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PART 22/27

COMMISSION STAFF WORKING DOCUMENT

Digital Decade 2026 country report

Accompanying the document

COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT, THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL COMMITTEE AND THE COMMITTEE OF THE REGIONS

State of the Digital Decade 2026: Closing structural gaps and mobilising investments for 2030 and beyond

{COM(2026) 288 final} - {SWD(2026) 154 final} - {SWD(2026) 156 final} - {SWD(2026) 157 final}

European Commission

DIGITAL DECADE COUNTRY REPORT 2026

Portugal

Portugal

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Executive summary

Portugal has strong assets in digitalisation, such as good connectivity infrastructure across the country and an outstanding position in digital public services for citizens and business. However, the country faces a series of challenges in achieving the successful digitalisation of businesses in advanced technologies, as it lags behind its European peers in the uptake of cloud computing and AI by enterprises. Meanwhile, Portugal has improved in overall basic digital skills more slowly than the EU average, even though the country continues to improve its share of ICT specialists.

Portugal is showing steady progress in its digital innovation and scale-up ecosystem, while also putting in place initiatives to increase its technological sovereignty. However, **the efforts of the Portuguese authorities in this area may be hampered by the slow uptake of cloud technology and AI by its enterprises**. This slow uptake could undermine the country's digital competitiveness, as low digitalised enterprises cannot take advantage of the potential productivity gains brought by digital tools that allow them to access new online markets.

Portugal recently presented its 2026-2027 National Digital Strategy Action Plan as a short-term implementation instrument of the National Digital Strategy adopted in December 2024. It turned the country's objectives into concrete measures focused on: (i) data governance and extracting value from data; (ii) digital public services; (iii) artificial intelligence (AI); (iv) cybersecurity; and (v) the strengthening of digital infrastructure. The plan prioritises a more focused set of actions compared with the plan for the previous cycle and now features greater emphasis on execution, measurable outcomes, and regulatory alignment with European frameworks. The most recent action plan also strengthens the development of sovereign digital capabilities (including cloud infrastructure, data centres, and trusted data ecosystems) and aims to enhance Portugal's competitiveness, resilience, and technological sovereignty.

Portugal in the Digital Decade

Portugal shows a high level of ambition in its contribution to the Digital Decade having set 12 national targets (out of 14 possible), 92% of which are aligned with the EU's 2030 targets. In its national roadmap, Portugal provided 8 trajectory points for 2025 (out of 13 analysed). The country is currently following these trajectory points very well, with 100% considered on track. Portugal addressed 89% of the 9 recommendations issued by the Commission in 2025, either by implementing significant policy changes (in 22% of cases) or making some changes (in 67% of cases) through new measures. According to the national roadmap, by the end of 2026, 62% of the measures will come to an end. The total public budget associated to these measures is EUR 1.6 billion, representing 75% of the total public budget outlined in the roadmap.

According to the special **Eurobarometer on 'the Digital Decade' 2026**, **72% of Portuguese people consider that digital policy should have a high or very high priority for the EU** in shaping our future in Europe. They also think that, in the next 10 years, the EU should cooperate with Member States to reinforce security and protection from online threats (89%), promote digital education and skills programmes (86%) and strengthen the regulation of online platforms (85%). In addition, **81% of Portuguese respondents think that the EU should reduce its dependencies on digital technologies from non-EU countries**, and 83% agreed that the EU should prioritise investments in digital

infrastructure and services that are developed and controlled in Europe. Meanwhile, 53% of respondents said that they would be willing to switch to an EU-based digital service provider even if it means slightly higher costs.

Funding for digital and multi-country projects

Portugal allocates 21.5% of spending in its total recovery and resilience plan (RRP) to digital (EUR 4.7 billion). In addition, under cohesion policy, EUR 2.3 billion, representing 10% of the country's total cohesion policy funding, is dedicated to advancing Portugal's digital transformation.

Portugal is a member of both the Local Digital Twins towards the CitiVERSE EDIC and the EUROPEUM EDIC. Portuguese entities are indirect and/or associated partners in the important project of common European interest (IPCEI) on Microelectronics and Communication Technologies (IPCEI-ME/CT). Portugal is also a participating state in both the EuroHPC Joint Undertaking (JU) and the Chips JU.

Digital Decade KPI (1)	Portugal				EU		Digital Decade target by 2030	
	Last available	DESI 2026 (year 2025)	Annual progress	National trajectory	DESI 2026	Annual progress	PT	EU
Fixed Very High Capacity Network	94.6%	97.1%	2.6%	96.0%	85.5%	3.7%	100.0%	100%
Fibre to the Premises (FTTP)	93.2%	95.5%	2.5%	95.0%	74.1%	7.1%	100.0%	-
Basic 5G coverage	98.7%	99.1%	0.4%	98.3%	96.8%	2.6%	100.0%	100%
Edge Nodes (estimate, new methodology)	-	150	-	-	7451	-	-	10000
SMEs with at least a basic level of digital intensity *	53.6%	63.9%	9.2%	-	71.4%	11.0%	90.0%	90%
Cloud *	32.3%	34.1%	2.8%	-	46.7%	9.5%	75.0%	75%
Artificial Intelligence	8.6%	11.5%	33.7%	-	20.0%	48.0%	75.0%	75%
Data analytics *	38.6%	45.0%	8.0%	-	39.9%	9.5%	-	75%
AI or Cloud or Data analytics *	54.4%	58.5%	3.7%	-	63.2%	7.5%	-	75%
Unicorns	1	2	100.0%	-	324	10.2%	2	500
At least basic digital skills *	56.0%	59.2%	2.8%	62.0%	60.4%	4.3%	80.0%	80%
ICT specialists	5.2%	5.4%	3.8%	5.0%	5.0%	2.0%	7.0%	~10%
e-ID scheme notification		Yes						
Digital public services for citizens	84.5	86.4	2.3%	88.0	84.6	2.8%	100.0	100
Digital public services for businesses	84.3	90.0	6.8%	87.0	88.6	2.7%	100.0	100
Access to electronic health records	88.1	92.2	4.7%	88.1	86.5	4.6%	100.0	100

(1) Indicators full description, metadata and sources in the DESI 2026 methodological note
(2) Last available data is DESI2025 (reference year 2024) except for indicators marked with a star * for which it is DESI2024 (reference year 2023)
(3) National trajectory value for 2025, if set by the country in its Digital Decade national roadmap

A competitive, sovereign and resilient EU based on technological leadership

Portugal is performing very well in connectivity, and has very high levels of broadband coverage, particularly in very high capacity networks (VHCN), fibre to the premises (FTTP), and overall 5G, with it scoring consistently better than the EU averages in these areas. In order to enhance digital innovation, competitiveness, and technological sovereignty, the 2026-2027 National Digital Strategy Action Plan strengthens Portugal's position by advancing plans for: (i) a **Sovereign Cloud Strategy** to

ensure secure control and processing of critical data under national and EU jurisdiction; (ii) a **National Data Centre Strategy** aimed at strengthening resilient, energy-efficient infrastructure capable of supporting both sovereign and commercial cloud and advanced computing services; and (iii) a **National Data Policy** that sets out a framework for trusted data sharing, data reuse, and extracting data from value that is aligned with the EU.

Portugal has shown progress in the digitalisation of businesses since last year, particularly in the adoption of data analytics, where it surpasses the EU average. However, in other areas (such as cloud technologies, AI, and overall digital intensity) Portugal's enterprises lags behind the EU averages. Portugal's growth rates in most areas of digitalisation are also lower than the EU averages, indicating that although Portugal is making progress, it is not keeping pace with broader EU trends.

Protecting and empowering EU people and society

Portugal's digital skills profile reveals a mixed performance. While the country has strengths in digital skills among young adults and in the adoption of generative AI, it lags behind the EU average in overall rates of growth in digital skills (and in particular among women, people with low levels of education, and older adults). The country's government has approved the **Digital Skills Pact Action Plan 2026-2030**, which has a budget of EUR 80 million. The plan encompasses training across basic, intermediate, advanced, and emerging digital skills and aims to be a key instrument for promoting inclusion, building skills and strengthening national competitiveness.

In the area of digital public services, Portugal makes a strong contribution to the EU's Digital Decade targets. The country performs particularly well in **digital public services** for citizens and business despite differences between regions. Portugal also shows a good performance in e-Government values and access to e-Health records.

Recommendations

- **Connectivity/5G:** Accelerate 5G rollout of the 3.4–3.8 GHz band in rural areas and promote the deployment of 5G SA networks while enabling advanced use cases. In addition, Portugal should continue to invest in the security and resilience of its submarine cable ecosystem.
- **Artificial Intelligence**: Continue supporting AI take-up and thus enable innovation by enterprises, including by timely implementation of ongoing and planned measures, in particular, when revising the national AI strategy including through a stronger sectoral focus on key verticals.
- **Cloud:** Encourage cloud take-up, in particular implement the plans for sovereign cloud infrastructure.
- **Unicorns:** Accelerate efforts to improve scale-up capacity with access to financing and removing barriers to expansion.
- **Basic digital skills:** Continue to evaluate the take-up of the current measures and identify ways to address the remaining needs, notably to tackle the digital divide in the society.
- **Cybersecurity:** Continue efforts to enhance the cyberliteracy and awareness, and to consolidate the implementation of cybersecurity measures, ensuring robust supervision, mandatory risk management and incident reporting across all essential and important entities, including supply-chain security and assessments of high-risk ICT suppliers in line with EU standards. In addition, Portugal should update its national strategy, leveraging resilience, innovation and resource allocation, aligned with common European objectives.
- **Basic digital intensity of SMEs and advanced technologies**: Continue fostering the adoption of advanced digital technologies by businesses identifying support measures for the medium-term.
- **eHealth**: To advance the adoption and integration of AI in healthcare, Portugal should (i) define up-to-date investment roadmaps for priority use cases aligned with its national strategy, and (ii) support healthcare organisations to participate in the Network of AI-Powered Advanced Medical Centres, by establishing co-funding schemes for piloting and deploying AI solutions in clinical environments.

