

DANISH DATA CENTER INDUSTRY

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Doing data centers differently

The Danish market and the policy landscape

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THE STARTING POINT

The constraint is no longer demand. It is the grid – and local opposition

Denmark has chosen to prioritise. We think it can also be the start of a better model for how data centers connect, contribute and get planned.



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Denmark's Data Center Ecosystem

Danish Data Center Industry (DDI) Member Ecosystem

200+
Members

DC Operators

Energy & Power

Cooling Systems

Connectivity

Construction & Engineering

IT Infrastructure

Legal & Consulting

Public, Education & Municipalities

Source: Danish Data Center Industry (DDI)

THE DANISH MARKET

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Denmark's data center market in 2026

Capacity is set to nearly triple by 2030, from 400 MW today to 1.2 GW.

398 MW	installed capacity today (+63 MW in the past year)
208 MW	under construction right now
465 MW	expected in total by the end of 2026
1,184 MW	expected by 2030 – roughly 1.2 GW



Segments towards 2030

Hyperscale

318 MW → 648 MW

Colocation

147 MW → 536 MW

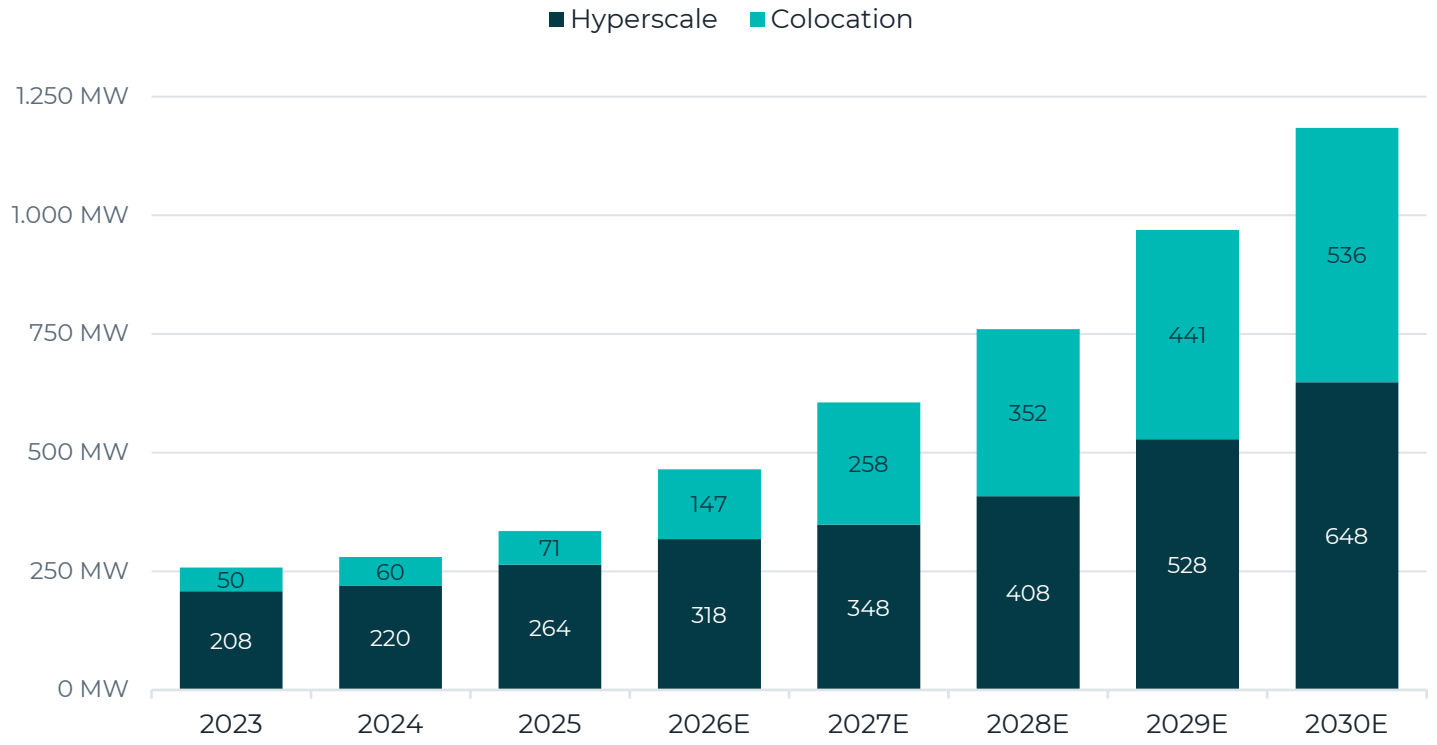
74 % of capacity sits in Jutland and Funen. Colocation grows from ~30 % to ~45 % of the market.

