



National Data Centres Plan 2026

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Contents

PORTUGAL'S NATIONAL DATA CENTRES PLAN 2026	3
OVERVIEW	3
National Data Centres Plan	4
1 – Current context.....	4
1.1 – Strategic importance	4
1.2 – Recent evolution of investment projects	4
1.3 – Structural advantages	5
2 – The opportunity	6
Action Plan for 2026-2027	7
Pillar I. Regulation and Governance	7
Pillar II. Energy and Infrastructure	10
Pillar III. Demand and Market	11
Pillar IV. Territory and Ecosystem.....	12

PORTUGAL'S NATIONAL DATA CENTRES PLAN 2026

OVERVIEW

On 13 April 2026, Council of Ministers Resolution No. 70/2026 approved the National Data Centres Plan (*Plano Nacional de Centros de Dados – PNCD*) and its Action Plan for 2026-2027 (*Plano de Ação do Plano Nacional de Centros de Dados – PAPNCD*).

The PNCD establishes the Government's strategic framework for the development of the data centre sector in Portugal, recognising data centres as critical infrastructure for economic competitiveness, public sector modernisation, and digital sovereignty. It is also designed to support the expansion of national computing capacity in a context of rapidly increasing demand for digital infrastructure and intensifying competition across European markets.

While Portugal benefits from strong structural fundamentals, particularly in energy, connectivity and land availability, installed capacity remains below the European average and project execution has lagged behind its potential. The PNCD therefore seeks to address key bottlenecks, including complex and fragmented permitting procedures, limited process transparency, grid access constraints, and dispersed demand, while creating a more predictable and investment-friendly environment.

The framework is structured around four strategic pillars:

- Regulation and Governance;
- Energy and Infrastructure;
- Demand and Market;
- Territory and Ecosystem.

Collectively, these pillars aim to enhance execution capacity, streamline investment conditions, and support the scalable development of data centre infrastructure in Portugal.

Key measures include:

- Simplification and acceleration of permitting processes;
- Strengthened coordination across public authorities;
- Improved access to energy and grid capacity;
- Identification of pre-enabled development sites;
- Structuring and aggregation of public-sector demand;
- Reinforcement of Portugal's international positioning as a strategic investment destination.

The Action Plan for 2026-2027 operationalises this framework, prioritising measures considered critical for imminent investment decisions.

The sections below set out the substantive elements of the PNCD and of the PAPNCD.

National Data Centres Plan

1 – Current context

1.1 – Strategic importance

The expansion of data centre capacity is a structural vector for Portugal's development, anchored in two core dimensions: economic growth and digital sovereignty.

From an economic perspective, data centres are foundational infrastructure for the digital economy. They enable the deployment of technologies such as artificial intelligence (AI), cloud computing, and large-scale data processing, while generating significant spill-over effects across sectors including energy, telecommunications, construction, and advanced manufacturing.

Data centres also underpin high-growth sectors such as cybersecurity, software, defence, electric mobility, and advanced manufacturing, with an estimated aggregate contribution to GDP of €56-86 billion by 2040. As such, they play a central role in attracting foreign direct investment and driving productivity gains.

From a digital sovereignty perspective, the increasing strategic importance of data and computing capacity makes domestic infrastructure essential. Dependence on installed capacity located outside national or EU territory creates exposure to geopolitical risk, capacity shortages, and operational vulnerabilities. Developing national capacity enhances resilience, ensures control over sensitive, and strengthens Portugal's position within European digital value chains.

4

1.2 – Recent evolution of investment projects

Between 2020 and 2025, Portugal's installed capacity nearly doubled. However, it still lags significantly behind the European average, making convergence unlikely without targeted public intervention.

Execution gaps are primarily driven by:

- Low project materialisation rates;
- Absence of internationally scaled hubs;
- Complex and time-consuming regulatory processes;
- Fragmented demand with limited aggregation mechanisms;
- Lack of major anchor projects;
- Relatively low levels of digitalisation of the economy.

1.3 – Structural advantages

Analysis of the national energy infrastructure indicates that, in the short term, the electricity grid has sufficient capacity to accommodate new data centre projects and therefore does not constitute a structural constraint. In addition, new mechanisms have been introduced to allocate grid connection capacity in a clear, competitive and transparent manner, notably the exceptional procedure for the allocation of connection capacity in high-demand areas, as set out in Decree-Law No. 80/2023 of 6 September.