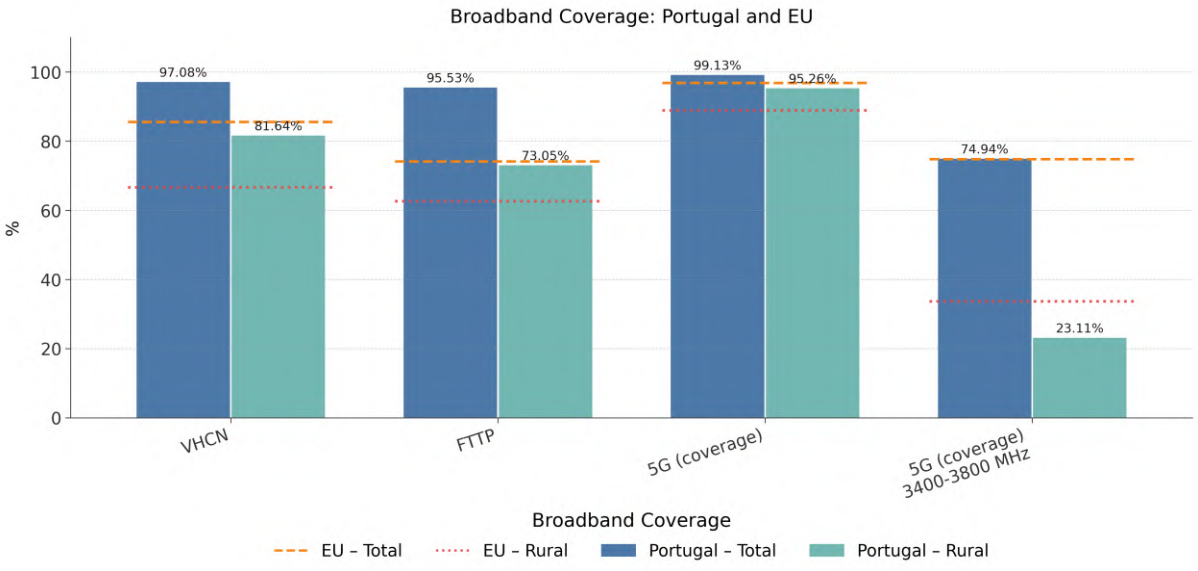
A competitive, sovereign and resilient EU based on technological leadership

Building technological leadership: digital infrastructure and technologies

Anchored in the 2026-2027 National Digital Strategy Action Plan, Portugal has put in place a mutually reinforcing architecture comprising: (i) its national sovereign cloud; (ii) its national data centre strategy; and (iii) its national data policy. Together, these tree components translate EU ambitions into concrete national action. By prioritising secure cloud infrastructures, robust data centre capacity and a trusted, innovation-friendly data ecosystem, these initiatives support the objective of a competitive, sovereign and resilient EU based on technological leadership. Portugal is advancing a **sovereign cloud strategy** to ensure that critical data and digital operations remain under national and European jurisdiction. This sovereign cloud strategy relies on infrastructures located within national territory and governed by EU law and has a strong focus on protecting sensitive data and enabling secure environments for artificial intelligence and advanced services. In parallel, the **National Data Centre Strategy** aims to modernise and expand resilient, energy-efficient and highly interconnected infrastructures. The strategy aims for these infrastructures to be capable of supporting sovereign and commercial cloud services as well as high-performance computing. Finally, the strategy also seeks to attract investment and innovation. Complementing these efforts, the **National Data Policy** establishes a framework aligned with the European Strategy for Data, by: (i) fostering trusted data sharing; (ii) strengthening the reuse of public sector information; and (iii) supporting the development of sectoral data ecosystems. Portugal aims for this policy to create a coherent foundation for digital innovation, economic growth and greater data sovereignty.

Connectivity infrastructure

Performance assessment



Portugal is at 97.08% of Fixed Very High Capacity Network (VHCN) coverage after an increase of 2.5 percentage points in 2025, and standing above the EU average of 85.54%. For households living in

sparsely populated areas, Portugal's VHCN coverage in 2025 was 81.64%, surpassing the EU average of 66.66% and showing an annual growth rate of 11.5%, outpacing the EU's growth rate of 7.7%.

In 2025, Portugal is at 95.53% of Fibre to the Premises (FTTP) coverage after an increase of 2.5 percentage points since last year and standing above the EU average of 74.13%. For sparsely populated areas, Portugal's FTTP coverage in 2025 was 73.05%, exceeding the EU average of 62.61%.

The overall 5G coverage is at 99.13% after an increase of 0.4 percentage points in 2025 and standing above the EU average of 96.79%. In the case of households in sparsely populated areas, Portugal's 5G coverage in 2025 was 95.26%, equally surpassing the EU average of 88.88%. **Regarding the 5G coverage in the 3.4–3.8 GHz band, the country is at 74.94% after an increase of 5.0 percentage points in 2025** and stands slightly above the EU average of 74.75**%. In sparsely populated areas, the 5G coverage in the 3.4–3.8 GHz band in 2025 is only 23.11%, which is lower than the EU average of 33.71%.** For 5G coverage in sparsely populated areas, Portugal's annual growth rate between 2024 and 2025 was 7.8%, which is significantly lower than the EU's growth rate of 32.9%.

Overall, **Portugal's broadband coverage, particularly in VHCN, FTTP, and overall 5G, is consistently higher than the EU averages although 5G coverage in the 3.4–3.8 GHz band in sparsely populated areas is notably lower than the EU average**, with a significantly slower growth rate.

In addition, **Portugal has shown commendable progress in both 5G SIM card penetration and the share of fixed broadband subscriptions at speeds equal to or greater than 1 Gbps**. In 2025, Portugal's 5G SIM card expressed as a share of the population reached 43.16%, although it remains below the EU average of 55.55%. However, Portugal's growth rate in this area slightly exceeded the EU's. More notably, Portugal's share of fixed broadband subscriptions for speeds of 1 Gbps or faster surpassed the EU average in 2025, reaching 29.05% with an impressive annual growth rate of 91.8%, far outstripping the EU's growth rate of 21.2%.

Although Portugal's current coverage is commendable and shows a performance mainly on track with the trajectories presented in its Digital Decade national roadmap, the country should focus on accelerating the expansion of its broadband infrastructure in sparsely populated areas, to maintain its competitive edge and ensure digital inclusivity.

In addition, the table below provides an overview of VHCN, FTTP and 5G coverage across NUTS-2 regions in Portugal. It reveals that **overall connectivity coverage is strong across all Portuguese regions throughout these three KPIs**, with only some differences observed in rural areas for fixed coverage.

Portugal

	VHCN coverage		FTTP Coverage		5G Coverage	
	Overall	Rural	Overall	Rural	Overall	Rural
National coverage	97.08%	81.64%	95.53%	73.05%	99.13%	95.26%
Alentejo	86.56%	77.27%	77.57%	60.90%	97.32%	95.61%
Algarve	96.96%	85.38%	95.60%	78.81%	98.90%	95.28%
Centro (PT)	95.53%	84.16%	92.90%	74.76%	98.43%	94.54%
Grande Lisboa	99.31%	80.05%	99.30%	80.04%	99.96%	96.72%
Norte	97.39%	75.92%	95.81%	67.22%	99.55%	97.70%
Oeste e Vale do Tejo	96.93%	88.85%	95.93%	86.52%	97.68%	92.21%
Península de Setúbal	98.18%	61.88%	97.90%	61.62%	99.95%	98.87%
Região Autónoma da Madeira	99.74%	99.82%	99.70%	99.65%	97.15%	91.47%
Região Autónoma dos Açores	99.11%	91.09%	98.50%	85.01%	98.30%	95.44%

Policy context and assessment of recommendations

In 2025, Portugal made progress in modernising its connectivity infrastructure in line with the EU Digital Decade targets by: (i) expanding 5G networks through additional spectrum bands and broader coverage across industrial and urban areas; (ii) strengthening fixed coverage through helping to reinforce the fibre optic backbone infrastructure to increase capacity and redundancy.

As in previous years, ANACOM (Portugal's telecoms regulator) has continued carrying out supervisory and enforcement actions in 2025. These actions focused on the mandatory technical regulations in Portugal governing the design, installation, and inspection of telecommunications infrastructures in both buildings (ITED) and urban developments/housing developments (ITUR). These infrastructures improve the conditions for the efficient expansion of fibre networks. ANACOM also continued to monitor and ensure the compliance of operators under the 5G Auction Regulation.

2025 also saw several improvements to the Portuguese information system SIIA Portal, which maps out physical infrastructure in the country suitable for hosting electronic communications networks. These improvements covered modules, notices, reliability, etc. As a result of these improvements, there were 42 000 accesses to SIIA in 2025. At the end of 2025, SIIA had 489 accredited entities and 2 108 registered users, and it provided information on almost 9 million existing suitable infrastructures by the end of 2025. In addition, the public portal of GEO.ANACOM (which provides public access to georeferenced information on fixed, mobile, and satellite network coverage across Portugal) was fully translated into English in 2025, enhancing its international projection and contributing to ensure greater transparency and accuracy of information, and thereby promoting the existence of reliable and resilient high-speed networks throughout the national territory.

Portugal´s copper switch-off continues. Copper-based (ADSL) connections represent less than 1,3% of broadband lines in the country according to the latest data available from ANACOM, and it is expected that 100% of the copper lines will be fully migrated and/or disconnected by 2030.

2025 recommendation on connectivity infrastructure: Consider assigning remaining 5G pioneer bands and promoting 5G take-up.
Portugal made some efforts to address the recommendation through new policy actions in 2025: Although no auction of new pioneering bands such as the 26 GHz band took place in 2025, ANACOM has already launched two consultations about these auctions ahead of its possible allocation in 2027 (part of the 26 GHz band is still managed by the army for military purposes). However, it is continuing

to consolidate the 700 MHz and 3.6 GHz bands. In February 2025, it conducted a public consultation on releasing the frequencies that remained unsold in the 2021 auction, specifically in the 700 MHz band. By the end of 2025, Portugal had surpassed the milestone of 15 000 installed 5G base stations.

