PowerlandMap

MARKET INTELLIGENCE

European AI & HPC Capacity Outlook 2026-2028

Judge how much AI and HPC capacity Europe can actually deliver by 2027 and 2028, and who controls it

86
report pages

Extended edition
29 October 2026
Analysis, project evidence and practical models

Original research snapshot dated 4 or 5 October 2026.
Expanded evidence retains its own source-check dates.

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READER GUIDE

Contents and edition guide

This extended edition combines the original research chapters with additional analytical work and a separately dated public-evidence register. The snapshots are not additive.

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Original research coverage

Definitions, European snapshot, country comparisons, operator segmentation, operational AI/HPC, delivery pipeline, density, customer commitments and the original project register.

How to read the update

The opening chapters retain the evidence freeze of 4 October 2026, or 5 October for the UAE study. The expansion was assembled on 29 October. Individual records show the date on which their source was last checked. Extraction is not a new operator confirmation.

Use the expanded record when it supersedes an older baseline statement. Capacity bases and phase boundaries remain explicit. Model inputs are labelled as assumptions. The PDF bookmarks provide direct navigation through the expanded sections.

The public sample contains exactly the first four pages. The complete study includes all sections listed above.

EXECUTIVE ASSESSMENT

Executive summary

The PowerlandMap European AI/HPC classification contains 416 projects, 174 confirmed AI projects and 153 operational records. Only 632.5 MW of operational IT capacity is supported by structured reported IT figures, so public disclosure remains a major constraint on market sizing.

The documented end-2028 reported IT total is 2,745.2 MW. Germany leads the structured country dataset with 1,036.1 MW, followed by Spain at 562 MW, the UK at 271.7 MW, Portugal at 237.5 MW and the Netherlands at 236.7 MW. These totals are documented floors, not a forecast of all European AI compute.

The market is shifting from generic “AI-ready” claims to facility-specific power density and liquid-cooling interfaces. However, readiness does not imply an installed AI workload or open capacity. The commercial question is who controls the power, which hall is ready, and whether the workload can be deployed in the required window.

416	174	2.745 GW
AI/HPC scope projects	confirmed AI	documented end-2028 IT

EVIDENCE FRAMEWORK

Research methodology and data architecture

Study scope. EU27, United Kingdom, Norway and Switzerland. Live capacity at evidence freeze and project targets through end-2028, with longer-dated strategic projects shown separately.

Database snapshot. 5,746 verified supply records across 129 countries; 4,033 live records; 1,713 pipeline records; 67,966.6 MW of sourced IT capacity. The active development pipeline contains 1,671 projects, including 551 under construction.

Canonical identity. PowerlandMap deduplicates campus parents, buildings, acquisitions and operator aliases. A competitor listing is used as a discovery signal, not copied blindly.

Source hierarchy. Primary operator/authority/utility evidence is preferred. Specialist media and directories are used to discover or corroborate records. Unknown values remain unknown.

Quality controls. Capacity basis, evidence grade, confidence, source date, construction stage and RFS provenance are stored separately.

Core field	Rule
IT MW	Only when explicitly supported or separately labelled estimate
Electrical/campus MW	Never silently treated as IT
RFS	Source date/period or labelled PLM estimate
Project status	Canonical pipeline stage
Availability	Requires commercial evidence; site total is insufficient
Source date	Retained for recency review