

# National Data Centre Plan

**Computational capacity as a strategic asset  
for sovereignty and competitiveness**

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XXV GOVERNO CONSTITUCIONAL

# Executive Summary

Data centres are a **strategic asset for competitiveness and digital sovereignty**. In addition to enabling the digitalisation of society, they act as a driver of foreign direct investment and the development of technological ecosystems.

Portugal currently starts from a **relatively small installed base**, with capacity **three to five times below the EU average**. Project implementation has been constrained by factors such as **complex regulatory processes, institutional fragmentation, and the absence of consolidated data centre hubs** at an international scale.

At the same time, the international context presents a **limited window of opportunity**. The rapid **adoption of AI is driving global demand** for computational capacity, while several **mature European markets face constraints** in deploying new infrastructure. In this context, demand in Portugal is expected to grow from **0.2 GW in 2025 to around 1 GW by 2030**, reflecting a CAGR of approximately **41%**, twice the European average.

Capturing this opportunity could generate a significant impact. For each additional 1 GW of installed capacity, the potential GDP impact is estimated at around **€8 billion** from initial investment over the first five years and approximately **€16 billion** from recurring annual operations (around **5–6% of Portugal's GDP in 2025**); the creation of approximately **3,300 direct jobs** during the operational phase; and a positive contribution to the trade balance of around **€8 billion**.

In this context, the National Data Centre Plan (*Plano Nacional de Centros de Dados*, PNCD) establishes an integrated approach to position Portugal as a European data centre hub, while ensuring environmental sustainability, energy efficiency, and territorial safeguards.

The PNCD structures State intervention through **15 initiatives to be implemented in 2026–2027**, organised across **four areas of action**: **I. Regulation and Governance**, to increase regulatory predictability and efficiency; **II. Energy and Infrastructure**, to ensure competitive deployment conditions; **III. Demand and Market**, to align public demand and strengthen international attractiveness; and **IV. Territory and Ecosystem**, to ensure sustainable territorial integration.