Source: DDI, Danish Data Center Market Report 2026. Installed power capacity; data centers typically run at 60–70 % of installed capacity.

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Steady growth, and colocation is catching up

Capacity grew 54 % from 2023 to 2026. Colocation is the fastest-growing segment.



+54 %

capacity growth 2023–2026, 15 % a year

×3.6

colocation growth 2026–2030 (147 → 536 MW)

74 %

of capacity in Jutland and Funen

Source: DDI, Danish Data Center Market Report 2026. 2023–2025 installed; 2026E–2030E based on announced projects and master plans (E = expected, end of year).

THE DANISH MARKET

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A market maturing beyond hyperscale

42 % of Danish enterprises use AI – the highest share in the EU. Demand is real, and more diverse.



Hyperscale anchors growth

Microsoft launched its Denmark East region in 2026 and is planning three sites in Varde and Esbjerg. Google expanding in Fredericia



Colocation goes AI-ready

Consolidation and repositioning: Equinix/CPP–atNorth, Templus–AtlasEdge, STACK's retail assets relaunched as Vaultica.



Danish capital enters

Thylander's first 12 MW phase in Esbjerg and pension-backed developments signal locally anchored investment.



Sovereignty moves into contracts

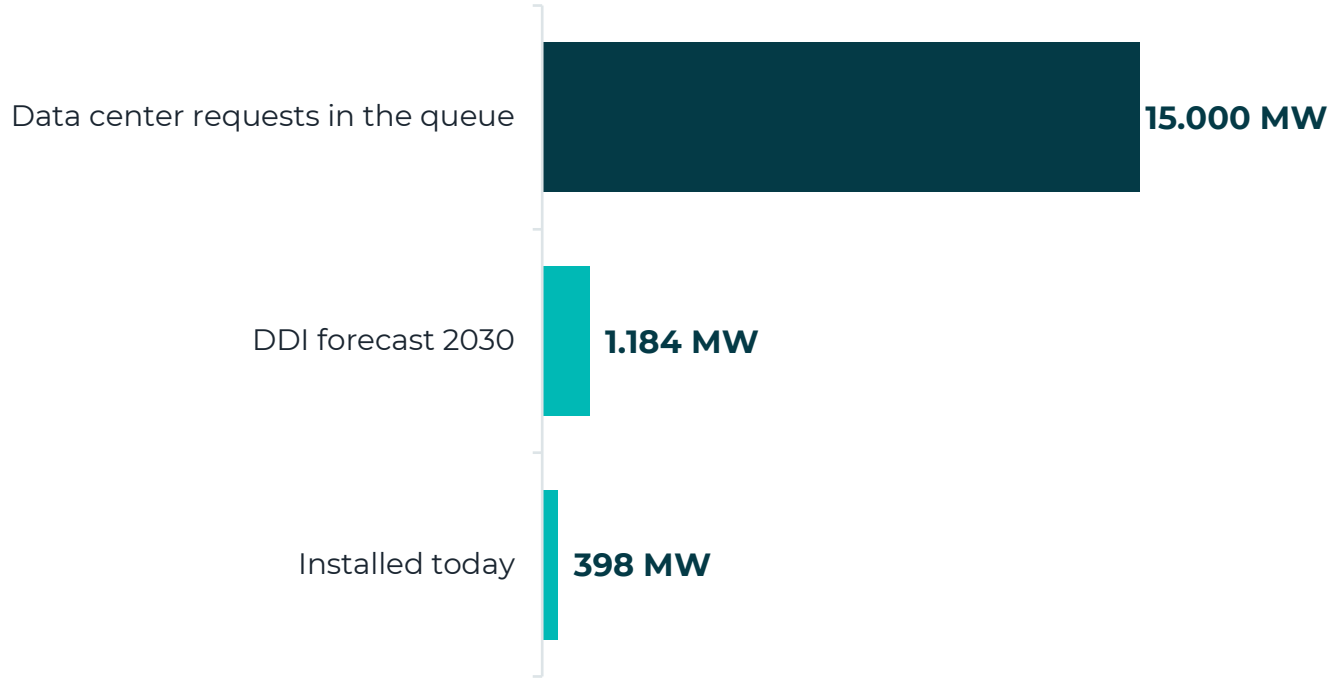
Aeven with T-Systems and Netic with OVHcloud bring European cloud options to Danish customers.

Sources: DDI, Danish Data Center Market Report 2026; Eurostat, Artificial intelligence in enterprises (2025).