Semiconductors

In 2025, Portugal strengthened its role in the European semiconductor ecosystem by advancing participation in the European Chips Act framework, particularly through expanded R&D collaboration and infrastructure development under the CHIPS Joint Undertaking. A key progress milestone that occurred in 2025, following the adoption of its National Strategy for Semiconductors in 2023, was the implementation of regulatory measures to support semiconductor R&D funding and streamline co-financing for national participants[1]. Another major milestone was the creation of a dedicated incentives framework in October 2025, complemented by EUR 6.4 million in funding to support strategic pilot lines in advanced packaging and photonics. This framework will ensure pre-financing for key innovation projects led by the country's National Innovation Agency. These actions reinforce Portugal's commitment to strengthening its position in Europe's semiconductor value chain.

2025 recommendation on Semiconductors: Continue efforts in semiconductors and strive towards leadership at EU level.

Portugal made some efforts to address the recommendation through new policy actions in 2025:

Portugal formally integrated into the European semiconductor landscape, aiming to enhance its technological competitiveness within global value chains. Innovation efforts have been supported through institutions such as the International Iberian Nanotechnology Laboratory (INL) in Braga, which hosts key events to identify opportunities and challenges in the sector. The INL is also leading POEMS (Portuguese Competence Centre in Semiconductors), which started its activity in the spring of 2025.

Edge nodes

Performance assessment

According to the Edge Node Observatory, Portugal is estimated to have deployed a total of 150 edge nodes by 2025. It is estimated that the EU has 7 451 edge nodes across all Member States. Due to a change in the methodology, this number cannot be compared with previous estimations.

Policy context and assessment of recommendations

In 2025, there were several funded R&D projects underway in Portugal that directly address edge computing in advanced networks, notably the MECON project - Multi-Access Edge Computing (MEC) over NTN for Beyond 5G & 6G, co-financed by COMPETE 2030 and with the participation of Portugal´s Institute of Telecommunications.

Edge nodes are a key enabler to bring computing and storage capabilities closer to the points of data generation and consumption, thereby: (i) enabling low-latency processing; (ii) reducing traffic to centralised cloud infrastructures; and (iii) supporting requirements related to confidentiality, compliance, and system resilience. In this context, their role becomes particularly relevant in light of

[1] ANI publishes Call for Proposals under the National Strategy for Semiconductors - ANI

Portugal's 2026-2027 National Digital Strategy Action Plan, which identifies data governance and extracting value from data as a structuring axis. The National Digital Strategy Action Plan also promotes the creation of conditions for trustworthy data sharing and reuse under clear and robust rules, which are closely aligned with the development of federated data spaces using decentralised infrastructures such as edge nodes as key enablers.

Quantum technologies

In 2025, the design and implementation of Portugal's national strategy for quantum technologies entered a decisive phase with work beginning on the final steps of the National Strategy for Emerging Technologies (ETE), public consultation on which was launched in August 2025. Coordinated by PLANAPP (Centre for Planning and Evaluation of Public Policies) in partnership with the National Innovation Agency (ANI) and Portugal's Foundation for Science and Technology (FCT), the National Strategy for Emerging Technologies establishes quantum technologies as one of three long-term strategic priorities for Portugal. The process of drawing up the strategy, spanning from April 2025 to March 2026, used a collaborative, evidence-based methodology to align public policy with the rapid evolution of quantum systems. By involving a broad spectrum of stakeholders (from research institutions to industrial actors) the strategy aims to set out investment priorities that will increase national competitiveness and secure Portugal's strategic positioning within the European and global technological landscape. The final framework, scheduled for public presentation in 2026, will provide the necessary roadmap to address the transformative challenges of the quantum sector while fostering a robust ecosystem for scientific and economic development.

Portugal is also deeply involved in the preparatory phase for the future Quantum Pilot Line supported under the CHIPS JU. In 2025, Portuguese institutions participated in four selected framework partnership agreements related to this preparatory phase and their subsequent specific grant agreements. The Iberian Nanotechnology Library and the Portuguese Quantum Institute are involved in the selected Quantum Pilot Lines, projects for which are expected to mobilise EUR 2.8 million in funding. There is also an ongoing EuroHPC Project, with INL as the national partner, for a high-level support team for the forthcoming EuroHPC quantum platforms, which will be online in 2026.

Supporting EU-wide digital ecosystems and scaling up innovative enterprises

SMEs with at least basic digital intensity

Performance assessment

Portugal is at 63.94% of SMEs with at least a basic level of digital intensity index after a progression of +9.2% annually between 2023 and 2025, standing below the EU average for 2025 of 71.39%. In 2023, the figure for Portugal was 53.61%, which was also below the EU average of 57.9%. Although Portugal's SMEs have shown improvement, the growth rate of 9.2% annually is slightly below the EU's annual growth rate of 11.0%. This indicates that while Portugal is making strides in digitalisation, it is not keeping pace with the EU average. For SMEs with a very high digital intensity index, Portugal stands at 7.0% in 2025, following an annual growth rate of 32.5%, which is below the EU average of 9.07%. The annual growth rate of 32.5% for Portugal is lower than the EU's growth rate of 43.9%. While Portugal has shown improvement, it is still behind the EU in terms of advanced digital intensity among SMEs.

Portugal

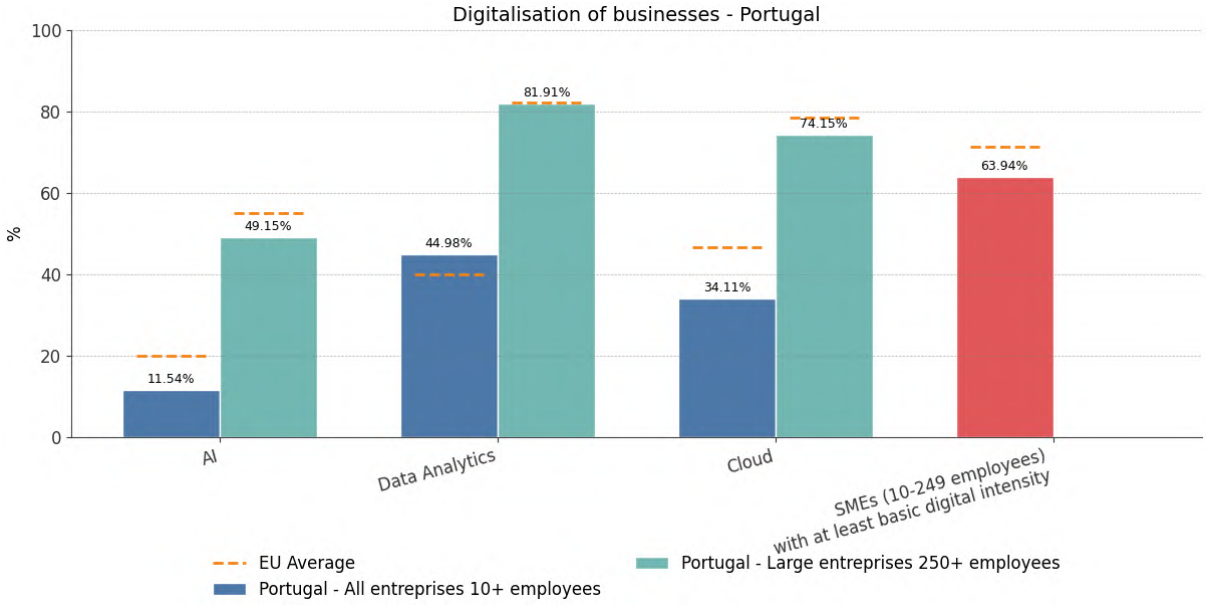
Policy context and assessment of recommendations

Although less digitalised SMEs prevent Portugal from fully taking advantage of the global productivity gains from digital technologies, the country has continued to advance the digitalisation of its SMEs with both measures included in its Digital Decade national roadmap and complementary actions developed beyond this framework. Central to this approach is the National Strategy, which sets a long-term objective of ensuring that 90% of Portuguese SMEs achieve at least a basic level of digital intensity by 2030.

In operational terms, Portugal's policies are geared towards: (i) helping SMEs to take up advanced digital technologies; (ii) strengthening digital skills; and (iii) facilitating access to experimentation environments and innovation support mechanisms. Nevertheless, **progress remains uneven, with SMEs still lagging behind larger enterprises, particularly in the deployment of more advanced digital solutions**. To further reinforce this policy impetus, the Digital Skills Pact, approved by the Portuguese Government on 30 December 2025, sets out a 2026-2030 action plan that includes comprehensive digital training programmes targeting SME workers. These initiatives are designed to address different professional profiles, and place particular emphasis on areas such as digital leadership, AI, data analytics, cybersecurity, and digital business tools. The government is also planning to introduce incentives to support SME investment in workforce training.

Take up of advanced technologies

Performance assessment



Portugal is at 44.98% adoption rate of data analytics after a progression of +8.0% annually since 2023, standing above the EU average of 39.85%. In 2023, Portugal's adoption rate was 38.56%, which was higher than the EU average of 33.25%. However, the annual growth rate of 8.0% is slightly lower than the EU's 9.5%. Focusing on SMEs, Portugal's adoption rate in 2025 is 44.11%, above the EU average of 38.59%. In 2023, the figure was 37.81%, higher than the EU average of 32.09%. The annual growth rate for SMEs is 8.0%, slightly lower than the EU's 9.7%. For large enterprises, Portugal's adoption rate in 2025 is 81.91%, slightly below the EU average of 82.03%. In 2023, the figure was 71.73%, marginally lower than the EU average of 71.81%. The annual growth rate for large enterprises is 6.9%, equal to the EU's growth rate.

Portugal

Portugal is at 34.11% adoption rate of cloud technologies after a progression of +2.8% annually since 2023, standing below the EU average of 46.69%. In 2023, Portugal's adoption rate was 32.29%, lower than the EU average of 38.97%. The annual growth rate of 2.8% is significantly lower than the EU's 9.5%. For SMEs, Portugal's adoption rate in 2025 is 33.17%, below the EU average of 45.74%. In 2023, the figure was 31.44%, lower than the EU average of 38.04%. The annual growth rate for SMEs is 2.7%, much lower than the EU's 9.7%. For large enterprises, Portugal's adoption rate in 2025 is 74.15%, lower than the EU average of 78.32%. In 2023, the figure was 70.46%, higher than the EU average of 69.72%. The annual growth rate for large enterprises is 2.6%, lower than the EU's 6.0%.

