

MARKET STUDY · EDITION 1 · FREE SAMPLE

European Data Centre Economics 2026

Prices, costs, balance and returns for European colocation, in one evidence base.

THE DATASET BEHIND THE STUDY

Data points by data family

Pricing and rents		972
Market balance		322
Build cost		386
Operating cost		332
Transactions, returns and operator results		204
Contract terms		89
Grid connections		145
Power prices and regulation		204

All data families 2,654 data points

IN BRIEF

- 01 268 data points across 21 markets, each re-read in its original document before publication; evidence to 10 October 2026.
- 02 Asking rents fall with deal size, and the rents large tenants actually pay sit below the asking ceilings.
- 03 Brokers disagree on vacancy and live capacity because their scopes differ. Each reading is printed side by side and never blended.
- 04 In the core markets a new large grid connection is quoted in years, not months.
- 05 Germany requires a PUE of 1.2 or better for data centres starting operation from 1 July 2026; the EU rating scheme issues its first labels from 15 August 2027.

WHAT THE FULL EDITION CONTAINS

- 01 Pricing
- 02 Market balance by metro
- 03 Cost stack
- 04 Unit economics
- 05 Capital markets and operator benchmarks
- 06 Demand and who is building
- 07 Contract terms
- 08 Regulation timeline
- 09 What this means for a provider
- 10 Data confidence
- 11 Method and limits
- 12 Data tables