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The queue is not the market

Data center requests in the grid queue are more than ten times what we expect to be built by 2030.



15 GW

of data center requests in a Danish queue of ~60 GW across all sectors.

1 GW

by 2030 in the Danish Energy Agency's own outlook (AF25), rising to 5 GW by 2050.

Policy built on the queue risks solving the wrong problem. Maturity screening is the right first step.

Sources: DDI, Danish Data Center Market Report 2026; Danish Energy Agency, Analyseforudsætninger til Energinet 2025 (AF25).

The Danish Emergency Grid Package

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Four categories replace first-come, first-served

Bill L 23 (tabled 20 August 2026) lets grid operators prioritise – and refuse – connections where capacity is short.

Highest priority → lowest priority

CATEGORY 1	CATEGORY 2	CATEGORY 3	CATEGORY 4
Protected needs	**Electrification & green transition**	**Standalone storage**	**Very large consumers**
Households, small businesses, normal load growth – and critical functions such as hospitals, defence and emergency services, incl. data centers supporting them.	Electrification of industry, transport and heat, PtX, hydrogen, CCS, biogas – and anything not in 1, 3 or 4.	Projects whose main function is system services, e.g. batteries and storage beyond own needs.	Very large, sustained capacity needs. At first implementation: data centers, deemed 'typically not geographically bound'.

Categories 1 and 2 cannot be refused for lack of capacity. Categories 3 and 4 can.

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Industry solutions for the grid constraints

Clean up the queue

Remove immature and speculative projects

Out of 15-16 GW in grid queue, only a small share are mature and ready-to-go projects. By cleaning up the queue, more realistic numbers can be the focus of political priorities

Gradual Ramp Up

Datacenters don't need the full capacity day one

Datacenters are typically build in phases, so the need for power increases gradually. Connection to grid capacity could be planned according to the ramp up plan, clearing up capacity in the short run

Flexibility/interruptibility

Get more capacity out of existing grid

On average the power grid only uses 15-20% of the capacity. With flexible consumers and more intelligent use of data, this could increase significantly – and every percentage point counts

Colocation

Digital Energy Hubs

By colocating datacentres with renewable energy production and storage, capacity can accellerated and pressure will be less on the grid

NATIONAL STRATEGY

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Denmark needs a national datacenter strategy

Announced 11 August 2026 by the Minister for Business & Competitiveness, Martin Lidegaard. Due before the end of the year.

> *We need to figure out how many we should have, where they should be placed, and what they should deliver, so they can support the green transition rather than become a problem.*

Martin Lidegaard, Minister for Business & Competitiveness

How much? How much capacity does Denmark need for AI and digitalisation?

Who? Who should build, own and finance it?

Where? Where should it go to benefit the grid and tap renewables?

Our ask: plan data centers, grids and renewables together from the start – and use the strategy to replace a sector ranking with a plan.

Sources: Kristeligt Dagblad/Ritzau (11 Aug 2026); DDI statement on the national data center strategy (Aug 2026).

European perspective

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Europe is moving in the same direction

Across Europe, access to power is becoming conditional on what a project contributes.

DEC 2025

EU · Grid connection guidance

No first-come, first-served in EU law. Prioritise on objective, transparent, non-discriminatory criteria.

PROPOSED 2026

EU · Cloud and AI Development Act

Triple EU capacity in 5–7 years. Acceleration zones picked for grid capacity, clean power and heat reuse.

EED

EU · Data center rating scheme

A common rating on energy and water efficiency makes performance comparable across markets.

DEC 2025

Ireland

New data centers must bring on-site or nearby generation/storage and match 80% of demand with new renewables.

ACM

Netherlands

Grid operators may prioritise projects that relieve congestion or serve societal needs.

AUG 2026

Finland

Government preparing grid-priority rules: maturity over first-come, first-served. Bill expected this autumn.

AUG 2026

Sweden

The PM confirms a national data center strategy. 7 GW of data centers in a 25 GW queue.

2026

Norway

Statnett tightens maturity requirements for large projects and publishes queue data.

The direction is clear. That is an opportunity – if the criteria are right.

Sources: European Commission C(2025) 6703; CADA 2026/0138(COD); CRU (Dec 2025); ACM; Finnish Govt. and Swedish PM (Aug 2026); Nordic TSOs (Jun 2026).

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We must think data centers, electricity grids and renewable energy together from the start – and look at how new digital capacity can support investment in both energy production and grid infrastructure.

Henrik Hansen
CEO, Danish Data Center Industry

DDI statement on the national data center strategy, August 2026 (translated from Danish).

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Thank you

