced areas such as software development, digital platforms, and emerging technologies like AI and cloud computing. Overall, Portugal is transitioning toward a more digital and innovation-driven economic model, with ICT playing a pivotal role in future growth.

PORTUGAL ICT - MARKET OVERVIEW

Digital Infrastructure

Portugal's strategic investment in critical digital infrastructure, including the EllaLink, Equiano, and Medusa submarine cables, has established the nation as a vital global connectivity hub. By bridging Europe with South America and Asia, this network provides the essential foundation for a robust and resilient digital economy.

Portugal leverages its significant renewable energy capacity - which powered over 60% of the national electricity grid in 2022 - to offer a green and dependable energy supply.

Combined with its geographic advantage for cost-effective cooling and water management, these assets position the country as an ideal, eco-efficient destination for large-scale, future-proof technological investment.

Portugal's commitment to modernizing its digital landscape is evidenced by its ranking as 3rd in the European Union (EU28) for ultra-fast fixed broadband in 2022. This milestone reflects a high level of connectivity maturity, ensuring that both citizens and businesses have access to the reliable, high-speed infrastructure necessary for digital innovation and public service efficiency

Office Market

Portugal's commercial office market is characterized by a shift toward high-quality, sustainable workspaces that meet modern international standards. In 2024, the market demonstrated significant resilience with record-breaking activity; Lisbon recorded its fourth-best year ever with over 200,000 sqm of office take-up, while Porto reached new highs driven by demand from the Technology, Media, and Telecommunications sectors.

This growth is anchored in a tightening supply of Grade-A office space, particularly in prime districts like Lisbon's Central Business District and the modern Parque das Nações.

Modern Office Building in Porto. Photo by PHC Software on Unsplash

City center Braga, Portugal

The vacancy rate in Lisbon is about 8,3% and the prime office rent per month is 29 EUR / sqm.

The prime office rent in Porto is between 14 and 21 EUR / sqm.

Braga with it 193,000 inhabitants is highly attractive to Shared Services Centres due to a skilled workforce and strong academic institutions, such as the University of Minho. The monthly rent prices range from 10 to 29 EUR / sqm.

Tech and Science Parks

Taguspark (Oeiras) is Portugal's flagship and most prominent science and technology park in the Lisbon region.

Tecmaia and the Parque de Ciência e Tecnologia do Porto are the main technology parks serving the Porto metropolitan and north region of the country.

Coimbra InovParque supports the technology ecosystem around one of Portugal's oldest university cities, Coimbra.

Other Tech and Science parks:

- Aveiro Science and Technology Park in Aveiro
- Parkurbis in Covilhã
- PACT – Parque do Alentejo de Ciência e Tecnologia in Évora
- Sines Tecnopolo in Sines
- Madeira Tecnopolo in Funchal

Technology and science is not limited to Lisbon and Porto. Cities like Viana do Castelo, Santa Maria da Feira, Beja, and Sines housing tech research centres, incubators, business service centres and many tech businesses too.

Education

According to OECD data, the country has around 106 higher education institutions in total, consisting of 36 public and 70 private institutions (including both universities and polytechnic institutes).

STEM education is widely available across the Portuguese university system, with almost all universities offering STEM-related programs.

PORTUGAL ICT - MARKET OVERVIEW

As of May 2025, there were 456,032 students enrolled in tertiary education for the 2024/2025 academic year. In 2024, the number of higher education graduates in Portugal reached a record high of 101,200.

Portugal's STEM enrolment in higher education reached 28.9% in 2023, above the EU average of 26.9%. The country produced 10,071 new STEM graduates in 2023.

The number of graduates in ICT is estimated to be between 7,000 and 8,000 per year, of which roughly 85% enter the workforce.

Workforce

As per Labour Force Survey (Inquérito ao Emprego) of Portugal's official statistics office, Portugal's employed population stood at approximately 5.25 million people in the second quarter of 2025, an increase of 2.9% compared to the same period one year earlier.

ICT employment

in 2025 the Portuguese ICT sector directly employed circa 245,000 people. The sector saw 5.3% annual growth in employment prior to 2026. In 2021, ICT services alone added over 12,800 jobs, reaching higher totals post-pandemic. For 2026 researchers forcast an additional 17,000 jobs in ICT.

English speakers

About 2.9 million Portuguese people speak English at a high level. Younger generations (ages 18-30) show even stronger proficiency, contributing to Portugal's 6th global ranking in the 2025 EF English Proficiency Index, where it scored 612 out of 800, corresponding to C1/C2 advanced levels.

German speakers

Around 20-25% of Portuguese adults report some knowledge of German as a foreign language, equating to roughly 1.5-2 million people out of a 10.3 million population, based on European Commission surveys up to 2022. Around 13,000 German speakers are in working age in Portugal. *Download our detailed analysis of availability an demand of German speakers in Portugal.*

Download the analysis at www.outsourcing-verband.org

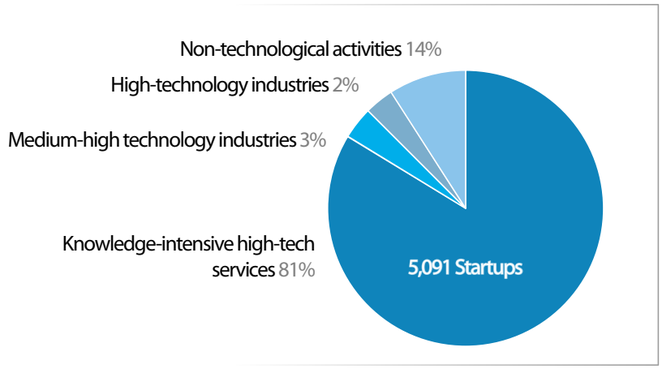
Salaries

In Portugal, the average gross compensation for an IT software engineer is EUR 51,150 annually, or EUR 25 per hour. They also receive an average bonus of EUR 2,281.

The average compensation for an entry-level IT software engineer with one to three years of experience is EUR 35,713 annually. Conversely, a senior level IT software engineer with eight or more years of experience makes an average of EUR 57,570 annually. (25)

Startups

Portugal's tech scene has grown into a major European player, now home to over 5,000 startups that account for about 1% of the country's GDP. While Lisbon still handles nearly half of all business, the industry is spreading out, with Porto, Braga, and Coimbra becoming centres for specialized work like Biotech and AI. (15)



According to Startup Portugal's Ecosystem Report 2025, about 3,990 Startups (ca. 67% of all startups) are strictly "Tech-based," focusing on software, AI, and digital services. Portugal currently hosts 6 "Unicorn" companies (startups valued at over $1 billion), including famous names like OutSystems, Talkdesk, and Feedzai. (15,16)

At least 7 prominent AI startups in Portugal have received notable funding as of early 2026, with broader directories suggesting dozens more have secured smaller rounds. Seedtable tracks 7 key players with USD 44.9 million aggregate funding:

- Stratio Automotive: USD 15.4 million (AI transport automation).
- YData: USD 6.6 million (synthetic data/AI privacy).
- Automaise: USD 5.4 million (no-code AI operations).
- detech.ai: USD 2.6 million (AI tech solutions). (17)

Startup Incubators

Portugal's startup ecosystem is supported by a robust national network of over 130 accredited incubators (RNI), which play a vital role in providing mentorship, infrastructure, and access to funding for more than 5,000 active startups. Leading hubs such as Unicorn Factory Lisboa, Startup Braga, and UPTEC have gained international recognition, with twelve Portuguese centres recently ranked among Europe's top 180 startup hubs in 2026. (22)

PORTUGAL ICT - MARKET OVERVIEW

Foreign Investments

In 2025, a record 55 tech centres opened in Portugal, signalling its shift from a trendy destination to a standard base for large-scale software and AI operations. Major players like Richemont and Airbus arrived to capitalize on local engineering talent and lower costs, with standout moves including Upwork's first non-US office in Lisbon and AstraZeneca's EUR 600 million investment to hire 750 people.

While Lisbon remains the primary draw, this expansion is increasingly spreading to Porto, Coimbra, and Braga.

In total, over 120 international companies have established major IT centres in Portugal. (14)

ICT Policy & ICT Sector Support

Portugal's ICT policy is currently governed by the National Digital Strategy (Estratégia Digital Nacional), which aims to place the country among the EU's most digitally advanced nations by 2030. The strategy is built on a "simplify first, digitalize second" philosophy, focusing on three core pillars: the digital empowerment of citizens (including a EUR 350 million investment in skills for 2025–2026), the digital transformation of businesses through "vouchers" for SMEs, and the total modernization of the State.

A major milestone in early 2026 was the adoption of the National AI Agenda, which allocates over EUR 400 million to transform Portugal into a "living lab" for AI, specifically targeting infrastructure like a new supercomputing gigafactory and specialized AI centres for the healthcare and justice sectors. (21)

ICT associations

The ICT landscape in Portugal is anchored by several influential associations that drive digital transformation and represent the sector's interests both nationally and internationally.

The APDC (Portuguese Association for the Development of Communications) serves as the primary platform for digital business, focusing on public policy, talent development, and large-

