

France

Country Profile

This country profile is part of Foundations at risk, a research programme by Economist Impact that examines the emerging threats affecting data centres globally and evaluates country-level exposure and resilience.

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Key insights

France is one of the top five data-centre markets globally. Its nuclear-powered grid gives it an advantage.

A strong policy environment supports innovation, cybersecurity and environmental sustainability, but **extreme heat events and energy challenges affect uptime and operational costs.**

Marseille's subsea connectivity and lower land costs make the **Mediterranean city ripe for data-centre expansion.**

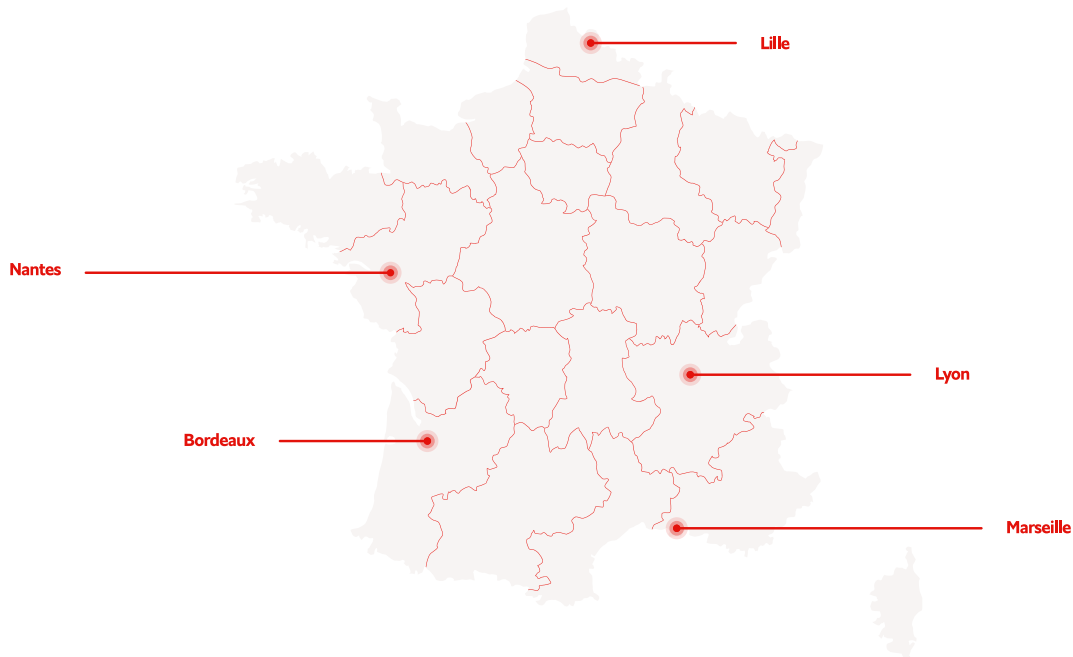


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Market overview

France enjoys a leading position in the European data centre market, anchored by Paris, which has attracted major data centre investments. France is home to all major hyperscalers and leading co-location providers, many of whom are investing heavily in the country: Brookfield and Data4 are planning to invest €20 billion to increase data centre capacity by more than 500 MW.¹ The sector is expected to grow at an average of 11% each year between 2024 and 2030, to reach US\$6.4bn. Vacancy rates in Paris fell by over 50%, to just under 8%, between 2024 and 2025, underscoring possible increases in rental costs unless regional diversification continues across the country.^{2,3}

Figure 1: Map of France highlighting new cities where investments are being made



Key data

Scale

300+ data centres

Capacity

more than **1,000 MW** of built-out total IT load capacity

Growth

11% each year between 2024 and 2030

Geographic hubs

Paris, Lille, Marseille, Lyon, Nantes and Bordeaux

Source: Pan American Finance. 2025 Global Data Center Market Report. Available at: <https://panamericanfinance.com/insights/energy-transition/global-datacenter-market-report-2025/regional-market-overviews-gdmr2025/france-gdmr2025>

¹ Matthew Gooding. Brookfield and Data4 to spend €20bn on AI infrastructure in France. February 10 2025. Available at: <https://www.datacenterdynamics.com/en/news/brookfield-and-data4-to-spend-20bn-on-ai-infrastructure-in-france/>

² CBRE. Global Data Center Trends 2025. June 24 2025. Available at: <https://www.cbre.com/insights/reports/global-data-center-trends-2025>

³ Research and Markets. France Data Center Market - Investment Analysis & Growth Opportunities 2025-2030. 2025. Available at: <https://www.researchandmarkets.com/report/france-data-centers-market>

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Key legislation

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1

Loi pour une République Numérique: promotes transparency, digital trust, and better coordination between public and private actors

2

France 2030: a €54 billion plan to support innovation and reinforce the industrial and technological sovereignty

3

French Quantum Plan/National Quantum Strategy: provides a roadmap for the government to coordinate and accelerate research and development in quantum science and technology