Portugal is at 11.54% adoption rate of artificial intelligence after a progression of +33.7% annually since 2023, but it is still standing below the EU average of 19.95%. In 2024, Portugal's adoption rate was 8.63%, lower than the EU average of 13.48%. The annual growth rate of 33.7% is lower than the EU's 48.0%. For SMEs, Portugal's adoption rate in 2025 is 10.66%, below the EU average of 18.9%. In 2024, the figure was 7.87%, lower than the EU average of 12.64%. The annual growth rate for SMEs is 35.5%, lower than the EU's 49.5%. For large enterprises, Portugal's adoption rate in 2025 is 49.15%, lower than the EU average of 55.03%. In 2024, the figure was 41.89%, higher than the EU average of 41.17%. The annual growth rate for large enterprises is 17.3%, lower than the EU's 33.7%.

Portugal is at 58.48% adoption rate of AI or cloud or data analytics after a progression of +3.7% annually since 2023, standing below the EU average of 63.2%. In 2023, Portugal's adoption rate was 54.4%, slightly below the EU average of 54.7%. The annual growth rate of 3.7% is lower than the EU's 7.5%. For SMEs, Portugal's adoption rate in 2025 is 57.7%, below the EU average of 62.32%. In 2023, the figure was 53.68%, slightly below the EU average of 53.74%. The annual growth rate for SMEs is 3.7%, lower than the EU's 7.7%. For large enterprises, Portugal's adoption rate in 2025 is 91.72%, lower than the EU average of 92.78%. In 2023, the figure was 86.53%, slightly below the EU average of 86.71%. The annual growth rate for large enterprises is 3.0%, lower than the EU's 3.4%.

Portugal needs to accelerate its digital transformation efforts to close the gap with the EU averages. Specific attention should be given to cloud technologies and artificial intelligence, where the adoption rates and growth rates are significantly lower than the EU averages. Policies and initiatives aimed at enhancing the digital skills of the workforce and providing incentives for businesses to adopt these technologies could be beneficial. Additionally, targeted support for SMEs, which form a significant part of the economy, could help in achieving a more digitally advanced business landscape in Portugal.

Policy context and assessment of recommendations

Portugal's approach to the uptake of cloud, AI, and data analytics by enterprises is anchored in clear national targets under its National Digital Strategy, which provide long-term direction while allowing flexible implementation. Although adoption levels by Portuguese enterprises, particularly for cloud services, remain below the EU average, recent progress indicates a positive trend driven by business-digitalisation policies and broader market developments, especially among SMEs.

Portugal's policy efforts have focused on putting in place the enabling conditions for adoption of digital technologies, including through investments in digital skills, innovation support, and alignment with EU initiatives. This approach is strengthened by the country's National Artificial Intelligence Agenda, which sets out a comprehensive and integrated framework across the entire innovation ecosystem, addressing: (i) infrastructure and data; (ii) innovation and adoption; (iii) talent and skills; and (iv) responsible AI development. Complementary initiatives aim to strengthen data governance and accessibility, in particular through the planned National Data Policy and the development of a state data platform to support evidence-based policymaking.

At the same time, Portugal is advancing a strategic vision for digital infrastructure as a cornerstone of technological sovereignty, economic resilience, and competitiveness. Portugal's ongoing review of the 2026-2027 National Digital Strategy Action Plan promotes an integrated approach to the development of key infrastructures, including sovereign cloud, data centres, connectivity, and critical technologies, in alignment with European priorities. In this context, the country is drawing up specific measures to: (i) improve data security and governance; (ii) support the implementation of sovereign cloud solutions; and (iii) optimise the management of public sector data. The overarching objective of these measures is to build a secure, scalable, and sustainable digital ecosystem that underpins national growth and innovation.

Portugal should benefit from continued support for AI take-up to enable innovation by enterprises, including by timely implementation of ongoing and planned measures. In particular, when revising the 2019 National AI Strategy: (i) the direction of Portugal's 'Apply AI' strategy should be taken into account, including through a stronger sectoral focus on key verticals; (ii) operational and co-financing bottlenecks affecting European Digital Innovation Hubs should be addressed to strengthen SME digitalisation and AI adoption; (iii) support should be provided for the scale-up of AI-native start-ups and the wider diffusion of technological advances across the economy; and (iv) measures to attract and retain AI talent should be strengthened, including by making the most of relevant EU initiatives.

2025 recommendation on SMEs and on the adoption of advanced technologies: Support the adoption of advanced digital technologies by businesses by fostering enhanced collaboration between public and private sector and academia and by identifying support measures for the medium-term. Regarding AI take-up, support it and thus enable innovation by enterprises, including by timely implementation of ongoing and planned measures. In addition, encourage cloud take-up, in particular implement the plans for sovereign cloud infrastructure.
Portugal addressed the recommendation by putting significant policy actions into place in 2025: Along with business digitalisation policies and broader market developments, Portuguese policy action has been focused on creating the conditions needed for the adoption of advanced technologies by enterprises. The new key highlight is the National Artificial Intelligence Agenda (ANIA) recently launched with an ambitious action plan delivered through 32 initiatives across the entire ecosystem (universities, research centers, enterprises, and public services). Some of the initiatives include the creation of national data spaces in critical areas and a National Platform of AI Products for SMEs. In addition, and regarding the cloud take-up, the Portuguese administration is designing a strategic plan for the development and implementation of a sovereign cloud infrastructure in Portugal, leveraging and boosting the capacity of local and national cloud service providers.

Unicorns, scale-ups and start-ups

Performance assessment

At the beginning of 2026, Portugal had 2 unicorns (2030 national target of 2), which is 1 more than in 2025. TEKEVER and Feedzai had reached unicorn status by early 2026, indicating that the indicative benchmark previously considered for this stage has effectively been achieved.

Policy context and assessment of recommendations

Policy priorities are not primarily focused on fixed unicorn targets, but rather on reinforcing the broader pipeline of start-ups and scale-ups, strengthening the business environment for digital start-ups and scale-ups through a policy approach centred on ecosystem development.

This orientation is embedded in **the Digital National Strategy, which sets a target of at least 6 000 start-ups by 2030, building on an existing base of approximately 5 100**. The rationale underpinning this objective is that expanding the overall start-up landscape, enhancing digital capabilities, and improving conditions for scaling are more effective than pursuing rigid outcome-based targets. In this context, the emergence of unicorns is understood to depend largely on market dynamics, investment cycles, and opportunities for international expansion.

Measures associated with the Digital Decade roadmap contribute indirectly to these objectives, particularly through actions supporting business digitalisation, the uptake of artificial intelligence, and innovation. In parallel, complementary initiatives more directly address the enabling conditions for start-ups and scale-ups, including improved access to finance, support for research-driven entrepreneurship, and stronger linkages between research institutions and the business sector.

The Deep2Start programme approved in 2024 and operationalised by the National Innovation Agency (ANI), has been partially launched in 2025 and it is currently in its first steps of the implementation phase[2] with initial instruments, while its full-scale investment architecture is still being progressively deployed. It aims to support deep-tech start-ups by promoting the valorisation of research results, supporting technology maturation and facilitating the transition from scientific research to market-oriented ventures. By targeting research-based teams and deep-tech projects, Deep2Start strengthens links between academia and the business ecosystem and complements other instruments supporting innovation and scale-up. Because the programme is still at an early stage of implementation, its impact on AI take-up and scale-up dynamics is expected to materialise progressively and should be assessed using objective indicators.

Despite these advances, scale-up capacity remains a structural challenge for Portugal. Limited access to later-stage growth financing and barriers to expansion within the Single Market continue to constrain Portuguese scale-ups.

2025 recommendation on unicorns and scale-ups: Continue improving the business environment and access to finance for digital start-ups to grow into scale-ups, including by targeting business R&D with public support.
Portugal has partially addressed its recommendation in 2025: Portugal has further strengthened the business environment for digital start-ups and scale-ups through a policy approach centered on ecosystem development.

Strengthening Cybersecurity & Resilience

Portuguese citizens and enterprises show a medium cyber awareness and preparedness, slightly above the EU average. In 2025, 58.64% of Portuguese individuals demonstrated above basic digital safety skills, outperforming the EU average of 51.34%. Similarly, in 2024, 57.73% of enterprises implemented at least five of the 11 cybersecurity measures tracked by Eurostat, slightly above the EU average of 56.85%. However, in most of the percentages Portuguese enterprises applying these measures are below the EU averages, with some gaps like in 'authentication via biometric methods' (15.77% in Portugal vs 18.27% in the EU) and 'data backup to a separate location' (75.02% in Portugal vs 79.23% in the EU).

[2] ANI launches first funding call for Deep Tech startups - ANI

Portugal

Portugal finally completed the transposition of the NIS2 Directive (EU) 2022/2555 through Decree-Law No. 125/2025 in December 2025. Although later than the EU deadline, the new National Cybersecurity Act transposing the Directive with entry into force scheduled for April 2026. The new framework significantly expands the scope of regulated entities and introduces stricter obligations on cybersecurity risk management, incident reporting, and governance. It also strengthens the role of national authorities, particularly the National Cybersecurity Centre (CNCS), within a more coordinated supervisory system. While the legal framework is now in place, implementation is expected to be gradual, with organisations required to progressively adapt to the new requirements over the coming months.

Regarding the cybersecurity of the Portuguese public administration, the Action Plan for 2025-2026 included an action about strengthening security mechanisms and cybersecurity monitoring of Public Administration, which aims to carry out: (i) The characterisation of services, applications, IT systems and publicly accessible technical identifiers of relevant Public Administration entities is carried out within the framework of the Cybersecurity Legal Regime (including the identification of interdependencies between systems); (ii) The creation of C-Level reports on the cybersecurity status of each Public Administration entity subject to the Cybersecurity Legal Regime; and (iii) The creation of a management and configuration platform for name resolution systems in Public Administration entities, configuring a perimeter security mechanism based on DNS Responsible Policy Zones.