Some key ICT Ecosystem partners in Portugal

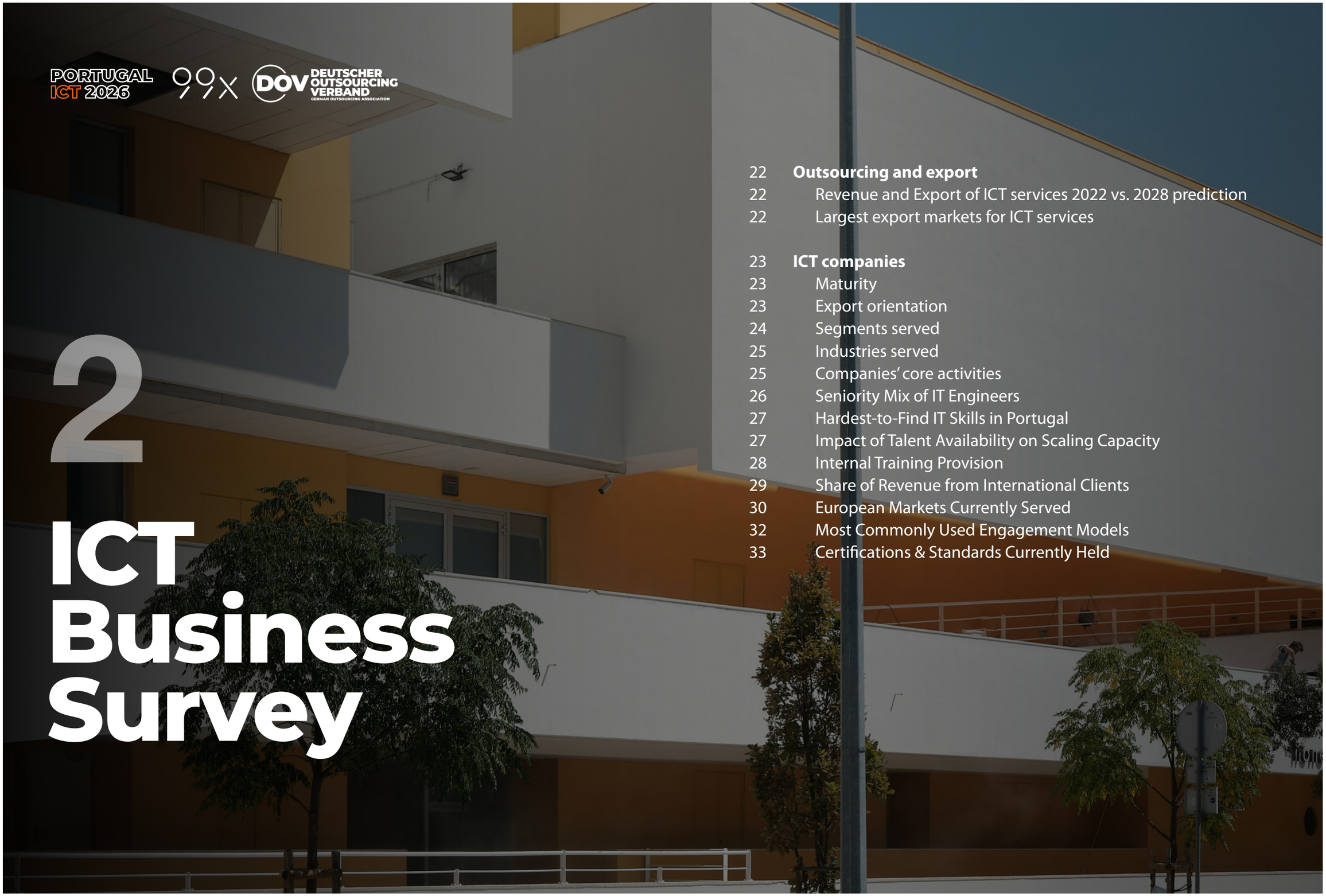
Organization	Info
Associação Portuguesa de Software (ASSOFT)	Portuguese Software Association was formed in 1991 by several companies in the area of Software, Hardware and Communications,
Associação de Empresas de Software Open Source Portuguesas (ESOP)	Represents Portuguese companies specialized in software and services based on open source technologies.
National Portuguese ICT Cluster (Tice.pt)	A cluster organization that brings together ICT companies, universities, research centers, and public entities
Associação para a Promoção e Desenvolvi-mento da Sociedade da Informação (APDSI)	Focuses on promoting the information society, digital governance, inclusion, and broader digital transformation topics
Portuguese Association of Science and Techno-logy Parks (TecParques)	Promotes and supports science and technology parks in Portugal
Associação Portuguesa Para a Inteligência Artificial (APPIA)	The primary professional organization for AI in Portugal, promoting research, education, and development in the field.
Startup Portugal	Designed to assist entrepreneurs and investors, it provides online and offline support on a one-to-one basis.
Data Science Portuguese Association (DSPA)	Promote Data Science and AI in Portugal, focusing on ethics, security, and education.

scale networking through its annual Digital Business Congress.

Complementing this is TICE.PT, the national ICT cluster based in Aveiro, which bridges the gap between academia and industry by coordinating major technological initiatives like the Gaia-X Portugal Hub and the CONNECT5 digital innovation project.

Tech events

Portugal hosts a dynamic array of international tech events, headlined by the world-renowned Web Summit in Lisbon (scheduled for November 9–12, 2026), and supported by specialized gatherings like the Data Makers Fest in Porto and the decentralized innovation festival Portugal Tech Week. (23)



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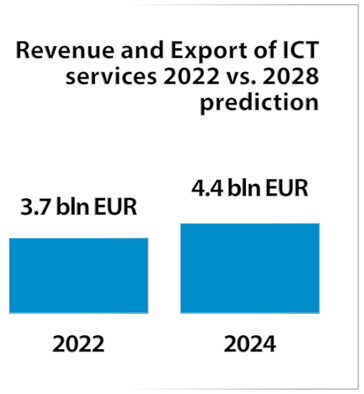
ICT Business Survey

IT services revenue is projected to rise from EUR 10.7 billion in 2023 to EUR 16.6 billion by 2028, achieving a CAGR of 6.9%. This growth is driven by exports, cloud adoption, and demand for cybersecurity and digital transformation services.

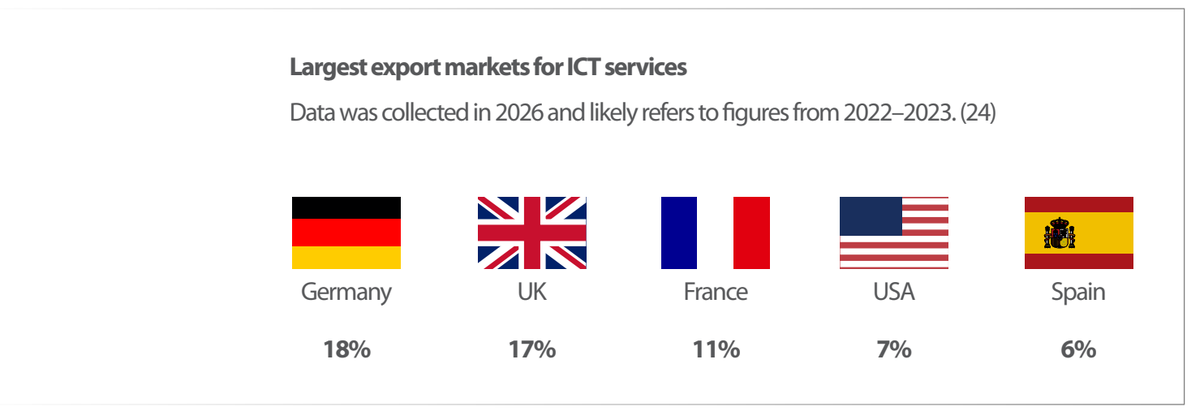


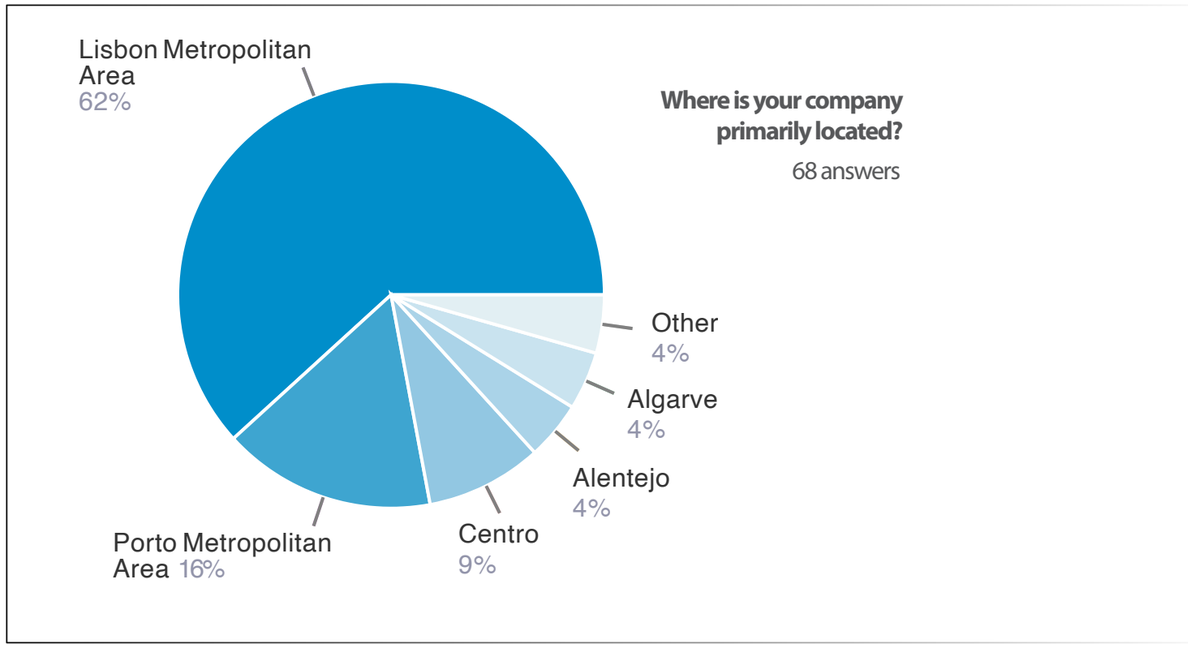
Outsourcing and export

Portugal's IT services exports are growing. In 2022, the digital sector (software and IT services) exported approximately EUR 3.7 billion, around 3% of total Portuguese exports, and reached about EUR 4,4 billion in 2024. (12)

These estimated export capabilities depend on a couple of variants, such as the supply side, where Portugal's education system needs to demonstrate that it can keep up with the growing demand for tech graduates, which for the moment is in questions. For the demand side, Portugal should be able to expand its footprint in European markets, given the exponentially fast developing need for tech capacities in Europe. (12)

Germany, the UK, and France together make up almost half of digital sector exports. Among these main export target markets, Germany (34%) and the United States (22%) are experiencing the fastest growth. (24)





ICT companies

The vendor landscape is dominated by smaller companies, with 61% of the market consisting of firms with fewer than 50 employees.

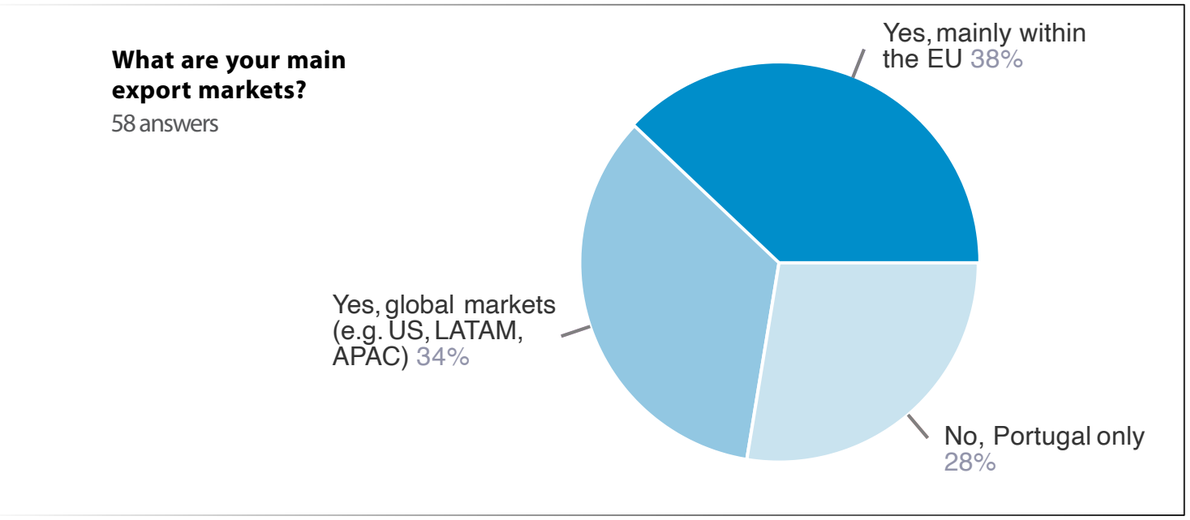
The total number of ICT companies is over 13,000. We estimate the number of mature and export ready ICT service companies to be around 9,000. (13)

Maturity

In our survey the majority of companies is operating for more than 10 years (49,9%), over 25% of companies operate for 6-10 years and about 15% operate for 5 years or less.