At the same time, the environmental impacts associated with intensive computing are being mitigated through technological solutions already proven at international level. These include smart grid optimisation, waste heat recovery, zero-water cooling systems, high-density and vertical deployment models, and the repurposing of existing industrial infrastructure. Taken together, these approaches demonstrate that the expansion of the sector is compatible with national objectives on environmental sustainability and the energy transition, provided it is framed by robust technical standards. In this context, it is also important to ensure the reuse of infrastructure and land at the end of their useful life or upon decommissioning, including through their adaptation to alternative industrial, logistics or technological uses, thereby mitigating long-term territorial impacts.

Portugal also benefits from a set of structural factors which, in combination, create particularly favourable conditions for the development of a competitive data centre hub in the European context.

With regard to electricity infrastructure, connection lead times typically range two and five years, broadly in line with Spain (one to five years), Sweden (three to five years) and Norway (three to six years), and generally below those observed in Ireland, where lead times frequently exceed five years. This level of predictability is particularly relevant in the context of increasing constraints and persistent delays in more mature European markets.

Portugal ranks among the leading European countries in terms of renewable energy generation and cost competitiveness. It is positioned 34th in the European Union for the share of electricity generated from renewable sources and 28th for the lowest average electricity price for non-household consumers, with production costs approximately 25% below the EU average. These factors have remained broadly stable in recent years and represent a key advantage for energy-intensive infrastructure.

In terms of connectivity, Portugal is among the best-performing countries in Europe, ranking third in the EU for FTTP fibre coverage, with approximately 92% of mainland territory covered. This is complemented by multiple submarine cable landing points, ensuring low latency, high resilience and strong international redundancy.

As regards water resources, the country benefits from reliable availability and can rely on advanced cooling technologies already tested internationally, including solutions that minimise or eliminate the use of inland water resources, such as seawater cooling and zero- water systems.

Climatic conditions also provide a competitive advantage. For example, Lisbon records an average annual temperature of approximately 16°C, with low variability, enabling greater energy efficiency in cooling operations.

Taken together, these factors provide Portugal with significant headroom to expand its computing capacity. This strengthens its ability to support the digitalisation of the economy, and the technological transformation of public administration, while reducing dependence on infrastructure and digital services located outside the national territory.

2 – The opportunity

The current international context presents a time-sensitive window of opportunity for Portugal to position itself as a European data centre hub, driven by a rare alignment of rapidly expanding demand and increasing constraints in traditional markets.

On the demand side, the accelerated adoption of AI is driving global growth rates of approximately 20% per year. Hyperscalers are facing increasing difficulty in keeping pace with the initial surge in demand for AI-related workloads and, in order to mitigate the risks associated with capital-intensive, on-balance-sheet investments, are progressively shifting towards long-term colocation models. At the same time, digital sovereignty has become a strategic priority across Europe, reinforcing the need for computing capacity located within the EU territory.

On the supply side, established European markets, characterised by high levels of installed capacity and a strong concentration in mature hubs, are facing growing constraints on further infrastructure deployment, including regulatory, spatial and energy-related limitations.

This combination of sustained demand growth and structurally constrained supply is driving a rapid reallocation of investment flows towards jurisdictions capable of offering available capacity, political stability, administrative efficiency and a predictable regulatory environment.

Importantly, the economic impact of data centre operations extends well beyond the technology sector. While a significant share of value is generated directly through data centre operations, cloud services, software and cybersecurity, the effects propagate across a wide range of sectors. These include professional services, such as engineering, consultancy and legal services, as well as hospitality, retail and other local economic activities driven by the concentration of high-value employment.

Additional indirect benefits are observed in sectors such as healthcare, education and entertainment, through talent attraction and regional economic dynamism, while manufacturing, logistics, banking and insurance capture downstream effects linked to digitalisation, financing and operational support.

Action Plan for 2026-2027

The Action Plan for 2026-2027 operationalises the framework established under the National Data Centres Plan, setting out the key measures to be implemented during this period. It is structured around four lines of action: regulation and governance; energy and infrastructure; demand and market; and territory and ecosystem.

The 2026-2027 period is expected to be particularly critical for the sector, as it is likely to concentrate a significant share of investment decisions by major international players. In this context, the Action Plan is designed to support the development of strategic computing capacity in Portugal, while enhancing the conditions for project execution, investment attraction and international positioning.