Public and private stakeholders in Portugal continue to make efforts both on general cybersecurity awareness and development of specialised skills, with the CNCS playing a central coordinating role. In October 2025, **CNCS launched the National Cybersecurity Certification Scheme, which is a voluntary framework designed to certify the cybersecurity level of digital service providers in Portugal**. Aligned with national and European standards, it aims to enhance trust, standardise security practices, and strengthen the overall resilience of digital services. In addition, CNCS has continued implementing several flagship initiatives, which reached operational maturity in 2025, including the C-Academy (which delivers cybersecurity training to public administration and private sector actors) and the Cybersecurity Competence Centres Network (C-Network), providing decentralised “one-stop-shop” support to SMEs and public entities across regions. Meanwhile, the Cybersecurity Digital Innovation Hub (C-Hub) continues to promote R&D and innovation uptake, while collaboration among major national companies is reinforced through the Cybersecurity Alliance.

In parallel, during 2025 the Portuguese Safer Internet Centre has continued actively developing and promoting campaigns, tools, and educational resources to raise awareness and digital skills across the population. These actions include: (i) educational programmes and targeted activities to encourage young people to adopt safer digital behaviour, such as the CIS Digital Camp 2025; and (ii) thematic campaigns like ‘Cybersecure Password’ and participation in European Cybersecurity Month.

Protecting and empowering EU people and society

Empowering people and bringing the digital transformation closer to their needs

Equipping people with digital skills

Basic digital skills

Performance assessment

Overall, 74% of Portuguese people think digitalisation of daily public and private services is making their life easier, which represent an increase of 3pp from last year, based on the Digital Decade Eurobarometer 2026.

Portugal is at 59.15% of individuals aged 16-74 with at least basic digital skills after an increase of 2.8% annually since 2023, when the figure was 55.97%. This places Portugal slightly below the EU average of 60.40% in 2025, which increased from 55.56% in 2023 at an annual growth rate of 4.3%. **Portugal's growth in this area is slower than the EU average, indicating a need for accelerated efforts to bridge the gap.** In fact, although the country is mainly on track according to the trajectory presented in its Digital Decade national roadmap, it is slightly below the aimed value by 2025 (62%).

Regarding the gender gap, **Portugal shows a disparity of 2.75 percentage points in favour of men, with 60.57% of men and 57.82% of women possessing basic digital skills**. This gap is equal to the EU average of 2.75 percentage points. Portugal's annual growth rates for men and women are 2.9% and 2.7%, respectively, both lower than the EU averages of 4.4% for men and 4.1% for women.

Education level significantly influences digital proficiency in Portugal. Individuals with no or low formal education have a basic digital skills rate of 25.81%, which is 33.34 percentage points below the national average and significantly lower than the EU average of 37.56% for this group. While Portugal's growth rate for this demographic is 5.6%, it remains below the EU's 5.7%, highlighting the need for targeted educational initiatives.

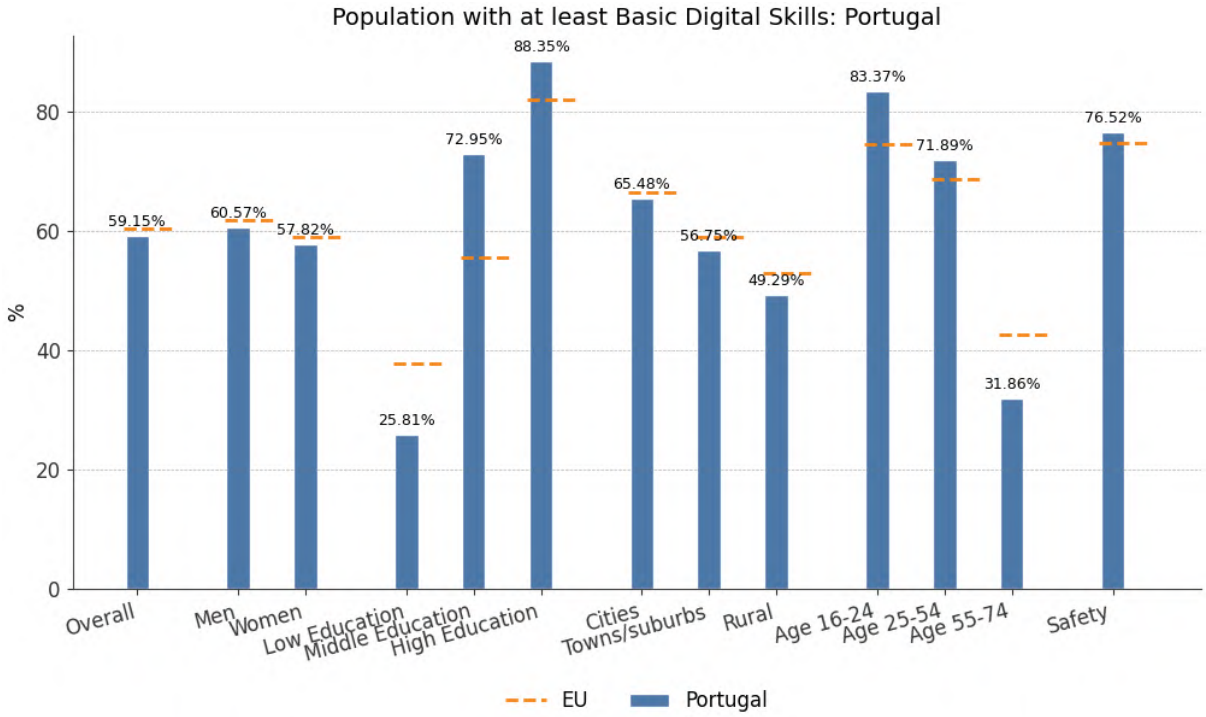
In urban areas, 65.48% of individuals have basic digital skills, slightly below the EU average of 66.50%. Portugal's growth rate in urban areas is 1.3%, compared to the EU's 3.1%. The gap between urban and rural areas in Portugal is 16.19 percentage points, larger than the EU average of 13.66 percentage points. However, rural areas in Portugal have seen a growth rate of 6.2%, outpacing the EU's 5.5%, though the overall skill level remains lower at 49.29% compared to the EU's 52.83%.

Young adults aged 16 to 24 in Portugal have a digital skills proficiency rate of 83.37%, significantly higher than the EU average of 74.55%. However, Portugal's growth rate for this age group is 0.4%, much lower than the EU's 3.2%. The gap between young adults and older adults (aged 55 to 74) in Portugal is 51.51 percentage points, much wider than the EU average of 31.95 percentage points. The skill level for older adults in Portugal is 31.86%, below the EU average of 42.6%, with a growth rate of 6.3% compared to the EU's 7.2%.

In terms of **digital safety skills,** 76.52% of individuals in Portugal have at least basic safety skills, slightly above the EU average of 74.63%. Portugal's growth rate in this area is 2.3%, lower than the EU's 3.6%.

Regarding the use of generative AI, 38.7% of people in Portugal used it in 2025, surpassing the EU average of 32.66% according Eurostat data. For professional purposes, 19.93% of individuals in Portugal used generative AI, also higher than the EU average of 15.36%. According to the Digital Decade Eurobarometer 2026, when asked about the most important obstacles to use more generative AI tools, Portuguese citizens pointed out 'lack of training or relevant skills to use generative AI tools' (35%), 'concerns about privacy or data protection' (30%) and 'concerns about accuracy or incorrect information' (28%).

In summary, **Portugal's digital skills profile reveals a mixed performance.** While the country shows strengths in digital skills among young adults and in the adoption of generative AI, it lags behind the EU average in overall digital skills growth, particularly among women, individuals with low education, and older adults. Targeted interventions are necessary to address these disparities, especially in rural areas and among less educated populations. Enhancing digital education and training programmes could help Portugal close the gap with the EU average and ensure more inclusive digital participation.



Portugal is at 62.52% of individuals exposed to untrue or doubtful content online in 2025, marking an increase of 9.9% annually since 2023, when the figure stood at 51.73%. This places Portugal above the EU average, which rose from 49.25% in 2023 to 55.90% in 2025, representing an annual growth rate of 6.5%. Focusing on the age group 16 to 24, 71.91% of individuals in Portugal were exposed to such content in 2025, compared to 66.34% in the EU. The figures for 2023 were 64.5% for Portugal and 61.66% for the EU. The gap between the youngest age group (16-24) and the rest of adults aged 25-64 is smaller in Portugal, at 4.68 pp, in contrast, compared to the EU's 7.77 pp. For adults aged 25 to 64, 67.23% were exposed to untrue or doubtful content in Portugal in 2025, compared to 58.57% in the EU. The annual growth rate for this age group was 10.0% in Portugal and 6.4% in the EU.

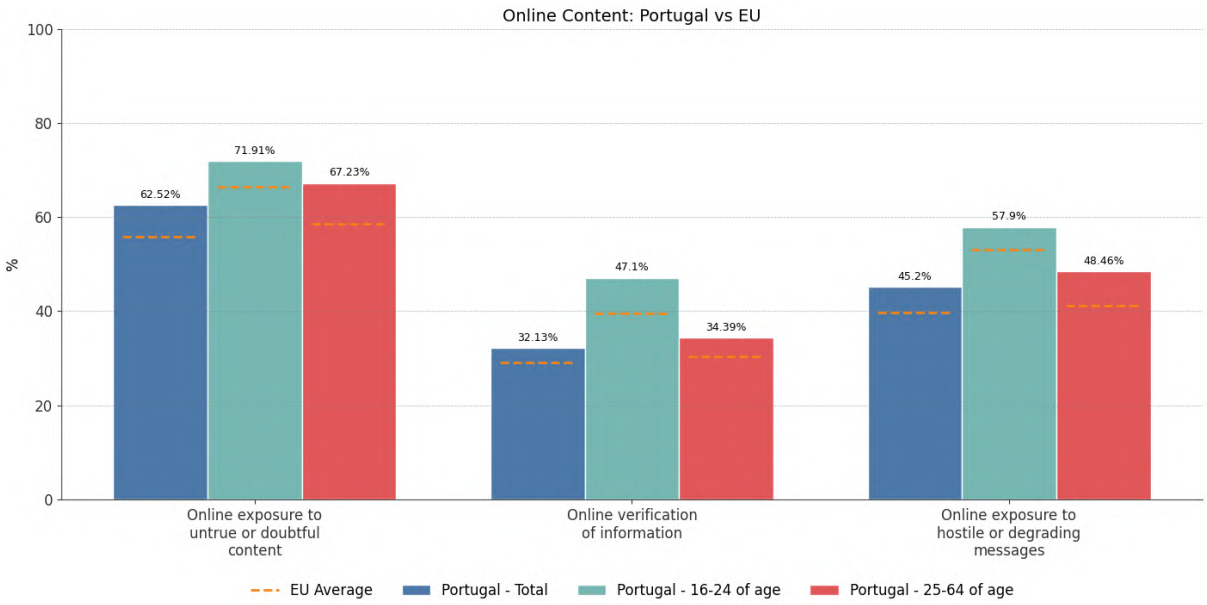
Portugal is at 32.13% of individuals verifying the truthfulness of online content in 2025, following an annual increase of 17.1% from 23.45% in 2023. This growth rate outpaces the EU average, which increased from 24.29% in 2023 to 29.16% in 2025, an annual growth rate of 9.6%. Among the youngest age group (16-24), 47.1% of individuals in Portugal verified online content in 2025, compared to

39.49% in the EU. The gap between the youngest age group and adults aged 25-64 is 12.71 pp in Portugal, slightly higher than the EU's 9.09 pp. For adults aged 25 to 64, 34.39% verified online content in Portugal in 2025, compared to 30.4% in the EU. The annual growth rate for this age group was 18.0% in Portugal and 9.9% in the EU.

