

Built for what's next: designing resilience into digital infrastructure

# France

## Country profile

## Summary

Strong hyperscale investment, rising demand for artificial intelligence and abundant low-carbon nuclear power are making France one of Europe's fastest-growing data centre markets.

Compared with Germany and the United Kingdom, France has a stable low-carbon electricity supply. But heatwaves, water stress and mounting pressure on established hubs, including Paris, still threaten resilience.

Resilience efforts focus on cyber-security, infrastructure protection and reliable energy supplies. Government policy also supports digital sovereignty, semiconductor investment and sustainability.

The next phase of resilience maturity will depend on adapting to climate risks, expanding beyond established hubs and preparing for disruptions that affect power, connectivity and critical supply chains.

## Key data

### Scale

**322**  
data centres<sup>1</sup>

### Capacity

**714**  
MW<sup>2</sup> (end-2024)

### Capacity growth

**17%**  
annual IT-load growth  
(estimated 2026–2031)<sup>3</sup>

### Geographic hubs

Paris is France's dominant data centre hub, anchoring the country's hyperscale and enterprise market. But as demand continues to grow, investment is increasingly extending beyond the capital. Marseille is strengthening its position as France's principal international connectivity gateway through its concentration of submarine cables, which provide direct links to Africa, the Middle East and Asia. Lyon and Lille are also emerging as attractive locations for new capacity and regional expansion.<sup>4,5</sup>



## About this research

Built for what's next is an Economist Enterprise research programme, sponsored by global property insurer FM. It examines how risks across energy, people and technology often come together to disrupt digital infrastructure, and how organisations can best prepare to meet those shocks.

The research is based on:

- A global survey of 1,800 data centre stakeholders across the digital infrastructure value chain from 21 countries
- Interviews with global industry experts
- An expert panel discussion

# Market overview

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## Growth trends

France's data centre market is projected to reach approximately €10bn (US\$11bn) by 2031, growing at a compound annual rate of about 10% between 2026 and 2031. Growth is being driven by cloud adoption, AI and wider digital transformation. France's predominantly nuclear-powered grid provides a reliable source of low-carbon electricity, supporting hyperscale investment. Paris remains France's primary data centre market, while Marseille is emerging as a major secondary hub, supported by extensive subsea cable connectivity linking Europe with Africa, the Middle East and Asia.<sup>6,7,8,9</sup>

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## Investment trends

Investment is accelerating. In 2025 France announced a €109bn (~US\$126bn) AI investment plan at the Artificial Intelligence Action Summit in Paris. Hyperscale capital is flowing rapidly to align infrastructure with France's National AI Strategy. France is attracting substantial investment in cloud and AI infrastructure. In 2026 Amazon announced plans to invest more than €15bn (US\$17bn) in France between 2026 and 2028, including the expansion of its cloud and AI capabilities. Wider AI-infrastructure commitments include an initial €45bn (~US\$52bn) investment by SoftBank to develop approximately 3GW of data centre capacity by 2031. This highlights the scale of demand being attracted by France's low-carbon electricity system.<sup>10,11,12</sup>



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## Key regulatory developments

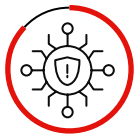
France's Green Industry Law, which came into force in October 2024, cut environmental approval times from 17 months to nine. In April 2025 the government also implemented the EU Energy Efficiency Directive, introducing stricter energy-performance requirements for new facilities. Operators that meet demanding efficiency standards can qualify for partial or full exemptions from the electricity excise tax. Companies can also claim a research tax credit covering 30% of eligible research and development costs up to €100m (US\$115m). Proposed legislation would classify qualifying data centres as *projet d'intérêt national majeur* (PINM), speeding up planning approvals and prioritising grid connections for eligible developments.<sup>13,14,15</sup>

# Key risks

Economist Enterprise's survey found that French data centre stakeholders perceive the following as the **greatest systemic risks facing the sector**:

**89%****Extreme weather  
or climate impact**

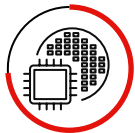
Heatwaves and drought are increasing climate risks for French data centres. In 2025 France experienced above-normal wildfires, flash floods and rising subsidence, causing growing pressure on cooling, water availability and infrastructure resilience as AI demand accelerates.<sup>16</sup>

**87%****Cyber-attacks**

High-profile infrastructure breaches, such as the exposure of personal data held on the FRANCE TRAVAIL information system, resulted in heavy regulatory fines. These highlight a vulnerable threat landscape that poses an ongoing hazard to network uptime.<sup>17</sup>

**78%****Grid capacity  
constraints**

Despite the advantages of low-carbon nuclear capacity, the massive scale of planned hyperscale AI deployments strains regional substations, making grid connection timelines a key operational hurdle.<sup>18,19</sup>

**74%****Limited critical  
minerals,  
semiconductors  
or cloud vendors**

Concentration in global semiconductor supply chains remains a strategic vulnerability, prompting efforts to strengthen domestic production capacity. France is expanding its semiconductor manufacturing ecosystem, including through the Tessalia initiative, which aims to increase European capacity for advanced semiconductor packaging and reduce dependence on overseas supply chains.<sup>20</sup>

**67%****Investment or  
insurance withdrawal**

Growing climate exposure combined with strict sovereign compliance requirements raises capital risk profiles, causing financing friction for less-capitalised operations.