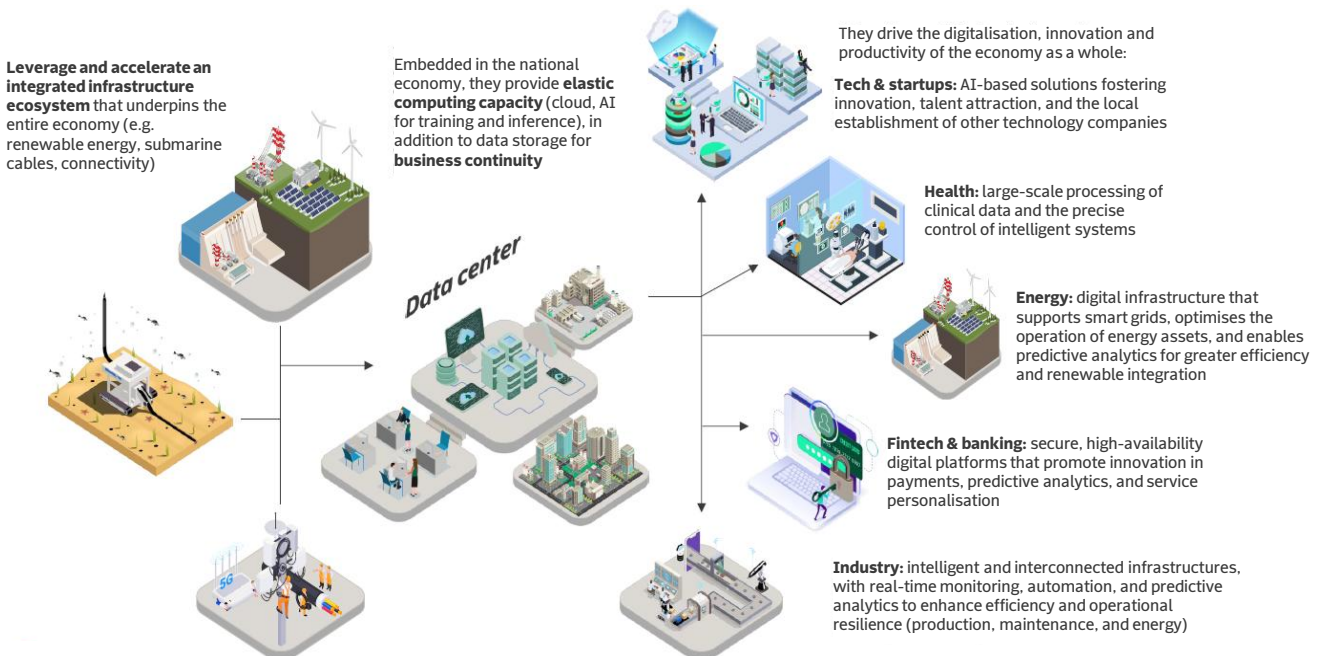
# Current Context

Data centres are **essential to support the new digital economy**, generating **multiplier effects across adjacent industries** and enabling **future growth arenas** (such as batteries, electric vehicles, cloud services, and AI). They can therefore be **transformative for the diversification and competitiveness of the economy**, through the attraction of **large-scale foreign investment**. The economic dimension is intrinsically linked to **digital sovereignty**, making it imperative for Portugal to develop its own capacity to ensure **strategic autonomy, resilience, and control over critical infrastructures**.

Portugal currently starts from a **relatively small installed base, between three and five times below the European Union average** (measured in per capita or per unit of GDP terms). Although national capacity has nearly doubled between 2020 and 2025, the country still lags **behind the main European hubs**. The national market is also characterised by a strong predominance of colocation data centres, with **limited presence of hyperscalers**.

In recent years, several projects have been announced, but their implementation has remained limited, reflecting challenges such as **speculation in grid connection, complex regulatory processes, and the absence of internationally consolidated hubs**.

## Impact of data centres on adjacent industries (illustrative)



Source: McKinsey & Co.

# Current Context

The analysis of national infrastructure indicates that Portugal has **favourable conditions** for the development of data centres. In the short term, the expansion plan for the **electricity grid provides capacity to accommodate new projects**, and clearer, more competitive, and more transparent mechanisms for capacity allocation have been developed.

At the same time, the **associated environmental impacts can be mitigated** through technological solutions already tested internationally, such as water-free cooling systems, reuse of residual heat, higher computational density, or the repurposing of existing industrial infrastructure. These solutions make it possible to **align the growth of the sector with sustainability and energy transition objectives**. In this context, it is also important to **ensure the reuse of infrastructure and land at the end of its lifecycle or in case of decommissioning**, namely through its adaptation to alternative industrial, logistical, or technological uses, preventing territorial liabilities.

## Structural support conditions

### World-class digital connectivity

*Extensive fibre coverage (around 92%) and multiple submarine cables, ensuring low latency and high international resilience.*

### Electric grid with available capacity

*Competitive activation timelines (2–5 years), comparable to other European markets and more predictable than in saturated hubs.*

### Easy access to seawater

*Availability of seawater for cooling – technologies that reduce or eliminate freshwater consumption have already been tested.*

### Competitive and renewable energy

*3rd country in Europe with the highest share of renewable energy, and production costs around 25% below the EU average.*

### Territorial availability for large-scale projects

*High availability of still-unoccupied urban land, facilitating the development of large-scale infrastructures.*

### Favourable climatic conditions

*Moderate and stable temperatures that reduce cooling requirements (for example, Lisbon has an average temperature of 16°C and low variability).*

# The Opportunity

The current international context opens a **limited window of opportunity for Portugal to establish itself as a European data centre hub**, driven by a rare combination of rapidly expanding demand and increasing constraints in traditional markets.

On the demand side, the **accelerated adoption of AI is driving global growth in computational capacity**, at rates close to **20% per year**. Major global cloud providers are struggling to keep pace with this demand and are increasingly resorting to long-term colocation agreements. At the same time, **digital sovereignty has become a strategic priority in the EU**, reinforcing the need for computational capacity located within European territory. In Portugal, demand for computational capacity could grow from **0.2 GW in 2025 to around 1 GW by 2030**, corresponding to a compound annual growth rate of approximately **41%**, roughly twice the European average.

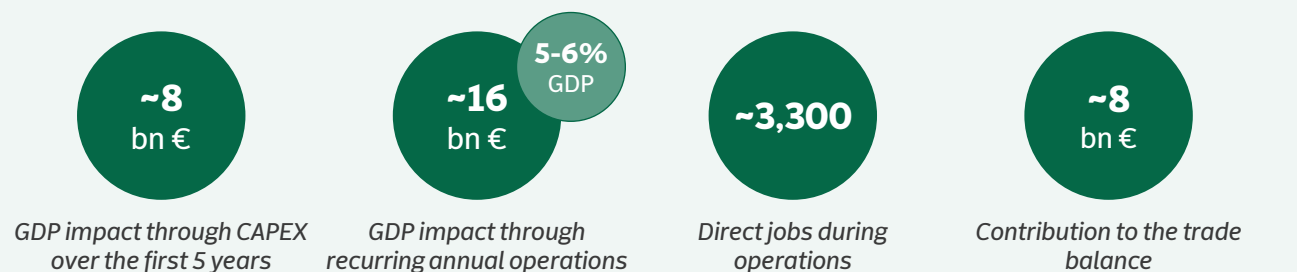
On the supply side, several mature European markets have faced constraints in **deploying new infrastructure**, due to energy, environmental, and territorial limitations. In this context, investment has been shifting towards **new geographies with greater capacity availability and more favourable structural conditions**.