Portugal is at 45.2% of individuals exposed to hostile or degrading messages online in 2025, reflecting an annual increase of 12.9% from 35.48% in 2023. This growth rate surpasses the EU average, which rose from 33.5% in 2023 to 39.72% in 2025, an annual growth rate of 8.9%. For the youngest age group (16-24), 57.9% of individuals in Portugal were exposed to such messages in 2025, compared to 52.99% in the EU. The gap between the youngest age group and adults aged 25-64 is smaller in Portugal, at 9.44 pp, compared to the EU's 11.85 pp. For adults aged 25 to 64, 48.46% were exposed to hostile or degrading messages in Portugal in 2025, compared to 41.14% in the EU. The annual growth rate for this age group was 13.7% in Portugal and 9.2% in the EU.

According to the **Digital Decade Eurobarometer 2026**, 75% of Portuguese people agree that online manipulation (such as disinformation, foreign interference, AI-generated content, deepfakes) poses a threat to our democratic processes. In addition, when asked about the online issues with a biggest personal impact on them, Portuguese citizens highlighted ‘misuse of personal data’ (55%), ‘fake news and disinformation’ (45%), and ‘insufficient protections for minors’ (41%). In relation with the latter, 92% of them think it should be a priority for the EU to further strengthen the protection of children and young people online.

The data reveals that Portugal consistently reports higher percentages of individuals exposed to untrue or doubtful content, as well as hostile or degrading messages, compared to the EU average. However, Portugal also demonstrates a stronger tendency among individuals to verify the truthfulness of online content, particularly in the youngest age group (16-24). The gaps in exposure to either hostile/degrading content or doubtful/untrue content between age groups in Portugal are generally smaller than those observed at the EU level, suggesting a more uniform exposure and behaviour across different age demographics in Portugal. The annual growth rates for all indicators (exposure and verification) in Portugal exceed those of the EU, indicating a more rapid evolution in online content behaviour in the country. This presents both challenges and opportunities for policymakers, particularly in addressing the higher exposure to harmful content while making the most of the increasing tendency to verify online information.



Policy context and assessment of the recommendations

On December 2025, the Portuguese Government approved the Digital Skills Pact Action Plan 2026-2030 (with an investment of up to EUR 80 million), which will encompass training across basic, intermediate, advanced, and emerging digital skills. The Pact constitutes a key instrument for promoting inclusion, upskilling workers, and strengthening national competitiveness, with particular attention to vulnerable groups and remote regions. It also seeks to foster advanced skills in areas such as AI and cybersecurity. The Pact is being implemented through 17 initiatives developed in partnership with higher education institutions, companies, cooperatives, associations, and public entities, ensuring the relevance, quality, and employability of the training offered. These initiatives aim to forge a direct link between digital education and the needs of the labour market, supporting workers in SMEs, public administration, and strategic sectors of the economy. With this pact, the Portuguese government is strengthening its commitment to digital skills and recognising that the development of digital skills is a strategic pillar for the country. This is because digital skills are a decisive factor for social mobility, civic participation, economic productivity, and the modernisation of public administration, fully aligned with the objectives of the EU's Digital Decade.

In addition, **Portugal implemented a broad set of digital skills programmes in 2025 targeting both unemployed and employed individuals, with a strong focus on labour market integration and reskilling.** The largest intervention was the Employment + Digital 2025 programme, which supports workforce upskilling across sectors and professional profiles. In 2025 alone, this programme reached 155 902 participants under training actions, complemented by 1 276 participants in leadership training, 6 280 beneficiaries through training vouchers, and 2 332 trainers under specialised upskilling measures.

Moreover, by 2025, **Portugal's 'Digital Skills Certificate' programme had reached 21 857 beneficiaries,** contributing to the improvement of digital skills across the Portuguese population as a key driver of social inclusion and employability. The programme provides a formal mechanism for the recognition of acquired skills, aligned with the European Digital Competence framework. It also offers structured training pathways at basic, intermediate, and advanced levels, enabling people to progressively develop and certify their digital proficiency in line with the evolving needs of the digital economy.

On disinformation, **the National Plan on Media Literacy is part of Portugal's Media Action Plan adopted in March 2025. The National Plan on Media Literacy** aims to strengthen the ability of journalists, institutions and the general public to navigate today's complex information environment shaped by disinformation, emerging digital technologies, and evolving media consumption habits. It seeks to promote media literacy for all audiences, combat fake news, encourage responsible and informed use of content, and support active, informed citizenship. To achieve these goals, the plan focuses on coordinated actions such as: (i) advancing media education and rights awareness; (ii) ensuring inclusion across regions and diverse groups; (iii) building skills through training and 'prebunking' strategies; (iv) promoting social responsibility; (v) putting in place systems for monitoring and evaluation; and (vi) fostering collaboration among stakeholders.

2025 recommendation on basic digital skills: Evaluate the take-up of the current measures and identify ways to address the remaining needs, notably to tackle the digital divide in the society.
Portugal addressed the recommendation by significant efforts and new policy actions in 2025: Along with previous programmes, the new Digital Skills Pact complements existing measures through a set of actions aimed at ensuring inclusive participation in the digital transition, with a particular focus on vulnerable groups and underserved regions. It promotes the development of basic digital skills through structured training programmes delivered by a network of partners, including the deployment of Community Digital Agents to further promote and build on the teaching of these skills. These efforts are supported by mobile training units to expand geographical reach, as well as awareness-raising campaigns across multiple media channels to increase participation. In addition, the Pact addresses barriers to access by assessing and facilitating the provision of mobile devices to socioeconomically disadvantaged populations, thereby enabling their engagement in initiatives to develop digital skills.

ICT specialists

Performance assessment

Portugal was at 5.4% of ICT specialists in total employment in 2025, standing slightly above the EU average of 5.0%. It showed an outstanding progress of 3.8%, significantly higher than the EU's average annual growth rate (2.0%). The country is on track according to its trajectory presented in the Digital Decade national roadmap.

The share of Portuguese women as ICT specialists stands at 22.30%, which is above the EU average of 19.50% but represents a decrease of 0.4pp since 2024. Regarding businesses' workforce requirements, according to data from 2024, 7.40% of Portuguese enterprises recruited or tried to recruit personnel with ICT specialists' skills (EU average: 9.55%).

Policy context and assessment of the recommendations

The Digital Skills Pact mentioned above promotes continuous learning and upskilling of the workforce by identifying priority areas for digital training in cooperation with companies and sector associations to improve employability and align skills with labour market needs. It focuses on providing intermediate and advanced digital training for the working-age population, including unemployed people, through certified programmes supported by skills assessments and partnerships between public and private entities. It has an emphasis on reskilling and upskilling in areas relevant to people's current and future job opportunities. The Pact also includes targeted training initiatives for public administration staff (with possible incentives to encourage participation) to support the digital

transformation of public services. This training for public administration staff includes accelerated capacity building in AI, as well as dedicated programmes for SME employees covering areas such as digital leadership, data analysis, cybersecurity and emerging technologies. Moreover, the Pact: (i) supports training in cutting-edge technological fields such as automation, AI, cloud computing and robotics; (ii) promotes PhD programmes in non-academic environments to strengthen innovation capacity; and (iii) implements the national 'Girls in STEM' initiative to encourage greater female participation in science, technology, engineering and mathematics.

Portugal's InCode2030 programme, adopted in 2017, has several sub-initiatives, one of which is the **+Digital Youth programme**. The +Digital Youth programme trained 8 333 trainees in 2025. It provides intensive, employment-oriented training for unemployed young people with secondary or higher education, covering areas such as programming, cybersecurity, data analysis, and digital marketing. In addition, the **Portuguese Vocational Training Department** (IEFP) trained 12 100 people in 2025 with modular training focused on digital skills. The IEFP offers short- and medium-term courses for both employed and unemployed people, enabling upskilling, reskilling, and specialisation across a wide range of digital domains.

The **PRO_MOV programme**, part of the European 'Reskilling 4 Employment' initiative, focuses on retraining people for future-oriented jobs through strong collaboration between large companies, public authorities, and training providers. Under the PRO_MOV programme, dedicated digital and business intelligence labs deliver specialised training in areas such as software development, data analysis, and cybersecurity. Currently, the PRO_MOV ecosystem has over 190 companies in Portugal and 11 active labs, which in 2025 hosted 235 trainees.

The UpSkills training programme, with further supports professional reconversion into ICT roles through a combination of intensive academic training and practical work placements in companies, trained 288 people during 2025.

In addition, the IEFP continued developing long-term ICT qualifications in 2025 through several secondary and post-secondary training pathways, including: (i) technological specialisation courses; (ii) apprenticeships and apprenticeship+ programmes for young people; and (iii) adult education and training courses. These initiatives provided structured, career-oriented training in specialised digital fields such as network installation and management, systems administration, software applications, data science, programming, and information systems technologies. In 2025, these programmes reached 9 542 participants, contributing to the development of advanced digital skills aligned with labour market needs.