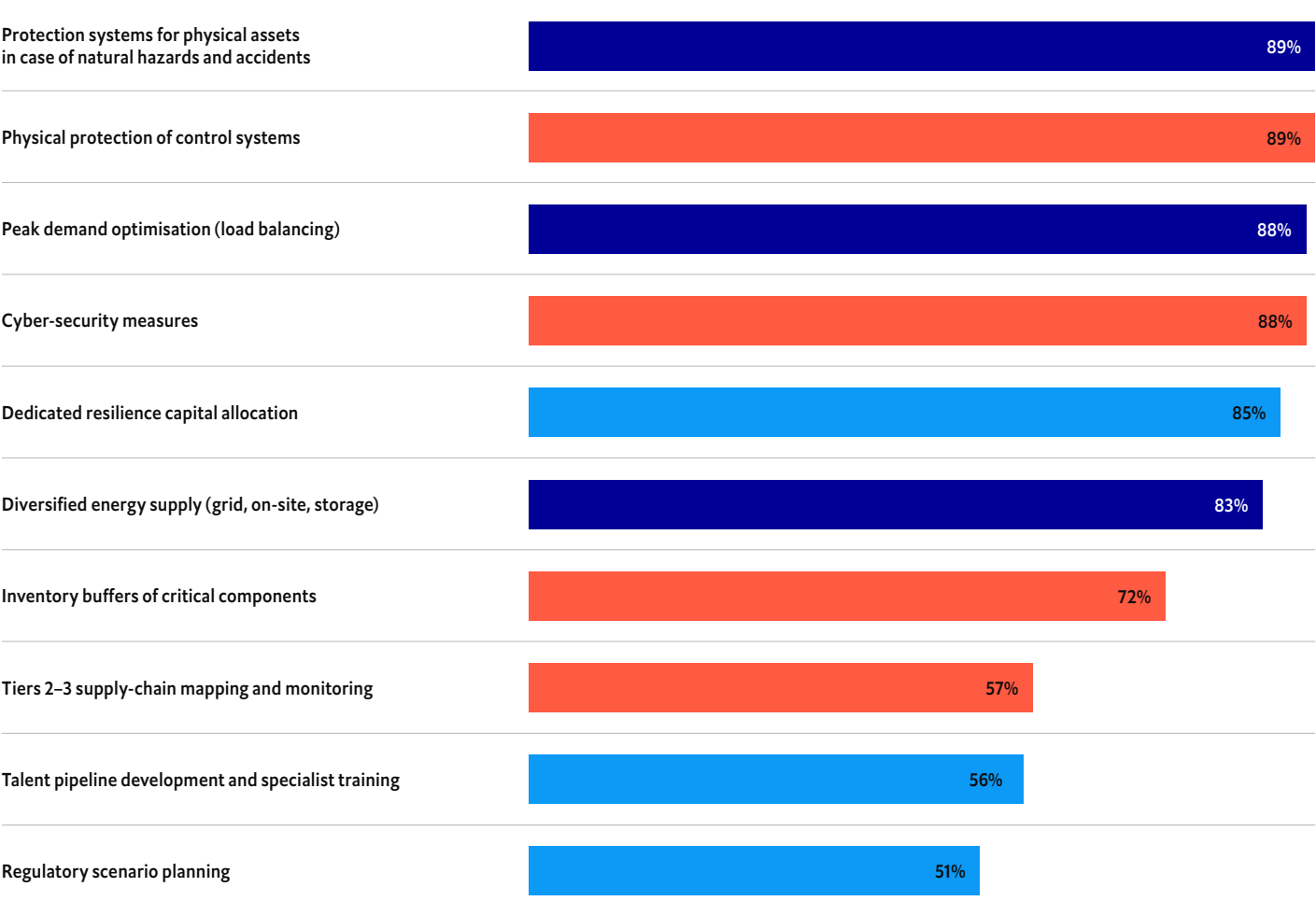
Source: Economist Enterprise survey, February-April 2026



# Resilience measures

## Top 10 resilience measures adopted by data centre stakeholders in France

■ Energy and environment   ■ Governance and human capital   ■ Technology and supply-chain digital infrastructure



Source: Economist Enterprise survey, February-April 2026

### Key takeaway

In France, resilience efforts focus on cyber-security, infrastructure protection and energy reliability. Strong governance and dedicated resilience spending suggest growing awareness of strategic risks. However, relatively few organisations are diversifying geographically or testing how several disruptions could occur at the same time. Strengthening these areas would improve resilience as risks become more closely connected.

