

SIS 2026 SUMMIT

TRANSFORMING THE PORCH INTO A HALLWAY: THE CONCLUSIONS OF THE SIS 2026 SUMMIT

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Owing to its geography and the vicissitudes of history, Portugal has been a pioneer in communication infrastructures between Europe and the rest of the world. It was here that, in the XV century, the technologies were developed that made the oceans known and linked Europe to a world that had hitherto been known only through legend. From that moment on, the information obtained dispelled the legends, and the knowledge achieved brought the world closer together.

In the XIX century, the world accelerated once again: information was no longer transported by maritime mail and began to be transmitted through electrical impulses. At that time, despite not having developed any of these technologies, Portugal demonstrated an ability to be a pioneer in their adoption, which is why, a mere fifteen days after the worldwide debut of the first submarine cable, Portugal connected to this network. By then, all district capitals were already connected by telegraph through a network with over 1,600 km of lines².

In this second quarter of the XXI century, on the verge of yet another digital frontier, those who attended the various panels of the SIS 2026³ summit last April were left with little doubt that Portugal and, generally speaking, the Iberian Peninsula, have a unique opportunity to become a central piece of this universe. Prosaically, one could say that it is a unique opportunity to add the role of an infrastructure hub to its existing role as a picturesque backdrop for social media posts.

Naturally, apart from its strategic location at the crossroads of the Atlantic and Mediterranean corridors, the new centrality of the peninsula will be driven by two crucial vectors: the exponential growth of artificial intelligence (AI) and the abundance of renewable energy. This, however, is not enough. Conceptually, digital infrastructures are more akin to a bicycle wheel, with its hubs, spokes, and rims, than to interconnected isolated silos. In this ecosystem logic, a data centre without

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² The telegraph opened to the public in 1855 with 32 km of lines; two years later, in 1857, it already had 1 571 km of lines and included a connection between Elvas and Badajoz (see [Connecting telégrafos, a invenção que ligou o mundo - Fundação Portuguesa das Comunicações | Museu das Comunicações](#) and [Telegrafia-as primeiras comunicações digitais.pdf](#)). The first cable to land in Portugal was connected in 1870, with the first transatlantic cable having been laid in 1858. See [ANACOM - 150.º aniversário do cabo submarino em Portugal, ITU Brochure_Submarine Cable_portugal.pdf](#) and [How perseverance laid the first transatlantic telegraph cable | Science Museum](#)).

³ The conference took place between 14 and 15 April in Cascais.

connectivity would merely be an expensive fridge, just as a submarine cable that does not serve data centres or have a capillary terrestrial network to connect to would serve no one.

Therefore, for Portugal, it is not enough to have twenty active or planned submarine cables connecting to sixty countries. It is imperative to guarantee robust terrestrial networks that ensure the capillarity of data connections, preventing the country from being reduced to a mere digital whistle-stop and enabling it to transform effectively into a relevant destination.

Consequently, the scale of the projects is undergoing a paradigm shift. If, a few years ago, the installed capacity of data centres in Portugal was measured in megawatts, the market is now openly discussing gigawatt projects. This change, recognised by network operators, is reflected upstream in the very management of energy infrastructure: where there used to be mere estimates of capacity reserve in the electrical grid for data centres, today there are firm orders and large-scale supply contracts.

The dimension of sustainability and energy autonomy has gained unexpected acuity in the face of current geopolitical events. In this context, once again, the Iberian Peninsula presents unique conditions within the European Union, with Portugal recording, in 2025, 68%⁴ of its consumption secured by renewable energies, and Spain approaching with a respectable 56%⁵ both countries maintaining the goal of exceeding 85% by 2030. Furthermore, energy costs for non-domestic consumers are around 25%⁶ lower than the European average, which constitutes a critical advantage for electro-intensive industries.

National geography also allows for the use of more efficient cooling systems, using seawater or the reuse of residual heat, reducing environmental impact and aligning the sector with the energy transition.

Parallel with the Atlantic and Mediterranean corridors, the Africa-Europe axis deserves attention, with the Medusa and Nuvem cables joining the three recently connected to Portugal⁷ in the coming years. The growth potential of the African continent is estimated at 5.5 times the current capacity, redesigning traffic between continents to guarantee greater reliability and redundancy, to avoid geostrategic bottlenecks such as that of the Red Sea.

In short, the window of opportunity for the Iberian Peninsula exists, but it requires agility to avoid the flight of investment to Northern or Central European markets. Success will depend on the capacity to transform the current volume of planned projects into tangible realities.

⁴ See [Consumo de energia eléctrica atinge valor mais elevado de sempre em 2025](#) (in Portuguese).

⁵ See [https://macedovitorino-my.sharepoint.com/personal/palmeida_macedovitorino_com/Documents/Microsoft_Teams_Chat_Files/Informe del Sistema Eléctrico: Informe resumen de energías renovables 2025](https://macedovitorino-my.sharepoint.com/personal/palmeida_macedovitorino_com/Documents/Microsoft_Teams_Chat_Files/Informe%20del%20Sistema%20El%C3%A9ctrico%20Informe%20resumen%20de%20energ%C3%ADas%20renovables%202025) (in Spanish).

⁶ The average value of €/kWh over the last 5 years is ±0.15€ for Portugal and Spain, compared to ±0.20€ in the EU average. see [boletim-eletricidade-eurostat_2025s1.pdf](#) (in Portuguese).

⁷ Ellalink (2022), Equiano (2023) and 2Africa (2024) (see [Equiano - Submarine Networks](#) e [Vodafone liga Portugal ao maior sistema de cabos submarinos do mundo - Vodafone Portugal](#)).