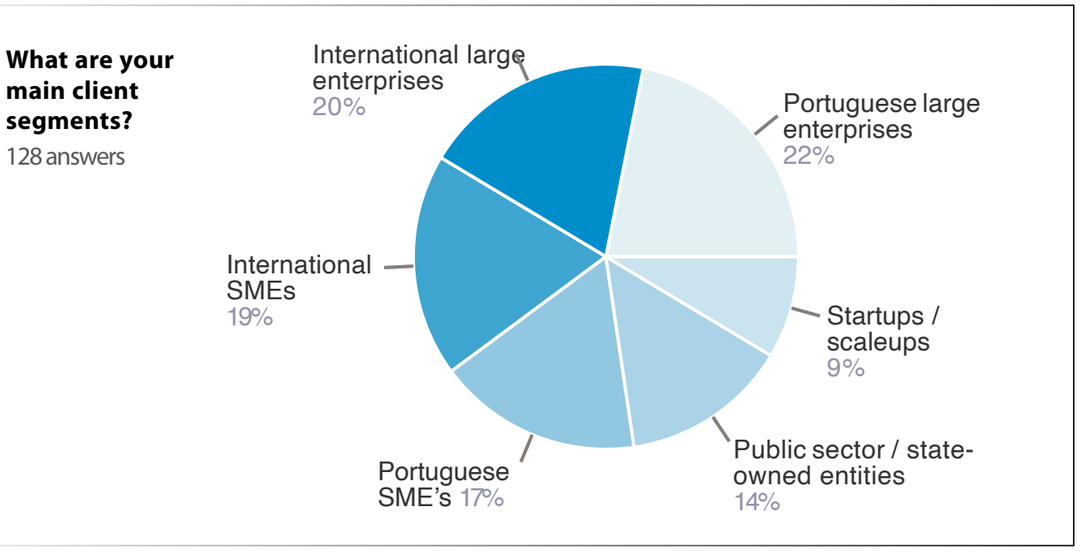
Export orientation

Portugal's ICT service sector is very export oriented with ca. 73% exporting services of which 38% export mainly to EU markets and 34% export also to other markets, globally.



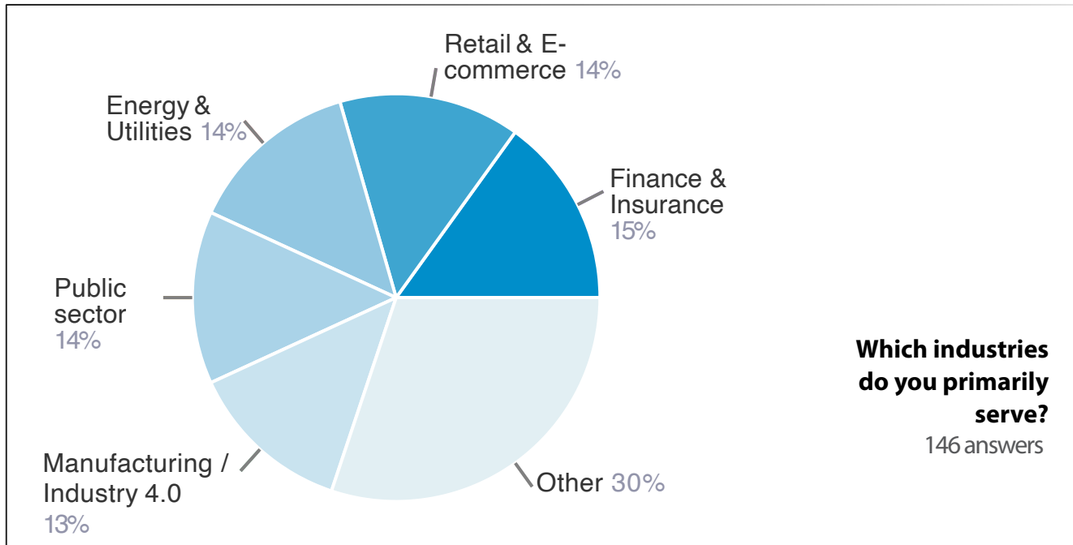
Segments served

Roughly 36.5% of vendors serve small businesses, 38.3% focus on the mid-market, and 25% have experience with enterprise-level clients exceeding USD 1 billion in revenue - demonstrating versatility across client sizes and budgets. Another focus are Startups and Scaleups in different countries, delivering speedy and effective tech development solutions.



Industries served

Portuguese IT companies have a wide industry focus, serving almost equally Finance, Retail, Energy, the Public sector and Manufacturing. Other sectors include Healthcare, Telecommunications, Sports, Entertainment, Media and Environmental technologies.



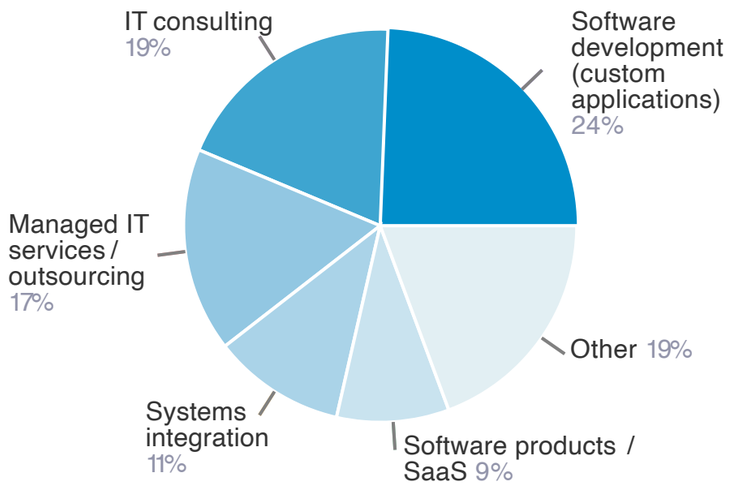
Companies' core activities

Our survey indicates that most companies focus on custom software development (24%), IT Consulting (19%) and Managed IT Services and Outsourcing together with 17%.

Other services include Systems integration (11%), and Software products and SaaS (9%), Cybersecurity, and Network services.

The outcomes suggests that companies are generally more focused on service-based offerings than on standalone product development.

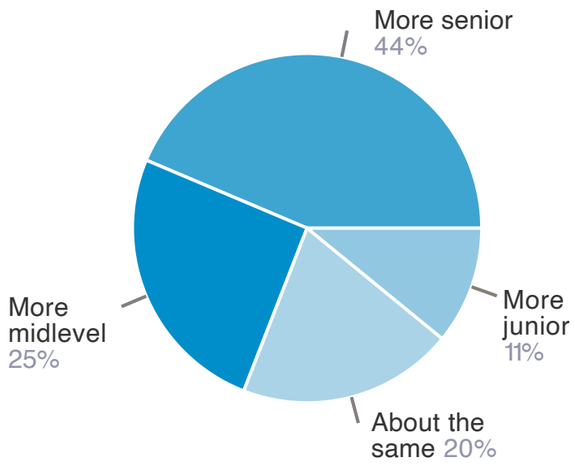
What best describes your company's core activity?
119 answers



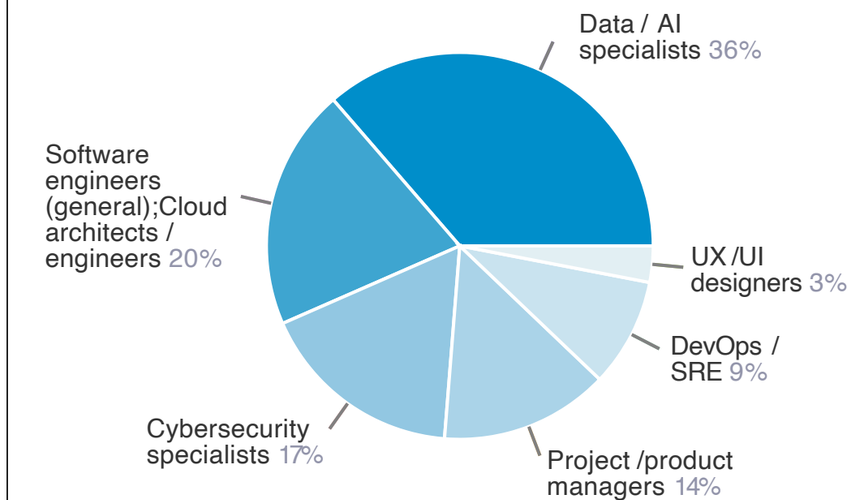
Seniority Mix of IT Engineers

The majority of Portuguese ICT companies surveyed have a senior-heavy workforce. Nearly half of respondents (44%) report having more senior engineers than any other level, while a quarter (25%) describe their team as predominantly mid-level. A further 20% have a roughly even distribution across all levels, and only 11% are predominantly junior-staffed.

What's the ratio of Junior, Mid- and Senior IT engineers in your company?
55 answers



Which skills are currently the hardest to find in Portugal?
99 answers



Hardest-to-Find IT Skills in Portugal

Data and AI specialists are by far the scarcest talent in Portugal's ICT market, cited by 36% of respondents — more than double any other category. This is followed by software engineers and cloud architects (20%), reflecting broad and persistent demand across the full development stack. Cybersecurity specialists rank third at 17%, consistent with the growing regulatory and security demands placed on organisations across all sectors.

Project and product managers are also notably difficult to source (14%), suggesting that the shortage is not limited to purely technical roles but extends to leadership and delivery management profiles. DevOps and SRE engineers round out the top five at 9%, while UX/UI designers appear to be the most readily available, cited by only 3% of respondents.

Overall, the data points to a clear concentration of talent pressure at the high-specialisation end of the skills spectrum - particularly in AI, cloud, and security - which mirrors broader European trends and underscores the urgency of upskilling and international talent attraction strategies in the Portuguese ICT sector.

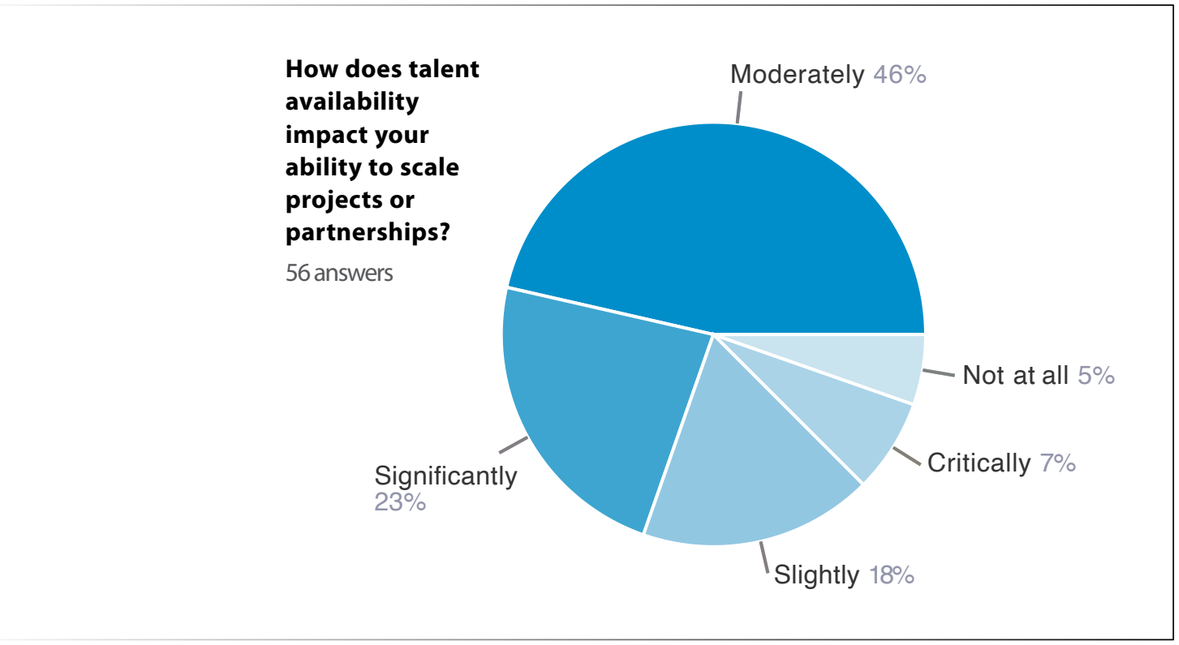
Impact of Talent Availability on Scaling Capacity

Talent availability is a meaningful constraint for the overwhelming

majority of Portuguese ICT companies surveyed. Nearly half of respondents (46%) say it moderately impacts their ability to scale projects or partnerships, while a further 23% report a significant impact. An additional 7% describe the effect as critical - meaning that in total, 76% of companies experience at least a moderate constraint on growth due to talent availability.

