

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

The Netherlands

Country profile

Summary

Demand for artificial intelligence, strong digital connectivity and sustainability goals are reshaping the Netherlands' data centre sector.

As AI workloads and power demand grow, grid capacity, cyber security and climate resilience have become the main operational challenges.

Resilience efforts focus on energy efficiency, cyber security and infrastructure protection, supported by a strong regulatory framework.

The next stage of resilience will depend on making existing infrastructure more adaptable, diversifying geographically and preparing for compound disruptions.

Key data

Scale

298
data centres¹

Capacity

1,090
MW²

Capacity growth

5%
annual IT-load growth
(estimated 2025–2030)³

Geographic hubs

Amsterdam is the Netherlands' primary data centre hub, accounting for around 78% of national capacity. But electricity network constraints and planning restrictions are reshaping investment. While existing approved projects continue to move forward, future expansion is increasingly being redirected towards locations such as Eemshaven and Wieringermeer, where greater land availability and access to offshore wind energy support large-scale data centre development.^{4,5}



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

Growth trends

Amsterdam remains the Netherlands' dominant data centre market, but rising demand and capacity constraints are reshaping where future growth can occur. Driven by AI and wider digitisation, demand for data centre capacity has increased, contributing to a fall in vacancy in and around Amsterdam from 24% to around 9% over five years. North Holland expects the number of data centres to rise from 67 in 2025 to 83 by 2030, with around 20 projects currently in the permitting phase. However, grid congestion, limited power availability and restrictive planning conditions are constraining further expansion around Amsterdam. As supply tightens, operators are increasingly exploring locations such as Rotterdam, The Hague, Almere, Lelystad and Groningen, where power availability, connectivity, residual-heat opportunities, flood risk and permitting will shape development. This geographic diversification is expected to support faster growth elsewhere in the Netherlands through 2031.^{6,7,8}

Investment trends

Demand for AI-ready capacity, strong connectivity and abundant renewable energy continue to attract investment. Between 2026 and 2031 more than €17bn (US\$20bn) is expected to flow into the Dutch data centre market. Construction costs remain lower than in Britain, Germany and France, helping maintain competitiveness. But, as in London, Paris or Frankfurt, power constraints and planning restrictions are increasingly directing new investment beyond Amsterdam to regional hubs.^{9,10,11}



Key regulatory developments

Unlike several European countries that are speeding up approvals for digital infrastructure, the Netherlands is taking a more selective approach to hyperscale development. Since January 2024, national planning rules have prohibited new hyperscale data centres larger than 10 hectares or with capacity above 70MW, except in designated locations in Het Hogeland (Eemshaven) and Hollands Kroon (Agriport A7). Amsterdam has also paused new data centre developments until at least 2030. Together with regional policies placing greater emphasis on sustainability, energy use and environmental impact, these restrictions are directing development towards more controlled and resource-efficient growth.^{12,13,14}

Key risks

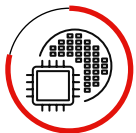
Economist Enterprise's survey found that data centre stakeholders in the Netherlands perceive the following as the **greatest systemic risks facing the sector**:

**86%****Extreme weather
or climate impact**

Climate-related risks are intensifying in the Netherlands. In June 2026, with temperatures approaching 40°C, the country issued its first Code Red warning for extreme heat, highlighting the growing need for resilient cooling systems and climate-adapted digital infrastructure.¹⁵

**84%****Cyber-attacks**

As one of Europe's largest digital hubs, the Netherlands faces growing cyber threats against critical infrastructure, cloud services and digital networks. In May 2026, Dutch authorities dismantled a botnet controlling 17m infected devices through 200 servers located in the Netherlands, illustrating both the scale and sophistication of threats targeting critical digital infrastructure.¹⁶

**79%****Limited critical
minerals,
semiconductors
or cloud vendors**

Growing AI demand is increasing competition for advanced semiconductors, electrical equipment and specialised components. Long lead times for AI hardware could delay new developments, making diversified supply chains and technology partnerships more important.

**74%****Investment or
insurance withdrawal**

Amsterdam's pause on new data centre development and wider planning constraints are redirecting investment towards alternative regional hubs. Delays and greater development uncertainty could make investors and insurers more selective, placing more emphasis on resilience, sustainability and long-term performance.

