PowerlandMap

MARKET INTELLIGENCE

European Brownfield & Retrofit Opportunity Study

Screen brownfield and retrofit opportunities for data center development before committing to site due diligence

63
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

Reuse thesis, screening gates, public reference projects, power rights, planning, environmental review, physical reuse, cost and schedule, case studies and transaction strategy.

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

Brownfield conversion is increasingly attractive because grid access, not land, is often the scarce development input. The value of an industrial site is therefore concentrated in the evidence around retained connection rights, HV assets, planning context and schedule.

PowerlandMap’s public-source screening identifies multiple large conversion references: DATA4 Escaudain (700 MW), SoftBank/EDF Bouchain (400 MW), Nebius/Azur Béthune (240 MW), Apto Fuenlabrada (240 MW), EDC One/Pego (800 MW) and several Eclairion/EDF sites. These are projects/reference cases, not properties offered for sale.

The main risk is false optionality: historic industrial consumption does not automatically transfer to a data-center load. Brownfield value should only be underwritten after connection ownership, capacity rights, remediation, change-of-use and reinforcement are understood.

13	800 MW	6
reference opportunities	largest public scale in register	core diligence gates

EVIDENCE FRAMEWORK

Research methodology and data architecture

Study scope. France, Germany, Benelux and Iberia, with selected European comparator cases. Public evidence through 4 October 2026. Confidential mandates are excluded.

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