Only 18% report a slight impact, and just 5% say talent availability has no effect on their scaling capacity at all.

The picture that emerges is one of a sector operating under steady but manageable talent pressure - not yet at crisis level for most firms, but clearly a limiting factor for growth and partnership development. Combined with the finding that Data/AI, cloud, and cybersecurity profiles are the hardest to source, this suggests that scaling bottlenecks are most acute in exactly the specialisations where international demand is growing fastest.

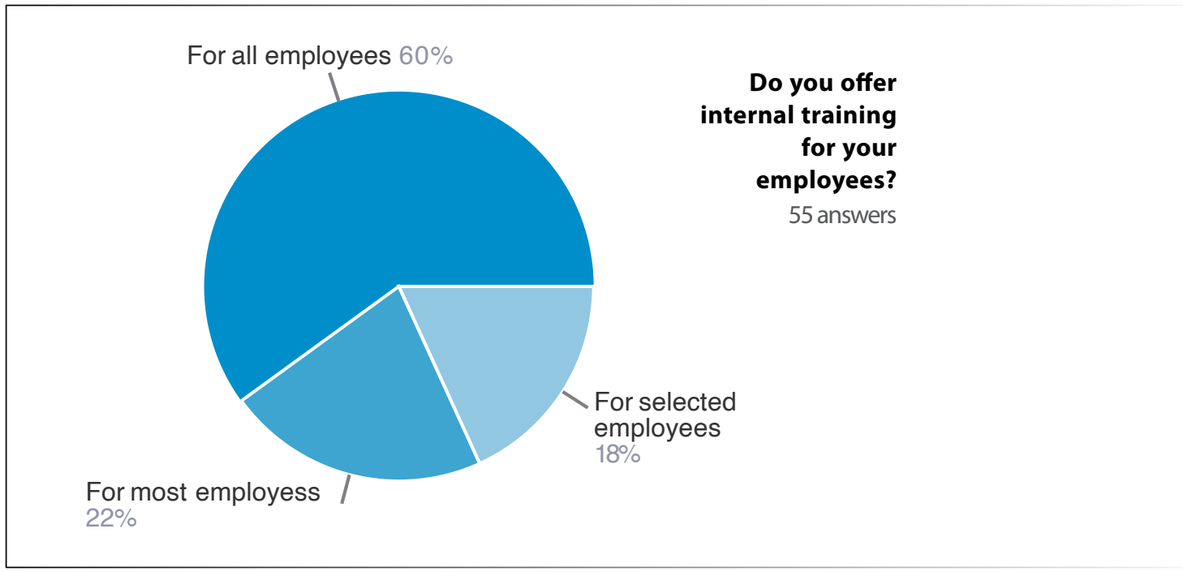


Internal Training Provision

The Portuguese ICT sector demonstrates a strong commitment to workforce development.

A clear majority of the responding companies (60%) offer internal training to all employees, while a further 22% of respondents extend training to most of their staff. Only 18% limit internal training to selected employees.

This means that 82% of surveyed companies provide training to the majority or entirety of their workforce - a notably high figure that reflects both the fast-moving nature of the technology sector and a proactive approach to retaining and upskilling talent in a competitive hiring environment. The near-absence of companies offering no training at all further reinforces the image of a sector that invests seriously in its people, which is a relevant quality signal for international clients and sourcing partners evaluating Portuguese ICT providers.



Share of Revenue from International Clients

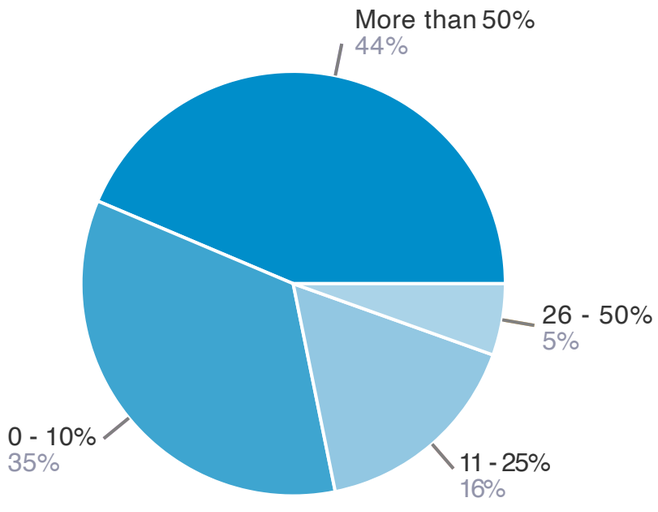
The data reveals a strongly polarised revenue structure within Portugal's ICT sector.

At one end, 44% of companies derive more than half of their total revenue from international clients - indicating a significant cohort of highly export-oriented firms for whom international business is the primary source of income.

At the other end, 35% remain largely domestic, with international revenue accounting for between 0 - 10% of their turnover.

Approximately what share of your revenue comes from international clients?

55 answers



The middle ground is comparatively thin: only 16% generate 11 - 25% of revenue internationally, and just 5% fall in the 26 - 50% bracket.

This bimodal distribution suggests that the sector is split into two fairly distinct groups - globally oriented exporters and domestically focused providers - with relatively few companies in transition between the two.

For German buyers and sourcing managers, the 44% of firms already generating the majority of their revenue abroad are particularly relevant, as they are likely to have the international delivery experience, language capabilities, legal familiarity, and cross-cultural competence needed for successful long-term partnerships.

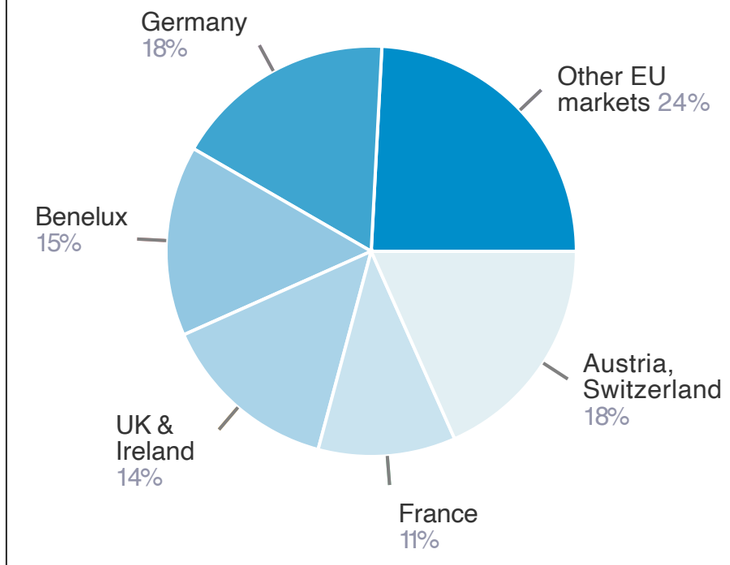
European Markets Currently Served

Portugal's ICT sector has a broad and well-distributed presence across European markets. Other EU markets collectively account for the largest share of responses (24%), reflecting wide geographic reach beyond the named destinations. Germany and Austria/Switzerland are the two most frequently cited individual markets, each mentioned by 18% of respondents, confirming the DACH region as the single most important

PORTUGAL ICT - ICT BUSINESS SURVEY RESULTS

Which European markets do you currently serve?

120 answers



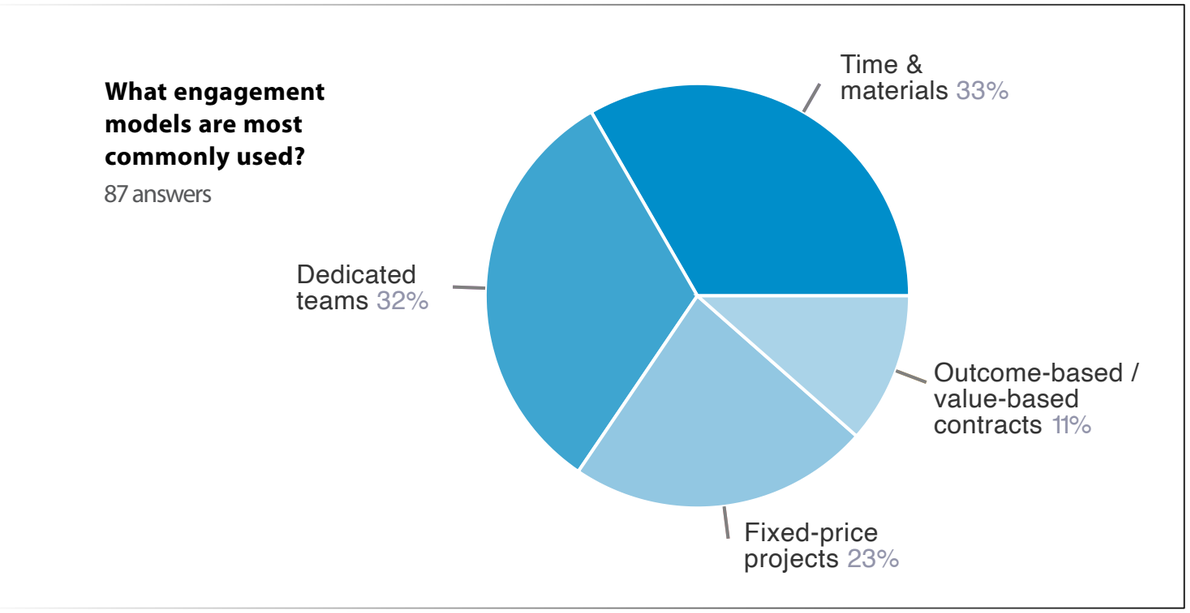
European target market for Portuguese ICT exporters.

Benelux ranks third at 15%, followed closely by UK & Ireland at 14% and France at 11%.

The prominence of the DACH region is a particularly significant finding. With Germany and Austria/Switzerland together accounting for 36% of all European market mentions, they represent by far the strongest bilateral relationship in Portugal's ICT export landscape.

This is consistent with the cultural compatibility, time zone alignment, and growing nearshoring appetite among German-speaking buyers that respondents highlighted elsewhere in the survey.

For German organisations evaluating Portugal as a sourcing destination, this data confirms that a substantial share of Portuguese ICT providers already has direct experience serving German-speaking clients - reducing onboarding friction and partnership risk considerably.



Most Commonly Used Engagement Models

Portuguese ICT companies show a strong preference for flexible, relationship-oriented engagement models. Time & materials is the most frequently used model at 33%, closely followed by dedicated teams at 32%. Together these two models account for nearly two thirds of all engagement structures, reflecting a sector that is well-aligned with the iterative, ongoing collaboration formats that international nearshoring partnerships typically require.