# Priority actions

## Least-adopted resilience measures and underestimated risks among data centre stakeholders

| Risks                                  | Measures                                                                  |
|----------------------------------------|---------------------------------------------------------------------------|
| Limited land availability<br>3%        | Multi-cloud, multi-vendor and network redundancy<br>6%                    |
| Community backlash<br>4%               | Geographic diversification across grids and jurisdictions<br>7%           |
| Water scarcity affecting cooling<br>5% | Community engagement<br>10%                                               |
| Technology obsolescence<br>9%          | Low-water or alternative cooling systems<br>17%                           |
|                                        | Stress-testing against sustained power curtailment<br>18%                 |
|                                        | Secured or diversified water supply<br>23%                                |
|                                        | Resilient and resource-efficient design and construction standards<br>25% |

Source: Economist Enterprise survey, February-April 2026

### Design for climate adaptation

Water scarcity affecting cooling is cited by just 5% of stakeholders. Encouragingly, adoption of resilience measures exceeds this level of concern, suggesting some degree of proactive action. However, uptake remains relatively limited overall, with just 17% adopting low-water cooling and 23% diversifying their water supplies.

### Key actions:

- 1 Assess heat, flood and water-stress exposure before site selection and before retrofits.
- 2 Use low-water, closed-loop or hybrid cooling where local conditions make water access uncertain.
- 3 Co-ordinate with municipalities, utilities, tenants and communities on water-use transparency and emergency cooling plans.
- 4 Include drought restrictions and heatwave grid stress in operational and insurance stress tests.
- 5 Assess whether regional sites provide genuinely independent power and connectivity pathways alongside their land, rental and energy-cost advantages.
- 6 Apply consistent engineering and operating standards across regional sites.

### Diversify critical infrastructure and service dependencies

Limited land availability is cited by only 3% of stakeholders, despite mounting pressure on France’s established data centre hubs as demand for AI-ready capacity grows. Concentration around a small number of locations can increase exposure to grid constraints, infrastructure bottlenecks and future expansion challenges. Yet geographic diversification is adopted by only 7% of stakeholders.

### Key actions:

- 1 Compare regional sites using grid availability, subsea/fibre connectivity, water exposure and planning readiness.
- 2 Co-ordinate early with RTE, the electricity transmission system operator, local authorities, operators, investors and tenants on connection timelines.
- 3 Use Marseille and other regional hubs to diversify latency, cable and energy dependencies.
- 4 Evaluate resilience trade-offs alongside rental, land and power-cost advantages.

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## Build future-ready infrastructure

Technological obsolescence is viewed as a relatively low risk, cited by just 9% of stakeholders. Yet our stress tests suggest that rapid advances in AI, cooling technologies could shorten asset lifecycles and increase stranded-asset risk. However, adoption of resilient and resource-efficient design and construction standards (25%) and asset-life and obsolescence stress-testing (27%) remains limited.

### Key actions:

- 1** Set shared design and engineering assumptions for future rack density, cooling, power, building structure and security needs before capital is committed.
- 2** Use asset-life stress tests to compare retrofit costs, downtime and residual value under multiple technology and building-design pathways.
- 3** Align owners, tenants, technology vendors, insurers and investors on upgrade triggers and funding responsibilities.
- 4** Build modular power, cooling and data-network pathways into new and refurbished facilities.
- 5** Build the workforce capability needed to operate, maintain and upgrade increasingly complex infrastructure.

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## Improve preparedness for compound disruptions

Resilience efforts remain focused on individual risks, while adoption of sustained power-curtailment stress testing (18%) and multi-cloud, multi-vendor and network redundancy remains relatively low (6%). However, France's leading risks—including heatwaves, cyber-attacks, grid constraints and supply-chain disruption—are increasingly interconnected.

### Key actions:

- 1** Map dependencies across power, cooling water, cloud services, subsea connectivity and critical suppliers.
- 2** Test scenarios combining heatwaves, cooling stress, cyber incidents and equipment delays.
- 3** Run joint exercises across stakeholders including tenants, operators, investors and infrastructure providers, that combine cyber incidents with power shortages, heat stress or critical-component delays.
- 4** Strengthen co-ordination between operators, utilities, infrastructure providers, tenants and public authorities.
- 5** Use exercise findings to update maintenance, critical spares, recovery plans, staff preparedness and capital investment.

## Conclusion

The data centre stakeholders in France benefit from strong low-carbon power, policy support and emerging regional hubs. The next stage of resilience maturity will require climate-aware design, reduced technology and location concentration and more regular ecosystem-level testing of interconnected shocks.

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