Portugal positions itself as an **emerging market**, with still limited levels of installed capacity, but with the **structural conditions to benefit from this shift in investment flows**. However, this requires **swift action**, otherwise Portugal risks losing this wave of investment to other markets already actively mobilising.

## Estimated economic impact

For each additional 1 GW of data centre capacity:

Source: McKinsey & Co.



1. Based on the nominal GDP forecast for 2025; European Economic Forecast Autumn; 2025

## The Goal

The PNCD aims to **transform the current dispersed pipeline into a set of executable projects**, strengthening the State's digital sovereignty and positioning Portugal competitively within the European and global data- and AI-driven economy.

# 2026 – 2027 Action Plan

# Areas of Action

## I. Regulation and Governance

Ensure **institutional coordination, greater transparency**, and the **streamlining of processes** associated with the implementation of these projects.

## II. Energy and Infrastructure

Reduce **time-to-power** e **time-to-market**, while ensuring adequate, scalable energy and infrastructure conditions aligned with the energy transition.

## III. Demand and Market

Structure **public demand** and position Portugal as an **attractive destination for strategic investment**.

## IV. Territory and Ecosystem

Integrate projects into the territory and local communities, maximising their **economic, scientific, and technological impact** in a sustainable manner.

The PNCD structures State intervention through **15 initiatives to be implemented in an integrated and priority manner in 2026–2027** – a critical period for investment decisions by the main international operators.

# I. Regulation and Governance

	Start Date	Relevant Entities
<p><b>I.1</b></p> <p><b>Strengthen AICEP as the single coordinating body</b></p> <p>Strengthen and enhance AICEP’s capacity to act as the central coordination structure for data centre projects, assuming the role of single point of contact for investors. The measure ensures interinstitutional coordination, active management of the project portfolio, and continuous monitoring of projects, promoting greater predictability, coherence in State action, and investor confidence, without altering the applicable legal, technical, or environmental requirements.</p>	H1 2026	AICEP
<p><b>I.2</b></p> <p><b>Review applicable licensing procedures</b></p> <p>Review the licensing procedures applicable to data centre projects, with the aim of simplifying them, while ensuring the rationalisation of stages, efficient processing, greater coordination between the competent entities, and compliance with maximum deadlines for decision-making and operationalisation, while fully ensuring compliance with all applicable legal, technical, and environmental requirements.</p>	H1 2026	AICEP, APA, Agência para o Clima, AGE, ICNF, CCDR
<p><b>I.3</b></p> <p><b>Monitor pipeline and decision times</b></p> <p>Develop and implement tools and processes to monitor the pipeline and the decision times of the entities involved, making it possible to track implementation status, identify constraints, and support active and informed management.</p>	H1 2026	AICEP, IAPMEI, APA, AGE, CCDR
<p><b>I.4</b></p> <p><b>Reduce variability in assessment</b></p> <p>Develop and make available common technical guidelines for project assessment, harmonising criteria, methodologies, and requirements across entities. The measure aims to reduce variability and uncertainty in assessments, increase predictability, and ensure the consistent application of legal, technical, and environmental requirements.</p>	H1 2026	AICEP, APA, AGE, CCDR, Municipalities, ICNF
<p><b>I.5</b></p> <p><b>Increase the quality and consistency of assessments</b></p> <p>Strengthen and build the capacity of the technical teams of the entities involved in the processing of licensing and project approval procedures, through specialised training. The measure aims to increase the quality and consistency of analysis, reduce asymmetries in capacity between entities, and improve the overall efficiency of the processes. Depending on the territorial and sectoral scope of the projects under analysis, and where justified, other entities involved in the decision process may also be invited.</p>	H1 2026	AICEP, IAPMEI, DGE, APA, AGE, CCDR, ICNF, IEFP, AT, DGRM

