PowerlandMap

MARKET INTELLIGENCE

European Time-to-Power & Grid Readiness

Compare how quickly a data center can realistically obtain grid power across the main European markets

62
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

Connection stages, queue signals, evidence density, country profiles, physical milestones, planning constraints, brownfield routes and the original diligence matrix.

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

Time-to-power is the primary gating variable for many European data-center projects, but public market commentary often conflates grid proximity, a submitted application and an accepted connection. PowerlandMap keeps requested, reserved, contracted and deliverable capacity as separate fields.

A 2026 cross-market review summarised upper-end wait signals of up to 10 years in the Netherlands, 7 years in Germany, 3-5 years in Spain and under 3 years in Italy. These figures are directional jurisdictional signals, not site-specific service dates.

PowerlandMap’s database shows the evidence problem directly: among 465 French supply records, only a minority expose structured requested/reserved/contracted/deliverable fields. The absence of a structured field is not evidence of no connection; it means the public record is insufficient for a comparable assertion.

10	7	3-5
yrs NL upper-end signal	yrs DE upper-end signal	yrs ES signal

EVIDENCE FRAMEWORK

Research methodology and data architecture

Study scope. France, Germany, Spain, Portugal, Italy, the Netherlands and Nordic markets. Public evidence through 4 October 2026.

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