Pillar I. Regulation and Governance

Objective: Ensure effective institutional coordination, simplification and regulatory transparency

Initiative	Description	Timeline	Entities involved
I.1 Strengthening AICEP as the single coordinating point	<p>Strengthen and further specialise the capacity of AICEP, E. P. E. to act as the central coordinating body for data centre projects, serving as a single point of contact for investors.</p> <p>The measure is intended to ensure effective inter-institutional coordination, active portfolio management and continuous project monitoring, thereby enhancing predictability, consistency in public action and investor confidence, without altering the applicable legal, technical or environmental requirements.</p>	S1 2026	AICEP
I.2 Review of applicable licensing and	Review the licensing and permitting frameworks applicable to data centre	S1 2026	1. AICEP

Initiative	Description	Timeline	Entities involved
<p>permitting procedures</p>	<p>projects with a view to simplification, streamlining and accelerated processing.</p> <p>The measure aims to rationalise procedural stages, ensure more efficient handling of applications, strengthen coordination among competent authorities, and promote compliance with defined decision and implementation timelines, while fully preserving all applicable legal, technical and environmental requirements.</p>		<p>2. Agência Portuguesa do Ambiente (APA)</p> <p>3. Agência para o Clima (ApC)</p> <p>4. Agência de Geologia e Energia (AGE)</p> <p>5. Comissão de Coordenação e Desenvolvimento Regional (CCDR)</p> <p>6. Instituto da Conservação da Natureza e das Florestas (ICNF)</p>
<p>I.3 Monitoring of project portfolio and decision timelines</p>	<p>Develop and implement tools and processes to monitor the project portfolio and the decision timelines of the entities involved.</p> <p>The measure aims to enable real-time tracking of project implementation, identify bottlenecks, and support active, data-driven case management and decision-making.</p>	<p>S1 2026</p>	<p>1. AICEP</p> <p>2. Agência para a Competitividade e Inovação (IAPMEI)</p> <p>3. APA</p> <p>4. AGE</p> <p>5. CCDR</p>
<p>I.4 Reduction of variability in assessment</p>	<p>Develop and make available common technical guidelines for the assessment of data centre projects, with a view to harmonising criteria, methodologies and</p>	<p>S1 2026</p>	<p>1. AICEP</p> <p>2. APA</p> <p>3. AGE</p> <p>4. CCDR</p>

Initiative	Description	Timeline	Entities involved
	<p>requirements across licensing authorities.</p> <p>The measure aims to reduce variability and uncertainty in assessments, enhance process predictability, and ensure the consistent application of legal, technical and environmental requirements.</p>		<p>5. Municipalities</p> <p>6. ICNF</p>
<p>I.5 Enhancement of the quality and consistency of assessments</p>	<p>Strengthen and equip the technical teams of the entities involved in licensing and approval procedures for data centre projects through targeted, specialised training.</p> <p>The measure aims to improve the quality and consistency of assessments, reduce capacity asymmetries across entities, and enhance overall process efficiency. Where justified and depending on the territorial or sectoral scope of the projects under review, other entities directly involved in project decision-making may be engaged.</p>	<p>S1 2026</p>	<p>1. AICEP</p> <p>2. IAPMEI</p> <p>3. Direção-Geral da Economia (DGE);</p> <p>4. CCDR</p> <p>5. APA</p> <p>6. AGE</p> <p>7. Instituto do Emprego e da Formação Profissional</p> <p>8. ICNF</p> <p>9. Autoridade Tributária e Aduaneira (AT)</p> <p>10. Direção-Geral de Recursos Naturais, Segurança e Serviços Marítimos (DGRM)</p>

Pillar II. Energy and Infrastructure

Objective: Reduce time-to-power and time-to-market, while ensuring adequate, scalable energy and infrastructure conditions aligned with the energy transition

Initiative	Description	Timeline	Entities involved
II.1 Identification and development of pre-enabled zones	<p>Map and select sites with adequate technical, energy, environmental and spatial planning conditions, and enable them as pre-developed zones for data centre projects.</p> <p>The measure aims to ensure alignment with designated economic zones, business location areas and renewable energy acceleration areas, as well as integration into applicable territorial planning instruments.</p> <p>It includes the advance securing of planning permissions, the completion of environmental assessments under a streamlined framework, the development of core supporting infrastructure, and the provision of grid connection conditions through coordinated planning with network operators.</p>	S1 2026	<p>Government together with:</p> <ol style="list-style-type: none"> 1. CCDR 2. APA 3. AICEP 4. AGE 5. Rede Eléctrica Nacional, S. A. (REN) 6. Municipalities
II.2 Integration of energy efficiency and demand flexibility	<p>Integrate energy-efficiency criteria and grid-connection flexibility mechanisms into planned infrastructure, with a view to optimising grid utilisation and enhancing the resilience of the energy system.</p>	S2 2026	<ol style="list-style-type: none"> 1. AGE 2. REN
II.3 Maximisation of economic	<p>Map, in a structured manner, the national value chains associated with data centres, identifying existing companies,</p>	S1 2026	<ol style="list-style-type: none"> 1. IAPMEI 2. AICEP