## II. Energy and Infrastructure

Start  
Date

Relevant  
Entities

### Identify and enable pre-installed zones

H1 2026

Government with: CCDR,  
APA, AICEP, AGE, REN e  
Municipalities

II.1

Map and select sites with adequate technical, energy, environmental, and territorial conditions. Enable these sites as pre-installed zones for data centre projects, ensuring their articulation with Responsible Economic Zones (*Zonas Económicas Responsáveis*, ZER), Business Location Areas (*Áreas de Localização Empresarial*, ALE), and Renewable Energy Acceleration Areas (*Zonas de Aceleração de Energias Renováveis*, ZAER), as well as their integration into territorial planning instruments. The measure consists of the prior obtaining of urban planning permits, the applicable environmental assessments under a simplified model, the construction of basic supporting infrastructure (e.g. access roads), and ensuring grid connection conditions through coordinated planning with operators. Should these zones not be used for data centres, they may be allocated to other uses compatible with territorial planning.

### Integrate energy efficiency and demand flexibility

H2 2026

AGE, REN

II.2

Integrate energy efficiency criteria and grid connection flexibility mechanisms into the planned infrastructure, promoting more efficient use of the grid and greater resilience of the energy system.

### Maximise the economic impact on the value chain

H1 2026

IAPMEI, AICEP,  
Associations,  
Technology Hubs

II.3

Map in a structured way the national value chains associated with data centres, identifying companies, skills, and specialised suppliers already existing in Portugal (e.g. engineering, construction, energy, cooling, maintenance, software, cybersecurity, professional services). The initiative aims to create a network of qualified suppliers, accessible to investors and developers, making it possible to reduce execution risks and enhance the multiplier effect of these infrastructures on the national economy.

# III. Demand and Market

Start  
Date

Relevant  
Entities

## Centralise public demand

H1 2026

ARTE e PA Entities

III.1

Centralise, map and quantify public for computational capacity, in alignment with the Sovereign Cloud Strategy. The measure aims to aggregate dispersed needs, increase demand predictability, and improve alignment between the supply of computational capacity and the needs of the public sector. Ensure that an appropriate methodology and the necessary supporting instruments are in place.

## Establish guidelines for proportionate State involvement

H1 2026

Portuguese  
Government, BPF

III.2

Establish guidelines for the exceptional involvement of the State in data centre projects of high strategic relevance to the country, based on transparent and proportionate technical and legal criteria.

## Develop differentiated models for international positioning, with a focus on digital sovereignty

H1 2026

AICEP, ARTE

III.3

Promote Portugal's international positioning in the field of data centres through distinctive strategies, including initiatives such as data embassies, aligned with digital sovereignty objectives and investment attraction.

## Create a single information point for investors

H2 2026

AICEP, ARTE

III.4

Create a dedicated information and promotion portal for investors in the data centre sector, in line with AICEP's Invest in Portugal portal, functioning as a single point of access to relevant information for decision-making. The portal should provide structured guidance on the main investment conditions in Portugal, including information on resource availability (e.g. land, energy, connectivity, and talent), the regulatory and tax framework, electricity grid development plans, and aggregated data on the project portfolio..

# IV. Territory and Ecosystem

Start  
Date

Relevant  
Entities

## Tie projects to the delivery of tangible benefits for local communities

H2 2026

Portuguese  
Government, BPF, APA,  
CCDR, e Municipalities

IV.1

Develop a benefit-sharing model with local communities associated with data centre projects, defining the mechanisms to be integrated into the applicable legal framework, namely in the context of licensing or under other relevant regimes. These mechanisms should be geared towards the creation of local value and tangible socio-economic benefits for communities (e.g. partnerships with educational entities, support for social initiatives).

## Strengthen the academic and technological ecosystem associated with data centres

H2 2026

MECI, AI<sup>2</sup>

IV.2

Promote the development of academic hub(s) and technology hubs as platforms for effective connection to the business fabric, fostering technology transfer, knowledge valorisation, and coordination between academia, R&D centres, and companies, with a direct impact on the competitiveness, innovation, and sustainable growth of the local and national economy.

## Ensure *ex ante* territorial safeguard mechanisms in projects

H1 2026

Portuguese  
Government

IV.3

Require, within the applicable legal framework, the prior definition of reversibility and territorial safeguard mechanisms in data centre projects, providing for alternative uses of infrastructures and land after the end of their useful life or in the event of decommissioning. The measure aims to reduce the risks of territorial liabilities, ensure long-term flexibility, and protect the public interest.



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