Fixed-price projects rank third at 23%, indicating that a significant minority of providers are also comfortable with clearly scoped, deliverable-based contracts - an important option for public sector clients and organisations with stricter procurement frameworks. Outcome-based or value-based contracts, while still a minority at 11%, signal a growing maturity in the market, with some providers willing to tie their compensation directly to measurable business results.

For German buyers and procurement managers, the dominance of time & materials and dedicated team models is a positive indicator.

These formats offer the flexibility to scale engagements up or down, embed Portuguese engineers directly into existing teams, and adapt scope as

PORTUGAL ICT - ICT BUSINESS SURVEY RESULTS

requirements evolve - all of which are essential characteristics for successful long-term IT sourcing partnerships.

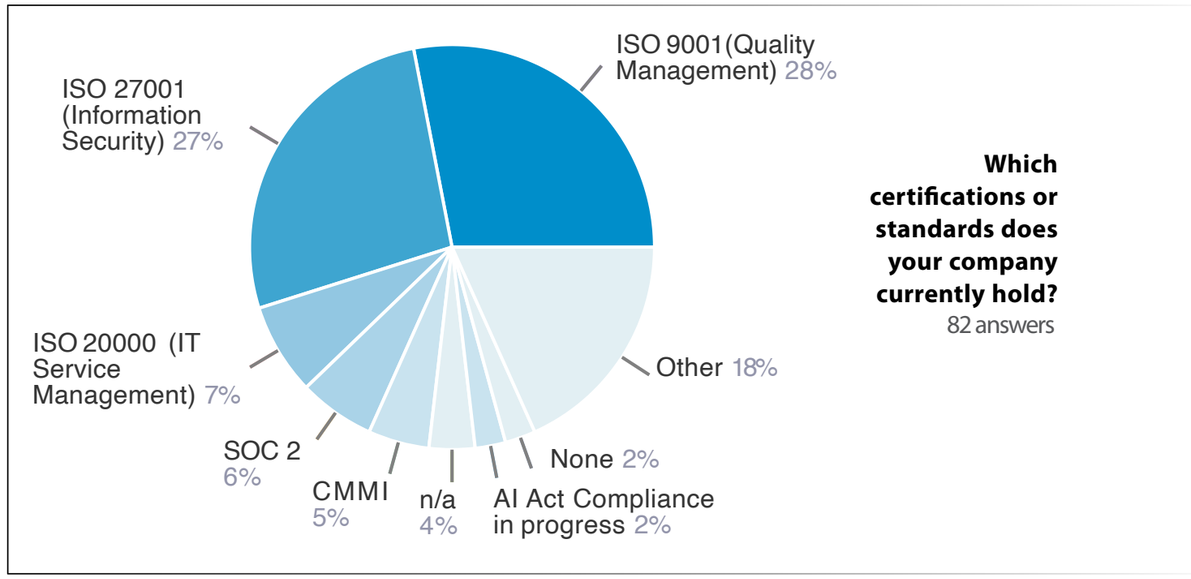
The availability of fixed-price options also ensures that more structured procurement processes, common in the public sector, can be accommodated without difficulty.

Certifications & Standards Currently Held

Portuguese ICT companies demonstrate a solid and well-rounded approach to quality and compliance certification. ISO 9001 (Quality Management) is the most widely held standard at 28%, closely followed by ISO 27001 (Information Security) at 27%. Together these two certifications account for more than half of all mentions, reflecting a sector that takes both operational quality and data security seriously - two areas of particular importance for international clients handling sensitive or regulated data.

ISO 20000 (IT Service Management) is held by 7%, SOC 2 by 6%, and CMMI by 5%, indicating that a meaningful subset of providers has invested in more specialised or internationally recognised compliance frameworks. A further 18% fall under other certifications, suggesting additional breadth beyond the named standards.

Notably, 2% of respondents are already actively working toward EU AI Act



compliance - a forward-looking signal that the sector is preparing for emerging regulatory requirements before they become mandatory.

Only 2% of respondents hold no certifications at all, which is a remarkably low figure and underscores the overall maturity and compliance-readiness of the Portuguese ICT supplier base. For German buyers - particularly those in regulated industries such as finance, healthcare, or public administration - the high prevalence of ISO 9001 and ISO 27001 certifications provides a strong baseline of assurance regarding quality management and information security practices.

Lisbon street map

PORTUGAL ICT 2026

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DOV DEUTSCHER OUTSOURCING VERBAND
GERMAN OUTSOURCING ASSOCIATION

3

Artificial Intelligence

Ai landscape

Portugal's AI landscape has shifted from experimental research to industrial application, driven by a mix of public investment and a surge in corporate AI hubs. In 2025 and early 2026, the government's "AI Portugal 2030" strategy focused heavily on integrating AI into public services and supporting "Deep Tech" through the National Network of AI Hubs.

Major international firms like AstraZeneca and Cloudflare have established massive data and AI operations in the country, citing the high density of STEM graduates from schools like Instituto Superior Técnico as a primary factor. These institutions, alongside research centers like INESC-ID and Fraunhofer Portugal, provide the technical backbone for the country's growing reputation as a hub for machine learning and computer vision.

The private sector is increasingly dominated by startups focusing on "Applied AI" rather than general models, with a strong emphasis on cybersecurity, healthcare, and retail automation. According to Startup Portugal and the 2025 IDC Tech reports, the ecosystem now features several "Soonicorns" (high-value startups) that utilize AI to optimize global supply chains and fraud detection.

While Lisbon's Unicorn Factory remains the central node for scaling these ventures, the "AI Corridor" between Porto and Braga has become a specialized center for industrial AI and robotics.

This growth is supported by a steady flow of venture capital, which increasingly prioritizes Portuguese AI firms due to their lower burn rates and high technical efficiency compared to Silicon Valley or London counterparts. (18)

Ai market

The market for Ai services in Portugal reached USD 462.48 million in 2024 and is forecasted to hit USD 4,3 billion by 2033, reflecting a 25.06% CAGR from 2025-2033.

Ai Services Market Portugal 2024 - 2033

PORTUGAL ICT - THE AI LANDSCAPE AND MARKET

Machine learning alone was projected at USD 298.60 million in 2025, driven by adoption across finance, healthcare, and manufacturing. (19)

Ai firms

Most tech service firms in Portugal offer at least some Ai related services, while many companies have integrated advanced services that help companies to realise the potential of Ai in their operations, offering their services on the home but also on the international market.

TechBehemoths lists for example 37 AI-specialized firms, focusing on machine learning, NLP, and cognitive computing, 91 AI companies/startups tracked by F6S, including services providers like EdgenAI and Leiria Technology Consulting Group, Clutch and GoodFirms highlight 20-40 top-ranked providers, such as NILG.AI and BySix, emphasizing AI consulting and development. (20)

Ai data center market

Portugal's Ai data center market is gaining momentum. Key growth drivers include national AI strategies, access to renewable energy, and strong interest from hyperscale operators. Portugal's stable political and regulatory environment supports long-term infrastructure investments. Providers are increasingly deploying high-density racks, AI-optimized GPUs, and advanced cooling technologies such as liquid cooling. In parallel, the expansion of AI-as-a-Service models and localized training of large language models is further accelerating demand for infrastructure.

The market analytics for Ai data centers in Portugal reflect this trend.

In 2025 Portugal AI Data Center Market Size stands at USD 107.21 million and is predicted to reach USD 518 by 2035. (26)

Ai Data Center Market Portugal 2020 - 2035

Investments in Ai

Portuguese companies raised their Ai spending by 24% in 2024, exceeding the European average of 22%. According to cloud service providers, Ai is expected to represent around 16% of IT budgets in Portugal by 2028. (26)

4

ICT Business Insights

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Germany and Portugal

Europe’s Technological Moment: Building Innovation Capacity in a Disrupted World

By Carlos Coutinho Silva, EVP 99x Europe & CEO 99x Tech Portugal

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EUROPE'S TECHNOLOGICAL MOMENT

The Context: A Convergence Without Precedent

Two forces are converging on Europe's technology sector in 2026. The first is geopolitical fragmentation and the response it has triggered: the push toward digital sovereignty. Trade tensions, shifting defence alliances, and the weaponisation of technology dependencies have made Europe's digital vulnerability impossible to ignore. The Franco-German Digital Sovereignty Summit of November 2025 and the subsequent EU-27 declaration transformed technological autonomy into a binding political commitment and pan-European infrastructure projects are moving from concept to deployment.

The second force is the acceleration of AI. By end of 2026, forty percent of enterprise applications will embed task-specific AI agents (Gartner), and ninety-two percent of developers at large enterprises already use AI-assisted coding tools (GitHub). AI is not a marginal improvement; it is a new paradigm for how technology is produced.

Germany and the UK—combined IT services value exceeding $190 billion—are at the centre, both facing acute talent shortages and investing heavily in HPC, cybersecurity, and AI infrastructure. Europe's broader BPO market, nearly $90 billion in 2025, is projected to surpass $219 billion by 2034.

Despite heavy investment, a recent BCG study found that only 4% of Nordic companies achieve strong AI returns, because most layer AI onto existing processes rather than redesigning workflows. The outsourcing industry itself is being reconfigured: FTE-based pricing is giving way to "autonomy-level pricing," where fully autonomous AI execution can cut per-unit costs by more than 50%. The entire value chain - pricing, governance, intellectual property - is being renegotiated.

The Challenges: What Is at Stake?

Europe has the ingredients for global technology leadership—world-class research, exceptional talent, and a regulatory framework that increasingly serves as a competitive differentiator. What it lacks is an operating model that translates these strengths into scalable, sovereign technology capacity. This gap manifests in three interlinked challenges.

The first is Europe's inability to retain its most promising companies. Labour frameworks designed for stability are not built for rapid scaling. The continent's venture capital ecosystem - €66 billion deployed in 2025 - represents only 22% of US investment volume despite comparable economic size. Shallower late-stage capital and slower liquidity push ambitious founders across the Atlantic precisely when they should be scaling within Europe.

The second is a chronic talent deficit that AI is compounding rather than solving. In the UK, 81% of companies report IT skills gaps; in Germany, the cybersecurity workforce has contracted even as regulation demands expansion.

While AI automates routine coding, it simultaneously creates demand for entirely new expertise - AI architects, multi-agent system designers, governance specialists - that the market does not yet produce at scale. This gap reinforces dependence on external partners and raises the strategic importance of nearshore ecosystems that can supply the right skills within European regulatory frameworks.

Value is shifting from code production toward architecture, integration, AI orchestration, and security.

The third is the global obsolescence of the traditional outsourcing model. When AI-augmented teams deliver in days what took weeks, contracts measured in person-hours lose their logic. Value is shifting from code production toward architecture, integration, AI orchestration, and security. Providers selling only capacity rather than accountability for outcomes will see their relevance erode - a repositioning that directly reshapes the role nearshore software development and testing plays in the European ecosystem.

These three challenges are connected: without a flexible, outcome-oriented technology services ecosystem that can supply talent and enable rapid scaling within European frameworks, the continent will continue to lose its best companies - and with them, the sovereign technology capacity it is trying to build.

The Path: Competing with AI, Not Against It

AI fundamentally changes how software is produced. But it does not remove the need for engineering judgment, system-level thinking, domain understanding, and accountability for outcomes. The narrative that AI will make outsourcing obsolete misreads the nature of software development: it is not about writing code, but about solving complex problems in real-world systems.