4

European Chips Act: bolsters Europe's semiconductor industry, enhances its resilience, reduces external dependencies, and aims to achieve a 20% global market share in advanced chips by 2030

5

EU's NIS2 Directive: strengthens cybersecurity across the EU by expanding the original directive's scope to more critical sectors and requiring entities to implement robust risk management measures and incident reporting

6

EU Energy Efficiency Directive: legislative framework aimed at reducing energy consumption and promoting energy efficiency across various sectors, particularly data centres

Investment landscape

The French government's active promotion of the data centre sector and aim to close the gap with more mature European markets have attracted strong international interest and investment from both governments and the private sector.⁴ Investors, especially global hyperscalers, are also attracted to France's energy mix: its national grid is about two-thirds nuclear-powered, allowing operators to access stable, low-carbon electricity.^{5,6}

Environmental compliance is also tightening. Although there are no blanket requirements for water or heat reuse, large facilities face case-by-case environmental scrutiny under French and EU laws. The new EU Energy Efficiency Directive mandates reporting on energy and water use for large data centres.^{7,8,9}



⁴ France 24. France quietly catches rivals in battle for data centre supremacy. July 24 2024. Available at: <https://www.france24.com/en/live-news/20240724-france-quietly-catches-rivals-in-battle-for-data-centre-supremacy>

⁵ World Nuclear Association. Nuclear Power in France. Available at: <https://world-nuclear.org/information-library/country-profiles/countries-a-f/france>

⁶ Benjamin Mallet. France's EDF in talks on deals to power three 1GW data centres. November 7 2024. Available at: <https://www.reuters.com/business/energy/frances-edf-talks-deals-power-three-1gw-data-centres-2024-11-07/>

⁷ Légifrance. Code de l'environnement. Available at: https://www.legifrance.gouv.fr/codes/texte_lc/LEGITEXT000006074220/

⁸ Légifrance. Code de l'énergie. Available at: https://www.legifrance.gouv.fr/codes/texte_lc/LEGITEXT000023983208/

⁹ European Commission. Commission adopts EU-wide scheme for rating sustainability of data centres. March 15 2024. Available at: https://energy.ec.europa.eu/news/commission-adopts-eu-wide-scheme-rating-sustainability-data-centres-2024-03-15_en

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Key Risks



Physical

Despite France's nuclear-powered grid, data centres in France and three other major EU economies consumed nearly two-thirds of all electricity used by data centres in the region.¹⁰ Its data centres are exposed to climate risks, notably heatwaves. France is one of nine countries that are most vulnerable to heatwaves, underscoring the urgent need for robust climate adaptation strategies and resilient infrastructure design in the data centre industry.¹¹



Cybersecurity

France's cybersecurity agency handled almost 4,500 reported cases of cyber attacks in 2024, a 15% year-on-year rise.¹² EIU rates France's cyber-attack risk as high, but strong safeguarding measures make it unlikely that France will succumb to these attacks.^{13, 14}



Geopolitical

Europe accounts for just under 10% of global semiconductor production, largely because of the French company STMicroelectronics.¹⁵ France still relies on imported semiconductors, which have a concentrated global supply chain dominated by firms in Asia and the US, creating significant trade risks.



¹⁰ European Commission. Energy Consumption in Data Centres and Broadband Communication Networks in the EU. 2024. Available at: https://interactdc.com/static/images/documents/JRC135926_01.pdf

¹¹ EM-DAT. Known Issues and Limitations—Specific Biases. Available at: <https://doc.emdat.be/docs/known-issues-and-limitations/specific-biases/#:~:text=Heat%20waves%20are%20often%20overlooked,%2C%20Spain%2C%20and%20Germany>

¹² ANSSI (the French Cybersecurity Agency). ANSSI publishes its 2024 annual review. May 2 2025. Available at: <https://cyber.gouv.fr/en/actualites/anssi-publishes-its-2024-annual-review>

¹³ Economist Intelligence Unit. Operational Risk. Available at: <https://viewpoint.eiu.com/analysis/risk/XG/FR/operational-risk>

¹⁴ Ibid

¹⁵ Sebastien Dauve. Polytechnique Insights. Semiconductors: can European industry regain ground? April 2 2025. Available at: <https://www.polytechnique-insights.com/en/columns/industry/semiconductors-can-europe-regain-ground/>

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Action Points for Leadership

Diversify geographically

Capitalise on France's nuclear-driven, stable, low-carbon electricity with continued expansion of data centres outside of Paris.

Fortify cyber defences

Maintain proactive cybersecurity management, leveraging both country and EU frameworks and continuous real-time threat monitoring.

Secure semiconductor supply

Diversify sourcing to reduce dependency on a concentrated global supply chain and explore increased domestic production. Consider wider EU production efforts to offset risk.

Accelerate sustainability

Engineer for heatwaves and invest in heat-recovery technologies to build resilience to heatwaves.