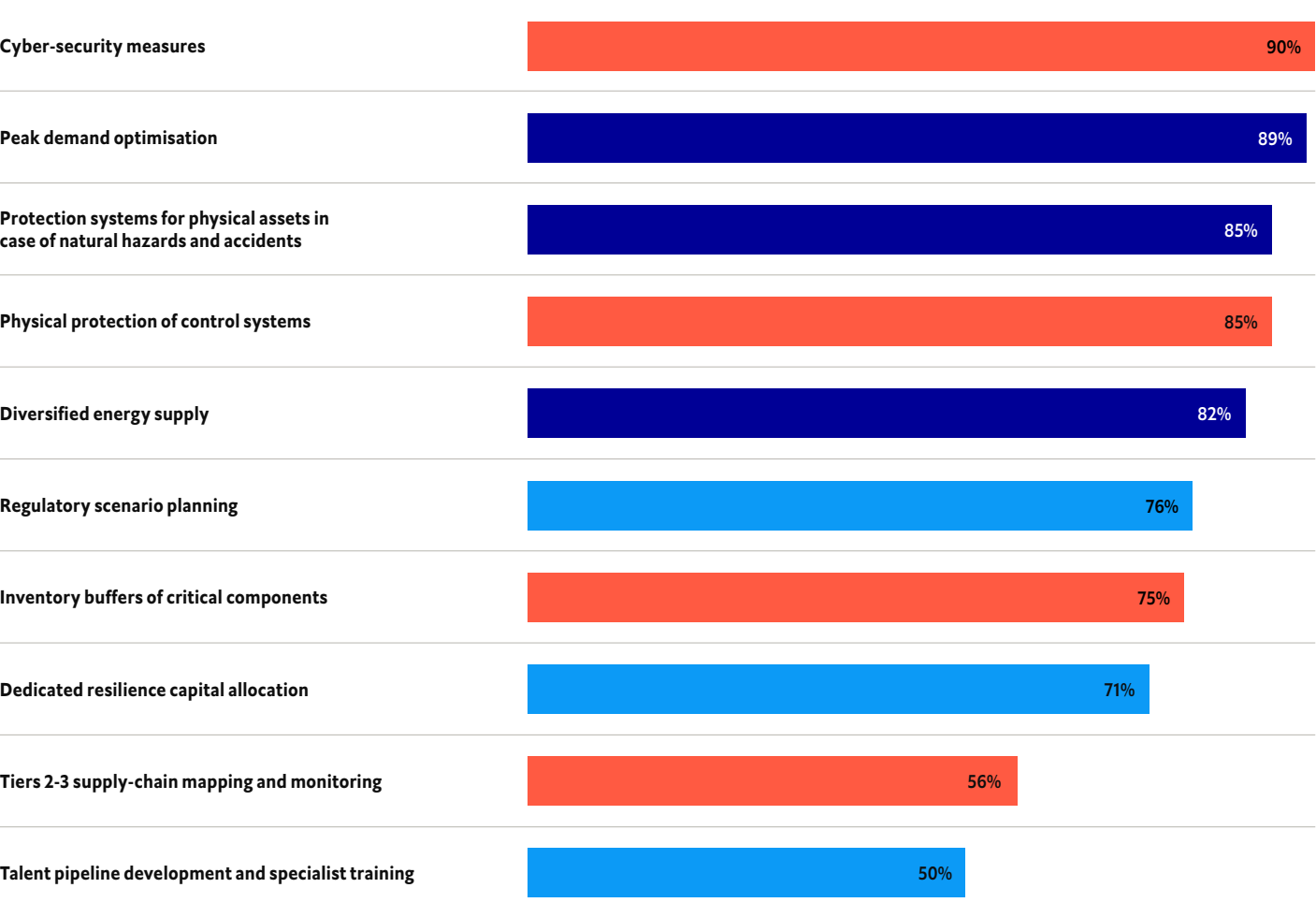
**56%****Grid capacity
constraints**

Electricity networks have become a major constraint, particularly around North Holland. Long waits for new grid connections are delaying commercial projects and influencing investment decisions, while operators increasingly seek locations with available power capacity or invest in on-site energy solutions as grid reinforcement progresses.^{17,18,19,20}

Resilience measures

Top 10 resilience measures adopted by data centre stakeholders in the Netherlands

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



Source: Economist Enterprise survey, February-April 2026

Key takeaway

Strong adoption of diversified energy supply reflects growing attention to power constraints, while cyber resilience remains a core strength. Lower adoption of dedicated resilience budgets, specialist talent development and community engagement suggests an opportunity to strengthen organisational capability and long-term resilience.