What is emerging is a maturity model for AI in software services. At the first level, AI functions as a productivity tool: code completion, automated testing, documentation. At the second level, AI agents take on autonomous subtasks: generating implementations, managing CI/CD pipelines, performing code reviews. At the third level, multi-agent systems orchestrate entire workflows, with human engineers as architects and quality guardians. Yet this acceleration does not make human expertise less valuable - it makes it more so. AI-generated code can use outdated libraries, fabricate dependencies, or ignore established standards. Gartner estimates that up to 40% of AI agent projects may be terminated by end of 2027 due to execution risks. At this stage, what organisations need is experienced engineers who know how to wield AI tools effectively and maintain accountability for production. The winning formula is AI-augmented engineers delivering outcomes that neither could achieve alone.

The European innovation playbook builds on this reality in three stages:

- First, leverage intelligent local talent to find product-market fit.
- Second, partner with nearshore providers to scale rapidly - the flexibility that European employment law does not offer natively.
- Third, deploy AI agents to codify and accelerate processes once human teams have established them.

Portugal can be a key enabler in this model - not primarily because of cost, but because of capability. With a projected number of 262,000 ICT professionals by 2026 and 28,000 STEM graduates annually, Portugal offers a deep pool of engineering talent that directly addresses the structural skills gap constraining Europe's major markets.

Portuguese teams already support some of Germany's most demanding technology projects, from automotive software modernisation to AI-powered compliance platforms.

Full GDPR and AI Act compliance, sixth place globally in English proficiency, and a mature

A talent paradox is taking shape: AI simultaneously automates traditional coding skills and creates new categories of expertise.

ecosystem shaped by the R&D centres of companies such as Microsoft, Siemens, Bosch, and Huawei make Portugal a high-value European partner - within the regulatory framework, in a similar timezone, and with a track record that speaks for itself.

The Future Belongs to Those Who Build It

In the years ahead, AI will shift from augmentation to full orchestration, with most routine tasks handled by AI agents within eighteen to twenty-four months.

A talent paradox is taking shape: AI simultaneously automates traditional coding skills and creates new categories of expertise - AI architects, multi-agent system designers, governance specialists. The technology that promises to reduce the need for programmers is simultaneously increasing demand for a more qualified, scarcer professional. Countries that invest in this transition will capture disproportionate value.

Digital sovereignty will become an operational requirement.

Digital sovereignty will become an operational requirement. Pricing models will evolve from time-and-materials to outcome-based engagements. And durable differentiation will come from what it has always come from: trust, delivery excellence, domain understanding, and long-term partnerships - compounded now by the ability to orchestrate AI effectively. The question is not whether disruption will come - it is already here. The question is who will seize the opportunity to lead.

How We Can Help

99x is a global technology group headquartered in Norway, with over 600 professionals across Scandinavia, Portugal, Sri Lanka, Brazil, and Malaysia, and roots in a Scandinavian culture of trust and quality. Through 99x Tech Experts Portugal - our European nearshore hub, with over sixteen years of experience and a pioneering track record delivering from Portugal to clients across fifteen European countries, including Germany, the UK, France, the Nordics, and the Benelux - we help European companies respond directly to the challenges outlined in this article.

For companies that need to scale engineering teams rapidly, we provide nearshore talent that integrates as an extension of our clients' product teams - engineers who take ownership of outcomes, not just tasks.

For organisations evolving from time-and-materials to outcome-oriented engagements, we offer hybrid delivery models combining senior human expertise with AI tools integrated across the full development lifecycle. For those navigating the transition to AI without losing governance and quality, we provide AI consulting, agent implementation, and AI-native development teams that understand where AI adds value and where human judgment remains irreplaceable.

Software development, QA, cloud engineering, data science, AI - we offer the full spectrum of capabilities, anchored in Portugal, within the European regulatory framework. If you are looking for a partner that combines proven European nearshore experience, accountability for outcomes, and AI capability - challenge us! We are ready for that conversation.

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View over Lisbon

EUROPE'S TECHNOLOGICAL MOMENT

PORTUGAL ICT 2026

AHK Deutsch-Portugiesische Industrie- und Handelskammer
Câmara de Comércio e Indústria Luso-Alemã

Germany and Portugal

Strengthening Digital Cooperation in Europe's ICT Landscape

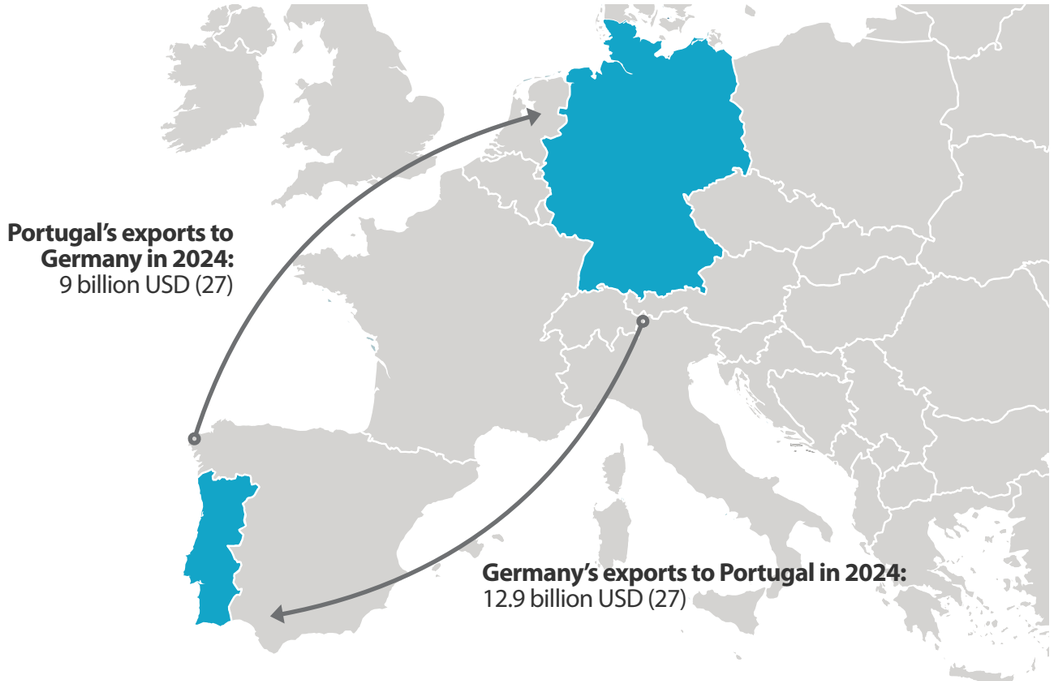
By AHK Portugal

The digital transformation of Europe's economy is accelerating rapidly, and international cooperation has become a key factor in strengthening innovation and competitiveness. In this context, the partnership between Germany and Portugal offers significant potential, particularly in the field of information and communication technologies (ICT).

Germany, as one of Europe's largest industrial economies, is undergoing an extensive digital transformation. Initiatives such as Industry 4.0, digital manufacturing, and the integration of artificial intelligence into industrial processes are driving the demand for advanced digital solutions. Portuguese technology companies and service providers are increasingly well positioned to contribute to these developments.

Portugal has built a dynamic and internationally oriented technology ecosystem over the past decade. The country has become an attractive location for technology investment, innovation centres, and start-ups. A highly qualified workforce, strong digital skills, and a competitive nearshore environment have made Portugal a preferred partner for many international companies seeking software development, IT services, and digital innovation capabilities.

German companies are among those benefiting from this ecosystem. Many have already established technology



GERMAN - PORTUGUESE COOPERATION

centres or partnerships with Portuguese firms in areas such as software engineering, cybersecurity, data analytics, and cloud services. These collaborations illustrate how complementary strengths can create value for both sides.

At the same time, digital cooperation between Germany and Portugal goes beyond business partnerships. Universities, research institutions, and innovation hubs in both countries increasingly collaborate on projects related to artificial intelligence, smart mobility, digital health, and sustainable technologies.

Another important dimension is talent development. As the demand for digital skills continues to grow across Europe, initiatives that promote vocational training and lifelong learning are becoming essential. The German-Portuguese Chamber of Commerce and Industry (AHK Portugal) actively contribute to this area through its engagement in dual vocational education and training programmes, helping to connect companies with qualified young professionals and strengthening the talent pipeline for the digital economy.

Looking ahead, deeper cooperation between Germany and Portugal in the ICT sector can play an important role in strengthening Europe's digital sovereignty and competitiveness. By combining Germany's strong industrial base with Portugal's agile and innovative technology ecosystem, new opportunities can emerge for joint projects, digital solutions, and scalable business models across the European market.

Platforms that foster dialogue and collaboration between companies, institutions, and policymakers will remain crucial in this process. As a facilitator of bilateral economic relations, AHK Portugal will continue to support initiatives that connect businesses, encourage knowledge exchange, and promote sustainable digital growth.

Deutsch-Portugiesische Industrie- und Handelskammer / Câmara de Comércio e Indústria
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LISBOA

Artificial Intelligence and Outsourcing

Who Is Responsible for the Algorithm?

Joana Mota Agostinho, Lawyer and Partner at Cuatrecasas Law Firm Portugal

PORTUGAL ICT 2026

CUATRECASAS

Digital sovereignty will become an operational requirement.

Many businesses no longer build every digital system in-house. Instead, they rely on outside vendors to design, train, test, manage, or operate AI tools. This arrangement can save time and reduce costs, but it also creates a serious legal and ethical question: when an algorithm causes harm, who is responsible?

The answer is not simple. Responsibility may be shared among the company using the AI, the vendor that developed it, the data provider, and sometimes even the human decision-makers who relied on it without proper review. In practice, however, organizations cannot avoid accountability merely because the technology was outsourced.

The growth of outsourced AI reflects a wider business trend. Companies often purchase AI systems from specialized technology providers rather than build their own models from the ground up.

Banks use third-party fraud detection tools. Employers rely on external platforms for hiring and performance assessment. Hospitals may adopt outsourced systems for diagnosis support or patient risk scoring. Public agencies also use external vendors for surveillance, eligibility screening, and predictive analytics. In each of these cases, a company or institution may not fully understand how the algorithm works, yet it still uses the system to make important decisions.

This creates a gap between technical control and legal responsibility.

Developer Liability: Holding AI Creators Accountable

One argument is that the developer of the algorithm should carry primary responsibility. After all, the vendor usually designs the model, selects the training methods, and determines how the system functions. If the system is biased, inaccurate, unsafe, or misleading, it seems reasonable to hold the developer accountable.

This is especially true when the vendor markets the tool as reliable, fair, or compliant with regulations. If those claims are false, the developer may be responsible for negligence, misrepresentation, or product-related liability. A developer cannot hide behind technical complexity if it released a flawed system into the market.

User Responsibility: Why Deploying AI Means Owning the Risk

However, placing all responsibility on the developer is not sufficient. The organization that chooses to use the AI also plays a central role. A company cannot simply say, "the vendor built it, so the vendor is to blame."

If the company applies the algorithm to real people, real customers, or real employees, it assumes its own duties. It must carry out due diligence before purchasing the system. It should understand the purpose of the tool, its limitations, the quality of the data used, and the risks of error or bias. It must also monitor the results in practice.

If warning signs appear and the company ignores them, responsibility clearly shifts toward the user as well.

This issue becomes even more important when AI supports high-stakes decisions. Consider an outsourced hiring algorithm that rejects qualified candidates from certain backgrounds.