Moreover, the IEFP also promotes **specialised ICT certifications through international IT academies in partnership with leading technology companies**. These include Microsoft academies (for digital skills and certification in Microsoft technologies), the Cisco Networking Academy (covering networking, cybersecurity, cloud computing, IoT, and programming), the Adobe Digital Academies (focused on UX design, software engineering, data science, and digital marketing for career transition), and Autodesk Academies (certifications in tools such as AutoCAD, Revit, and Fusion 360). In 2025, 1 839 Portuguese people sat exams in one of these certification programmes, resulting in 1 313 successful certifications, strengthening employability through industry-recognised credentials.

2025 recommendation on ICT specialists: Identify ways to attract ICT specialists, promote ICT studies, digital upskilling and reskilling options, and continue reinforcing gender balance in the field.
Portugal addressed the recommendation through some new measures in 2025: The new Digital Skills Pact sets out measures to reskill and upskill working-age people. Portugal also runs other programmes such as the new 'AI Fast Track', which is an accelerated visa regime to attract highly qualified researchers in AI to live and work in Portugal, helping to attract ICT specialists to the country.

Key digital public services and solutions – trusted, user-friendly, and accessible to all

Performance assessment

In 2025, Portugal's total digital public services score for citizens (which covers both national and cross-border users) reached 86.41/100 points, which is above the EU average of 84.64/100 points and represents a 2.3% increase compared to 2024. The country is on track according to its trajectory presented in the Digital Decade national roadmap. When looking specifically at digital public services for national citizens, Portugal reached 99.85/100 points in 2025. This is above the EU average of 94.01/100 points, and it marks a 2.6% increase from 2024. For cross-border digital public services for citizens, Portugal's 2025 score was 72.98/100 points, which is below the EU average of 75.28/100 points. Compared to 2024, this reflects a 1.8% increase.

Citizens' related life events that score particularly well include Family (100.0), Transport (99.48), and Studying (93.75). Conversely, Health (70.0), Moving (75.0), and Career (83.33) show the most room for improvement. Across levels of government for national citizens' digital public services, central government services scored 89.78/100 points, regional government services scored 100.0/100 points, and local government services scored 91.67/100 points.

Portugal's total digital public services score for businesses (covering both national and cross-border businesses) was 90.0/100 points in 2025, standing above the EU average of 88.59/100 points. This represents a 6.8% increase from 2024. The country is on track according to its trajectory presented in the Digital Decade national roadmap. The Business-related life event scoring particularly well is Business Start-Up (95.0), whereas Regular Business Operations (85.0) show the most room for improvement. Notably, Portugal's cross-border digital public services score for businesses reached 80.0/100 points in 2025, reflecting a 16.6% increase compared with 2024 and standing above the EU average of 78.4/100 points. On the other hand, digital public services for businesses available to national users in Portugal scored 100.0/100 points. This represents no change since 2024 and places the country above the EU average of 98.8/100 points.

Across the two Digital Decade KPIs, Portugal's Digital Public Services for Businesses indicator performs better than its counterpart for citizens. This stronger performance is underpinned by digital public services for businesses available to national users, which forms the most mature component of the KPI, even as cross-border digital public services for businesses remains less developed. Recent progress has been driven primarily by improvements in cross-border digital public services for businesses, reflecting positive momentum across the KPI. While life events such as Family, Transport, and Business Start-Up perform best, lower-scoring areas such as Health, Moving, and Career do not yet exhibit the same level of maturity.

Overall, Portugal's alignment with EU levels varies across the two Digital Decade KPIs, with strengths concentrated in national services and weaker performance in cross-border delivery. A similar pattern appears across government tiers, where central administrations are showing the greatest need for

improvement. Despite these gaps, the underlying direction of change indicates Portugal is on a positive upward trajectory toward achieving the 2030 digitalisation targets.

Regarding e-government users, Portugal has 82.53% individuals who used the Internet for interaction with public authorities on websites or on mobile applications, which is above the EU average of 76.03%. On the e-government auxiliary indicators, the country performs particularly well on 'users support' scoring at 100, 'pre-filled forms' with 96.34% and 'transparency of service delivery, design and personal data' scoring at 85.25.

Portugal's access to e-Health records reaches a score of 92.23, which is quite above the EU average of 86.51. The country is on track according to its trajectory presented in the Digital Decade national roadmap. However, there are significant socio-economic disparities in the use of digital health tools as the percentage of Portuguese people with lower level of education who seek health information, book a medical appointment or access electronic health records online, is much lower than that of people with a high level of education[3].

Policy context and assessment of the recommendations

Integrated in the GOV.PT portal, **the Virtual Citizen Shop is a key component of the government's strategy to provide a single digital access point for all public services by 2030.** The Virtual Citizen Shop consolidates services from 22 public entities, offering over 150 digital services, most of which are targeted at businesses. These services include administrative updates, licensing, company creation, and regulatory compliance procedures. Designed for accessibility and efficiency, the Virtual Citizen Shop allows users to complete processes remotely and includes video call support to ensure assisted access when needed. Usage data from 2025 indicates significant engagement, with over 95 000 page views and nearly 60 000 active users. In parallel, the GOV.PT virtual assistant, launched in late 2024 and improved during last year, uses generative AI to improve user interaction with public services. It supports multilingual communication and provides information on more than 2 300 services through text, voice, or avatar-based interfaces. Ongoing development of the Virtual Citizen Shop aims to expand its functionality to include transaction completion, process tracking, and appointment scheduling, further strengthening digital accessibility and user experience in public administration.

The GOV.PT mobile application introduced a digital business wallet on 26 January 2026 as part of the National Digital Strategy Action Plan 2026-2027. This feature enables entrepreneurs and authorised representatives to securely access and share essential business documents through a centralised digital environment, reducing reliance on multiple platforms and paper-based processes. It reflects a broader transition toward an integrated digital-wallet model that serves both individuals and organisations, aligning with the existing European Digital Identity Framework and the proposed European business wallet regulation. Although it is designed to evolve progressively, in its initial phase, the Digital Business Wallet includes core documents such as the company's electronic identification card, tax status certification, social security compliance declaration, and beneficial ownership registry. These documents hold official legal value, are automatically updated, and can be validated in real time via QR code. Additional functionalities include paperless invoicing, notification and alert systems, and digital authentication and signature capabilities. Future versions will expand document availability and services, including: (i) certifications related to SMEs, financial compliance, and business registration data; and (ii) features such as alerts for taxes, social security, EU funding opportunities, and public procurement. Later developments aim to integrate advanced services such as company creation, access to financing and procurement systems, and interaction with financial institutions.

[3] https://health.ec.europa.eu/document/download/db9179a4-ceb1-4d37-9429-597cab410ca6_en?filename=2025_chp_pt_english.pdf (see page number 20)

Leveraging digital transformation for a smart greening

In Portugal, air emissions of the ICT sector are low, and the recycling of electronic equipment is also a good level. Recently published by Eurostat, sectoral data on the air emissions show that the ICT sector in Portugal emitted 11.5 kg CO2 equivalent per capita, which is below the EU average of 22.8 kg CO2 eq (data from 2022[4]). Most of these emissions come from the ICT services activities (83.7%). The ICT sector however represented only 0.24% of air emissions in the total economy, comparable to the EU average (0.35%). In addition, 86.34% of ICT-related waste collected (corresponding to two categories of waste electrical and electronic equipment) are recycled or prepared for reuse[5], which is slightly above the EU average (80.23%).

On citizens' perceptions reflected in the Digital Decade Eurobarometer 2026, **74% of Portuguese people think AI should be developed as a priority in an environmentally sustainable way** (e.g. using renewable and clean energy). In addition, 52% of them consider 'green digital technologies (e.g. energy-saving tech)' as the technology with a most positive impact in the next ten years.

During 2025, Portugal continued to integrate sustainability into its digital transition agenda, particularly through smart territories, data-driven governance, and the digitalisation of public services.

The Action Plan 2026–2027 establishes a foundation for aligning digital transformation with environmental sustainability by framing the Strategic Review of the National Digital Infrastructure as both a means to enhance technological sovereignty and a lever for long-term ecological objectives. This approach is further reinforced by the National Data Centre Plan, which adopts an integrated perspective encompassing economic, energy, environmental, and digital considerations. Through a focus on green computing and the attraction of investment in sustainable digital infrastructure, Portugal seeks to strengthen its competitiveness while ensuring that digital growth supports national climate and energy targets. This integrated vision provides a basis for developing a coherent framework in which digital innovation and environmental sustainability progress in a mutually reinforcing manner.

The implementation of the National Strategy for Smart Territories has progressed substantially, with broad territorial coverage and a strong emphasis on capacity building, data integration, and digital innovation. Urban Management Platforms and complementary digital solutions have been deployed across nearly all municipalities, significantly exceeding initial targets, while extensive training programmes have strengthened administrative capabilities and supported ongoing knowledge dissemination. Key digital infrastructures have been developed to support governance and decision-making, including the Smart Territories Portal, which centralizes information, monitoring tools, and best practices, as well as systems such as digital twins, the Local Government Observatory, and an integrated data platform designed to enhance interoperability and enable new public services. Collaborative initiatives, such as the Community of Practice and standardized data models, further contribute to coordination, innovation, and the sharing of expertise across territories. The strategy has evolved in response to updated policy priorities and benefited from increased funding, allowing for expanded implementation and improved functionality of digital solutions. Overall, results indicate

[4] Eurostat - Air emissions from the ICT sector by NACE Rev. 2 activity

[5] Eurostat - Waste electrical and electronic equipment (WEEE) by waste management operations

strong uptake and impact, reflected in widespread municipal participation, expanded digital infrastructure, increased training outcomes, support for businesses and entrepreneurs, and tangible economic effects, including job creation.

In addition, **Portugal's non-profit waste-management organisation Electrão continued to help companies comply with the principle of extended producer responsibility** in 2025. It did this by assuming responsibility for the end-of-life management of electrical equipment, batteries, and packaging placed on the market. Electrão is the only entity in Portugal managing recycling systems across these three waste streams, while also contributing to the management of single-use plastics through urban cleaning systems. The system currently involves more than 2 000 companies, with significant volumes of waste – particularly electrical equipment and batteries, – being collected and processed for recycling. Electrão's activities in 2025 covered the full waste-management cycle, including collection, sorting, transportation, treatment, and recovery, while promoting more efficient resource use and supporting the transition to a circular economy. Electrão also continued to play a role in raising awareness around waste prevention, reuse, and recycling.

