PowerlandMap

MARKET INTELLIGENCE

European Data Center Development Pipeline 2026-2030

Identify which European data center development projects deserve commercial outreach or investment screening before their first halls are delivered

100
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

Pipeline definitions, country ranking, stage and RFS distributions, date provenance, country profiles, major projects, power and planning milestones, commercial triggers and appendices.

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 active PowerlandMap global pipeline contains 1,671 projects, including 551 under construction. In the selected European set, Germany has 95 active projects, Finland 88, Spain 81, France 71, and the UK and Italy 55 each.

Reported IT capacity is concentrated differently from project count. Spain has 2,808 MW of sourced IT across its active pipeline records, Germany 2,373.3 MW and Finland 1,506 MW. Sweden has 34 active projects but no sourced IT MW in the current structured pipeline aggregate, illustrating a disclosure gap rather than an absence of capacity.

RFS quality remains uneven. Some projects have source-based dates; others use PowerlandMap’s P25/P50/P75 analytical model. Country comparisons should therefore show both project count and RFS provenance, and project-level decisions should prefer physical milestones over headline dates.

1,671	551	5.75 GW
active global projects	under construction	ES+DE+FI sourced IT MW

EVIDENCE FRAMEWORK

Research methodology and data architecture

Study scope. EU27, United Kingdom, Norway and Switzerland. Evidence freeze 4 October 2026; projects targeting delivery through 2030 prioritised, with longer-dated strategic projects retained where material.

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