Even if the software provider created the model, the employer using it may still face liability for discrimination. The same is true when a lender relies on outsourced credit scoring, or when a hospital uses an AI tool that leads to harmful treatment decisions.

The law generally focuses on who made or adopted the decision, not only on who wrote the code. Outsourcing a function does not automatically outsource legal responsibility.

Outsourcing a function does not automatically outsource legal responsibility.

Shared Responsibility in Complex AI Supply Chains

Another challenge is that AI systems are rarely created by a single actor. A model may be built by one company, trained on data collected by another, hosted by a cloud provider, and adjusted

by the customer using its own internal data. This layered structure makes it difficult to identify one responsible party. In many cases, responsibility should be understood as shared rather than exclusive.

The developer may be responsible for defective design. The data supplier may be responsible for poor or unlawful data practices. The client may be responsible for improper implementation or lack of oversight.

Human managers may be responsible for blindly following algorithmic outputs without independent judgment. The more complex the supply chain, the stronger the need for clear allocation of duties.

Why Contracts Alone Can't Manage AI Risk

Contracts are often used to address this problem, but contracts alone do not solve it. Businesses usually negotiate terms about warranties, indemnities, limitations of liability, testing, and compliance with law. These provisions are important because they define the relationship between the customer and the vendor. Yet a contract cannot erase obligations owed to regulators, consumers, employees, or the public. A vendor may agree to compensate a client for certain losses, but that does not prevent a harmed person from bringing a claim against the company that used the AI. Contractual protection is therefore only one part of a broader governance framework.

The Transparency Gap: Why Black-Box AI Undermines Accountability

Transparency is also a key issue. Many outsourced AI systems operate as "black boxes," meaning their internal logic is difficult to explain. This lack of clarity can make accountability harder to enforce. If a company does not know why the system made a decision, it may struggle to challenge or correct the outcome. For this reason, responsible organizations should require a meaningful level of explainability from AI vendors. They should ask how the model was trained, what data was used, how accuracy was measured, and what steps were taken to test for bias or error. The less transparent the system, the greater the risk for everyone involved.

Shared Accountability in AI: Responsibility Follows Control, Not Outsourcing

From a policy perspective, the best answer is not to search for one single responsible party in every case. Instead, responsibility should follow control, knowledge, and impact.

The developer should be responsible for the quality and safety of the product it creates.

The deploying organization should be responsible for how the system is selected, used, and supervised. Where humans remain in the loop, they should be accountable for meaningful review rather than automatic approval. This shared approach better reflects how modern AI systems actually operate.

In conclusion, outsourcing does not remove responsibility for artificial intelligence. It redistributes it across a network of actors, each with different obligations. The algorithm may be designed by a vendor, but once it is used to influence rights, opportunities, money, health, or reputation, responsibility becomes broader. The company using the system cannot escape scrutiny by pointing to a third party, and the developer cannot avoid blame by claiming the customer misused the product.

As AI becomes more powerful and more common, accountability must remain a human and institutional duty. The real question is not whether someone is responsible for the algorithm. The real question is whether every party involved is prepared to accept the responsibility that comes with it.

5

Contacts

And Partner profiles

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Founded in 2000 and headquartered in Norway, 99x is a global technology group specialising in digital product engineering and related technology services. The group works primarily with technology-led organisations, supporting the design, development, and continuous evolution of digital products and platforms.

Originally established as a specialist software engineering company, 99x has grown into a multinational group comprising nine companies spread across Portugal, Norway, Sweden, Poland, Sri Lanka, Brazil, and Malaysia. The group operates through an integrated delivery model that combines local presence with globally distributed teams, shared engineering standards, and common governance structures.

The 99x Group employs more than 600 professionals across engineering, product management, design, quality assurance, and supporting disciplines. Teams collaborate across geographies to serve clients in Europe and North America. The distributed delivery model is designed to provide proximity to customers while ensuring scalability, continuity, and access to a broad talent base.

European business values, including trust, transparency, and long-term orientation influence 99x's operating principles. These principles guide client engagement, internal collaboration, and decision-making across the group.

Services and Capabilities

- Tech Experts: Dedicated teams and specialist capacity designed to integrate closely with client organisations and existing delivery structures.
- AI and Data-Driven Solutions: Practical application of artificial intelligence and data-driven approaches to support automation, decision-making, and operational improvement.
- Product and Platform Engineering: End-to-end digital product development, from early discovery and MVPs to the ongoing development and maintenance of complex software platforms.
- Digital Solutions and Web Platforms: Design and development of web-based and customer-facing digital solutions, typically integrated with enterprise systems such as CRM, ERP, and commerce platforms.

Clients and Industry Experience

99x works from scale-ups to enterprise organisations, with a strong focus on software and product-centric companies, across sectors including finance, SaaS, logistics, automotive, defense, e-commerce and retail.

PORTUGAL - ICT BUSINESS PARTNERS

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Cuatrecasas is an international law firm with a strong presence in Portugal, Spain, Chile, Colombia, Mexico and Peru. With a diverse multidisciplinary team of more than 2,000 professionals of 29 nationalities, it provides comprehensive legal services across all areas of law, with a strong focus on business and a sector-driven approach. The firm has 24 offices in 11 countries and works very closely with law firms in other jurisdictions to provide teams, tailored to the needs of each client and situation.

Our Technology and Telecommunications practice offers technical and cross-sectional knowledge and provides global and comprehensive solutions to companies in the ICT sector.

In Portugal, Cuatrecasas has offices in Lisbon and Porto, with a total of over 220 lawyers, who represent some of the largest national and international companies operating in the country, including half of the companies listed on the Portuguese stock index (PSI20).

Cuatrecasas has been considered by the Financial Times the most innovative law firm in Continental Europe in the past twenty years (FT Innovative Lawyers Awards 2024-2025).

Tech Remote Hub (TRH)
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Tech Remote Hub (TRH) is a nearshore Salesforce and ServiceNow boutique headquartered in Portugal, specialising in building, operating and transferring Salesforce and ServiceNow expertise centers for European companies looking to establish or scale delivery capability in Portugal.

With Salesforce Partner and ServiceNow Specialist Partner status, TRH covers the full implementation cycle across Sales Cloud, Service Cloud, Agentforce, Einstein Ai, ITSM, HRSD, CSM, and NowAssist Ai.

Every consultant is backed by Ai accelerators embedded across the entire delivery cycle - from discovery and configuration through to go-live and post-launch optimisation - ensuring faster, higher-quality outcomes for clients. Based in Portugal with a senior-led team and strong English proficiency, TRH offers full timezone alignment with DACH and Central Europe. Whether you need remote delivery capacity or a dedicated expertise center built and operated on the ground in Portugal, TRH is the partner to make it happen.

SourcingPartner.eu (Germany)
contact@sourcingpartner.eu
www.sourcingpartner.eu

SourcingPartner.eu is a specialized advisory platform with a strong focus on international ICT sourcing and distributed delivery models. As a spin-off of the German Outsourcing Association, it combines deep expertise in global sourcing strategies with access to an extensive international network of IT service providers, technology partners, and public stakeholders.

The organization supports companies end-to-end in designing and implementing international sourcing initiatives, including location strategy, partner identification, and the setup of nearshore and offshore development teams. Its core strength lies in enabling fast, structured access to qualified IT partners across multiple markets, helping clients scale delivery capacity, optimize costs, and accelerate innovation.

With active engagement across numerous ICT markets and a curated network of pre-qualified providers, SourcingPartner.eu facilitates efficient matchmaking between demand and supply. In addition, it contributes to greater market transparency through advisory services, research, and capacity-building initiatives, supporting both private sector clients and international development programs in building sustainable global sourcing ecosystems.

AHK Portugal – German-Portuguese Chamber of Commerce and Industry
www.ccila-portugal.com

AHK Portugal – the German-Portuguese Chamber of Commerce and Industry – is the official representative of German business in Portugal and part of the global network of German Chambers of Commerce Abroad (AHKs). Established to promote and strengthen economic relations between Germany and Portugal, AHK Portugal supports companies in developing sustainable business opportunities in both markets. With a broad membership base of companies from various sectors, the Chamber acts as a platform for networking, dialogue, and cooperation. It offers market entry support, business partner searches, market studies, and delegation trips, as well as the organization of conferences and business events that foster bilateral exchange. AHK Portugal is also strongly committed to vocational education and training. Through the DUAL training system, implemented in cooperation with companies and educational institutions, the Chamber contributes to the development of qualified talent and to strengthening the competitiveness of companies in Portugal. By connecting businesses, institutions, and decision-makers, AHK Portugal actively contributes to deepening German-Portuguese economic cooperation.

German Outsourcing Association
www.outsourcing-verband.org

The German Outsourcing Association is an independent, non-profit membership organisation founded in 2010 that supports the development of ICT services, outsourcing, and global business services in Germany and international markets. It acts as a platform for companies, public institutions, consultants, and service providers involved in IT and business process sourcing, particularly across the DACH region.

The association provides market insights, advisory services, publications, and events to help organisations optimise sourcing strategies and IT service delivery. With a network spanning more than 30 international markets, it facilitates global cooperation, connects stakeholders, and accelerates sourcing initiatives.

A core focus of the organisation is improving transparency in the ICT services landscape, supporting informed decision-making, and enabling effective collaboration between buyers, providers, and public stakeholders.

Through its research, media platforms, and international initiatives, the association contributes to digital transformation efforts in Germany and emerging markets, while fostering knowledge exchange and best practices across the global sourcing ecosystem.

ANJE - National Association of Young Entrepreneurs

www.anje.pt

ANJE – Associação Nacional de Jovens Empresários is a leading non-profit organisation that supports and represents young entrepreneurs in Portugal. Founded in 1986, it has played a key role in promoting entrepreneurship, innovation, and business development across the country.

With a network of around 5,500 members and several regional hubs, ANJE offers a wide range of services, including training, business advisory, incubation, and acceleration programmes. It supports entrepreneurs throughout the entire business lifecycle—from idea generation to growth and internationalisation—while facilitating access to mentoring, funding opportunities, and skills development.

A strong focus is placed on innovation and technology-driven ventures, contributing to the creation of competitive, high-value businesses. Through its initiatives, ANJE actively strengthens Portugal's startup ecosystem and fosters international connections.

As a recognised social partner and member of the Economic and Social Council, ANJE also contributes to shaping economic policy and enhancing the long-term competitiveness of the Portuguese economy.

APDC – Portuguese Digital Business Community

www.apdc.pt

APDC – Portuguese Digital Business Community is the leading business association representing Portugal's ICT and digital ecosystem. Founded in 1984, APDC brings together over 130 corporate members and 400 individual professionals, including the country's main technology, telecommunications, media, consulting and digital services companies.

APDC's mission is to foster the sustainable development, competitiveness and internationalization of Portugal's digital sector. The association actively promotes dialogue between industry, government, regulators and academia, contributing to public policy, regulatory frameworks and strategic initiatives that strengthen the digital economy. Through flagship programs such as UPskill – Digital Skills & Jobs, and through international partnerships and high-level events, APDC plays a central role in talent development, innovation acceleration and cross-border collaboration.

APDC is committed to positioning Portugal as a reliable, high-quality and competitive technology and nearshore partner within the European and global markets.