impact across the value chain	<p>capabilities and specialised suppliers in Portugal (e.g. engineering, construction, energy, cooling, maintenance, software, cybersecurity and professional services).</p> <p>The measure aims to establish a network of qualified suppliers accessible to investors and project developers, thereby reducing execution risks and enhancing the multiplier effect of these infrastructures on the national economy.</p>		<p>3. Sectoral business associations</p> <p>4. Technology hubs</p>
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Pillar III. Demand and Market

Objective: Structure public demand for computing capacity and strengthen Portugal's position as an attractive destination for strategic investment in data centres

Initiative	Description	Timeline	Entities involved
III.1 Centralise public-sector demand	<p>Centralise, map and quantify public-sector demand for computing capacity, in alignment with the Strategy for the Sovereign Cloud.</p> <p>The measure aims to aggregate dispersed needs, increase demand predictability, and improve the alignment between the supply of computing capacity and public-sector requirements.</p>	<p>S1 2026</p>	<p>1. Agência para a Reforma Tecnológica do Estado, I. P. (ARTE)</p> <p>2. Public Administration entities</p>
III.2 Establishment of guidelines for proportionate State participation	<p>Establish guidelines for the exceptional involvement of the State in data centre projects of high strategic relevance, based on transparent and proportionate technical and legal criteria.</p>	<p>S1 2026</p>	<p>1. Government</p> <p>2. Banco Português de Fomento (BPF)</p>

Initiative	Description	Timeline	Entities involved
III.3 Development of differentiating models for international positioning, with a focus on digital sovereignty	Promote Portugal's international positioning in the data centre sector through differentiating strategies, including initiatives such as data embassies, aligned with the objectives of digital sovereignty and the attraction of strategic investment.	S1 2026	1. AICEP 2. ARTE
III.4 Establishment of a single information point for investors	<p>Create a dedicated information and promotion portal for investors in the data centre sector, aligned with AICEP's <i>Invest in Portugal</i> platform, serving as a single point of access to information relevant to investment decision-making.</p> <p>The portal should provide structured guidance on the key conditions for investment in Portugal, including, inter alia, information on resource availability, the applicable regulatory and tax framework, electricity grid development plans, and aggregated data on the project portfolio.</p>	S2 2026	1. AICEP 2. ARTE

Pillar IV. Territory and Ecosystem

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

Initiative	Description	Timeline	Entities involved
IV.1 Linking projects to the	Develop a benefit-sharing model with local communities associated with data	S2 2026	1. Government 2. BPF

<p>delivery of tangible benefits for local communities</p>	<p>centre projects, defining the mechanisms to be integrated into the applicable legal framework, including in the context of licensing and other relevant regimes.</p> <p>The measure aims to ensure the creation of local value and delivery of tangible socio-economic benefits for communities (for example, through partnerships with educational institutions and support for social initiatives).</p>		<p>3. APA</p> <p>4. CCDR</p> <p>5. Municipalities</p>
<p>IV.2 Leveraging the academic and technological ecosystem associated with data centres</p>	<p>Promote the development of academic hubs and technology clusters as platforms for effective integration with the business ecosystem, fostering technology transfer, knowledge valorisation and coordination between academia, R&D centres and industry, with a direct impact on competitiveness, innovation and the sustainable growth of the local and national economy.</p>	<p>S2 2026</p>	<p>1. Ministry of Education, Science and Innovation</p> <p>2. Universities</p> <p>3. Agência para a Investigação e Inovação, I. P.</p>
<p>IV.3 Ensuring <i>ex ante</i> territorial safeguard mechanisms in projects</p>	<p>Require, within the applicable legal framework, the prior definition of reversibility and territorial safeguard mechanisms in data centre projects, including provisions for the alternative use of infrastructure and land at the end of their useful life or in the event of decommissioning.</p> <p>The measure aims to mitigate the risk of territorial liabilities, ensure long-term flexibility, and safeguard public interest.</p>	<p>S1 2026</p>	<p>Government of Portugal</p>

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