Priority actions

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

Risks	Measures
Limited land availability	Multi-cloud, multi-vendor and network redundancy
Sabotage of critical digital infrastructure	Geographic diversification across grids and jurisdictions
Community backlash	Community engagement
Data centre technologies become obsolete	Stress-testing against sustained power curtailment
Water scarcity affecting cooling	Low-water or alternative cooling systems
	Asset-life and obsolescence stress-testing

Source: Economist Enterprise survey, February-April 2026

Building community support

Few survey respondents rank community backlash among their most significant resilience risks (6%). Balancing digital infrastructure with competing demands for land, energy and the environment will make public support increasingly important. However, only 16% of stakeholders invest in community engagement, leaving scope for earlier consultation, greater transparency and better co-ordination.

Key actions:

- 1 Establish collaborative regional forums uniting operators, utility providers, local authorities and community representatives.
- 2 Maintain transparent communication channels detailing data centre land use, power draw and environmental metrics.
- 3 Embed comprehensive social-impact reviews into early site selection and expansion assessments.
- 4 Factor public sentiment trends and permitting delays into corporate risk-modeling exercises.

Build future-ready infrastructure

AI infrastructure will require higher rack densities, more power and new cooling technologies. Yet technological obsolescence (6%) and water scarcity (7%) receive relatively little attention. Only 23% of stakeholders test for technology obsolescence and just 22% have adopted low-water or alternative cooling systems. In a market constrained by land, power and planning limits, extending the life and flexibility of existing assets will become increasingly important.

Key actions:

- 1 Set shared design and engineering assumptions for future rack density, cooling, power and security needs before capital is committed.
- 2 Use asset-life stress tests to compare retrofit costs, downtime and residual value under multiple technology 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 Strengthen the engineering and operational skills needed to maintain and upgrade increasingly complex infrastructure.

Diversify critical infrastructure and service dependencies

Very few stakeholders see land availability as a major resilience risk (1%). Yet planning restrictions, limited grid capacity and scarce development land are concentrating data centres in relatively few locations. Similar concentration exists among cloud providers, technology suppliers and network routes. Only 10% of stakeholders have diversified geographically and just 7% use multi-cloud, multi-vendor or network redundancy. Reducing these dependencies will strengthen business continuity. As the Netherlands manages digital infrastructure growth within an increasingly constrained planning environment, reducing dependence on individual sites, grids and technology providers will be essential to strengthening business continuity.

Key actions:

- 1** Diversify critical workloads across cloud platforms, network providers and regions to reduce dependence on a single provider or location.
- 2** Evaluate new sites using power availability, connectivity, planning constraints and climate resilience alongside commercial considerations.
- 3** Ensure geographic diversification creates genuinely independent power, connectivity and operational pathways.
- 4** Map dependencies across grids, cloud services, fibre connectivity and critical suppliers to identify single points of failure.
- 5** Test how the loss of a site, grid connection or cloud provider could affect operations and use the findings to strengthen continuity planning.
- 6** Apply consistent engineering and operating standards across regional facilities.

Conclusion

Dutch data centre operators have built strong foundations in energy resilience, cyber security and infrastructure protection. The next stage of resilience will depend on making existing infrastructure more adaptable, reducing concentration across critical infrastructure and improving preparedness for interconnected disruptions. Achieving this will require closer collaboration among operators, utilities, technology providers, investors and policymakers.

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About FM

This research programme is sponsored by FM, one of the world's largest commercial property insurers, and is dedicated to helping organisations build resilience and protect long-term business value. Drawing on nearly two centuries of engineering expertise, scientific research and loss-prevention experience, FM helps clients better understand and manage the risks that affect critical operations and infrastructure.

FM Intellium brings together research, engineering insight and resilience intelligence to help organisations evaluate, strengthen and benchmark resilience across the digital infrastructure ecosystem. By providing a clearer view of resilience vulnerabilities, system interdependencies and emerging risks, FM Intellium supports better business, investment and policy decisions in an increasingly complex digital environment.