2025 recommendation on green: Consider introducing a coherent approach to twinning the digital and green transitions.
Portugal has addressed this recommendation through some efforts during 2025: The Action Plan 2026-2027 lays important foundations for twinning the digital and green transitions by positioning the Strategic Review of the National Digital Infrastructure as both a driver of technological sovereignty and a contributor to long-term sustainability. In addition, the ongoing National Data Centre Plan reinforces this alignment by adopting an integrated vision that explicitly incorporates economic, energy, environmental, and digital dimensions.

Annex I: National roadmap analysis

Portugal's national Digital Decade strategic roadmap

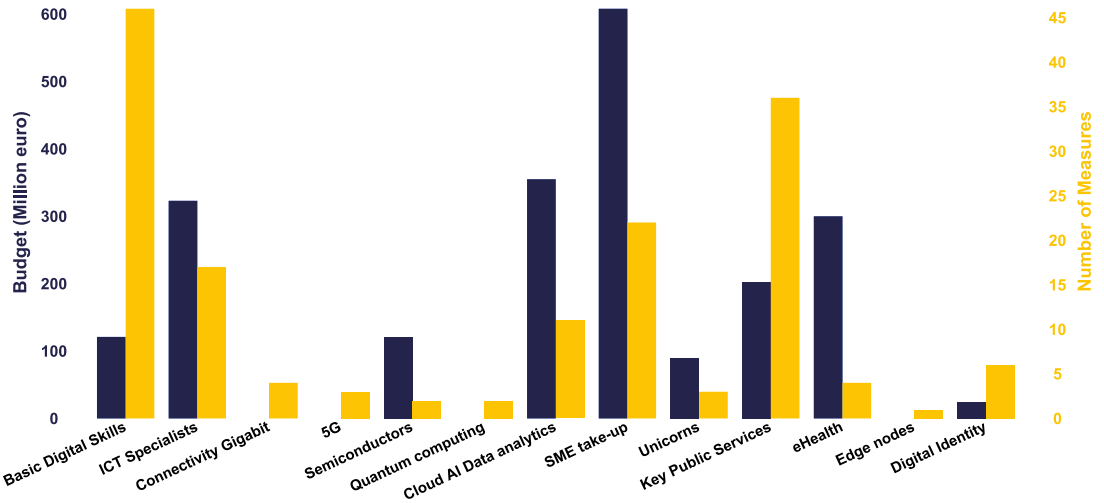
Portugal submitted a fully revised national Digital Decade roadmap in December 2024 (with targeted adjustments until March 2025), containing 157 measures, 12 targets (up from 5 reported last year) and 8 trajectories (compared to none in the previous roadmap). The roadmap is largely based on Portugal's National Digital Strategy also from December 2024 and its action plan, which were both put out for consultation with stakeholders as reported in the roadmap. The updates are aligned with the new Commission's priorities on AI, sovereignty, simplification and digital skills, as well as addresses a substantial number of roadmap recommendations issued in 2024, as listed below.

- *Propose targets and trajectories concerning VHCN, FTTP, 5G coverage, edge nodes, cloud, AI and data analytics separately, accessibility of key public services for citizens and businesses, access to e-health records and set trajectories for basic digital skills, ICT specialists, digital intensity of SMEs, unicorns using correct baseline values.* Portugal largely addressed this recommendation. Targets for edge nodes and data analytics are missing, as are target trajectories related to the digitalisation of businesses.
- *Align the level of ambition of the target for ICT specialists with the EU target*: The 7% target was not raised, and no explanation was provided.
- *Consider establishing national ambitions for technological leadership, competitiveness, and resilience to support EU-wide targets regarding semiconductors and quantum:* No new ambitions were introduced, but reporting was expanded.
- *Supplement the roadmap with measures related to connectivity:* information was added related to 5G and VHCN tenders, as well as submarine cable investments.
- *Review the measures contributing to targets on skills and digitalisation of enterprises, consider setting up additional measures for ICT specialists and basic digital intensity of enterprises:* National measures were listed and described more extensively, but both the attribution of these measures to concrete targets – and the novelty of these measures – is unclear.
- *Review the budget description of all presented measures, highlighting both national and EU sources:* A more comprehensive overview was added.
- *Provide more information on the implementation of digital rights and principles (and Digital Decade general objectives), including what national measures contribute to it:* Portugal provided a comprehensive mapping in this regard.
- *Incorporate, where appropriate, measures reported through other channels in the roadmap:* Portugal addressed this recommendation, except for some areas (e.g. cybersecurity).
- *Consult key stakeholders, as outlined in the DDPP, before proposing the adjustment to the national roadmap:* Stakeholder consultations were conducted in the context of National Digital Strategy.

Overall, Portugal presented a non-exhaustive selected set of the main policies and measures contributing to the achievement of most of the Digital Decade targets. The measures presented also cover several types of objectives: technological leadership, sovereignty, competitiveness and human-centred digital transformation. The roadmap responds to most of the objectives, such as human-centred digital transformation, simplification, sovereignty and resilience. However, areas

such as sustainability and inclusion lack specific focus, while competitiveness is not comprehensively articulated. The revised roadmap continues to prioritise digital skills (but not across all demographics), digital public administration and the digitalisation of businesses, in particular through information sharing and improving the skills of employees. In total, the measures presented amount to EUR 2.15 billion, or 0.75% of GDP, with a significant share of the funding for this coming from the Recovery and Resilience Facility.

Measures and budget in national roadmap[6]



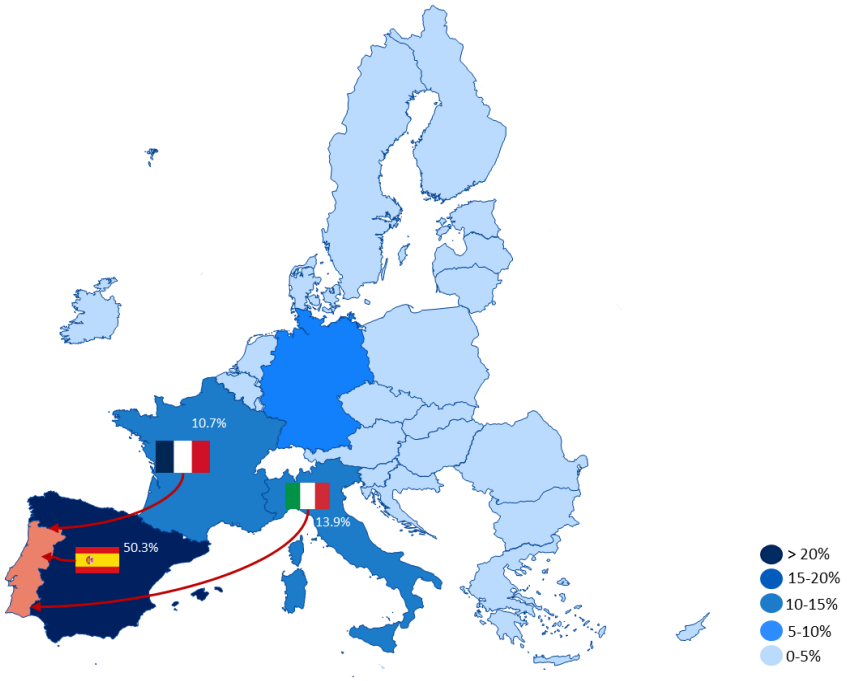
[6] When referring to national roadmaps, data used in this report are those declared by the Member States in their national roadmaps, on the basis of the Commission's guidance (C(2023) 4025 final). Data might reflect possible variations in reporting practices and methodological choices across Member States. No systematic assessment of the extent to which Member States followed the guidance was carried out.

Annex II: Funding, economic impacts & Multi-Country Projects

Country results from the study 'Assessing the Economic Impact of Digital Investments under the Recovery and Resilience Facility'

A modelling study conducted by the European Commission services, with the FIDELIO model, assesses the economic impact of the digital component of the RRF. As of November 2025, the digital part of the Recovery and Resilience Plan of Portugal was evaluated to EUR 4.61 billion with EUR 10 million for digital infrastructures, EUR 1.56 billion for digital skills, EUR 1.07 billion for the digitalisation of businesses, EUR 1.82 billion for the digitalisation of public services, and EUR 146 million for other digital priorities.

The total economic impact of RRF digital measures is estimated to EUR 4.14 billion for the national economy. Of this, EUR 3.46 billion stems from the direct effects of Portugal's own RRP and EUR 679 million corresponds to spillover effects from the implementation of other EU Member States' plans. Portugal benefited the most from spillover effects from RRPs of Spain (EUR 342 million), Italy (EUR 95 million), France (EUR 73 million). The most impacted sectors are ICT Services (EUR 1.23 billion), Education (EUR 481 million) and Trade (EUR 479 million).



RRF spillover effects to Portugal

Portugal

Funding from the Recovery and Resilience Facility (RRF) & Cohesion Policy

Portugal allocates 21.5% of its total recovery and resilience plan to digital (EUR 4.7 billion)[7]. In addition, under cohesion policy, EUR 2.3 billion, representing 10% of the country's total cohesion policy funding, is dedicated to advancing Portugal's digital transformation[8].

Multi-Country Projects

Portugal is a member of the Local Digital Twins towards the CitiVERSE EDIC and of the EUROPEUM EDIC. It is also an observer to the Alliance for Language Technologies EDIC and is leading efforts to set up an EDIC in the area of startups. Portuguese entities are indirect and/or associated partners in the IPCEI on Microelectronics and Communication Technologies (IPCEI-ME/CT). Portugal is also a participating state of the EuroHPC Joint Undertaking (JU) and of the Chips JU.

[7] The share of financial allocations that contribute to digital objectives has been calculated using Annex VII to the Recovery and Resilience Facility Regulation. Last data update: 23 April 2026.

[8] This amount includes all investment specifically aimed at or substantially contributing to digital transformation in the 2021-2027 Cohesion policy programming period. The source funds are the European Regional Development Fund (including Interreg), the Cohesion Fund, the European Social Fund Plus, and the Just Transition Fund.