PORTUGAL - ICT ECOSYSTEM PARTNERS

DSPA – Data Science Portuguese Association

Hugo Lourenço Furão
hugo.furao@dspa.pt
www.dspa.pt

The DSPA – Data Science Portuguese Association is a non-profit organization dedicated to advancing, empowering, and promoting Data Science and Artificial Intelligence in Portugal and internationally. With the mission to "Empower Data Science for a Better World," DSPA serves as a collaborative hub connecting professionals, companies, academic institutions, and decision-makers, fostering a dynamic and innovative ecosystem across the data community. The association drives sector growth through certification programs, conferences, educational initiatives, workshops, and networking events, enabling knowledge sharing and the development of highly skilled talent. In addition, DSPA emphasizes ethical and responsible use of Data Science, supporting best practices, regulatory discussions, and strategic studies that contribute to the maturity and credibility of the field.

Based in Oeiras, DSPA plays a significant role in representing the Data Science sector to both public and private entities. It actively encourages national and international cooperation and supports projects of public value, reinforcing its commitment to shaping a sustainable and impactful Data Science landscape in Portugal.

Startup Portugal

www.startupportugal.com

Startup Portugal's mission is the development of activities of public interest for the promotion of entrepreneurship, in close connection with public and private entities operating in the national entrepreneurship ecosystem.

Startup Portugal aims to support the Government in the creation and implementation of the National Strategy for Entrepreneurship, and monitor the design and implementation of public policies to support entrepreneurship, promote entrepreneurship and Portuguese startups in national and foreign territory, seek and implement European funding aimed at boosting the entrepreneurial fabric, among other activities.

Startup Portugal's activity is developed with different economic sectors, using the support of various entities and partners, public and private, including entrepreneurs, startups, incubators, investors, companies, academia and governmental organizations, for the development of different initiatives that contribute to the growth of the startup ecosystem and a greater culture of entrepreneurship in the country. It is also a founding member of ESNA - Europe Startup Nations Alliance.

National Portuguese ICT Cluster - TICE.PT
www.tice.pt

The National Portuguese ICT Cluster - TICE.PT was created in 2008, with headquarters in Aveiro. It engages and mobilizes relevant actors throughout Portugal, and in particular in the regions of Braga, Porto, Coimbra and Lisbon, covering the entire value chain in the area of ICT. The concertation platform TICE.PT ensures and promotes the interfaces between the academic world, represented by universities and institutes R&D, the business world, represented by the affiliates and also through networks, in particular of Smes, represented by their associations.

The National Portuguese ICT Cluster TICE.PT, Site of Information Technologies, Communication and Electronics, was formally recognised by the Portuguese Government in August 2009, within the framework of Collective Efficiency Strategies of NSRF.

The TICE.PT aims to promote and leverage networking strategies for the sector. Network between companies and R&D centers, in order to induce a renewal active in national economic context, producing positive effects on national offering, enhanced by innovation and knowledge, creating export capacity and added value in domestic products.

Portuguese and multinational ICT companies operating in Portugal that contributed to this study

Company	Website
AdvanceWorks	www.advanceworks.ai
Airbus Portugal	www.airbus.com
Atos	www.atos.net
Aubay Portugal	www.aubay.pt
Babel Ibérica, S.A.	www.babelgroup.com/pt-pt
BDO	www.bdo.pt
Bee2Solutions, Lda	www.bee2solutions.com
BridgeLK Learning Technologies	www.bridgelk.com
Cargobull Service Solutions	www.cargobull.com
CIBEN, SA	www.ciben.pt
Critical TechWorks	www.criticaltechworks.com
Dualgrid - Gestão de Redes Partilhadas	www.dualgrid.pt
Foodintech	www.flowtech.pt
Future X	www.futurex.pt
Humansoft	www.humansoft.pt
IASAÚDE	www.iasaude.pt
Indra - Minsait	www.minsait.com/en
Integer Consulting	www.integer.pt/
Kyndryl	www.kyndryl.com
Lufthansa LGSP	www.lufthansa-lgsp.com
Mercedes-Benz.io	www.mercedes-benz.io
Nearshore Portugal	www.nearshoreportugal.com
Nextbitt	www.nextbitt.com
Nuno Cubal Reis, Unipessoal Lda.	www.nunoreis.pt
Outsourcing Portugal	www.outsourcing-portugal.co.uk
Pixelplan - Digital Web	www.pixelplan.net
Sinaltech	www.sinaltech.pt
SWJ Portugal Engineering Solutions Unipessoal	www.swj-pt.com
uMan Xpert	www.uman.pt
Ux Interactive	www.hi-interactive.com
Webssential	www.webssential.pt
Wincode, SA	www.wincode.pt
Zematek	www.zematek.pt

Acknowledgements and Contributors

The Portugal ICT Market Study 2026 is a joint initiative led by the German Outsourcing Association and 99x, supported by ICT Markets for analytics and the German-Portuguese Chamber of Commerce and Industry (AHK).

The study was made possible through the contributions of key partners, including Cuatrecasas - a specialized law firm, TechRemoteHub (TRH) - an End-to-end AI powered Salesforce and ServiceNow specialist firm, and SourcingPartner.eu - a German IT sourcing advisory.

Finally, our ICT ecosystem partners - including ANJE, ADPC, DSPA, Startup Portugal, and TICE.PT - played a pivotal role in onnecting with ICT companies, and technical communities in Portugal. Their involvement helped translate the initiative from a standalone effort into a collaborative, ecosystem-wide effort with broader relevance and uptake.

The editors and producers extend their sincere appreciation to all partners, contributors, and participants whose collaboration has enabled valuable insights into Portugal's ICT sector. These findings aim to support informed decision-making among ICT leaders, consultants, and public sector stakeholders across Europe and beyond, and to foster new international partnerships.

Stephan Fricke, CEO at German Outsourcing Association

PORTUGAL ICT 2026

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Analytics by:

Institutional partner:

Partners:

Ecosystem partners:

Media partners:

Nr.	Titel / topic / info	Link
1	Portugal GDP Growth Rate	https://tradingeconomics.com/portugal/gdp-growth
2	Share of economic sectors in GDP	https://www.statista.com/statistics/372187/share-of-economic-sectors-in-the-gdp-in-portugal/
3	Wikipedia, Cities of Portugal	https://en.wikipedia.org/wiki/List_of_cities_in_Portugal
4	Digital Infrastructure	https://www.jsa.net/portugal-advancements-in-subsea-cables-and-digital-infrastructure/
5	Commercial office market Lisbon and Porto	https://pdf.euro.savills.co.uk/portugal/savills-office-q2-2025.pdf
6	Office market Braga	https://www.idealista.pt/en/arrendar-escritorios/braga/
7	Tech and Science Parks	https://en.wikipedia.org/wiki/Science_and_technology_in_Portugal
8	Higher Education in Portugal	https://www.statista.com/topics/13732/higher-education-in-portugal/ ; https://grokipedia.com/page/List_of_universities_and_colleges_in_Portugal ; https://www.portugalglobal.pt/en/investment/why-portugal/reasons-to-invest/talent/
9	Higher Education in Portugal - Area of education	https://www.pordata.pt/en/db/portugal/search+environment/table
10	Employment	https://www.trade.gov/country-commercial-guides/portugal-information-and-communications-technology
11	Employment	https://www.statista.com/statistics/419585/number-of-employees-ict-services-sector-portugal/ ; https://www.reportlinker.com/dataset/c4b2f33307a94a6b7cdc4b2dc6ccc26c6da8053b
12	IT services Exports	https://www.portugalglobal.pt/media/ztlmymv3/digital-industry-report.pdf ; https://tradingeconomics.com/portugal/ict-service-exports-bop-us-dollar-wb-data.html
13	IT companies in Portugal	https://techbehemoths.com/blog/the-ict-in-portugal-overview-and-companies-data
14	Foreign investments	https://devs.com.pt/news/55-tech-companies-opened-in-portugal-in-2025-a-record-year-for-new-hubs , https://devs.com.pt/news/55-tech-companies-opened-in-portugal-in-2025-a-record-year-for-new-hubs ; https://www.pixelmatters.com/insights/tech-companies-choosing-portugal-for-their-hubs
15	Startups	https://www.portugalglobal.pt/en/trade/startup-ecosystem/ ; https://ecoreport.startupportugal.com/wp-content/uploads/2025/11/portugals_startup_ecosystem_20256.pdf
16	Startup Unicorns	https://investinportugal.portugalglobal.pt/industries/digital-sector/
17	AI Startups	https://www.seedtable.com/best-ai-startups-in-portugal
18	AI landscape	https://www.theportugalnews.com/news/2026-02-19/portugal-leads-ai-usage/971786 , https://my.idc.com/getdoc.jsp?containerId=US51736824&pageType=PRINTFRIENDLY
19	Ai market	https://www.statista.com/outlook/tmo/artificial-intelligence/machine-learning/portugal#market-size. , https://www.statista.com/outlook/tmo/artificial-intelligence/portugal. , https://www.imarcgroup.com/portugal-artificial-intelligence-market
20	Ai companies	https://techbehemoths.com/companies/artificial-intelligence/portugal. ; https://www.f6s.com/companies/artificial-intelligence/portugal/co. ; https://clutch.co/pt/developers/artificial-intelligence
21	ICT Policy	https://www.portugal.gov.pt/en/gc25/communication/news-item?i=portugal-consolidates-leadership-in-digital-transformation-and-boosts-state-reform , https://dig.watch/updates/portugal-government-backs-ai-with-e400-million , https://startupportugal.com/ , https://www.portugal.gov.pt/en/gc25/communication/news-item?i=portugal-consolidates-leadership-in-digital-transformation-and-boosts-state-reform

PORTUGAL ICT MARKETS STUDY 2026 - SOURCES

Nr.	Titel / topic / info	Link
22	Startup Incubators	https://startupportugal.com/wp-content/uploads/2024/02/Members-List-_-RNI-Portugal-Incubators-_-January-2024.pdf
23	Tech events	https://www.bleap.finance/blog/best-tech-events-in-lisbon
24	ICT Export markets	https://www.portugalglobal.pt/media/ztlmymv3/digital-industry-report.pdf
25	IT salaries in Portugal	https://www.salaryexpert.com/salary/job/it-software-engineer/portugal ; https://www.reddit.com/r/PortugalExpats/comments/1jlrlqq/software_engineering_salaries_portugal_vs_other/ ; https://www.paylab.com/pt/salaryinfo/information-technology
26	Ai and Ai data center market	www.imarcgroup.com/portugal-artificial-intelligence-market ; https://www.dcmarketinsights.com/report/portugal-ai-data-center-market ; https://www.essential-business.pt/2025/12/15/ai-take-up-in-portugal-low-compared-to-eu-average-but-gaining-traction
27	Trade between Germany and Portugal	https://oec.world/en/profile/bilateral-country/prt/partner/deu ; https://tradingeconomics.com/germany/exports/portugal

Imprint

Publisher and contact:
Deutscher Outsourcing Verband e.V.
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W: www.outsourcing-verband.org

This study has been produced in partnership with leading German and Portuguese economic and ICT sector support organisations as well as with Portuguese and European private sector partners.

Editorial office and research lead: Stephan Fricke
Images: Companies and authors, stockimages and graphics, maps licensed via unsplash.com und 123rf.com
Production: ICT Markets ltd. (www.ict-markets.eu)

Distribution: This publication is available for free download via www.outsourcing-verband.org. If you want to share the study, please include a link to the download site for reference.

Press inquiries: Stephan Fricke, office@outsourcing-verband.org

MAAT - Museum of Art, Architecture and Technology, Lisbon

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